Strengthening Voluntary Sector Capacity Through Technology

Report of the Joint Table on
Information Management/Information Technology
of the Voluntary Sector Initiative

September 2002

Canada

Voluntary Sector

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A Message from the Members of the IM/IT Joint Table

We, the members of the Information Management/Information Technology (IM/IT) Joint Table, are pleased to submit our report to the Joint Coordinating Committee (JCC) of the Voluntary Sector Initiative (VSI), and to the Minister of Industry responsible for the implementation of this initiative.

When the voluntary sector and the Government of Canada launched the VSI in the summer of 2000, one of their main goals was to serve Canadians better by strengthening the capacity of the voluntary sector. They agreed that helping voluntary organizations make more efficient and effective use of technology to achieve their missions was a good way to contribute to this goal. Our task as members of the IM/IT Joint Table was to recommend how to do it. This report outlines our recommended strategy.

Our approach was to find out what voluntary organizations needed most to improve their ability to achieve their missions, and then develop a strategy for addressing those needs through effective use of information management and information technology.

We commissioned surveys of the "current reality," as well as needs and best practices. We reviewed the literature and the results of cross-Canada VSI consultations with volunteers and voluntary organizations, collaborated with other VSI joint tables, consulted experts in Canada and other countries, and took advantage of the Joint Table's collective experience and expertise. We also talked to many knowledgeable people about technology and the voluntary sector to test our ideas as we developed them.

We were impressed by the challenge of developing a strategy capable of addressing the priority needs of a sector whose organizations are so diverse. Our strategy had to be helpful for organizations throughout the sector and the country, but it could not be "one-size-fits-all."
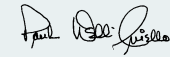
We were equally impressed by the foundation for responding to these challenges. This foundation includes the dedication of voluntary organizations to achieving their missions; the creativity of many voluntary organizations and networks across Canada already using the technology, existing infrastructure and programs in innovative ways; the interest of the Government of Canada, foundations and private sector partners in collaborating to strengthen the sector's technological capacity; and the growing recognition throughout Canada that voluntary organizations are essential to our collective well-being.

We feel privileged to have had the opportunity to contribute to strengthening the capacity of the voluntary sector. We value the ideas and collaboration of the many volunteers, voluntary organizations, and private sector and government partners who helped to shape the strategy we recommend, and thank them for their contribution.

Voluntary Sector Representatives

Don McCreesh (Co-Chair)

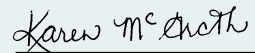Paul Dell'Aniello

Margaret Fietz

Ian Kershaw

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Kathy Marshall

Karen McGrath
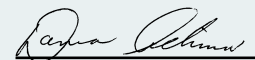
Ex officio members:
Gary Birch
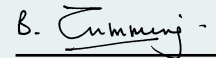Marilyn Box
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Executive Summary

A key goal of the Voluntary Sector Initiative (VSI), launched in June 2000, is to strengthen the capacity of the voluntary sector. The VSI recognizes that information management and information technology can make a major contribution to the capacity of voluntary organizations to achieve their missions and to the sector's capacity to play its role as one of the three pillars of Canadian society alongside the private and public sectors.

Recognizing that the voluntary sector is behind the private and public sectors in making effective use of information management/information technology (IM/IT), the VSI established the IM/IT Joint Table to develop recommendations on how to increase the capacity of voluntary organizations and the sector as a whole to make effective use of IM/IT.

The IM/IT Joint Table commissioned surveys, reviewed the literature, consulted experts, reviewed the results of cross-Canada VSI consultations, and took advantage of the experience and expertise of its members to develop an accurate picture of the "current reality" regarding the sector's use of IM/IT and related needs.

The Joint Table identified six main challenges facing voluntary organizations and the sector in making more effective use of IM/IT:

- diversity of the voluntary sector
- limited familiarity of board members, staff and volunteers with IM/IT
- barriers to acquiring IM/IT
- challenge in finding funding
- limited means for organizations to communicate and network
- sustainability of efforts to make effective use of IM/IT.

The Joint Table recommends a strategy with five components to respond to these challenges:

1. Increase the funding available to voluntary organizations for investing in technology by establishing a dialogue with funders of the sector in order to change their funding policies and practices to include technology investments.

2. Help voluntary organizations make more efficient and effective use of technology by linking existing community-based networks together, providing a central access point to the networks and providing access to discounted pricing for IT investments through a virtual technology store.

3. Strengthen the capacity of voluntary organizations to communicate and network by developing a portal.

4. Increase the cost-effectiveness of grant-seeking and grant-giving processes by developing a Web-based interactive funding service.

5. Increase the awareness of voluntary organizations of the benefits of information management and information technology for the achievement of their mission.

