Strategic Communications for Nonprofits

# Technology Literacy Benchmarks for Nonprofit Organizations

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# Acknowledgments

Like many tools of its kind, the benchmarks are not the product of one person or organization. Instead, they are the result of the knowledge and experience of many folks working in the nonprofit technology assistance field. These benchmarks started as a project of the National Strategy for Nonprofit Technology. NPower, in partnership with the Benton Foundation and the SBC Foundation, has taken the lead in this revision of the benchmark document, adding a new section on Telecommunications & Internet Access. We have drawn heavily from the advice and work done by ArtsWire, OneNorthwest, CompuMentor/TechSoup; CompassPoint Nonprofit Services; NPOTech; IT Resource Center; and, Coyote Communications. It is our hope that these benchmarks continue to be enhanced and updated to reflect the changing environment of both the nonprofit community and the technology world.

# Introduction

**The *Technology Literacy Benchmarks for Nonprofit Organizations* are a unique tool designed to help nonprofit organizations grapple with the challenges posed by computer technology. Before explaining how the tool should be used, though, we would like to explain why a benchmarking format, instead of a simple list of recommendations or guidelines, was chosen.**

Benchmarking is a powerful process nonprofits can use to assess and evaluate their organizations' practices, operations, and functions against a set of "best-in-class" criteria. This document contains 43 "best-in-class" benchmarks divided among six different sections. Each benchmark represents the current standard for appropriate, efficient and sustainable technology use in a nonprofit organization. Collectively, they provide an example of how a technologically literate nonprofit integrates technology into its daily work.

We know, of course, that creating a technologically literate organization is a continuous, iterative process. As one commentator has put it, benchmarking is the process of "taking your organization towards best practice." (Evans, 1994). The *Technology Literacy Benchmarks* are intended to help lay the groundwork for creating this continuous improvement process. This process generally takes place in three phases:

**Phase One: Completion of benchmarks instrument.**
During the first phase, a team of individuals, representing a cross-section of the organization is brought together to: (1) review the benchmarks and the associated explanation, and (2) assess the organization's technology use against each individual benchmark. After reviewing the document you will see that a sliding scale and multiple-choice measurements are included to aid the assessment process. These measurements are not a test — they are only guides intended to help you understand where your organization is in the process of moving towards technology best practice.

We strongly recommend that the assessment be done as part of an organization-wide process of short or long-term technology planning. We encourage you to complete the assessment in the earliest stages of your planning process.

**Phase Two: Technology planning and implementation.**

Once the assessment is finished, the team should examine its results and highlight the organization's technology strengths and challenges. The following questions can serve as a guide:

1. How does your organization currently use technology and how effective is this use?
2. How can your organization improve its use of technology to further advance its mission?

After you've had an opportunity to review the data you collected during the assessment, you will want to create a technology plan. This plan will serve as a roadmap for addressing your identified challenges. (You will find detailed information about creating technology plans in Section A of the benchmarks).

**Phase Three: Institutionalization.**

The final phase of the benchmarking process centers on developing mechanisms for ongoing reflection about your organization's use of technology. The completed benchmark assessment should become a living document that is regularly revisited and reviewed by your organization. Regular reflection will enable you to modify and revise your technology plan, as needed, and to consistently meet your organization's technology needs.

The criteria used to establish each of the benchmarks in this document have been drawn from the experiences of a large and diverse group of nonprofit technology consultants. The benchmarks started as a project of the National Strategy for Nonprofit Technology. With support from the SBC Foundation and the Benton Foundation, NPower has taken the lead in this revision of the benchmarks drawing heavily from the advice and work done by ArtsWire, ONE/Northwest, CompuMentor/TechSoup; CompassPoint Nonprofit Services; NPOTech; IT Resource Center; and, Coyote Communications. It is our hope that these benchmarks continue to be enhanced and updated to reflect the changing environment of both the nonprofit community and the technology world.

We want to hear from you! Let us know how you've used the benchmarks and what you gained from them. Contact us at Benchmarks@NPower.org.

## A Benchmarks Case Study[1]

In September 1999, Arts/Boston was selected to participate in a series of activities designed to help arts and cultural organizations better capitalize on information technology. The activities were part of a project of The New York Foundation for the Arts called *Knowledge in Technology* (or KIT). Throughout the KIT project, Arts/Boston used a tool derived from the *Technology Literacy Benchmarks*.

During phase one of the benchmarking process, Arts/Boston conducted an assessment of its technology infrastructure. A technology team that included several members of the organization's staff and board of directors carried out this assessment. The team also received technical assistance and guidance, as needed, from a nonprofit technology consultant with special expertise in arts organizations.

During its work, the team identified Arts/Boston's technology strengths — as well as the areas that needed immediate attention. One of the team's discoveries was that the organization did not have a functional system in place for backing up its critical database. Miki Robinson, the leader of the technology team described the situation:

> *We knew we weren't backing up our Arts/Mail database as regularly as we should, and we were painfully aware that it was one of our key organizational information assets, but our system was so ancient it couldn't efficiently and automatically complete a backup. We started to imagine how impossible it would be to reconstruct the database...and immediately put a simple and inexpensive solution in place.*

Similar findings were made about the organization's technology budgets and its staff's access to the Internet.

The team then moved into the second phase of the benchmarking process and began creating its technology plan. In order to write the plan, the team researched possible solutions to its challenges. It did this by consulting the Internet, and by speaking with computer savvy staff as well as technology vendors. Once solutions were agreed upon, they were incorporated into the written technology plan. In its final form, the technology plan covered a three-year period, with very specific information for the first 18 months about computer hardware, software, connectivity, training, costs, and funding.

During the third and final phase of the benchmarking process, the Arts/Boston team created mechanisms that the organization could use to continually reexamine its use of technology, thereby avoiding the pitfalls it faced in the past. This continual reassessment and improvement process was assured by the team's decision to meet regularly and to supervise the implementation of the technology plan. As Miki Robinson described it, "technology planning is now an organizational habit."

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[1] This case study is designed to illustrate each of the three benchmarking phases previously described. It is adapted from "Knowledge in Technology" by Beth Kanter. A full copy of the case study is available at www.nyfa.org/fyi/fyi_summer2000_pg6.htm.

# Instructions

**1. The benchmarks are intended to be a guide for non-profit organizations as they integrate technology into their organization's mission and daily work.**

The benchmarks are based upon the experience and research of individuals who help nonprofits leverage technology to its fullest.

**2. The benchmarks are not a test.**

This document is designed to be an assessment instrument that organizations can use to more fully understand their technology strengths and challenges. The benchmarks assessment instrument is successful only if an organization uses it to better understand its "technology culture" and to plan for future use of computer technology.

**3. The benchmarks are best completed by a team of people from your organization.**

This team should include representatives from your executive director's office, program staff, and board members. You may also want to include other individuals, such as volunteers, on the team depending upon your organization's structure and mission.

**4. You will find a narrative "Explanation" which corresponds to each benchmark.**

Be sure to review the explanation before deciding whether you meet or do not meet the benchmark.

**5. Various documents are referred to in the benchmarks; these include a technology plan, security policies, and network maps.**

Some organizations find it helpful to (1) make copies of these documents as they complete the benchmarks and (2) attach them to the applicable page of the benchmarks. The completed instrument can then serve as a living assessment tool that can be reviewed and revised as your organization's technology systems change.

**6. There are two groups of benchmarks in each section: baseline benchmarks and "extra credit" benchmarks.**

Baseline benchmarks are the absolute minimum requirements for a technologically-literate organization. Extra-credit benchmarks are designed to help the organizations move to more sophisticated levels of technology usage.

**7. There are also two types of questions used throughout the assessment instrument:**

**a) Yes/No** questions ask the team to make a judgment about the organization's status in relation to a specific benchmark; and

**b) Scaling questions** ask the team to determine the extent to which the organization meets the benchmark's recommendation.

**8. Once the benchmark assessment process is complete,**

an organization's staff and leadership should identify areas of strength, as well as concern, and develop a plan for meeting all baseline benchmarks.

# A. Technology Planning


Developing and using a technology plan is one of the most empowering things a nonprofit organization can do as it seeks to use computer technology to its fullest. A technology plan will help your organization maximize computer technology's potential by serving as the touchstone for all of your organization's technology activities.

The technology planning benchmarks willprove useful whether you already have a technology plan or not:

- ✔ If you do not yet have a plan, complete the benchmarks first and then use them to guide your plan's development.
- ✔ If you already have a technology plan, use the benchmarks to assess how thorough and complete it is and use the "extra credit" benchmarks to make your plan even better.

## 1. Your organization should have a two- or three-year written technology plan that is integrated into your organization's overall strategic plan and/or annual program plan.

### Explanation:

Many nonprofits find themselves reacting to technological problems and developments on an ad hoc basis. At times we may feel as if computers have minds and personalities of their own – and not very pleasant ones at that. A technology plan will allow your organization to take a proactive approach to the use of computer technology. By developing and using a technology plan, you and your organization will be in full control of your computer resources.

