

Technology 101 for Nonprofit Organizations



Your Presenter



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Agenda



- Introductions
- Assumptions and Goals
- Technology Planning
- Sample Tech Plan
- Finding the Right People
- Implementation
- Affordable Nonprofit Tech Products
- Questions

ASPCA Grants Department

- ASPCA Grants department started in **2008**
- Administered **50+ grant programs** guided by **50+ grant officers**
- Over **8,500 grants** totaling almost **\$90 million**
- Over **2,600 grantees** in all 50 states and 5 territories
- Grantees include **rescues, sanctuaries, non-profit and municipal/county shelters**, and **animal control agencies**
- Beneficiaries include **dogs, cats, equines and farm animals**



Michael Barrett
Vice President, Grants
Management



Binah
Director, Squeaky
Toy Acquisitions



Adam Liebling
Director, Grants
Management



Susie Lim
Grants Technology
& Training
Administrator



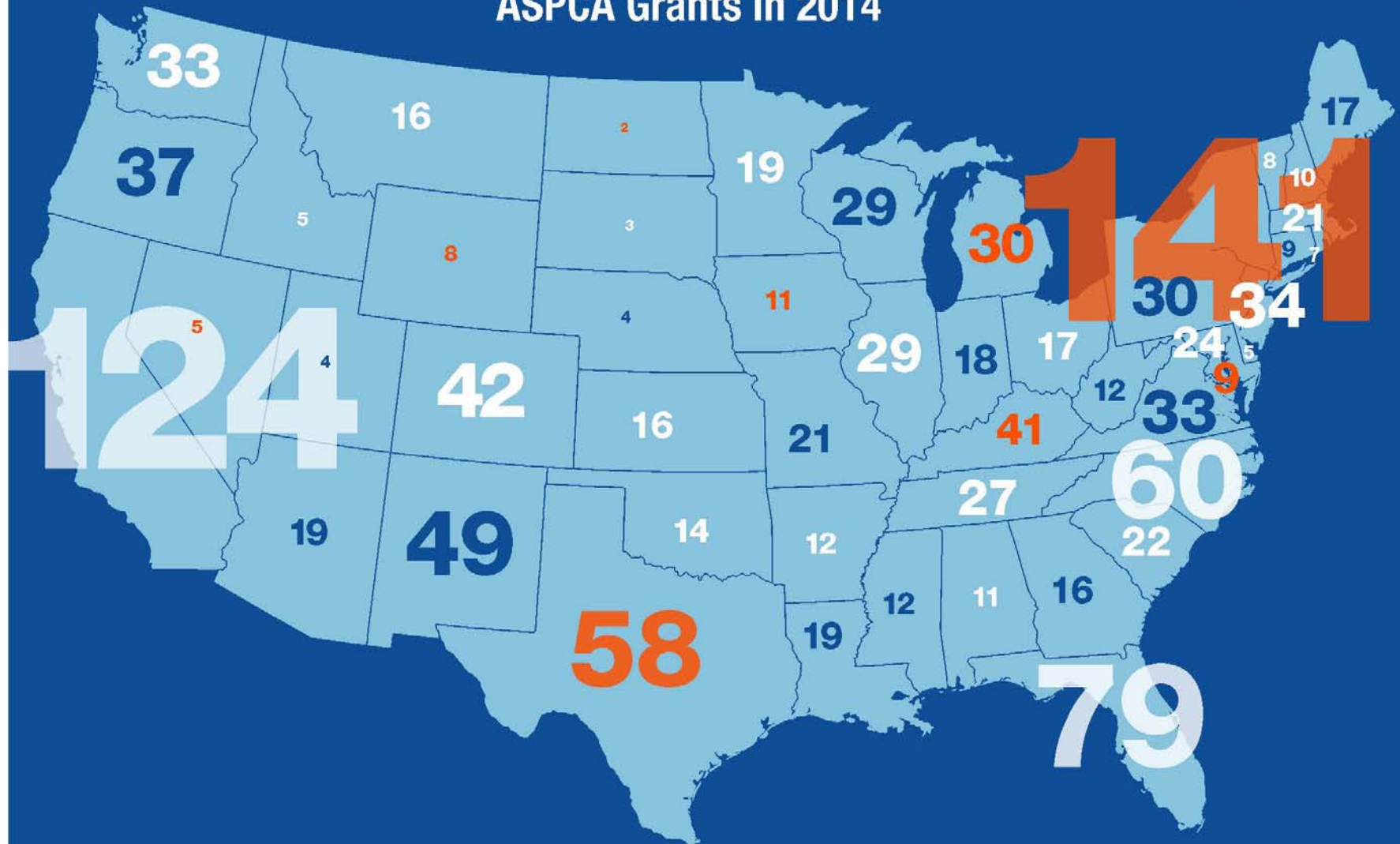
Claire Sterling
Director, Grant
Strategies

