Tech Fundamentals for Small Nonprofits

Presented by Karen Graham for Hartford Foundation for Public Giving, November 2023

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I'm a nonprofit leader and technology strategist who loves helping people solve problems–from making their work easier and more enjoyable, to enabling their organization to more effectively achieve its mission. I am a frequent writer and speaker on technology leadership, software selection, user adoption, innovation, and strategic IT alignment.

Pronouns: She/Her

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What did you come here to learn?

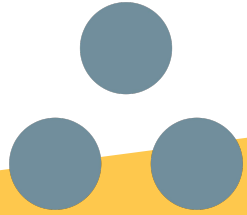Pause and jot down a few questions or learning objectives.

Agenda

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1. What success looks like
2. Finding areas for improvement
3. Productivity and collaboration tips
4. Common mistakes
5. Working with consultants
6. Wrap-up

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What does technology look like when you are stable, secure, and poised for growth?

Hartford Foundation's Assessment Framework

Asks 16 questions about technology
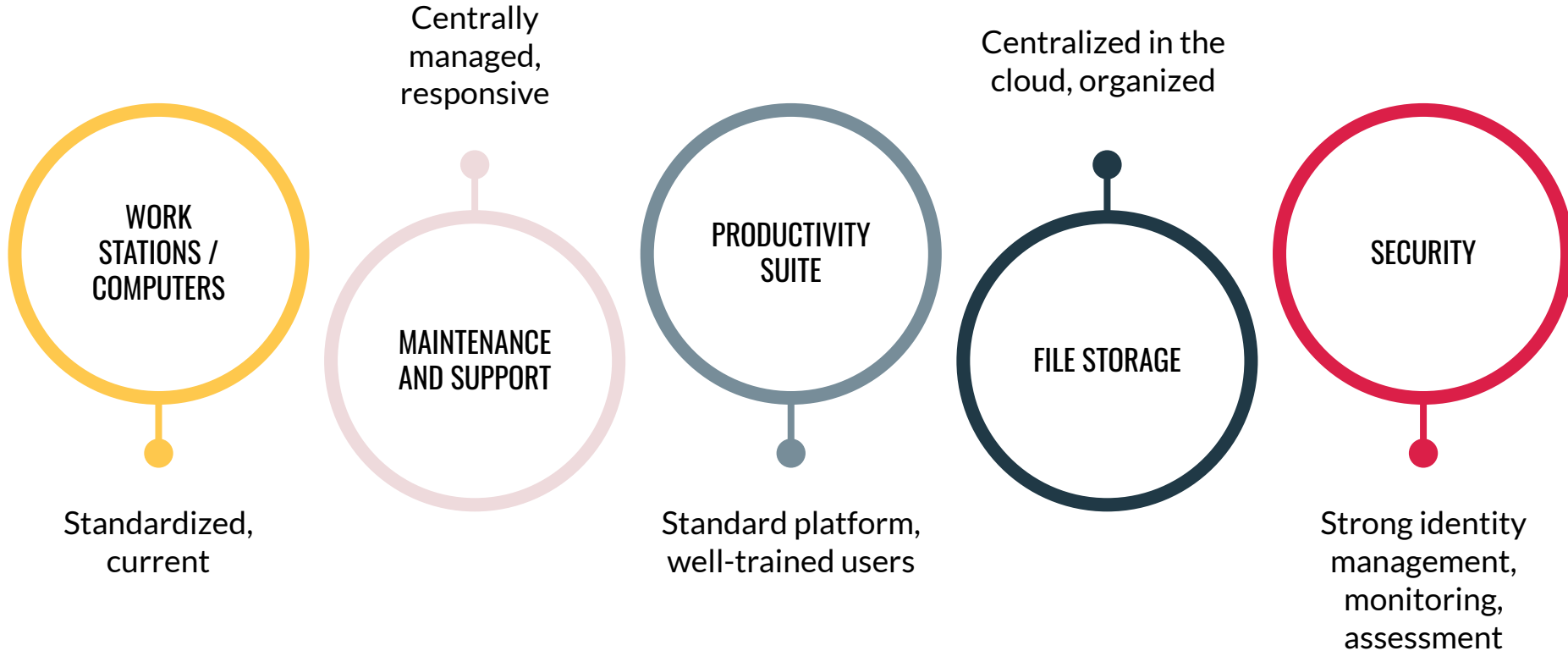
(I'll share more assessments later)

* 8. How does your organization set up new hardware and software and keep them up to date?