Because the nonprofit environment and computer technology change so frequently, try to make your plan relatively short-term in nature – no longer than two to three years, regardless of the length of your overall strategic plan. By limiting the time period, you will be positioned to consider and, if needed, respond to changes in technology more frequently.

### Measurement:

**Check all that apply:**

- ◯ Yes, our organization has a technology plan.
- ◯ Yes, our organization has a plan, but it is not very detailed.
- ◯ Yes, our organization has a plan, but it is not integrated into our strategic plan/annual plan.

◯ No, our organization does not have a plan, but we are presently working on one.

◯ No, our organization does not have a plan.

## 2. Your organization's technology plan should include the following components:

- Technology vision statement for the organization.
- Statement describing your organization's mission and programs.
- Statement describing your organization's current use of technology and how it supports program operations.
- Inventory of your organization's current hardware and software.
- Inventory of staff computer skills.
- Statement of long-and short-term technology goals.
- Strategy for meeting the plan's goals.
- Timeline for meeting the plan's goals.
- Budget detailing the costs of implementing the plan.
- Evaluation criteria to determine whether the plan's goals have been met.

## Explanation:

Your technology plan should lay out all of the information you think you will need to make smart technology decisions in the future. As a result, work to make your plan thorough and comprehensive. If planning time or resources are limited, though, concentrate on these four key elements:

(1) a broad vision statement for your use of technology;
(2) a description of the strategy you will use to achieve this vision;
(3) a timeline; and
(4) a budget. Try to be as specific as possible for the first 18 months of your plan's timeline.

Most importantly, remember that the planning process is designed to be an empowering one. You should feel more in control of your organization's technology needs and future after creating the plan. One way to make sure this happens is to avoid creating a detailed blueprint for installing new technologies or identifying the exact specifications of computer hardware until you are ready to purchase and implement each technology. Instead, use the planning process to clearly identify where your organization is in relation to where it wants to go. Finally, telephone systems, voicemail, fax machines, printers, scanners, digital cameras, voice-activated keyboards, photocopiers and video conferencing tools can all be included in your technology plan wherever appropriate.

## Measurement:

**Circle "Yes" or "No" for each component:**

| | | |
|---|---|---|
| Technology vision statement. | Yes | No |
| Statement describing your organization's mission and programs. | Yes | No |
| Statement describing your organization's current use of technology. | Yes | No |
| Inventory of your organization's current hardware and software. | Yes | No |
| Inventory of staff computer skills. | Yes | No |
| Statement of long- and short-term technology goals. | Yes | No |
| Strategy for meeting the plan's goals. | Yes | No |
| Timeline for meeting the plan's goals. | Yes | No |
| Budget. | Yes | No |
| Evaluation criteria. | Yes | No |

## 3. The completed technology plan should have strong organizational leadership and management support.

### Explanation:

Active support for your plan by your organization's leadership, board of directors and management personnel will be critical to its success. No matter what kind of an initiative it is, if an organization's leadership does not buy into it, nothing will happen. Getting leadership support for your technology plan will not only ensure financial backing of the plan, but it will prove immensely helpful for motivating staff to learn and use new technology tools.

Once your organization's leadership is on board, don't let them get away! Create an inclusive, ongoing planning process that keeps everyone interested and invested in the project. You can do this by actively seeking the input of leadership when creating the plan and by having technology updates as part of management team and board of director meetings.

### Measurement:

**Circle the best answer:**

1 2 3 4 5

Minimal leadership support

Very strong leadership support (e.g., board and executive director approval of plan)

## 4. Your organization should have an adequate budget to implement its technology plan or it should have a fund development strategy to secure needed funding.

### Explanation:

When reading this benchmark most nonprofits don't know whether to laugh or cry. Budgeting for technology in a resource-scarce environment can be a challenge, at best. But, if your organization is able to make technology a resource priority, it will reap the rewards of its investment. Here are a couple of things to keep in mind when working on technology budgets:

- First, in an ideal world, your organization's budget should include money for computer hardware, software, staff training and ongoing technical support. However, hardware and software should not be the major budget items. In fact, nonprofits should spend approximately 70% of their total technology spending on "human costs" such as training, technology upgrades, ongoing technology maintenance and staff support. The reasoning behind this is straightforward. You can have all the greatest gadgetry money can buy, but if the system is down or no one knows how to use it, the technology's value to your organization is negligible.

- Second, you should base your budget on the assumption that individual computers should be replaced every three years, although in reality, many organizations do this only every four or five years. An easy budgeting trick is to allocate a certain amount of money in your annual budget for each computer workstation in your organization. These funds can then be used to purchase and replace about a third of your computers every year. The remaining funds can be used to maintain the machines that were not replaced.

• Third, when submitting grant requests for technology funding, be sure to include a copy of your technology plan. Funders will be impressed with your organization's systematic and careful thinking about computer technology.

## Measurement:

**Check all that apply:**

- ◯ Yes, we adequately address hardware in our budget.
- ◯ Yes, we adequately address software in our budget.
- ◯ Yes, we adequately address staff technology training in our budget.
- ◯ Yes, we adequately address technology technical maintenance and upgrades in our budget.
- ◯ Yes, we have a fund development strategy in place.
- ◯ No, we do not have an adequate budget or a fund development strategy in place.

## 5. The technology plan should address hardware and software compatibility.

## Explanation:

Many nonprofits use a wide variety of computers, operating systems and software packages. Although the different assortment of colors and shapes may make things fun to look at, it doesn't necessarily result in computers that are compatible with one another. For purposes of these benchmarks, compatibility means that your files and documents can be freely and easily shared between computers.

If incompatibility is a problem for your organization, include a strategy for addressing it in your technology plan. If incompatibility does exist, and it is desirable, explain why in your plan. For example, your organization may use Macintosh machines for high-end graphics work while the majority of computers in your office are Windows-based.

## Measurement:

**Check one:**

- ◯ Yes, our plan addresses compatibility.
- ◯ No, our plan does not address compatibility.

## 6. The technology plan should be created by a team of individuals who possess programmatic as well as technology expertise.

### Explanation:

To ensure that your technology plan is tied to your agency's mission, don't let it be the sole responsibility of computer experts. One of the greatest strengths of the nonprofit sector is its recognition that different voices, working in concert, can make the most profound impact. In keeping with this belief, work to make sure your technology plan is created by a team of people who represent different parts of your organization's operations.

If you work in the human services field, for example, seek to include program managers and front-line service providers as well as computer experts. Also, be sure to have representatives of your organization's board of directors and executive leadership on the team. And, if your organization does not have sufficient internal technology expertise, consider seeking the assistance of an outside consultant who is knowledgeable about the nonprofit sector.

Finally, think about including "technology skeptics" as well as "technology enthusiasts" on your team. This kind of diversity will not only lead to a more thoughtful plan, but it can help enhance the plan's credibility among staff.

### Measurement:

**Check all that apply:**

- ◯ Yes, our plan was created by a team with both programmatic and technology expertise.
- ◯ Yes, our plan was created by a team that included representatives of the executive director's office and the board of directors.
- ◯ Yes, our plan was created by a team that included technology skeptics and enthusiasts.
- ◯ No, our plan was created by a team with technology expertise only.
- ◯ No, our plan was not created by a team.

## 7. Your organization should identify someone who is responsible for implementing the technology plan.

### Explanation:

Save your technology plan from the fate of so many other reports, plans and white papers — don't let it sit alone on a bookcase or in a filing cabinet, hidden away, collecting dust. Choose someone to put your plan into action. Select a technology savvy staff member to act as the "plan manager." This person should be charged with making sure the plan's goals are achieved, and to be responsible for regularly reporting back to your organization's leadership and technology planning team.

Also, after you've finished the plan, start implementing it as soon as possible — this way you won't lose the momentum gained during the planning process. Use the timeline you included in the plan and aim to have one major accomplishment under your belt within two months of finalizing the planning process.

### Measurement:

**Check all that apply:**

- ◯ Yes, we have identified someone responsible for implementing the plan.
- ◯ Yes, we have someone who regularly reports back to leadership and the planning team on the progress of implementation.
- ◯ No, we have not identified someone responsible for implementing the plan.

## Extra Credit:

**Your organization should keep current on new technology developments in the nonprofit sector and should use this knowledge in its technology planning efforts.**

### Explanation:

Nonprofit organizations are always scanning their environments and looking for better and more effective ways to deliver services. Use the same approach when dealing with computer technology. Examine how other nonprofit organizations in your area use technology to further their missions and then use this knowledge to help guide your own planning efforts. You can find out what other nonprofits are doing by attending nonprofit technology conferences, reading the technology articles and columns in your field's professional journals, visiting nonprofit technology Web sites and subscribing to nonprofit technology list-servs.

### Measurement:

**Circle the best answer:**

1 2 3 4 5

Unaware of new developments

Very aware of new developments

## Extra Credit:

**Your organization's technology plan should be regularly and formally updated.**

### Explanation:

You've worked hard to create your technology plan, don't let that work go to waste. Make your plan a living document by regularly reviewing and updating it at least annually. (Your plan should also be updated whenever your organization's strategic or annual program plan is updated.) As additional software and hardware are purchased and eliminated by the organization, make sure your plan reflects these changes. Remember, your technology plan is the touchstone for all of your technology decision making, don't let an out-of-date plan lead to bad decisions.