Implementation of the strategy will be managed during the transition to full ownership by the voluntary sector by the IM/IT Secretariat of Industry Canada.

I. Introduction

Information management and information technology (IM/IT)[1] have been transforming organizations in the private, public and voluntary sectors, particularly in the last decade or so. For many organizations, the impact of the technology has been far-reaching, transforming their operations, communications and structures, and even affecting their missions. Although the transformation process may be challenging, most organizations find the technology essential for achieving their missions.

The consensus of reports and knowledgeable observers is that the voluntary sector[2] has been behind the private and public sectors in making effective use of IM/IT.[3] It is a matter of concern. Voluntary organizations engage us in the life of our communities, bring us together, provide many services (including most of our social services) and give voice to shared concerns. They are essential to our collective well-being. More effective use of technology could make the contribution of voluntary organizations and the sector as a whole even more valuable.

One of the main goals of the Voluntary Sector Initiative (VSI), launched in the summer of 2000, is to strengthen the capacity of the voluntary sector. The VSI recognizes IM/IT as a key contributor to "capacity," along with human and financial resources, skills, knowledge and experience.

The present report recommends a strategy for helping voluntary organizations and the voluntary sector as a whole strengthen their capacity to use IM/IT efficiently and effectively to achieve their mission.

More specifically, the strategy is designed to help voluntary organizations use technology to develop more cost-effective ways for carrying out essential activities such as:

- raising and donating money
- recruiting and supporting volunteers
- managing staff and board business
- delivering services
- advocating improvements in legislation, public policies and programs
- keeping abreast of new developments
- communicating inside and outside the organization
- networking with other organizations.

For the voluntary sector as a whole, the strategy is designed to support the development of a stronger sense of the sector's role as one of the three pillars of Canadian society alongside the private and public sectors, and a greater capacity to play this role. The strategy takes account of the Accord[4] signed in December 2001 by the voluntary sector and the Government of Canada to enhance their relationship and strengthen their ability to serve Canadians.

The IM/IT Joint Table is one of six joint tables established under the VSI. The mandate of the IM/IT Joint Table is to *develop and implement initiatives to help strengthen voluntary organizations with the knowledge and technological capacity they need to achieve their specific mission and mandate*. The full mandate of the Joint Table and its program and operating principles are available on the VSI website (**http://www.vsi-isbc.ca/eng/joint_tables/ im_it/terms_of_reference.cfm**).

The strategy is designed to be implemented before the conclusion of the VSI, projected for the spring of 2005. Conceived as a sustainable strategy that can respond to concrete, immediate challenges of voluntary organizations, as well as to the longer term concerns of the sector as a whole, its benefits should become progressively apparent during the implementation period and over the long term.

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[1] See Appendix II for definitions

[2] The concept of the voluntary sector is the one used by the VSI (**http://www.vsi-isbc.ca/eng/faqs.cfm**)

[3] See, for example, *Building on Strength: Improving Governance and Accountability in Canada's Voluntary Sector. Final Report*. "Broadbent Report." Panel on Accountability and Governance in the Voluntary Sector. (1999) p. 14 (**http://www.vsi-isbc.ca/eng/reports.cfm**)

[4] *An Accord Between the Government of Canada and the Voluntary Sector*. (December 2001) (**http://www.vsi-isbc.ca/eng/joint%5Ftables/accord/the_accord_doc.cfm**)

II. Approach

Identify guiding principles for developing recommendations

The IM/IT Joint Table attached a high priority to establishing principles and processes to guide its work. The program principles listed below constitute the guiding principles adopted by the Joint Table to help it develop practical recommendations for addressing the priority needs of the voluntary organizations and the sector as a whole.

The Joint Table's program principles, along with a brief commentary (in italics), are:

a) Work in partnership with other sectors (e.g. private sector); share the responsibility.

  • *recognizes that partners can make an important contribution to formulating and implementing the strategy, that it should build on existing structures, networks and programs, and that responsibilities and benefits should be shared.*

b) Do not create any solution that will put agencies at risk. All solutions should balance risk and benefit to organizations.

  • *recognizes the need to avoid solutions that are like "an offer you can't refuse" and that may lead organizations to overextend themselves financially or otherwise.*

c) Put organization and management ahead of technology.

  • *recognizes that technology should serve — not determine — the needs of voluntary organizations.*

d) Program should not be about hardware.

  • *recognizes the success of the federal VolNet program in providing hardware to many voluntary organizations, and the need for a broad strategy to strengthen technological capacity.*

e) Begin with the mandate and mission of voluntary sector organizations.

  • *recognizes that mandate and mission should drive technological needs.*

f) The solutions/recommendations must create the greatest impact upon the sector, keeping in mind the specific needs of a variety of communities of interest.