Helping Animals Coast to Coast!

ASPCA

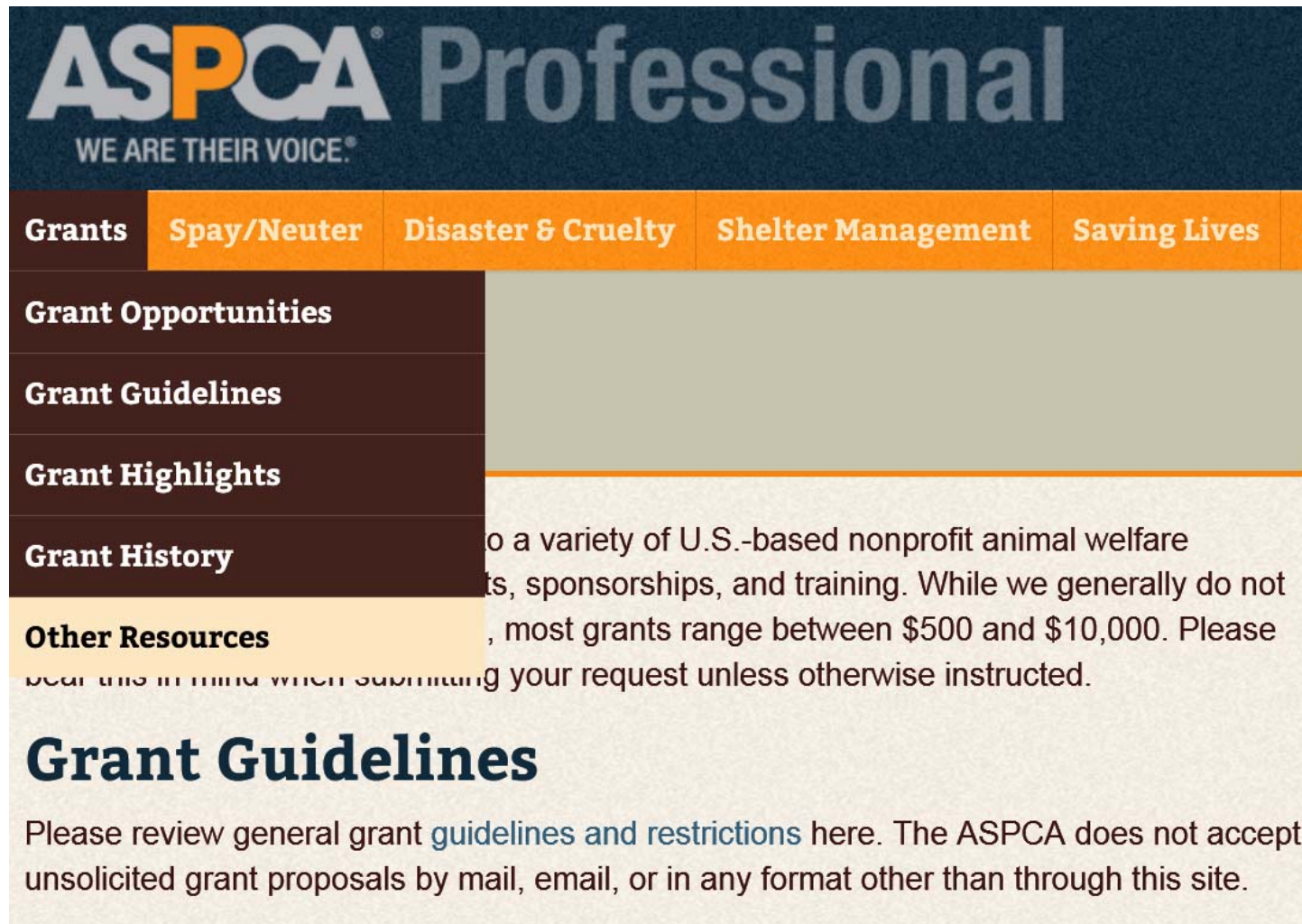
Grants

ASPCA Grants in 2014



ASPCApro.org/grants

Grant Resources



The screenshot shows the ASPCA Professional website. The header features the ASPCA logo with the tagline "WE ARE THEIR VOICE." Below the header is a navigation bar with tabs for "Grants", "Spay/Neuter", "Disaster & Cruelty", "Shelter Management", "Saving Lives", and "S". The "Grants" tab is selected, revealing a dropdown menu with options: "Grant Opportunities", "Grant Guidelines", "Grant Highlights", and "Grant History". Below the menu, a section titled "Other Resources" contains text about grant opportunities for U.S.-based nonprofit animal welfare organizations, mentioning that most grants range between \$500 and \$10,000. A "Grant Guidelines" section follows, advising users to review general grant guidelines and restrictions on the website, noting that the ASPCA does not accept unsolicited grant proposals by mail, email, or other means.

ASPCA Professional
WE ARE THEIR VOICE.®

Grants Spay/Neuter Disaster & Cruelty Shelter Management Saving Lives S

Grant Opportunities

Grant Guidelines

Grant Highlights

Grant History to a variety of U.S.-based nonprofit animal welfare
ts, sponsorships, and training. While we generally do not

Other Resources, most grants range between \$500 and \$10,000. Please
bear this in mind when submitting your request unless otherwise instructed.

Grant Guidelines

Please review general grant [guidelines and restrictions](#) here. The ASPCA does not accept unsolicited grant proposals by mail, email, or in any format other than through this site.