○ Our organization does not supply hardware and software.

○ We set up hardware and software on an ad-hoc basis, and staff members manage them on their own. Technical support, processes, and training on IT asset management are inadequate or nonexistent.

○ We use some digital tools to help us manage hardware and software, but the tools don't fully meet our needs, or we aren't using them as well as we could. Processes, tech support, and training are basic, and this type of technology doesn't seem to be a priority.

○ We use a centralized system that generally meets our needs, but it may lack some features, or we are not using its advanced features. Processes, support, and training are adequate to support system standards.

○ We use a comprehensive remote monitoring and management (RMM) system that meets current needs and integrates with other key systems. Staff members are well trained, processes and support are strong, and this technology aligns with our overall strategy.

* 9. How does your organization troubleshoot and repair computers and other hardware?

○ Our organization does not have a need to troubleshoot and repair computers and other hardware.

Basic IT Infrastructure

Centrally managed, responsive

Centralized in the cloud, organized

WORK STATIONS / COMPUTERS

MAINTENANCE AND SUPPORT

PRODUCTIVITY SUITE

FILE STORAGE

SECURITY

Standardized, current

Standard platform, well-trained users

Strong identity management, monitoring, assessment

Ugh, Security

Sorry, you can't ignore it. Cybercriminals target small nonprofits.

Biggest risks:

- Ransomware
- Social engineering

But there are steps you can take to prevent and prepare!

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Other Technologies

Digitized, automated

Digitized, supports remote collaboration

DATABASES

FUNDRAISING, MARKETING, ADVOCACY, AND ENGAGEMENT

WEBSITE

COMMUNI-CATIONS

PROGRAM DELIVERY

Cloud-based, supported, secure

Up-to-date, supported, search optimized

Leverages technology to improve reach and quality
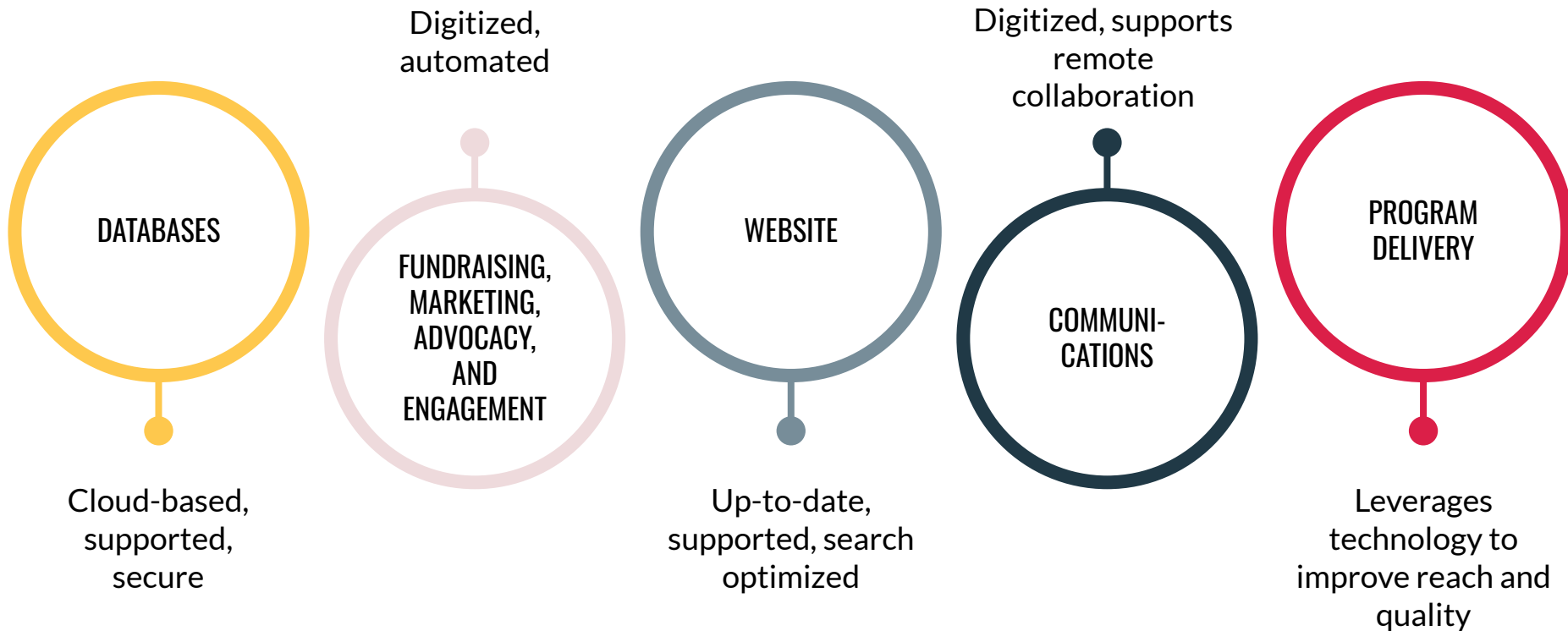
Guidelines and Practices