### Measurement:

**Circle the best answer:**

1 2 3 4 5

Organization rarely consults and updates plan.

Organization regularly consults and updates plan.

# Extra Credit:

**Your organization should understand and plan for the organizational changes that will surround implementation of the technology plan.**

## Explanation:

Implementing new computer systems can be a very stressful time for staff. There may be new software programs to learn and operate, new methods for saving and retrieving files, new passwords to memorize and new ways of accessing the Internet and sending e-mail. All staff, even those who helped create the technology plan, will need support and assistance during this time, especially when the unavoidable challenges and setbacks take place. The following tips will help make the change process easier for you and your entire organization:

- Make sure staff members fully understand the plan and the changes associated with it. Make clear that the changes the organization is experiencing meet a critical need and that fulfilling the plan's goals are an organizational priority.
- Prepare the staff and help them cope with the pain of change. Acknowledge the reality of the changes and provide a realistic view of the future. Create systems that allow staff members to help one another cope with the change.
- Keep the staff informed about the progress of the technology plan's implementation.
- Ensure that the organization's leadership demonstrates a continuous commitment to the plan. Leadership should model support and encouragement for the plan and provide the resources needed to guarantee its successful implementation.
- Empower those who are responsible for implementing the technology plan. Leadership and management should not dictate, in detail, how the plan will be implemented. Instead, those staff members who are responsible for implementing the plan should have the authority to make the plan a success and to deal with problems as they arise.

## Measurement:

**Circle the best answer:**

1 2 3 4 5

Organization has spent little time and effort preparing for change.

Organization has spent considerable time and effort preparing for change.

# B. Staff Use of Technology


The success of your organization's use of technology will, in large part, be determined by your staff members' ability and willingness to use computer tools. Work hard to give staff the support, training and resources they need to feel in control of technology and to become expert in its use. Otherwise, they may simply wind up feeling defeated and overwhelmed by your organization's computer systems. At the same time, organizational leaders should try to make their technology expectations of staff clear and explicit.

The following benchmarks will assist you in assessing the level of organizational support your staff members receive and the clarity of your organization's expectations. Use the extra credit benchmarks to bring an even higher level of sophistication to your staff support system.

## 1. All staff members should have easy access to the computer software and hardware they need to do their jobs effectively.

### Explanation:

Make it a clear goal of your technology plan that all of your organization's staff members will have easy access to word-processing and spreadsheet programs. These applications are considered basic "office productivity tools" throughout the nonprofit sector. In addition, work to make sure that all staff members have access to the specific software packages they need to carry out their jobs. For example, those staff members who are responsible for tracking member, volunteer or client contacts and activities will likely need access to a database program that will allow them to maintain these records with ease. Similarly, marketing and communications personnel will probably need access to desktop publishing software. Try to identify all of your organization's software needs during the technology planning process.

In addition to software, your organization's computers should be sufficient for staff to do their jobs. Seek to ensure that your organization's computers are Windows-capable, or Macintosh equivalent, and have sufficient disk space and memory needed to run job-specific software programs.

### Measurement:

**Circle the best answer:**

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| Very few staff members have immediate access to needed hardware and software. | | | | All staff members have access to needed hardware and software. |

## 2. All staff members should have desktop access to the Internet resources they need to do their jobs effectively.

### Explanation:

In just a few short years, the Internet has become the primary information resource system used by nonprofit organizations. No longer just a curiosity, the Internet is an extremely important information tool. The Internet's increasing importance to nonprofit management can be readily seen in the area of resource development.

Free and subscription-based Internet resources for grant research and prospect identification are now commonplace, and foundations and corporations publicize their giving guidelines and distribute their grant applications via their Web sites. In fact, in the near future nonprofits may very well wind up applying for grants and submitting their grant reports online. Try to make the most of Internet resources by ensuring that each of your staff members has desktop access to the Internet. And, remember, include use of the Internet in your technology plan.

### Measurement:

**Circle the best answer:**

1 2 3 4 5

Very few staff members have desktop access to needed Internet resources.

All staff members have desktop access to needed Internet resources.

## 3. All staff members should have ready access to the technology training needed to meet minimum levels of technology competency.

### Explanation:

If an organization's leaders have expectations about staff members' technology competency, then it's only fair that the organization provide opportunities for staff to gain this competency. Technology training is the primary way to gain this competency.

One of the concerns nonprofits have about technology training is its cost. This is especially true when staff members attend trainings and then leave the organization – and take all of the knowledge gained from the training with them. Avoid this "brain drain" by working to make sure a training participant's learning is institutionalized within your organization.

One way to institutionalize technology learning is to adopt a "train-the-trainer" approach. Under this approach, each person who attends a training workshop is required to hold in-house workshops for those who did not attend. In order for this approach to succeed, though, be sure your staff attends the in-house workshops. Also, it will help if training participants document their learning in employee manuals and other similar documents.

It's often difficult to determine who should attend a training workshop. In an ideal world, we would send everyone to training who has an interest. But resource limitations prevent this from happening. To help identify which staff members should attend a given training, use the following questions as a guide:

- Why is training being sought? What is the problem or need? Is it something that training can solve, or are there other organizational issues at play?

- Will the goals and objectives of the training session meet the need? Is this the right training for the problem?
- Which staff members need the training?
- What are the employees' long-range training/professional development plans?
- What are the learning styles of the staff members who will attend, and do they match the format of the training?
- What supplemental resources will staff need after the training (e.g., books, CDs, online resources)?
- Will the staff members who attend the training share and document their learning and work to institutionalize this knowledge?

## Measurement:

**Circle the best answer:**

1 2 3 4 5

Very few staff members have ready access to technology training.

All staff members have ready access to technology training.

## Extra Credit:

**All staff members should meet minimum levels of technology competency as part of their regular employee review.**

## Explanation:

Without a doubt, nonprofit leaders have expectations of their staff members, and vice versa. However, we tend to shy away from having expectations of one another when it comes to computer technology.

In general, your organization's staff members should have the skills and knowledge needed to operate basic computer technology in the same way they are expected to possess the skills and knowledge needed to operate basic office equipment (e.g., telephone, voice mail, fax machine and copier). It is recommended that these expectations be incorporated into a staff member's regular employee review. By incorporating these requirements into employee reviews, your organization will experience a number of important benefits. For example:

- Management will have a formal opportunity to learn about each staff member's expectations, fears and abilities in relation to computer technology.
- Management will be able to formally acknowledge and reward staff member behavior that furthers the organization's technology plan.
- The organization will have an opportunity to stress the importance of its technology plan with individual staff members.
- The organization's leaders will have a chance to learn how information technology is viewed by staff and how it is used on a daily basis.

## Measurement:

**Check all that apply:**

- ◯ Yes, all staff members are required to meet minimum competency levels.
- ◯ No, only certain staff members are required to meet minimum competency levels.
- ◯ No, staff members are not required to meet minimum competency levels.

## Extra Credit:

**All staff members should follow a technology use policy, and this policy should be included in the organization's employee manual.**

### Explanation:

Computer technology allows nonprofit organizations to improve their efficiency and effectiveness. However, as an organization increases its use of technology, it runs an increased risk of losing or damaging valuable data through error or misuse of technology tools. Your organization's technology resources are extremely valuable and should be used and managed responsibly. As a result, all of your authorized users should be required to comply with computer use and Internet use policies. These policies should address personal utilization of equipment and software, e-mail privacy and copying of software. Aim to have these policies included in your organization's employee manual and work to make sure everyone is apprised of them.

### Measurement:

**Check all that apply:**

- ◯ Yes, our organization has a written technology use policy.
- ◯ Yes, our organization enforces its technology use policy.
- ◯ Yes, our organization's technology use policy is included in our employee manual.
- ◯ No, our organization does not have a technology use policy.

# C. Business Systems

An organization's accounting and database software programs are often described as its business systems. These extremely important computer systems are closely tailored to meet an organization's needs and resources. However, in order for an organization to fully benefit from these systems, the people who use them most must receive proper training and support.

The following benchmarks will help you to assess whether your business systems are doing all they can for you and whether the staff members who use them have all they need to make the most use of them. The extra credit benchmarks can be used by your organization to further improve and refine your business systems afterthey have reached a satisfactory level.

## 1. Your organization should use or have access to a fund-based accounting software package that meets current and long-term organizational needs (organizations with budgets over $500,000 only).

### Explanation:

When deciding which accounting package is for you, be sure to choose one that will meet your current and future needs. Often, larger nonprofits will need a sophisticated software program that maintains separate balance sheets for each account. Your organization will likely need one of these packages if it receives restricted gifts from outside funders and if it is required to produce separate financial reports for each of these gifts.

As you select an accounting package, also be sure to review Statements 116 and 117 promulgated by the Financial Accounting Standards Board. These statements govern the ways in which nonprofit organizations must record gifts and present their financial information in audited statements. The accounting system you choose should allow you to meet these requirements.