  • *recognizes that the strategy should aim to be relevant to all voluntary organizations and the sector as a whole, while focussing scarce resources on priority needs such as those typical of small and medium-sized organizations.*

g) All IM/IT products must meet the common look and feel of accessibility guidelines.

  • *recognizes the fundamental importance of accessibility considerations.*

h) The program must address the recommendations and guidelines established in the Working Together document.[5]

  • *recognizes that the recommendations and guidelines of background documents, such as Working Together, need to be taken into account in any strategy.*

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[5] *Working Together: A Government of Canada/Voluntary Sector Joint Initiative: Report of the Joint Tables*. Voluntary Sector Task Force, Privy Council Office and Government of Canada. (August 1999) (**http://www.vsi-isbc.ca/eng/reports.cfm**)

Assess the current reality to provide a solid basis for recommendations

The Joint Table focussed on developing as clear a picture as possible of the "current reality" as the basis for developing its recommendations. In addition to drawing on relevant literature, the work and consultations of other VSI joint tables, the views of experts, and the experience and expertise of its own members, the Joint Table commissioned two surveys.

The first survey, *Information Management/Information Technology — Environmental Scan*, prepared by PRA Inc., was an environmental scan and literature review of information management/information technology. The survey report, issued on March 31, 2001, identified general trends, opportunities and gaps in information technology for voluntary organizations.[6]

The second survey report, *Technology Needs of the Canadian Voluntary Sector*, prepared by RealWorld Systems and issued on January 29, 2002, identified the needs of the voluntary sector primarily through interviews with the staff and executives of voluntary organizations.[7]

The findings of both surveys are consistent with many other assessments of the current reality and needs of voluntary organizations.[8] These assessments are reflected in the results of consultations on the Accord and National Volunteerism Initiative (which became the Canada Volunteerism Initiative (CVI)), the views of experts solicited by the Joint Table, including members of other joint tables and the VSI Joint Coordinating Committee, and the views and experience of IM/IT Joint Table members themselves.

An important part of the current reality is the fact that governments, voluntary organizations and the private sector have been working to develop policies, programs, partnerships, infrastructure, networks and initiatives that can support the voluntary sector's efforts to strengthen its technological capacity. This represents a great deal of investment in terms of funding, hardware, software, connectivity and ingenuity that can strengthen the technological capacity of the voluntary sector.

At the federal level, a well-known example is the VolNet program, which fulfilled its mandate at the end of March 2002 to offer Internet connectivity, including computer equipment, new information technologies, network support and Internet skills development, to voluntary organizations. Other examples include Industry Canada's Community Access Program and Smart Communities program, and the Community Learning Networks under Human Resources Development Canada's (HRDC's) Office of Learning Technologies.[9] Some provincial governments have also made major investments in programming that strengthen the technological capacity of voluntary organizations, and these investments have resulted in some interesting initiatives.[10]

For some years now, the federal and provincial governments and many municipalities have been undertaking major online initiatives designed to facilitate the development of effective "electronic relationships" with organizations, including voluntary organizations, as well as individuals throughout Canada. The more sophisticated these initiatives become, the greater their value to voluntary organizations that have integrated IM/IT effectively into their plans and operations.

Across Canada, there are numerous community-based networks,[11] many of which have been highly creative in developing the electronic infrastructure and expertise needed by local organizations, including voluntary organizations, to make efficient and effective use of the technology. These networks often rely on funding, facilities and programming from a variety of governmental and non-governmental sources to develop both the electronic infrastructure and related training and technical support services needed by local voluntary and public sector organizations to achieve their missions.

One of the strengths of the community-based networks and other community-based initiatives is that they provide the basis for the kind of sustainable face-to-face contacts with knowledgeable people concerned with practical local issues that most voluntary organizations value.

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6   See *Information Management/Information Technology — Environmental Scan*, PRA Inc. (March 2001) (**http://www.vsi-isbc.ca/eng/joint_tables/im_it/reports.cfm**)

7   See *Technology Needs of the Canadian Voluntary Sector*, RealWorld Systems (January 2002) (**http://www.vsi-isbc.ca/eng/joint_tables/im_it/reports.cfm**)

8   See, for example, *From Access to Applications: How the Voluntary Sector is Using the Internet*. Commons Group. (November 2001) (**http://www.volunteersonline.ca**)

9   See Community Access Program (**http://www.connect.gc.ca/en/240-e.htm**); Smart Communities (**http://www.connect.gc.ca/en/300-e.htm**); Community Learning Networks (**http://olt-bta.hrdc-drhc.gc.ca/ourprogram/index_e.html**)

10   See, for example, Ontario's *Making IT Work for Volunteers* (**http://www.volunteersonline.ca**)

11   See, for example, County of Oxford Integrated Network (COIN) (**http://www.county.oxford.on.ca/coin**)

III. Challenges

Most of the surveys and assessments of the "current reality" mentioned above identify issues that may pose challenges to strengthening the technological capacity of the voluntary sector. The following are leading examples of these challenges.