About You: Raise Your Flipper!

POLL:

**What are you most
interested in learning?**



1. **Technology Planning**
2. **Affordable Technology Products**
3. **Finding the Right Tech Person**
4. **Social Media**
5. **Other**

Assumptions

- Organization is small (under 50 staff members)
- No dedicated technology staff
- Nonprofit rescue or shelter
- Small budget
- Limited resources
- Basic computer skills
- Looking for a start point
- Enjoys cute animal pictures



Goals



- **Better understand** what technology is and how it can serve you.
- Learn the **first steps** of a simple technology plan.
- Find the **right people** to help get your project off the ground.
- Identify **low-cost and free technology products**.
- **Empower** you to begin comfortably implement technology solutions.
- **Energize** you with ideas on next steps for your organization.

What is Technology?



WHAT IS TECHNOLOGY?

Things purposefully created by humans to **make life easier** and to **solve problems**.

The **application** of scientific knowledge for **practical** purposes. (Oxford English Dictionary)

WHAT IS NONPROFIT TECHNOLOGY?

Deliberative use of technology by nonprofit organizations to **maximize potential** in numerous areas primarily in supporting the **organization mission** and **meeting reporting requirements to funders and regulators**. (Wikipedia)

Potential = Time, Cost, Labor

Why Technology?



To better meet:

Organization Mission

Business Requirements

What should your technology product or service do?