For further guidance in selecting an accounting software package, see the explanation to the next benchmark.

### Measurement:

**Check all that apply:**

- ◯ Yes, our organization uses or has access to a fund-based accounting software package.
- ◯ Yes, our organization's fund-based accounting package will meet long-term needs.
- ◯ No, our organization uses a different type of accounting software that will meet our needs.
- ◯ No, our organization does not use an accounting software package.

## 2. The organization should use or have access to a small-business accounting software package that meets current and long-term organizational needs (organizations with budgets under $500,000 only).

### Explanation:

Small nonprofit organizations are likely to find software packages like QuickBooks, Quicken and OneWrite more than sufficient to meet their financial recordkeeping needs. When determining which software package you need, consider the following questions:

- How does the software package handle financial reporting? Are you able to build your own reports? If not, are the pre-built reports sufficient?
- Are you able to track transactions by fund, department, program or grant, as needed?
- Does the package allow you to track expenses and revenue by department or program?
- Can you keep prior months open, and does the software package allow for flexible reporting periods?
- Can you export data to other software programs such as Lotus or Excel?
- If you want to maintain your accounting records on a cash basis, will the software package support this?
- What is the cost of the package, and are there hidden customization expenses?

If you do not have the resources to maintain a computerized accounting system of your own, try to use an outside bookkeeping service that uses its own computerized accounting system.

For more information about accounting software packages, see the explanation to the previous benchmark.

### Measurement:

**Check all that apply:**

- ◯ Yes, our organization uses or has access to an accounting software package.
- ◯ Yes, our accounting package will meet long-term needs.
- ◯ No, we do not use an accounting software package.

## 3. Staff members should use a database to keep track of individuals and groups of individuals associated with the organization, such as clients, members, volunteers, contacts, funders, major donors or prospects.

### Explanation:

It wasn't that long ago that nonprofits kept contact information for their organizations' members and volunteers on 3" x 5" note cards and stored them in a shoe box! Thankfully, shoeboxes have been replaced by powerful and easy-to-use databases. Databases are welcome additions in the fight to manage and keep track of ever-increasing volumes of information.

Because everyone's information storage and reporting requirements differ, you'll want to plan carefully before you purchase or build a database system. Here is a simple guide to use when planning a database or revising your current system:

- What information do you currently keep track of?
- What information are you not tracking but should?
- What reports do you need to produce?
- How does information flow through your organization, and how should this process be altered? For example, who collects, enters, updates and accesses data about a caller, foundation or client? Should these responsibilities be reassigned?
- Does your system allow you to create both electronic and paper/envelope mailings?
- Does your office have multiple databases? If so, should they be integrated?

As you review these questions and begin planning or revising your database, it will help to prepare a written database development plan. This plan should be integrated into your overall technology plan.

## Measurement:

**Check all that apply:**

- ◯ Yes, our organization uses a database that tracks individuals and groups of individuals.
- ◯ Yes, our organization uses a database that meets our needs.
- ◯ No, our organization is currently building/planning a database.
- ◯ No, our organization does not have a database.

## 4. Staff members should receive proper training in the organization's business systems.

## Explanation:

Training is essential to the effective use of technology. This is particularly true for those who work with the organization's business systems. Seek to ensure that staff members who use these systems have access to needed training. For more information about staff technology training, see the explanation to Benchmark B3 on page 18.

## Measurement:

**Circle the best answer:**

1 2 3 4 5

Very few staff members receive proper training in business systems.

All staff members receive proper training in business systems.

## Extra Credit:

**Staff members should have easy access to needed technical support for its business systems.**

### Explanation:

If you purchased an off-the-shelf database or accounting system, or had it custom-built, be sure that the staff members who use these systems have continuing, easy access to needed technical support. Advocate for your organization and its needs with the database developer (if custom-built) and work to get as complete a technical assistance package as possible. In particular, try to secure the following as part of your support package: product updates, downloads, patches, FAQs, a searchable product knowledge base, e-mail support, message boards and access to a technical support specialist. The terms and costs of technical support should be negotiated prior to purchasing the system or contracting with a developer.

If your system was developed internally, assign a staff member to maintain and repair the system. This person should be the resident expert on the program and should be available to assist other staff members who use it.

### Measurement:

**Circle the best answer:**

1 2 3 4 5

Very few staff members have easy access to technical support.

All staff members have easy access to technical support.

## Extra Credit:

**Your organization should have adequate documentation for its business systems.**

### Explanation:

Having complete documentation for your accounting and database systems will save you countless headaches down the road by ensuring that knowledge about them is institutionalized. Proper documentation is invaluable when seeking technical support, making modifications to a program or seeking services under a warranty. It will also help train new employees on the use of these programs. Remember to make copies of all of your software documents and store them in a safe place.

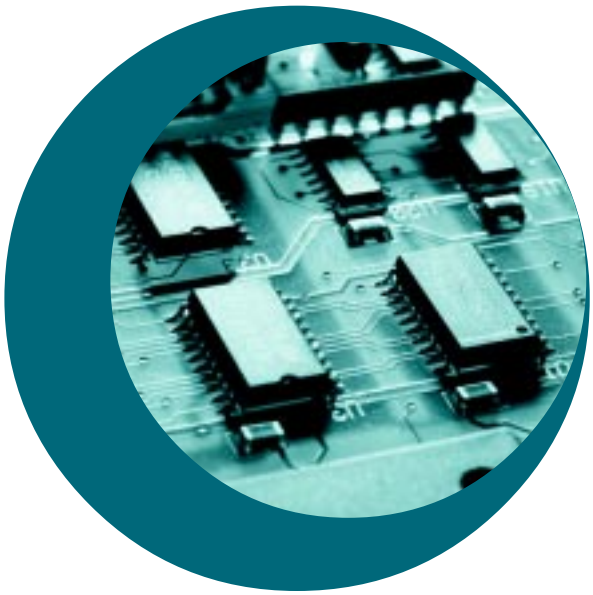
In general, documentation for off-the-shelf or custom-built computer systems should include an operating manual and technical program specifications. If your system was developed internally, have the person who created it prepare an operating manual and work to ensure that the manual is regularly updated to reflect changes or modifications to the program. Finally, it's always a good idea to have the manual reviewed by at least one other program user for clarity, accuracy and thoroughness.

### Measurement:

**Check all that apply:**

- ◯ Yes, our organization has adequate documentation for our systems.
- ◯ No, our organization has some documentation, but it is not adequate.
- ◯ No, our organization is developing documentation.
- ◯ No, our organization does not have documentation.

# D. Networks



Just like your organization's business systems, your network is a mission-critical technology system. When your network is running properly you can see the results immediately—your staff members are able to share information and resources with one another quicklyand effortlessly.

The following benchmarks will help you determine whether your current network is designed to best meet your needs. You can also use the benchmarks to decide whether your network is adequately supported and documented. If you do not have a network, then review the benchmarks to guide your development of one. Finally, if you have a network that meets your needs, review the extra credit benchmarks to assure that it meets the veryhighest levels of support and stability.

## 1. An organization with five to ten staff members in one office should, at a minimum, have a peer-to-peer network.

### Explanation:

A peer-to-peer network will allow your staff members to share information (e.g., files and documents) with one another quickly and easily. It will also allow staff to share important computer resources, such as printers and Internet accounts. Technically, a peer-to-peer network does not have a dedicated server or hierarchy among computers. All of the computers on a peer-to-peer network handle security and administration for themselves.

Setting up a peer-to-peer network is relatively simple and inexpensive. Most computers in use today have software pre-installed that can be used to connect them to other computers. For example, all versions of the Mac operating system, as well as Windows 9x and Windows 2000, allow for peer-to-peer networking.

But, before you implement a peer-to-peer network, be sure to review the following guidelines:

- If your organization is likely to grow beyond 10 staff people in the near future, a peer-to-peer network will probably not meet your needs for very long. Networks with dedicated servers are much better suited to larger organizations.

- Security on a peer-to-peer network is very basic and is not well suited for the protection of very sensitive information, such as financial and accounting records.
- All of your staff members will need to learn several simple procedures to guarantee that the network runs properly. These procedures include sharing files, folders and printers.

For an alternative to peer-to-peer networks, see the next benchmark.

## Measurement:

**Check the one that applies:**

- ◯ Yes, our organization has a peer-to-peer network.
- ◯ No, our organization is currently planning/building a peer-to-peer network.
- ◯ No, our organization does not have a peer-to-peer network.

## 2. An organization with more than ten staff members in one office should have a client/server network.

## Explanation:

In contrast to peer-to-peer networks, client/server networks use a computer that is running software that enables it to serve specific requests from other computers on the network (called clients). Network users commonly store their documents on the server, and the server can take requests for print jobs from other computers and send them to a specific printer. There are many other more sophisticated tasks that network servers can handle.

It's not necessary for you to become familiar with all of the technical details of computer networking in order to determine whether you should have a server-based network. The most important thing to understand is that a network server is a special kind of computer that is designed to handle the computing demands of many users.