Diversity of the voluntary sector

The great diversity of the voluntary sector poses a challenge to any strategy about technology aimed at having a significant impact across the sector. For instance, the vast differences between large urban-based organizations, such as universities, hospitals, national umbrella organizations and major foundations, on the one hand, and the tens of thousands of small voluntary organizations, including those in rural and remote areas, on the other hand, strongly affect their capacity to make effective use of technology.

The large organizations typically have the resources, expert technical staff and access to communications infrastructure needed to make extensive use of IM/IT. The small organizations, by contrast, typically have meagre resources and very limited access to tech-nical expertise. Organizations in rural and remote areas generally lack communications infrastructure, such as high-speed Internet or, in some cases, even basic Internet service. This does not necessarily mean that all large organizations have adequate resources or make efficient and effective use of technology, nor that the opposite is true for small organizations. However, the cards are generally stacked against the smaller organizations when it comes to making cost-effective use of technology.

The diversity of voluntary organizations extends to many other dimensions beyond those mentioned above, including their goals, their approach to man-aging their affairs, the activities in which they are engaged, the types of services they provide, their "clientele," the mix of volunteers and paid staff, and their language of work. The diversity of organizations poses a particular challenge to the leadership of the voluntary sector, especially its capacity to communicate within and outside the sector.

A key challenge is to help develop in all voluntary organizations — regardless of size, location or other characteristics — the technological capacity suited to their diverse missions. This challenge includes helping to reduce the technological gap (digital divide) between voluntary organizations, and strengthening the capacity of the sector to play its role as one of the three pillars of Canadian society.

Limited familiarity of board members, staff and volunteers with IM/IT

Several surveys, including the PRA survey mentioned on page 4 and the consensus of expert opinion, indicate a general lack of awareness of IM/IT by staff and management at all levels, including senior management and board members. Without direct experience with the technology, management and staff often have an inadequate understanding of its potential value and the resources and effort needed to use it efficiently and effectively.

In addition, many organizations that have chosen to acquire the technology do not possess adequate knowledge and skills to plan for its introduction/expansion and long-term sustainability, and to provide for related staff/management training and technical support.

Most Canadian voluntary organizations have Internet connections and use e-mail routinely.[12] Some have their own websites. Relatively few, however, have made IM/IT an integral part of their operations to the point where they use the technology strategically in fulfilling their missions.

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[12] Note: Some small voluntary organizations rely on computers and related technology owned by their volunteers. Some do not consider the technology relevant to their missions and the way they operate. See *Survey of Voluntary Organizations*. EKOS Research Associates Inc. (March 2001) (**http://www.volnet.org/english/studiesreportspage.htm**)

Predictably, larger voluntary organizations make much greater, more sophisticated use of the technology than many of the small and medium-sized organizations.

The table below, based on a report[13] on technology in the U.S. voluntary sector, reflects some of the challenges in adopting technology by focussing on attitudes toward technology. The majority of voluntary organizations surveyed in that report fall into categories 1 and 2. Given that Canada and the U.S. have embraced technology to roughly the same extent, one can infer that Canadian voluntary organizations fall into the same categories as their American counterparts.

Many more private sector and governmental organizations have moved closer toward categories 3 and 4 than those in the voluntary sector. One implication is that, if the voluntary sector is to play its role as one of the three pillars of Canadian society alongside the private and public sectors, and be an effective partner with them, it will need to move closer toward categories 3 and 4.

A key challenge is to increase the familiarity of board members, executives, staff and volunteers with IM/IT.

Barriers to acquiring IM/IT

One of the barriers to acquiring technology often mentioned by voluntary organizations is the restriction applied by some government departments and foundations to using the funding they provide for acquiring technology.

A key challenge is to reduce this major barrier by persuading funders that it is in their own interest, as well as that of voluntary organizations, to provide funding for the acquisition of technology. The challenge includes providing support for affordable acquisition of the technology.

Challenge in finding funding

Virtually any organization can legitimately claim that it finds time and money too scarce to fully achieve its mission, but for most voluntary organizations this scarcity poses a particular challenge. Most voluntary organizations report spending a substantial amount of time on the application and reporting processes associated with raising money rather than actually doing the work they need to do to fulfil their mission.