1. Increase **impact**
2. Decrease **time** and/or **cost** expended on tasks
3. Increase **quality** of work product
4. Increase **satisfaction**

Technology Planning

Approach like programmatic plan or project:

- HOW MUCH
- BASELINE
- WANTS
- WHY
- WHAT
- WHO
- WHEN
- HOW WELL

Define your budget

Review your current technology status

Create a wish list

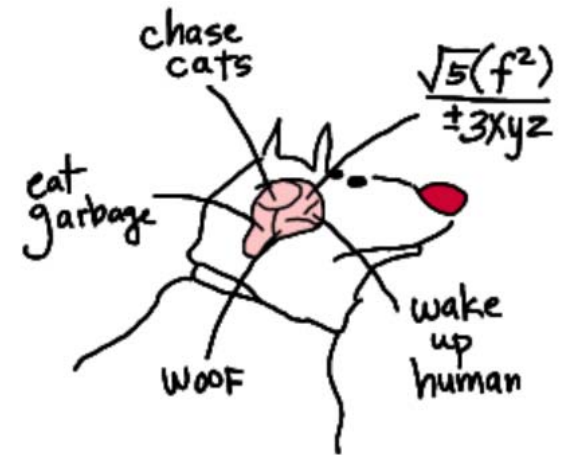
Think about the **why** of each item

Prioritize your wish list based on **why**

Ask and **communicate** with **stakeholders**

Calendar your **timeline**

Consider the **quality**



Technology Plan Example #1

COST \$10,000

BASELINE

- 5 year-old server with backup tape drive
- 10 desktop computers
- 2007 Microsoft Office suite
- Old version of Quickbooks

WANTS

- New 2015 server with cloud backup
- 3 new desktop computers
- 2010 Microsoft Office suite
- New version of Quickbooks