In general, server-based networks will provide your organization with a much more robust computer infrastructure than will peer-to-peer networks. For example, a server can act as a central storage place for user files. It can help manage multiple print jobs and run complicated database, fax and e-mail programs. Once you have a server-based network in place, it is easy to add new computers to these networks as the organization grows.

## Measurement:

**Check the one that applies:**

- ◯ Yes, our organization has a server-based network.
- ◯ No, our organization is currently planning/building a server-based network.
- ◯ No, our organization does not have a network.

## 6. The technology plan should be created by a team of individuals who possess programmatic as well as technology expertise.

### Explanation:

To ensure that your technology plan is tied to your agency's mission, don't let it be the sole responsibility of computer experts. One of the greatest strengths of the nonprofit sector is its recognition that different voices, working in concert, can make the most profound impact. In keeping with this belief, work to make sure your technology plan is created by a team of people who represent different parts of your organization's operations.

If you work in the human services field, for example, seek to include program managers and front-line service providers as well as computer experts. Also, be sure to have representatives of your organization's board of directors and executive leadership on the team. And, if your organization does not have sufficient internal technology expertise, consider seeking the assistance of an outside consultant who is knowledgeable about the nonprofit sector.

Finally, think about including "technology skeptics" as well as "technology enthusiasts" on your team. This kind of diversity will not only lead to a more thoughtful plan, but it can help enhance the plan's credibility among staff.

### Measurement:

**Check all that apply:**

- ◯ Yes, our plan was created by a team with both programmatic and technology expertise.
- ◯ Yes, our plan was created by a team that included representatives of the executive director's office and the board of directors.
- ◯ Yes, our plan was created by a team that included technology skeptics and enthusiasts.
- ◯ No, our plan was created by a team with technology expertise only.
- ◯ No, our plan was not created by a team.

## 7. Your organization should identify someone who is responsible for implementing the technology plan.

### Explanation:

Save your technology plan from the fate of so many other reports, plans and white papers — don't let it sit alone on a bookcase or in a filing cabinet, hidden away, collecting dust. Choose someone to put your plan into action. Select a technology savvy staff member to act as the "plan manager." This person should be charged with making sure the plan's goals are achieved, and to be responsible for regularly reporting back to your organization's leadership and technology planning team.

Also, after you've finished the plan, start implementing it as soon as possible — this way you won't lose the momentum gained during the planning process. Use the timeline you included in the plan and aim to have one major accomplishment under your belt within two months of finalizing the planning process.

### Measurement:

**Check all that apply:**

- ◯ Yes, we have identified someone responsible for implementing the plan.
- ◯ Yes, we have someone who regularly reports back to leadership and the planning team on the progress of implementation.
- ◯ No, we have not identified someone responsible for implementing the plan.

## 5. Your organization should have virus protection software installed on all of its computers.

### Explanation:

You've seen all of the news reports about computer viruses and the damage they can cause. You'll wonder how this could ever happen to an organization after learning how incredibly easy (and cheap) it is to protect your computer system against these fearsome bugs. Here are some guidelines to follow when battling viruses:

- Use reputable, up-to-date, properly installed anti-virus software.
- Update your virus list regularly. (Some programs will do this continuously via the Internet.)
- Configure your software so that it scans all new software, files, documents, diskettes and Internet downloads before they are placed onto computers and servers.
- Only install new software that you receive from reputable sources. Secondhand software is often not checked, and shrink-wrapped software isn't necessarily unused.

### Measurement:

**Check all that apply:**

- ◯ Yes, our organization has virus protection software installed on all of our computers.
- ◯ Yes, our organization's virus list is updated regularly.
- ◯ No, our organization has virus protection software installed only on some of our computers.
- ◯ No, our organization is in the process of installing software on all of our computers.
- ◯ No, our organization does not have virus protection software installed on any of our computers.

## 6. Your organization should have adequate documentation for its network.

### Explanation:

Adequate documentation will greatly ease administration of your network and save you and your technology staff/consultants wasted time when working on the network. Try to keep all of the documentation about your network in one centralized, safe place, perhaps in a "Network Notebook."

One of the most important things to include in your notebook is a written map of your network's components and layout (sometimes referred to as a network diagram). This map should detail how the network wires are strung, how they are connected to individual computers, how the computers are connected to network routers and hubs and where the computers and other equipment are physically located in your organization. Other documents worth including in your network notebook are:

- Network/computer problem logs.
- Emergency support numbers for consultants and technology staff.
- Network settings.
- Hardware and software inventories.

Although it may seem unnecessary to pull all of these documents together at first, you'll be glad you did it when needing quick and easy access to details about your network's operations.

### Measurement:

Check all that apply:

- ◯ Yes, our organization has adequate documentation for our network.
- ◯ No, our organization has some documentation, but it is not adequate.
- ◯ No, our organization is developing documentation.
- ◯ No, our organization has no documentation.

## Extra Credit:

**Your organization should have a firewall for its network if there is a continuously open Internet connection (such as DSL, a cable modem or T1).**

### Explanation:

More and more nonprofits are using the Internet, and many of them have dedicated Internet connections that are always live and open. Although the benefits of dedicated lines (speed and convenience) are significant, there are also some serious risks to protect against. The primary risk stems from the fact that nonprofits with dedicated Internet lines can have their networks hacked into—and sensitive data can be damaged, stolen and disseminated. Firewalls can help stop this from happening by preventing unauthorized access into your network. For most organizations, an off-the-shelf firewall software package will be more than sufficient. But, before you purchase such a package, be sure to ask your network administrator if it is the best type for you.

### Measurement:

**Check all that apply:**

- ◯ Yes, our organization has a firewall.
- ◯ No, our organization is planning/building a firewall.
- ◯ No, our organization does not have a firewall.

## Extra Credit:

**Your organization should have a network security policy, and this policy should be included in the organization's employee manual.**

### Explanation:

A network security policy will help ensure that your organization's computer resources are used and managed responsibly. Try to make sure your policy specifies who has "administrator privileges" (who has access to your server), how long user passwords are and how often they need to be changed (every 90 days is recommended). Your server hardware should be stored in a secure location, and only key individuals should have access to this area.

### Measurement:

**Check all that apply:**

- ◯ Yes, our organization has a security policy.
- ◯ Yes, our organization's security policy is included in our employee manual.
- ◯ No, our organization does not have a security policy.

# E. E-Mail and Web Sites

Nonprofit organizations have recognized the incredible value of e-mail and Web sites—both are powerful communications tools that can be used to build links with external stakeholders.

Use the following benchmarks to assess whether your organization is making the most of these tools. If you do not have e-mail and/or a Web site, use the benchmarks as a guide to begin developing these tools. And review the extra credit benchmarks to add increased value to your Web site.

## 1. Your organization should have e-mail accounts for each staff person.

### Explanation:

E-mail allows for quick and convenient communication. For small organizations, an Internet-based e-mail service, such as AOL or Juno, will likely meet the organization's needs. When choosing which service to use, be sure that it allows you to send and receive attachments.

Larger organizations will probably want to use an e-mail software package such as Eudora Pro or Outlook that will enable staff members to have their own individual mailboxes and will store old e-mail messages on your organization's server.

When choosing an e-mail software package for your organization, try to use one that will allow you to do the following:

- Direct mail into different user mailboxes.
- Search through old messages.
- Send messages with differing levels of priority.
- Attach multiple files and/or documents.

### Measurement:

**Check all that apply:**

- ◯ Yes, our organization has e-mail accounts for each staff person.
- ◯ No, our organization only has e-mail accounts for some staff people.
- ◯ No, our organization only has one e-mail account.
- ◯ No, our organization does not have e-mail.

## 2. Your organization should have a simple Web site that acts as an online brochure (small organizations with limited resources or organizations with limited external communication needs only).

### Explanation:

A Web site provides a nonprofit organization with the ability to convey its message, mission and services to many more people than traditional forms of communication. Small organizations should work to concentrate their initial Web site efforts at developing an online brochure. Once this is in place, a more advanced Web site can be built. An online brochure should include the following information:

- The organization's mission statement.
- Current news about the organization.
- Organization services and how to access them including mailing address, phone and fax numbers and appropriate e-mail contact information.
- Information about staff members.
- Significant organizational achievements.
- Information about volunteering.
- Directions on how to donate to the organization.
- Links to related services and resources.

Before you start building your site, though, try to create a written Web site development plan. This plan should be informed by your organization's overall technology plan. It's also a good idea to consult a Web site designer when deciding on site layout, graphics, colors and fonts. Once construction begins, your site content will need to be organized, edited and ready for posting. And be sure to identify someone who will be able to provide technical support and assistance to those staff members responsible for managing the site. For more information about Web site management, see the extra credit benchmarks in this section.

### Measurement:

**Check all that apply:**

- ◯ Yes, our organization has a Web site.
- ◯ No, our organization is planning/building a Web site.
- ◯ No, our organization does not have a Web site.

## 3. Your organization should have a Web site with interactive opportunities (organizations with budgets over $500,000 or organizations with significant external communication needs).