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TRAINING

Users know how to spot and respond to security threats

Users are confident with at least basic features of the tools you regularly use

POLICIES

There are written policies for acceptable use of technology and data privacy
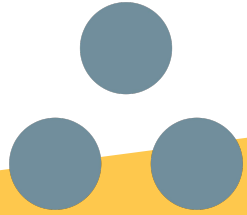
Staff receive training on these policies

The organization enforces the policies

○ ○ ○ ○ ○

Poll: Where do you need the most improvement?

- ❏ Work stations/computers
- ❏ Maintenance and support
- ❏ Productivity suite
- ❏ File storage
- ❏ Security
- ❏ Databases
- ❏ Fundraising, marketing, advocacy, and engagement
- ❏ Communications
- ❏ Program delivery
- ❏ Training
- ❏ Policies

If you are below standards in multiple areas, where should you start?

Scenario: What Would You Do?

😄Workstations/computers
😦Maintenance and support
😐Productivity suite
😐File storage
😦Security
😐Databases

😄Fundraising, marketing, advocacy, engagement tools
😄Website
😐Communications
😦Program delivery tech
😄Staff training
😐Policies

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More Assessment Tools

Online Technology Assessment (Tech Impact)

Digital Assessment Tool (Tech Soup)

Tech Accelerate (NTEN)

Data Maturity Self Assessment (Data Orchard)

Cybersecurity Assessment Tool (Ford Foundation)

Image credit: pexels-thirdman-7659569

Training that actually works

DO

Train in small increments

Use a lab environment, simulation, and reflection

Consider different learning styles

Reinforce at intervals

Recognize and provide accountability

DON'T

Assume people understand

Equate knowledge with behavior change

Worksheet

[Download a copy](#)

Strategic Technology Planning Worksheet

OBJECTIVES

Why do you need a strategic technology plan?

TEAM

Who should be on the planning team? Consider who has knowledge of technology as well as program needs, who can provide a strategic perspective, and whose support will be crucial.

GOALS

Define a handful of goals for your plan. For example, our technology systems and hardware procurement will support up to 10 new hires working remotely over the next three years.

1.
2.
3.

CONTEXT

What is happening internally or externally that influences this plan? Is there a merger or leadership transition? A new strategic plan for the organization?
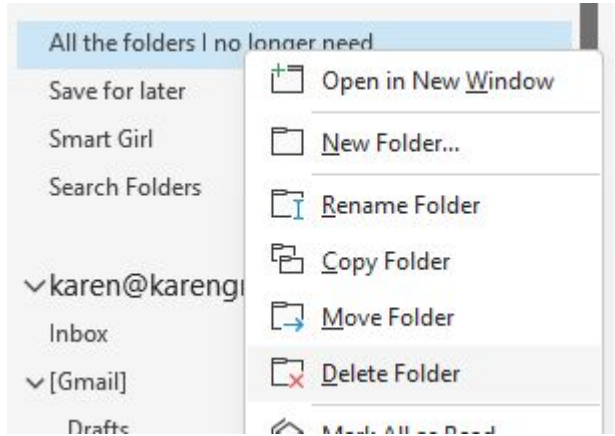
CURRENT SITUATION

Describe your current state, including:

- Hardware
- Productivity software
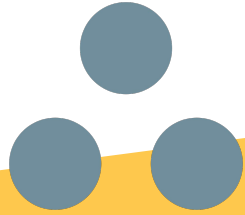
How can you use technology to improve productivity and collaboration?