WHY **Time and Cost and Satisfaction and Impact**

WHAT Server, computers, MS Office, Quickbooks

WHO Executive director, staff, accountant, tech consultant

WHEN 6 month timeline

HOW WELL Small office package vs. corporate package

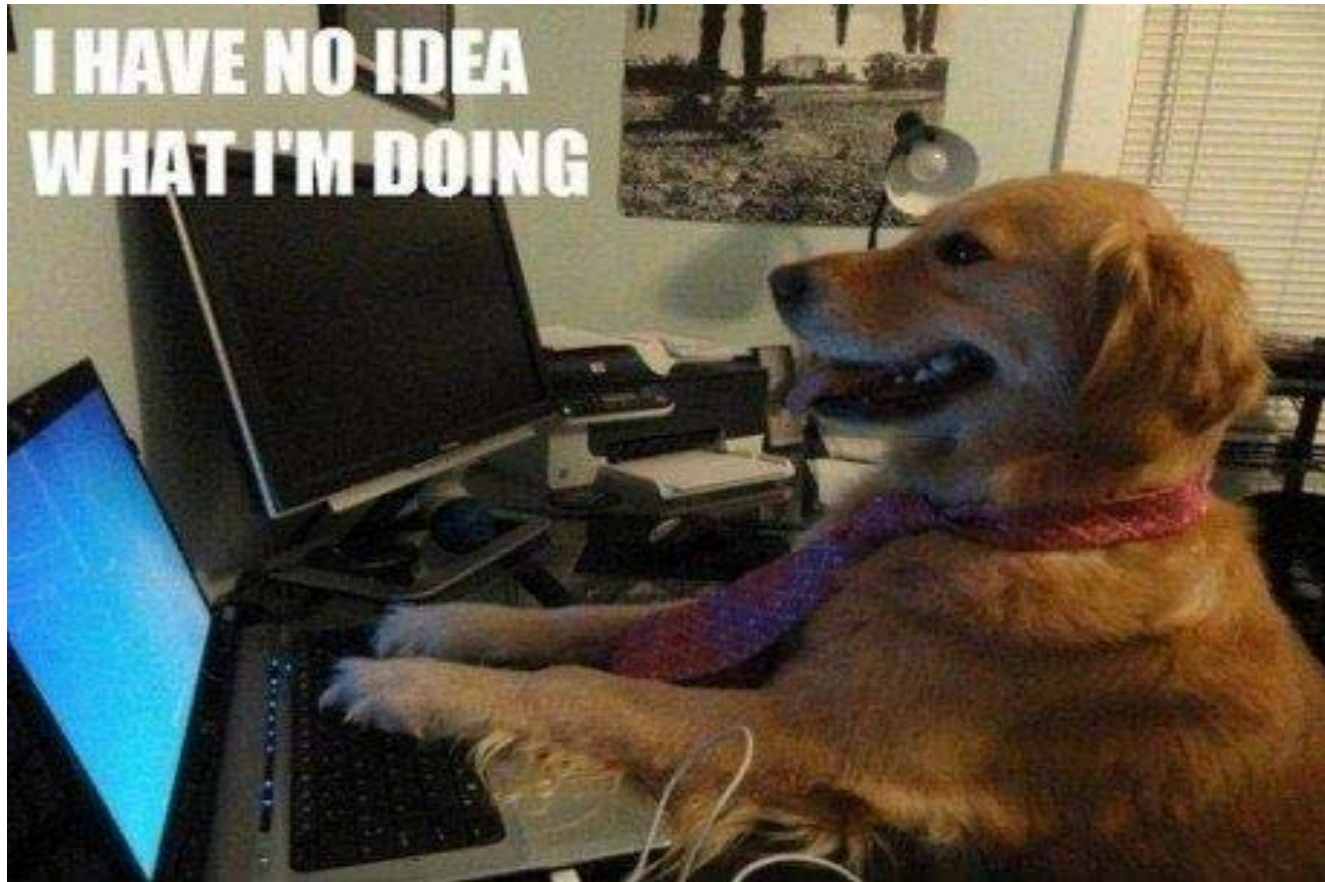


Technology Plan Example #2

- HOW MUCH \$1,000 Budget (one time)
- **BASELINE** **Microsoft Office 2007**
- **WANTS** **Microsoft Office 2010**
- WHY Cost (\$1,200 per year)

Labor and satisfaction (No pop-ups, can open files sent by Microsoft 2010 users)
- WHAT Microsoft Office 2010 Nonprofit Edition
- WHO Executive director, accountant, staff, IT consulting firm
- WHEN 1 month timeline
- HOW WELL Microsoft Office 2010 Nonprofit Edition vs. Professional Edition

I Have a Plan, Now What?



Consultants and Volunteers

Need Technical Expertise

Suggestion: Start with technical assessment

Consultant – Paid skilled labor

Volunteer – Unpaid skilled labor

Considerations for Decision

1. Consultant cost versus budget
2. Scope of project
3. Timeline
4. Project value
5. Recommendations



Consultants



1. Prepare **request for proposals** (RFP) based on technology plan
2. Ask comparable nonprofits for **recommendations**
3. **Decide** based on:
 - Cost of Labor (hourly or project-based)
 - Interviews
 - Deliverables matching your needs
4. Build in **extra time** for **questions, training** and **problems**
5. **Evaluate** consultant for future projects

SUGGESTION: Work with selected firm on **smaller project** with **set cost** and **timeframe** to **evaluate** before moving to larger project.

Volunteers



For more information on finding great volunteers, please reference Part 2 of the ASPCA's three-part technology webinar series:

Leveraging Pro Bono to Expand Your Impact

- Use **technology plan** to form a detailed job description
- Ask comparable nonprofits for **recommendations**
- Craft a **compelling job description**
- Consider your technology project and break up the project into **manageable tasks**

Tips for Finding the Right Person



1. Find candidates who work with nonprofit organizations of a similar size and budget.
2. Interview at least 3 candidates.
3. Present candidate with a particular technical need and ask how they would approach the scenario. Do you understand their approach? If not, do they explain their approach in a way you understand?
4. How does the candidate handle questions? Are they listening to you?
5. Ask for an example of past documentation of a tech project. Will they document your project?
6. Make sure the candidate does not have conflicts of interest with tech product companies.
7. Ask candidates for references and call them.
8. Beware of jargon.