1	2	3	4
Technology is overhead	Technology is overhead	Technology is necessary	Technology is a strategic resource
Upgrade only when it hurts too much not to	Upgrade as a last resort	Have and use modern software and e-mail	Have and use latest software and applications
Fear technology	Blend new and old technology; may be networked	Capable of using technology strategically	Use it to deliver services, fund-raising and communication
Resist adopting technology	Adopt technology at a slow pace	Willing and able to make technological changes	Adopt and adapt technology to meet their needs at a fast pace

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[13] *Circuit Rider Report 1999* (to obtain a copy, visit **http://www.technologyworks.org/contact.htm**)

Many organizations recognize that raising money is an ongoing strategic activity. It includes meeting real needs in the community and ensuring that potential supporters understand and appreciate the work being done and the need for adequate resources. A frequently reported frustration arises, however, in connection with the application and reporting processes required by funders, particularly those outside the community who do not have the opportunity to get a first-hand impression of the organization applying for money. Application and reporting requirements are typically extensive, unclear and different from one funder to another, including funding organizations *within* governments.

A key challenge is to make funding application and reporting processes simpler, harmonized, and, generally, more time efficient and cost-effective.

Limited means for organizations to communicate and network

Communication and networking are key elements in capacity building as demonstrated by the public and private sectors. The voluntary sector needs to improve its access to the communication and networking tools now being used by the other sectors.

The VSI consultations confirmed the value of facilitating communications and networking among voluntary organizations. Many participants remarked on how useful it was to have the opportunity to get together with volunteers and staff from diverse organizations in their region. The voluntary sector's work to date on the VSI and the work of the Voluntary Sector Roundtable, which led to the VSI, required extensive communications throughout the sector. The VSI website has demonstrated the potential benefit of technology that can help the voluntary sector strengthen its role as one of the three pillars of Canadian society through efficient and effective communications.

A key challenge is to develop a portal for the voluntary sector that can — among other things — help voluntary organizations get the information and services they need, communicate and network, and help strengthen the sector's capacity to play its role as one of the three pillars of Canadian society.

Sustainability of efforts to make effective use of IM/IT

The integration of IM/IT in most organizations is a process that needs to be sustained over the long term. It is a process that often raises serious questions about the substantial investments required and the risks that they might not pay off.

Integrating technology involves much more than acquiring some computers, Internet connections and software. It involves planning the introduction or expansion of the technology to support an organization's mission, and this usually calls not only for changes in the budget, but often for changes in structures and operations as well. It involves deciding such matters as the specific technology to acquire, the networks to connect with, the training that staff, volunteers, board members and partners need to use the technology effectively, and the technical support needed over the long term.

The specific needs of individual organizations will vary with the broad diversity of the characteristics touched on above. It is clear, however, that addressing only one need, such as acquiring hardware, does not go far in integrating technology effectively. It is also clear that the cost of providing even a single basic computer to most small and medium-sized voluntary organizations alone would consume all of the VSI's $94.6 million five-year budget, let alone the IM/IT Joint Table's $10 million five-year budget.

A key challenge is to develop a strategy that will ensure leaders in the voluntary sector appreciate the benefits of IM/IT, remove the obstacles to acquiring it, and provide the tools to integrate it into the plans and operations of voluntary sector organizations on a sustainable basis.

IV. Recommendations: A Technology Strategy for the Voluntary Sector

Reflecting on the challenges outlined above and on the reports, surveys and assessments from which they were derived, the Joint Table considered the kinds of responses that would be of greatest use to voluntary organizations throughout the sector, and of special value to those that need help most.

The recommended response to the above challenges is a strategy that has five components designed to support one another.

Recommendation 1:

Increase the funding available to voluntary organizations for investing in technology by establishing a dialogue with funders of the sector in order to change their funding policies and practices to include technology investments.

The approach is to change current policies and funding practices of governments and foundations that preclude, complicate or undervalue the importance of providing funding to voluntary organizations for technology such as hardware, software, Internet connections, upgrades and training.

Discussions with foundations and government agencies that fund voluntary organizations — funders — have been encouraging. Many of them recognize that providing funding for investment in technology makes sense and that it strengthens the capacity of voluntary organizations to achieve their missions — missions that funders are interested in supporting.

Some foundations and government agencies have been working toward the recommended changes in funding practices and, in some cases, have already made them. The action needed to make further progress on this component of the strategy has four elements:

- develop a business case that demonstrates the value to funders of investing in the technological capacity of voluntary organizations
- develop a business case that voluntary organizations can use to support their applications for funding for investments in technology
- enlist the support of governmental and foundation partners who favour changing funding practices in using the business case to persuade the rest
- disseminate the business case to voluntary organizations for their direct use with funders.

The change in funding practices would increase the funds available to voluntary organizations for investment in IM/IT (see the list of essential activities, page 2). While the total amount of funding available would not be directly affected by the recommended change in funding practices, investing a greater share in technology would lead to more effective use of *all* funding. This would increase the overall capacity of voluntary organizations to deliver services and otherwise achieve their missions.