Managing Your Inbox

Use a method like Getting Things Done - or anything that works for you - to minimize touches.

Ditch the folders.

Integrate a task management app, such as Todoist.

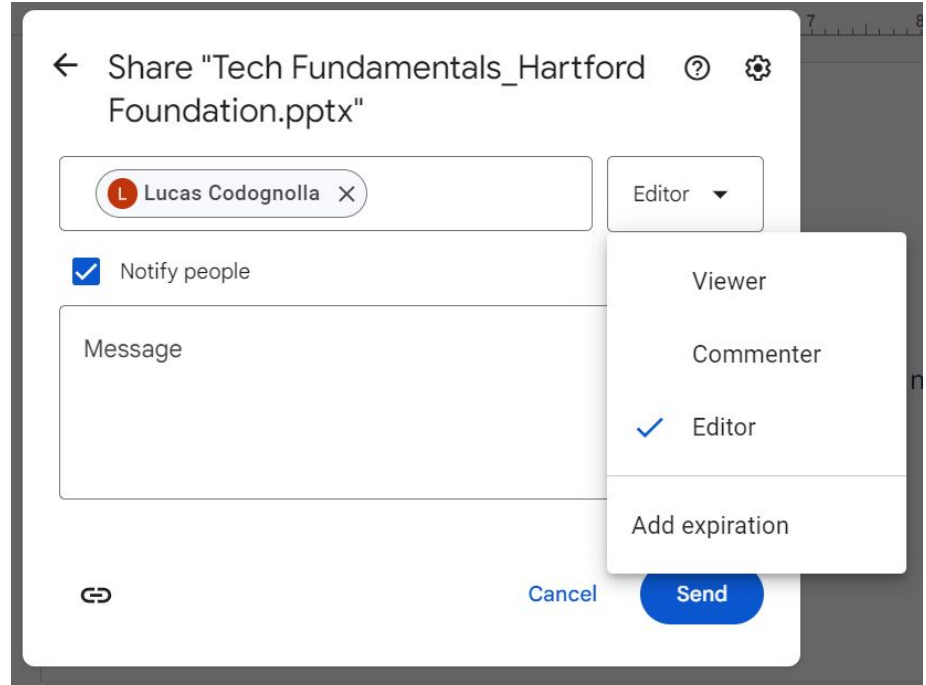Reduce email by moving to chat tools like Slack.

Collaborating on Documents

Share via link rather than via attachment

Learn to use suggestions and comments

Keep all important documents in an organization folder on the cloud, not in personal drives (e.g. One Drive) or on your computer

Free and cheap apps

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Trello and Asana - visual project management

Boomerang Gmail extension - follow-up reminders

Remember the Milk and Microsoft To Do - task management

Discord and Teams - chat

Zapier and IFTTT - integration/automation

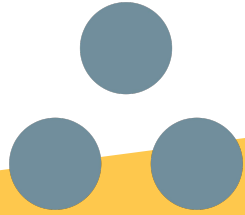Chat GPT and Claude - generative AI

Toggl - time tracking

Canva - design

Otter and Fireflies - transcription and meeting summaries

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Reflection Activity

What is one area where a productivity gain could make a huge difference for you? Could you apply any of these tools or techniques?

What mistakes to new/small nonprofits tend to make when it comes to technology?

Using Personal Accounts

Risk of losing access to your website or files

Lose control of private data

Looks unprofessional to clients, funders, prospective employees

Bad password practices

Avoid reusing passwords and using simple or easy-to-guess passwords.

Instead, use a password manager like Passly or Lastpass.