### Explanation:

Larger organizations or organizations that need to communicate frequently with outside constituents should not only include those items listed in the explanation to Benchmark Two in this section on their Web sites, but they should try to create sites that allow for enhanced levels of interactivity. We've all seen boring, static Web sites that never change. Try to make your Web site come to life by using interactive elements. For example, you may want your Web site to allow visitors to send e-mail to staff members or key constituents,

search document archives, participate in an e-mail discussion list, join an online discussion forum or donate money to your organization.

### Measurement:

**Check all that apply:**

- ◯ Yes, our organization has a Web site with interactive components.
- ◯ No, our Web site does not have interactive opportunities.
- ◯ No, our organization is planning/building a Web site.
- ◯ No, our organization does not have a Web site.

## 4. Your organization's Web site should be integrated into your overall communications strategy.

### Explanation:

A Web site is a communications tool, and, as a result, you'll want yours to be a key component of your organization's marketing and public relations efforts. To help ensure a high level of integration with your marketing efforts, think about placing your Web site under the supervision and management of your communications department. Finally, by reviewing the following questions, you will be able to assess and improve your Web site:

- What message is your organization trying to send with the Web site?
- Who is the target audience?
- How can the message be most effectively presented?
- What do you expect the Web site to bring the organization?
- How can you make the most use of interactive elements?
- Do the Web site's graphics, colors and fonts match your organization's other marketing materials?

### Measurement:

**Circle the best answer:**

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| Web site is not at all integrated into the communications strategy. | | | | Web site is completely integrated into the communications strategy. |

## 5. Your organization's Web site should be updated regularly.

### Explanation:

The larger and more complex your Web site is, the more work it will take to maintain and keep it current. Try to keep your site interesting, but simple. One recommendation is that about 80% of your site's content should be static while the remaining 20% should be changed and updated regularly. Work to have someone on staff, or an external consultant, add content, check links to make sure they are still live and useful and update addresses and staff contact information. Finally, consider retooling or freshening your site's overall appearance and look every 18 months.

### Measurement:

**Circle the best answer:**

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| Web site is rarely updated. | | | | Web site is regularly updated. |

## Extra Credit:

**Your organization's staff members are able to use advanced e-mail tools, such as filtering and rules.**

### Explanation:

Good e-mail programs (like Eudora and Outlook) have the ability to automatically review incoming and outgoing messages for certain characteristics, then move or store them in particular folders within the e-mail program. By using filters and rules, staff will be able to move particular e-mail messages to special folders or view only those items that meet specified conditions. For example, filters might allow your organization's staff to view only high-priority items or only those you deem work-related. Filters and rules are also excellent tools for managing high volume of e-mail traffic.

### Measurement:

Circle the best answer:

1 2 3 4 5

No staff members are able to use advanced e-mail tools.

All staff members are able to use advanced e-mail tools.

## Extra Credit:

**Your organization's Web site advances and serves its advocacy efforts.**

### Explanation:

For those organizations that, as part of their mission, attempt to influence policy through social and political action, a Web site can be an integral part of this effort. In combination with e-mail, a Web site can provide critical information and educational materials about an organization's work and cause, and it can serve as a vehicle for gaining members or contacts that can be leveraged during campaigns.

### Measurement:

**Check all that apply:**

- ◯ Yes, our Web site is an integral component of our organization's advocacy efforts.
- ◯ Yes, our Web site allows members to join our organization/cause.
- ◯ Yes, our Web site informs members and visitors about key campaigns and how to contact decisionmakers.
- ◯ No, we do not use our Web site to advance our advocacy efforts.

# F. Telecommunications and Internet Access

Nowadays, most people expect that all organizations-including nonprofits-will be able to connect to the Internet. Internet connectivity allows organizations to perform a wide variety of mission critical tasks: use e-mail, conduct research on the web, post information to the web, create and maintain a web site and use web-based software applications. The question for nonprofit organizations is no longer whether they should have Internet connectivity, but rather what type of connection, and who is the best provider.

Some questions you will need to answer before you can make Internet-related decisions are: How does your organization plan to use the Internet-both now and in the future? How reliable and fast do you need your Internet connection to be? What Internet access options are available in your area? What do all these different options cost?

Navigating through your organization's Internet access options means that you will need to navigate through the world of telecommunications jargon. Telecommunications is essentially how you will connect to the Internet (e.g. with a phone line, with a "broadband" connection, via Satellite, etc.) The jargon of the telecommunications world is one of bits, bytes and bandwidth. To help you through your telecommunications and Internet journey, we have included a telecommunications glossary at the end of this section. As you read through the following benchmarks, please refer to the glossary whenever you come across a term or word that is new to you.

## 1. Your organization has a reliable connection to the Internet.

### Explanation:

Your organization needs to have a reliable connection to the Internet with an accountable and dependable Internet Service Provider (ISP.) In general, you should avoid using ISPs that provide free services or depend on advertising for revenue. In addition, you should look for an ISP that specializes in providing Internet services to businesses-not just residential users. Also, you should hunt for an ISP that offers your organization a flat, monthly rate for unlimited Internet access so your monthly costs are predictable.

In order to choose an appropriate ISP you will want to take the following into consideration:

- Look for an ISP that other organizations recommend.
- Whether an ISP offers a flat rate fee for monthly, unlimited Internet access.

- Whether the ISP has both online and phone based technical support.
- How long the ISP has been in business. Be wary of new ISPs. Those that have been in business over the past few years are more likely to offer dependable Internet services and be able to help resolve any problems you may have. New ISPs may offer attractive pricing for their services but you will want to ensure that they can provide good, consistent, long-term service for your organization.
- What the user-to-modem ratio is for the ISP. If you are looking for a dial-up connection (as opposed to a broad band connection), look for an ISP that has a user-to-modem ratio of 10-1 or less. This ratio refers to the number of modems available for each customer using the service. A high user-to-modem ratio, like 50-to-1, means that when you dial-up to get on the Internet, you will get a busy signal more frequently than if your service provider has a lower user-to-modem ratio.
- What connection speed the ISP provides. If you are looking for a dial-up connection, your ISP should connect at a minimum of 56Kbps. (Note: "Kbps" means Kilobytes per second - essentially the amount of data transferred per second.)

## Measurement:

**Check the one that applies:**

◯ Yes, our organization gets our Internet service from a reliable provider who charges a flat monthly fee (no hourly surcharges) and who responds to our technical support needs.

◯ Yes, our organization has a reliable Internet connection; however, our provider charges us for extra time spent online.

◯ No, our organization does not have an Internet connection of its own; we rely on our staff's personal accounts for Internet access.

◯ No, our organization has no connection to the Internet whatsoever.

# 2. All staff members who need Internet access should be able to get to the Internet from their desktops.

## Explanation:

Today's communication tools depend on Internet access. Most people expect to be able to communicate with their staff via e-mail or go to the Internet for information. Like a phone, each of your staff should have easy access to the Internet from his or her desktop computer. Asking your staff to send or receive email, conduct research on the web or do other Internet dependent work via a shared computer will significantly decrease staff productivity (and, most likely, increase staff frustration). The good news is that the cost of providing agency-wide Internet access continues to decrease and is now affordable for most nonprofit organizations.

## Measurement:

**Check the one that applies:**

◯ Yes, our organization has desktop Internet access for all staff who need it.

◯ No, our organization does not have desktop access for all staff who need it.

## 3. Your organization should have a single, agency-wide connection to the Internet.

### Explanation:

If your organization has more than one computer with Internet access, you should install an agency-wide "shared" Internet connection. This holds true whether you have a simple dial-up connection or a more sophisticated broadband connection.

If your organization connects to the Internet through a dial-up connection and has more than one computer connecting this way, you will want to explore using a special modem, called an "analog modem router" that allows several computers access to the Internet from a single, shared phone line. Sharing a single dial-up connection with a router will be cheaper than having a dedicated line for each computer and will allow for a single, agency-wide Internet connection. This means fewer troubleshooting headaches and security risks and no more staff conflict over who is using the Internet connection and for how long.

If you use a broadband connection to the Internet, you will want to consider a router or small office-networking device that will link multiple computers to the Internet through a shared connection. (If you have more than one computer in your office with separate broadband connections to the Internet, you will want to talk to your ISP as soon as possible about combining these into one connection.)

### Measurement:

**Check the one that applies:**

◯ Yes, our organization provides shared Internet connectivity to staff.

◯ No, while our organization has a reliable Internet connection, each computer has its own separate connection to the Internet.

## 4. Your organization should have an Internet connection with adequate speed and "bandwidth."

### Explanation:

As described in the telecommunications glossary, bandwidth refers to how much and how fast you can send and receive data (information) through your Internet connection. The key is to determine the amount of bandwidth your organization needs. As a general rule, if you have a staff of less than five checking email a few times a day, and only two or three who need to be online at any given time, then a 56Kbps dial-up connection will most likely handle basic needs, although, it will not be fast, particularly for accessing the web. However, if you have a staff of more than five who regularly check email (2-3 times an hour) and who search the Internet on a regular basis, then you will want to consider a broadband connection with a minimum bandwidth of 128Kbps. If you have more than ten staff using the Internet on a regular basis, then a broadband connection with a bandwidth of 256K or more is preferable.