Recommendation 2:

Help voluntary organizations make more efficient and effective use of technology by linking existing community-based networks together, providing a central access point to the networks and providing access to discounted pricing for IT investments through a virtual technology store.

The approach is to help voluntary organizations plan the introduction or expansion of the technology they need, acquire the technology, integrate it effectively into their operations and sustain it — at an affordable cost.

The key activities associated with effective use of the technology need to be well coordinated. These activities include:

- planning (including budgeting) for the introduction and maintenance of new technology
- acquiring and upgrading technology
- training of management, staff and boards
- technical support.

Implementation of this element of the strategy would build on community-based IM/IT networks across Canada. These networks, as mentioned above, rely substantially on existing "infrastructure" that governments, voluntary organizations and the private sector have been putting in place for some time.

The objective of this element of the strategy would be pursued through three complementary avenues:

- link together up to 50 community-based IM/IT networks, leading to sustainable, networked regional capacity for ongoing technology planning, integration, training and technical support

- provide a central access point for voluntary organizations
- develop a "virtual technology store" accessible through the portal and offering voluntary organizations advantageous procurement arrangements for hardware, software and training, maintenance, support, etc.

The community-based networks can provide one of the most effective ways to introduce and support information and communication technology because they operate through practical face-to-face approaches at the local level. A key advantage is that costly infrastructure and expertise, as well as experience, can be shared by many different kinds of organizations that serve the community.

Through a competitive selection process, existing community-based networks could receive funding to help them expand their capacity to respond to requests from local voluntary organizations for assistance in planning the acquisition/expansion of technology, training and technical assistance. A modest hourly fee would be charged to voluntary organizations for the services supplied.

The acquisition of hardware, software, Internet connections, etc. would be facilitated through an expansion of the types of advantageous procurement arrangements that currently exist with major suppliers such as Apple, IBM, Hewlett-Packard and Compaq. To do this, a "virtual technology store," similar to some of the offerings of *In Kind Canada*[14] and the U.S. *TechSoup*,[15] but designed to meet Canadian needs, would be a key service on the portal through which voluntary organizations could acquire the technology, training and technical services they need at low cost.

14   See *In Kind Canada* (**http://www.inkindcanada.ca/en/index.html**)
15   See *TechSoup* (**http://www.techsoup.org**)

Recommendation 3:

Strengthen the capacity of voluntary organizations to communicate and network by developing a portal.

The approach is to develop a portal for the voluntary sector. The portal would be a strategic IM/IT resource for the voluntary sector. Directly or through linkages with voluntary organizations, governments, foundations and private companies, the portal would provide Web-based services such as the "virtual technology store" and funding exchange (see below) needed by voluntary organizations. The portal can also be viewed as an interactive electronic magazine to facilitate networking and advocacy, and generally strengthen the sector's capacity to play its role as a one of the three pillars of Canadian society alongside the private and public sectors. The design of the portal is based on experience with Canadian and foreign portals for the voluntary sector.

Development and operating costs could be minimized through partnership and leverage arrangements with government, such as sharing a common platform. These arrangements, if they are more economical and advantageous for the sector, would not compromise the independence with which the voluntary sector could operate the portal. The portal would leverage and partner with government while maintaining independence through a voluntary sector management team. Sustainability could also be pursued through subscription fees for specialized services such as the funding exchange and virtual technology store. (Appendix III provides a conceptual model of the portal.)

Recommendation 4:

Increase the cost-effectiveness of grant-seeking and grant-giving processes by developing a Web-based interactive funding service.

The approach is to develop a Web-based interactive service designed specifically for the sector and its funders. The service would respond to a major priority of voluntary organizations to significantly increase the cost-effectiveness of the processes associated with searching, applying and accounting for funding. The service would be designed to generate similar benefits for governmental, foundation and private sector partners that provide funding to voluntary organizations. The service could be sustained by subscription fees from voluntary organizations and funders.

Using common technical standards, government, foundation and private sector funders would participate by providing simplified, harmonized, online application and reporting procedures. Voluntary organizations would participate both by providing standard information about themselves and by using

the Web service for applying and accounting for funding. The changes in funding practices under Recommendation 1 would contribute to the effectiveness of the service.

Key benefits for voluntary organizations would include reducing the resources they devote to application and reporting processes. The result would be that more organizations would have the resources and inclination to invest in the technology they need not only to raise funds, but also to fulfil other aspects of their missions. This would help strengthen the overall technological capacity of the voluntary sector.

Key benefits for governmental, foundation and private sector funders would correspond to those of voluntary organizations, i.e., fewer resources tied up in administration and paperwork, more funds available for distribution, better matching of funding and suitable organizations/goals, open marketplace and greater technological efficiency.