Create passphrases, or passwords at least 12 characters with a combo of letters, numbers, symbols, and capital letters.
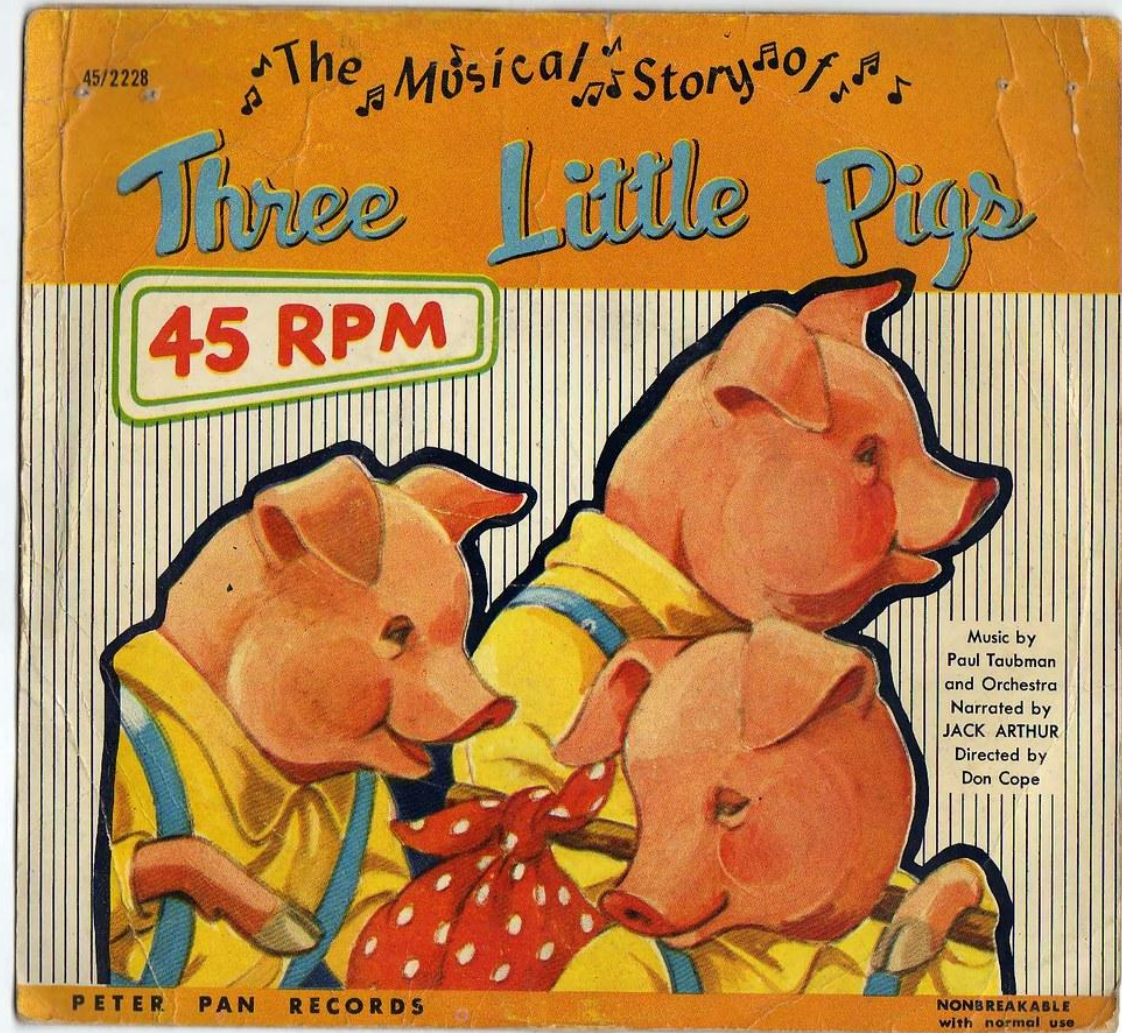
PASSWORD123

RedSocks

lZWqeY!3N#3l
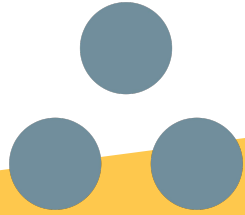
BobDylanandPrincearefromMinnesota

Underinvesting

Build what you really need into your budget and find funding for it.

Remember to invest in support–which is more important the smaller your organization is.

What's the best way to get help?