### Measurement:

**Check the one that applies:**

◯ Yes, our organization has an Internet connection that is adequate in terms of speed and bandwidth.

◯ No, our organization does not have an adequate Internet connection in terms of speed or bandwidth.

## 5. If your organization is going to use a broadband connection to the Internet, make sure that the type of broadband service (e.g. DSL, Cable or Satellite) and services offered are adequate to meet the needs of your agency.

### Explanation:

Broadband Internet connections come in several flavors with some of the most common and affordable being DSL, Cable, or Satellite. Each flavor comes with different options for speed and flexibility. The main area of flexibility revolves around whether or not your organization can get a "static IP" address. Basically, a static IP address is a permanent address on the Internet for your organization that can be used for a variety of purposes. In general, you will need a static IP address if you want to host your own web site, host e-mail or allow users to connect to your office computers systems via VPN (which stands for "virtual private networking"). VPN allows users from home or another offsite location to connect to your office computer systems and access files, documents and other resources just as if they were in the office. Internet Service Providers who offer DSL and Satellite broadband connections can usually offer a Static IP address, but they are not commonly offered by ISPs who provide only cable broadband connections.

Below are more complete descriptions of DSL, Cable, and Satellite broadband connections. (Note: There are more broadband options discussed in the glossary.)

**1. DSL** – Digital Subscriber Line. DSL is a service that provides a high-speed digital connection to the Internet over existing phone lines. Though widely available, there remain some areas where DSL service is not available. It is one of the cheapest and most flexible broadband connections currently available. Speed can range from 256 Kbps to 6.0 Mbps (Note: Mbps stands for millions of bits per second or mega bits per second) depending on availability, providing an Internet connection that is flexible enough to change with your organization's needs. DSL is the easiest service to use if your organization wishes to provide services like VPN, email, or a website.

**2. Cable** – Cable modem service providers use the existing cable television infrastructure to deliver Internet access in many communities. Cable provides an acceptable solution for basic Internet access and is faster than a dial-up connection, however, the speeds vary depending on how many people in your area are using the system (the more folks using it - the slower it generally is.) Home users are generally the target market for cable modem service and, as a result, you may not be able to get some services like a static IP address.

**3. Satellite** – Satellite hosting systems are growing in availability and affordability. They offer the promise of high speed Internet access regardless of location. Satellite broadband offers flexibility similar to DSL, but these services are relatively new and have not been widely tested in the marketplace. In addition there is a 1/3-of-a-second pause for connecting to the Internet via satellite, similar to the delay you may notice on the phone when calling overseas, which may not be important to all nonprofits, but should be taken into consideration.

When choosing a broadband Internet access approach you should take into consideration the following:

- If you have the choice between Dial-up and a Broadband connection, the Broadband connection will generally offer higher speeds, require less troubleshooting (after it is up and running) and have more consistent performance.
- If you have a choice between DSL (Broadband) and Cable (Broadband), providers offering DSL access will generally offer additional services your organization may need such as e-mail or website hosting. In general, DSL is a more flexible platform for Internet access. Where DSL is not available, and flexibility is required, Satellite may be a viable option.
- 256Kbps is sufficient for most access needs. Increased speeds may be of use in your particular setting, but it is important to note that not all DSL providers offer a range of speeds.

## Measurement:

**Check the one that applies:**

◯ Yes, our organization has adequate Internet access speeds and our Internet access is flexible enough to meet our various Internet related needs.

◯ Yes, our organization has adequate access speeds BUT we do not have the flexibility to host our organization's email, web site, or provide remote access to information.

◯ No, our organization does not have adequate access speeds for the needs we have, nor do we have the flexibility to host our organization's email, web site, or provide remote access to information.

# 6. Your organization should have adequate security measures in place to protect itself from potential damage caused by Internet hackers and viruses.

## Explanation:

Having an "always-on" broadband connection to the Internet means that staff can access information on-line quickly and efficiently. It also means that your agency's computer systems have a higher risk of being accessed by an "unauthorized person" -usually called a "hacker." To protect your agency's client files, donor information, and confidential reports, your organization needs to install a firewall with any broadband connection to the Internet. (A firewall is basically a "wall or door" between your office computer systems and the outside world - it will let in folks you want to let in and help keep others out.) For security and privacy, it is also important to consider a firewall for a dial-up connection. Many firewalls can also help protect your office computers from viruses. There are both software and hardware firewall options, but hardware firewall options tend to be more secure, stable, and flexible than software alternatives.

## Measurement:

**Check the one that applies:**

◯ Yes, our organization has applied hardware based security measures to our Internet connection.

◯ Yes, our organization has applied firewall protection, but it is software based.

◯ No, our organization has not applied any security measures to our Internet connection.

## Extra Credit:

**Your organization provides Internet access to staff working from home or traveling.**

### Explanation:

Travel and alternative work arrangements, such as working from home or from multiple offices, are increasingly common for nonprofit staff. Nonprofits need to keep up with evolving workplace trends and provide reliable Internet access for staff regardless of where they physically do their work. Your organization's ISP can work with you to ensure that staff is not hindered on the road by needing to make long-distance phone calls or stuck at home with no Internet access at all. In addition to providing reliable, easy-to-use access for staff who work from home, many ISPs provide local or 1-800 dial-up options that remove technology barriers for staff who take their jobs on the road.

### Measurement:

**Check the one that applies:**

- ◯ Yes, our organization provides the ability for staff to access the Internet while they travel or while they are at home.
- ◯ Yes, our organization provides the ability for staff to access the Internet while they travel, but they must dial long-distance.
- ◯ No, our organization does not provide the ability for staff to get online while they travel.

## Extra Credit:

**Your organization provides secure access to organization resources, such as email and files, when staff travel or work from home.**

### Explanation:

In this day and age, it is relatively easy to provide travel or home-based staff with secure access to your agency's computer files, documents, calendars and e-mail - just as if they were in the office. If your organization's staff needs to take their office with them wherever they go, if they need their computer to look the same, feel the same, and function the same whether they are in Toledo or Timbuktu, then you should think about installing a Virtual Private Network (VPN.) VPN acts as the staff's private toll road, where only they have the option to pass through and access their documents, e-mail and files located on your organization's computer system.

Alternatively, nonprofit staff working remotely may simply need to post and share files with co-workers. A simple 'agency-only' website, called an Intranet, fits the bill when you need access to specific files and basic sharing capabilities in a safe, secure environment. As long as a staff member can obtain Internet access and remember the organization's Intranet address, they have all they need to do their work - whether they are one mile or one thousand miles away from the office.

### Measurement:

**Check the one that applies:**

- ◯ Yes, our organization provides remote access for our staff as determined by our organizational needs.
- ◯ Yes, our organization provides remote access to our staff, but it does not support all our organization's remote access needs.
- ◯ No, our organization does not provide remote access.

# Special Considerations for Nonprofits in Rural and Underserved Areas

Nonprofits in rural areas or in underserved communities often have limited Internet access options - especially broadband options. Not only are high-speed options such as DSL and cable modem service sometimes not available in these areas, the number of ISPs that provide even basic, dial-up service may also be limited. Luckily, things are improving and the number of options is increasing.

## 1. Your organization should explore national ISPs if local options cannot meet its Internet access needs.

### Explanation:

While there are good ISPs even in rural and underserved communities, if a local provider cannot meet your nonprofit's needs in terms of reliability, available bandwidth, or customer service (see Benchmark #1), do not hesitate to pursue national options. Even though they are larger in scope, national ISPs can provide you with a local or 1-800 number so that you can use their service without paying long-distance fees. Just because they have national reach does not necessarily mean these ISPs are expensive. In fact, in many cases they are no more expensive than a local account with unlimited access.

### Measurement:

**Check the one that applies:**

- ◯ Yes, our organization has a local ISP that meets our needs.
- ◯ Yes, our organization has an account with a national ISP that provides us Internet access with a local or 1-800 dial-up number.
- ◯ No, our organization does not have a local or a national ISP to meet our needs.

## 2. If your organization requires broadband access and land-based options are not available, it should consider a satellite-based service.

### Explanation:

Some nonprofit organizations may find themselves in need of broadband access but with no land-based services, such as DSL or cable, that meet their needs. If this is the case for your organization, you should investigate the availability - and viability - of a satellite-based ISP. It may sound a little sci-fi for a small nonprofit, but recent advances in satellite-based technology have made satellite-based access an option in the most remote areas. As with any ISP, there is a plethora of pricing options depending on whether you want to purchase hardware, pay for installation, or just lock into a monthly fee for all of the above. Satellite-based ISPs charge anywhere from $90 to $1200 per month, but they offer the same flexibility as DSL and sometimes offer additional services including video conferencing.

### Measurement:

**Check the one that applies:**

- ◯ Yes, our organization needs a broadband connection and we are using a satellite-based service.
- ◯ Yes, our organization needs a broadband connection and we are weighing the benefits and costs of a satellite-based system.
- ◯ No, while our organization needs a broadband connection, we are not looking at satellite-based systems.