Recommendation 5:

Increase the awareness of voluntary organizations of the benefits of information management and information technology for the achievement of their mission.

The approach is to mount a campaign targeting voluntary sector boards and managers to raise awareness of the benefits of IM/IT and to provide information on the tools available to help organizations adopt and use the technology effectively.

The campaign would include:

- distributing information widely across the voluntary sector
- sharing best practices
- putting in place a sharing process for organizations making effective use of the technology that are prepared to act as role models for others.

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V. Implementation

The IM/IT Secretariat of Industry Canada, as the staff team of the government department that sponsored the IM/IT Joint Table, will supervise the implementation of the Table's recommendations by organizations that have qualified themselves through a competitive process.

VI. Outcomes

The recommendations outlined above are designed to generate the following outcomes:

- Boards of voluntary organizations under-stand the need for IM/IT and are prepared to invest resources.
- IM/IT becomes part of the normal business planning process of voluntary organizations.
- Funders are more open to supporting IM/IT expenditures.
- Voluntary organizations realize that other organizations overcome similar challenges through IM/IT.

- Voluntary organizations have access to expert advice, appropriate hardware and software, training and technical support at reasonable rates.
- Voluntary organizations are able to reduce the time they spend looking for sources of funding and filling out application forms.
- Voluntary organizations have a place of their own where they can quickly find information, keep up to date and share experiences.
- Voluntary organizations feel that they belong to a family of organizations with similar interests and facing the same challenges.

VII. Conclusion

The five recommendations of the IM/IT Joint Table reflect an integrated and coherent strategy to strengthen the technological capacity of the voluntary sector. In developing its recommendations, the Table was conscious of ongoing sustainability issues and therefore believes that the recommended strategy addresses those criteria. As such, where feasible, the strategy will build on or enhance existing processes and projects in the sector.

The IM/IT Joint Table also believes that the strategy will go a long way toward achieving the Table's mandate of increasing the capacity of voluntary sector organizations to achieve their specific missions and mandates. The Table recommends that Industry Canada ensure that services and products developed as a result of the Table's recommendations are owned and sustained by the voluntary sector once they are fully functional and the work is completed or when the IM/IT Secretariat closes in March 2005, whichever comes first. It should be noted that various collaborative mechanisms may be in place by that time to foster the ongoing work within the sector.

The members of the Joint Table have expressed a desire to continue to be involved during the implementation phase by providing advice and guidance on an as-needed basis in order to ensure there is continuity and understanding of the underlying rationale and logic behind the strategy.

Appendix I: Summary of Recommendations

1. Increase the funding available to voluntary organizations for investing in technology by establishing a dialogue with funders of the sector in order to change their funding policies and practices to include technology investments.

2. Help voluntary organizations make more efficient and effective use of technology by linking existing community-based networks together, providing a central access point to the networks and providing access to discounted pricing for IT investments through a virtual technology store.

3. Strengthen the capacity of voluntary organizations to communicate and network by developing a portal.

4. Increase the cost-effectiveness of grant-seeking and grant-giving processes by developing a Web-based interactive funding service.

5. Increase the awareness of voluntary organizations of the benefits of information management and information technology for the achievement of their mission.