Congratulations!



You have a plan and a tech person.

Now what.....



More Planning!

ACTION PLAN

- **Review project plan**
- **Ask questions.** Don't be shy!
- **Cost and refine your priorities and wish list**
- Clue them into **free/low-cost nonprofit tech products**
- Create **implementation timeline**
- Build in **milestones dates** for decision points
- Create a **communication strategy**
- Build in **training** for yourself and users
- Plan for **beta testing**
- Plan for **fixing bugs**
- **Get approval** on action plan



Implementation Tips



- **Follow action plan!**
- Document implementation and revisions
- Publish updated timelines
- Communicate frequently
- Question variances
- Create back-up plans
- Build in follow-up loops
- Finish implementation
- Archive implementation plan
- Review the implementation
- Add lessons learned for future implementation
- **Celebrate!**



Tech Product Shopping



Free and Low-Cost Tech Products and Services

For more information on locating free and low-cost technology resources, please reference Part 1 of the ASPCA's three-part technology series presented by Gail Samuelson Carpentier of TechSoup Global:

[Navigating the World of Donated and Discounted Technology](#)

Sample Resources

- **Tech Soup:** www.techsoup.org
- **Google Apps:** www.google.com/nonprofits/
- **Salesforce:** www.salesforcefoundation.org/nonprofit/

*For qualified and eligible nonprofit organizations. Availability, fees and information may change. ASPCA does not endorse these websites or products.

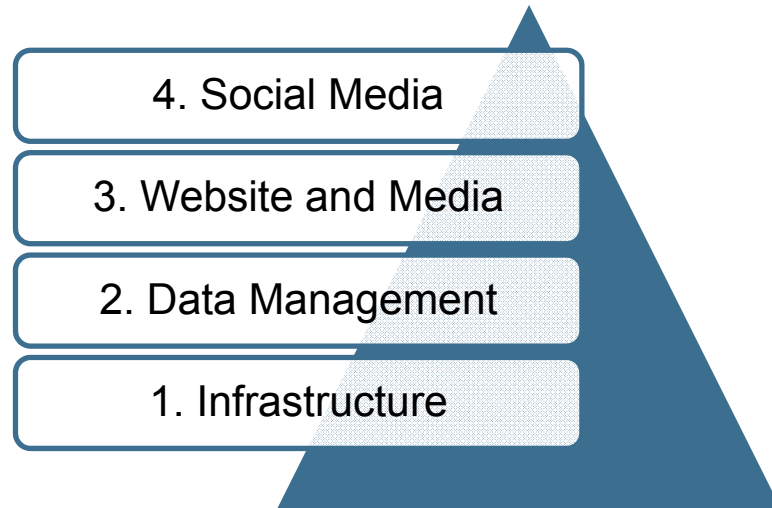
Top 10 Tech Product Asks

1. Website
2. Fundraising database
3. Customer relationship management database (CRM)
4. Shelter management database
5. Accounting system
6. Internet security system
7. Email broadcast tool
8. Project management system
9. File sharing system
10. Collaboration systems

* Social Media



Tech Product Fundamentals



1. Does your organization have a good infrastructure to support new tech products?
 - Computer hardware
 - Email
 - File storage
2. Have you built in replacement cycles for your infrastructure?
3. Is IT in someone's job description?
4. Why do you want a particular technology?

Technology Planning Tips

Think critically about your technology plan within the frame of:

- Why
- Investment
- Managing change
- User needs
- Support and maintenance
- Risk

Messing Up



Not Purrfect is OK

Technology is built on:

- Embracing and learning from failure
- A process driven by cycles
- User acceptance testing and upgrades
- Documentation and archiving
- Replacement cycles
- Change

What is the change you envision for your organization if you had the technology resource you needed?

Answer in the chat.



PAWS for Questions?