**Broadwidth** – Refers to the capacity of your Internet connection to send and receive information. Bandwidth is often measured in Kilobits per second (Kbps). A dial-up connection has a maximum of 56Kbps while broadband ranges from 128Kbps to 6.0 Mbps. **Downstream** bandwidth refers to how fast data comes into your organization and **upstream** bandwidth refers to how fast data can be transferred out of your organization.

**Broadband** – Defined as a high-speed Internet connection that delivers at least 128Kbps of data. The six major broadband technologies are:

**i. DSL** – Digital Subscriber Line. DSL is a service that allows a digital connection to the Internet to be established over existing phone lines. DSL has two limitations – the organization's distance from the local exchange provider's Central Office (CO) and the organization's geographic location. DSL is only available to users located within a 16,000-foot cable distance, or approximately three miles, from the local exchange provider's CO and within the geographies where the provider has deployed the necessary infrastructure. It is, however, the cheapest and most flexible broadband connection currently available. Speed generally ranges from 256 Kbps to 6.0 Mbps depending on availability. DSL is the easiest service to use if your organization wishes to provide any kind of hosting services like VPN, email or a web site. The cost of DSL involves both the charge levied by your local telephone company for DSL transport, as well as charges from your ISP for DSL access to the Internet. Typically the monthly fees for DSL service will range from $35-50 dollars a month with approximately a $150 set-up fee.

**ii. ISDN (Integrated Services Digital Network)** ISDN is similar to DSL in that it uses existing phone lines to deliver the service. ISDN speeds range from 64Kbps to 128Kbps, so at slower speeds it does not truly qualify as a broadband connection. ISDN does not use any kind of dial-up nor involve per-call fees. For those that live too far for regular DSL, ISDN may be the only phone line based option for a persistent connection. ISDN tends to be priced at a higher rate per bit of speed than DSL or other types of broadband. ISDN can still be a very satisfactory solution for data transmission compared to using a modem, but the cost can be prohibitive, exceeding $200 a month.

**iii. Cable** – Using existing infrastructure that is used to deliver cable television, many communities can use cable to access the Internet. Cable is excellent for accessing the Internet and is more stable and faster than a dial-up connection. It is generally focused on home use so using the connection as an organizational tool can have some limitations. The limitations placed on users in terms of their ability to provide any hosting services can make cable less desirable than DSL service if you want to provide those kinds of resources. Cable speeds vary tremendously depending on the overall use of the cable system. The more people using the system in your neighborhood, the slower your access will be. While cable can offer tremendous speeds, those speeds cannot be guaranteed. Pricing for Cable Internet Access may also require cable television, which averages $30 per month with a $20 set-up fee.

**iv. T1** – A T1 line is the most expensive connection method available in the "broadband" range. It offers tremendous speeds, 1.544Mbps, the ability to combine phone and data systems into one "pipe," and fantastic reliability. However, it typically costs in excess of $1000 per month, and is only appropriate for non-profits with large staff (over 150) or those with significant data hosting needs.

**v. Satellite** – Satellite telecommunication options are growing in availability and affordability. They offer the promise of being able to access the Internet at high speeds regardless of location. While the market is currently small, satellite broadband service offers a good alternative for areas where other technologies aren't yet offered. Recent changes allow for 400Kpbs satellite broadband service for $90 per month with an $800 fee for installation.

**vi. Fixed wireless** – An emerging technology that moves data via transition towers, fixed wireless is a good alternative in areas where other technologies aren't yet offered. Generally, fixed wireless is more expensive, requires a clear line of sight to towers, and its signals can be affected by weather. Pricing varies depending on location.

**Dial-up** – Connecting to an ISP via a standard phone line and modem is called dial-up. There is a number of dial-up ISPs. Some are national in scope and others focus on providing services only to the local community.

**Domain Host** – The company or service responsible for "hosting" your organization's domain name and all domain related services. Your domain host and your ISP do not need to be the same.

**Domain Name** – Having an established name that identifies you on the Internet. For non-profits it typically follows the pattern 'yourorganizationname.org". The ".org" extension in reserved for non-profit organizations. You can reserve your domain name in a number of ways and most ISPs will do it for you. Visit www.networksolutions.com to reserve your domain name directly.

**Firewall** – A hardware device or software program that provides security for your computer or network when it is connected to the Internet.

**Internet Service Provider (ISP)** – A company that provides Internet access and related services that might include email, web site hosting and domain hosting. Many organizations use one ISP for Internet access while using another for domain related services of email and web site hosting.

**IP Address** – Every time you go online the machine you are on must have an IP address. Think of it as your phone number. Your ISP or your office network assigns dynamic IP addresses automatically in most cases, changing each time you connect. However there are certain advantages to having permanent, or "static" IP address, which are also available from your ISP. Advantages include the ability to host your own email, web site and support Virtual Private Networking.

**Modem** – A modem is a device that enables a computer to transmit data over telephone lines. Computer information is stored digitally, whereas information transmitted over telephone lines is transmitted in the form of analog waves. A modem converts between these two forms.

**Router** – A device that provides traffic control for information flowing into and out of your organization. A router will often function as a **firewall**.

**Virtual Private Networking (VPN)** – A Virtual Private Network allows a user to connect through the Internet or public network in a manner that allows access to an organization's in-office computer files, e-mail and database.

**Below is a list of some web-based resources where you can get additional information to help you plan for, implement and support technology in your nonprofit organization. This list is not a comprehensive accounting of all the web-based resources available to help nonprofits integrate technology into their agencies, it is simply meant to provide a starting point for nonprofits looking for additional information and resources.**

## Technology Planning

Nonprofit Resources @ Helping.org /
Enhancing the Way You Work
www.helping.org/nonprofit/howyouwork.adp#techplanning
contains several resources to help your organization with technology planning.

## Paying for Technology

IT Resource Center / Enabling Technology Funding
npo.net/nponet/computer/ETF_overview.htm

Nonprofit Resources @ Helping.org /
Finding Technology Funding
www.helping.org/nonprofit/grants.adp

NPower / Technology Funding Resources
www.npower.org/resourcesandlinks/TechFundraising/TechnologyFundraisingResources.htm

## Technology Training

Nonprofit Resources @ Helping.org / Finding Help Near You
www.helping.org/nonprofit/findinghelp.adp

TechSoup / List of Nonprofit Technical Assistance Providers
www.techsoup.org/resourcelist.cfm?resourcelistid=24

## Staff Technology Usage Policies

TechSoup / Sample Nonprofit Acceptable Use Policy
www.techsoup.org/sub_downdetails.cfm?downloadid=79

## Databases

NPower / Database Concepts: Tame Your Unruly Data
www.npower.org/resourcesandlinks/HandsOnTechHowTos/DatabaseHowTos.htm

Technology Rocks / Ebase
www.ebase.org

## Local Area Networks

NPower / Create the Wired Workplace
www.npower.org/resourcesandlinks/HandsOnTechHowTos/NetworkingHowTos.htm

TechSoup / Overview of Computer Networks
www.techsoup.org/articles.cfm?topicid=3&topic=Computer%20Networks

## Virus Protection

NPower / About viruses
www.npower.org/resourcesandlinks/HandsOnTechHowTos/VirusProtectionHowTos.htm

## Web Sites

Nonprofit Resources @ Helping.org / Planning Your Web Site
www.helping.org/nonprofit/planning.adp

## Telecommunications & Internet Access

**Because each organization's telecommunications needs are so unique, there is no single on-line resource to which we can send you. This being the case, we have some alternative resources to recommend:**

- Talk to other nonprofits. One of the best places to learn is from your peers.
- Spend time on the website of your current, or prospective, ISP. If you have questions regarding the nature of your service, are looking for pricing, or want to get a sense of how a prospective ISP delivers customer service, their website is a great place to start.
- Talk to a salesperson. See if they talk at a technical level that's easy to understand. Have them explain their services to you (see if they can talk/meet you at your technical level). This can provide you with a great test of their future ability to provide good customer service and will highlight their technical capabilities.
- Talk to local nonprofit oriented consultants. While not always available in your area, a good consultant who understands the needs of nonprofits can be an excellent asset when making Internet related decisions.

## Additional Web Sites Focusing on Nonprofits and Technology:

Arts Wire SpiderSchool (maintained by the New York Foundation for the Arts)
www.artswire.org/spiderschool

Helping.org's Nonprofit Resources (maintained by the Benton Foundation in partnership with AOLFTW Foundation)
www.helping.org/nonprofit

Low-income Networking and Communications (LINC) Project (hosted by the Welfare Law Center)
www.lincproject.org

Nonprofit Tech Association / Tech Library for Nonprofits
www.tech-library.org

NPower
www.npower.org

NPTalk (from OMBWatch's Nonprofits Policy & Technology program)
www.ombwatch.org/npt

ONE/Northwest: Online Networking for the Environment
www.onenw.org

TechTarget.com Network
http://whatis.techtarget.com/

Progressive Technology Project
www.progressivetech.org

TechRocks
www.techrocks.org

TechSoup (a project of CompuMentor)
www.techsoup.org

Technology Works for Good
www.technologyworks.org