Appendix II: Definitions

Communication technologies are used to communicate inside and outside the organization (mail, telephone, fax, voice mail, e-mail, teleconferencing, video conferencing).
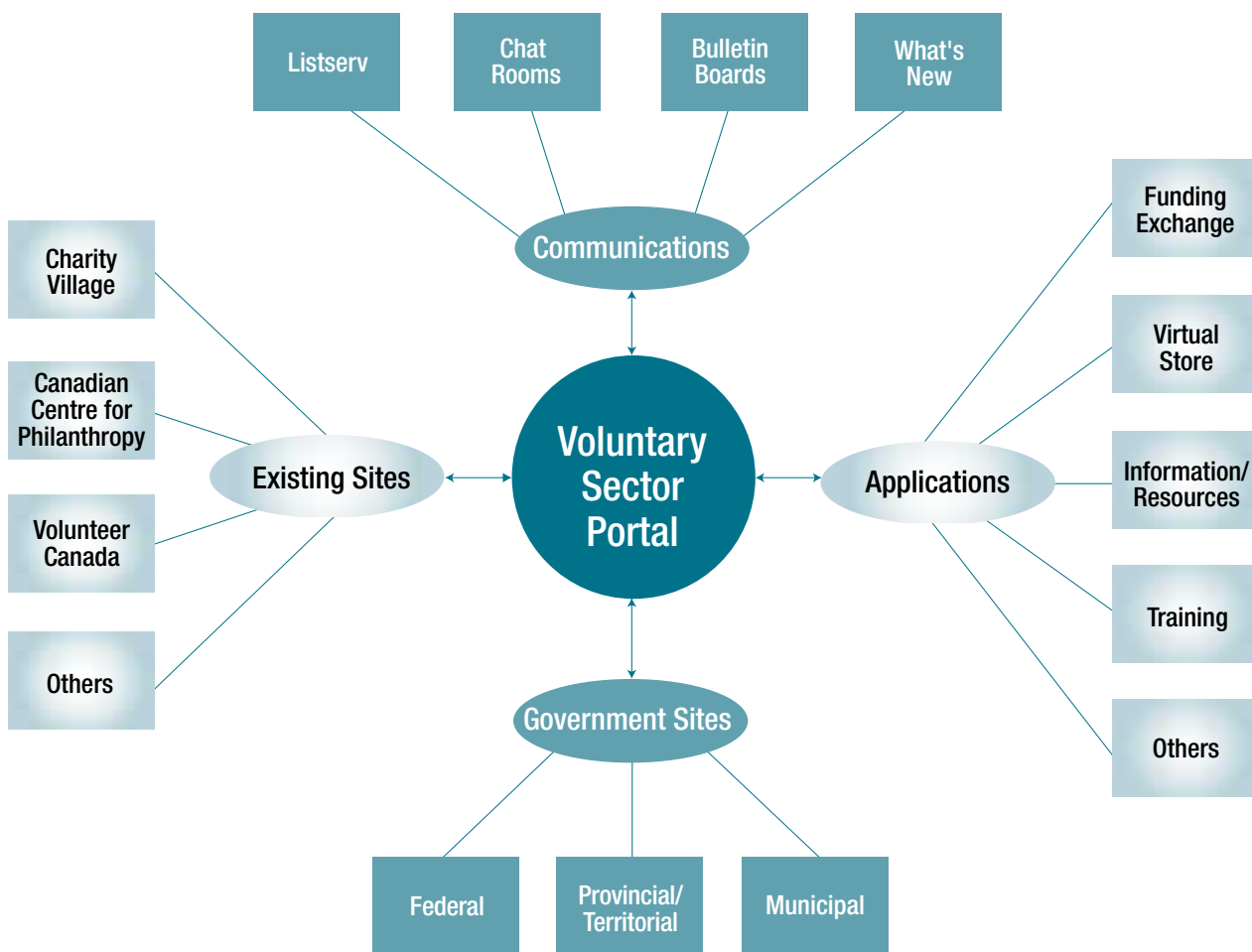
Information management (IM) is the ability to share and communicate information, using technology, to improve the organization's capacity in planning and management (including personnel, finance, marketing and systems).

Information technology (IT) is the use of any sort of electronic tools to help manage, store, manipulate, transmit or receive information (e.g. e-mail, Internet, website, online resource centres, online discussion groups).

Technological capacity is the development, acquisition and productive use of technological tools (both information and communications management) and related content in achieving a mission or mandate.

Technological tools, for the purpose of this report, include not only Web- and Internet-based solutions, but also the full range of office software and hardware common to modern organizations.

Appendix III: Conceptual Model of a Portal

Appendix IV: IM/IT Joint Table Members[16]

Voluntary Sector Representatives

Don McCreesh (Co-Chair)
Volunteer
YMCA Canada

Paul Dell'Aniello
Director
Seagram Chair of Management
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Margaret Fietz
President and Chief Executive Officer
Family Service Canada

Ian Kershaw
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Focus IT Solutions Inc.

Philip King
VP e-Business
United Way of Greater Toronto

Kathy Marshall
National Coordinator
Disabled Women's Network Canada

Karen McGrath
Executive Director
Health and Community Services
St. John's Region
Newfoundland and Labrador

Gary Birch (ex officio)
Chair
Advisory Committee on Assistive Devices

Marilyn Box (ex officio)
Secretariat Officer
Voluntary Sector Initiative

Josephine Sutton (ex officio)
Director
Womenspace

Government Representatives

Lisanne Lacroix (Co-Chair)
Corporate Secretary
Industry Canada

Donna Achimov
Director General
Public Access Programs
Communication Canada

Bob Cumming
Manager
Departmental Coordination
Rural Secretariat
Agriculture and Agri-Food Canada

Réjean Gravel
Director General
Systems and Informatics Directorate
Corporate Services
Environment Canada

Rodney Hagglund
Director
Voluntary Sector Initiative
Charities Directorate
Canada Customs and Revenue Agency

Susan Margles
Executive Director
Canadian Health Network
Health Canada

Nancy Wildgoose (ex officio)
Voluntary Sector Task Force
Privy Council Office

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[16] The positions with which Joint Table members are identified are those they occupied during preparation of this report. Some members have since moved to new positions.