Ask the Internet

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Use web search or AI tools

- Paste in the error code
- Describe the circumstances
- Include your OS, browser, or application version

Or use learning sites such as:

- https://learn.microsoft.com/en-us/
- https://trailhead.salesforce.com/
- https://www.reddit.com/r/techsupport/

Google

"Failed to load resource: the server responded with a status of 439 ()" Chrome Version 119.0.6045.107

Google Search   I'm Feeling Lucky

Learn how Google supports veterans

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Nonprofit-Specific Help and Discounts

TechSoup

Discounts on Microsoft, Adobe, and many other products

Articles and webinars

Tech Impact

Tech support and services from a nonprofit

Articles and webinars

Annual conference

NTEN

Membership organization

Articles and webinars

Annual conference

Google for Nonprofits

Discounts on Google products including Adwords

Consultants, Service Providers, Pro Bono, and Volunteer

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CONSULTANTS AND SERVICE PROVIDERS

They can provide expertise, outside perspective, and additional capacity, freeing you to focus on your core work.

*Be thoughtful about contracting and setting expectations.

PRO BONO AND VOLUNTEERS

Can't beat the price!

But will they be around later when you have questions?

*Get documentation and make a long-term plan for sustaining their work.

Choosing an Expert

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[New England Nonprofit Consultant Directory](#)

Or, ask a colleague!

Some things to look for:

- experience with similar organizations and projects
- evidence of good listening and critical thinking
- ability to explain technical matters in plain language
- great references

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Setting Expectations and Keeping Things On Track

✓ What will be required of me or my team?

✓ How will we communicate?

✓ How often will you check in?

✓ What is the process for approving deliverables?

✓ What happens if we fall behind?

✓ What constitutes success for you on this project?

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Hartford Foundation's Nonprofit Support Program

For organizations with an annual budget <$300K

Start with a free tech assessment

Get connected with consultants

https://bit.ly/hfpgtech

NSP Nonprofit Support Program
HARTFORD FOUNDATION FOR PUBLIC GIVING

SEARCH

I NEED HELP WITH...   WHAT WE OFFER   WORKSHOPS   FIND A CONSULTANT   NEWS   ABOUT NSP

Technology Support for
SMALL ORGANIZATIONS

Grants and other resources to help small nonprofits meet their technological needs.

Technology is a mission-critical investment that can stretch your scarce resources farther and accelerate your organization's impact. By thoughtfully integrating technology into your operations, communications, fundraising, and service delivery, you can fundamentally shift the way you deliver your mission and serve your community.

The Hartford Foundation's Nonprofit Support Program is now offering **technology support** to organizations that:

- are a registered 501(c)(3) nonprofit;
- are located in the Hartford Foundation's 29-town region;
- and have an annual budget of under $300,000.

HOW THE PROCESS WORKS:

1. Complete a Technology Assessment Survey

To be considered for a Small Organization Technology Grant or other resources, you must complete a brief online survey assessing your current technology systems and capacity.

CLICK HERE TO COMPLETE THE SURVEY

2. Work with a consultant to identify solutions

Once the survey has been submitted, your organization will be matched with a consultant for up to 3 hours of consultation. The consultant will review your survey results, help you identify tech projects that are most [ ] for your organization, and estimate implementation costs.

[ ]sist you with implementation, we have developed implentation plans for some of the most common technology projects:

+ Updating an Existing or Creating a New Website

+ Donor Management System

+ WHAT WE OFFER

Every opportunity starts with a conversation.
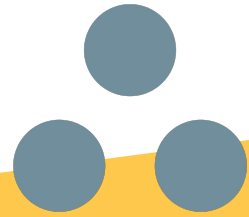
To discuss your organization's needs, contact:

Amy Studwell
Senior Community Impact Officer
astudwell@hfpg.org
860-548-1888 x1040

I need help with....

Explore more resources in strategic technology and other areas of nonprofit management and leadership.

What did you learn today, and how might you apply it?

Stable, productive nonprofits have current, centrally managed technology

Address basic infrastructure and security first, but don't overlook program delivery

There are loads of free and cheap tools to streamline your work

Beware of underinvesting, personal accounts, and poor password practices

Get outside help if needed - and choose wisely

Bonus tip: Win support for tech investment by making a "business" case and a persuasive pitch.

What questions do you have?

Thank you

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Contact me with further questions at karen@karengrahamconsulting.com. The first 25 minutes of advice are free!