

CASE STUDY

The New Standards for Nonprofit Technology

SPONSORED BY:





MARKETING CLOUD

for

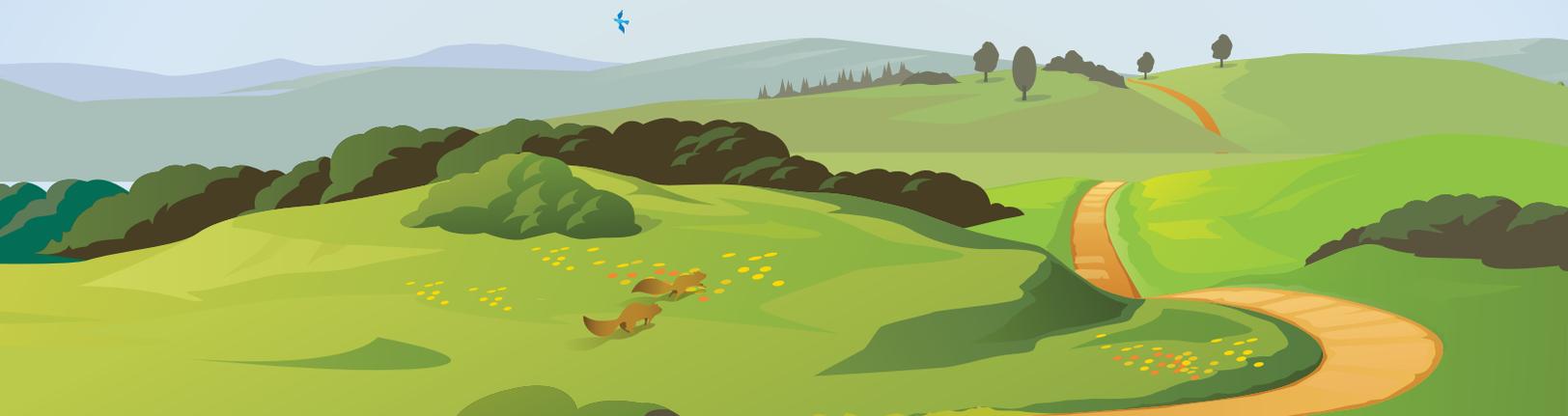
NONPROFITS

Connect to your constituents at the right time with the right message.



salesforce.org
nonprofit
cloud

Learn more at
bit.ly/marketing4nonprofits





CASE STUDY

The New Standards for Nonprofit Technology

When Hanna Thomas started as digital director at the climate change advocacy organization 350.org in February of 2018, she was surprised by what she found. Suddenly she was in charge of just about everything that plugged into the wall except the coffee maker — plus a plethora of software, like the group’s databases and website.

Digital tools are in every part of the nonprofit workplace today, yet many organizations have not put much time or thought into understanding how those technologies differ and the ways they can be

most effectively managed. Thomas, for example, was given responsibility for everything from IT support to social media, customizable tools for field organizers and even video production.

“I’d get a lot of questions,” she says. “I’d have to explain that it is not my job to fix your printer.”

Take Stock of Your Technology

That situation is not uncommon in nonprofit organizations says Sam Dorman, principal and consultant at The Build Tank, a technology consulting firm that works with social-change organizations. He says that too many nonprofits

have an outdated view of technology and think of it as the domain of the IT department. “The world is going through a digital transformation and social-sector organizations have to keep up with that by putting smart people in the right roles,” he says.

Nonprofits can benefit greatly by dividing up responsibility for various types of technology and taking different approaches to managing those systems. The kinds of things that are relatively static — that either work or need to be fixed but can’t be customized like desktop computers or email — belong in an IT department. But technology systems that are most closely tied to helping an organization achieve its strategic goals, products that can be customized and can evolve over time to meet an organization’s changing needs, must be treated differently, says Dorman. They need more ongoing attention and leadership.

Get Your Leaders to Buy In

The often-high cost of new digital tools can leave boards, executive directors, and presidents reeling from tech “sticker shock,” says Ananda Robie, CRM product manager at the Center for Action and Contemplation, a spiritual group based in Albuquerque that aims to inspire thought and meaningful action in the world. The sweeping change in operations that tech can entail also represents uncertainty for many leaders. But it’s imperative that they fully commit to a tech project.

When Robie took her job three years ago, a tech consultant told her bosses that he wouldn’t work with them if they didn’t fully get behind implementing new technology.

It’s the kind of jolt many organizations need to move forward, Robie says. Getting leaders excited about a tech project, keeping them informed about progress, and reminding them why they wanted to take the plunge in the first place is imperative.

“If you’re getting pushback from your leaders, you won’t be progressing as fast as you should be,” Robie says.

Find an Innovative Funder

When One Degree, an organization that serves the poor in Los Angeles and the San

Francisco Bay area, wanted to enlarge its tech platform five years ago, it knew it couldn’t do it alone. It would need financial support. The group digitally linked hundreds of clients with social services, but its platform needed serious upgrading.

“We needed a scalable outreach guide,” says Rey Faustino, chief executive at One Degree. “Our whole premise has been to move people from paper to digital. But we needed to do a better job of monitoring clients after they received digital referrals to make sure they actually got those services.”

The project the organization had in mind—an expanded platform called One Degree Pro—would manage service referrals and provide social workers and other professionals with information on the services their clients were receiving

Faustino sought out small grant makers and persuaded them that One Degree needed better technology to grow larger and reach more people. A grant from the UniHealth Foundation supported training guides for professionals.

Since the new tech was put in place, the group has expanded its services to include 20,000 clients who are now linked with more than 10,000 social workers and other practitioners.

“We’ve grown every year since the upgrade,” Faustino says. “That wouldn’t have happened if we had tried to rely on our own resources.”

“If you’re getting pushback from your leaders, you won’t be progressing as fast as you should be.”

Other organizations have similar stories. College Forward, an organization in Texas that provides coaching and other support services to 7,000 new first-generation college students each year, sought out and received a \$250,000 anonymous grant in 2012. It used the money to buy the tech platform offered by Salesforce, an IT company, and develop a student services

database that allowed it to take on many more students as clients.

Start a Product Team

More organizations are starting to put together product teams to manage this kind of technology. These teams include staff members who spend time with the employees who use the products to understand their needs, who help to train staff on the full capability of the technology, and who can help to strategize about the best platforms to use and how the technology can further an organization's strategic goals.

Nonprofits don't need to go on a hiring spree to staff a product management team, Dorman says. Often, with a little training, existing employees can do many of the jobs required. A deep understanding of an organization's mission, relationships with people across departments, and insight into how they use technology can be far more valuable than any particular technological expertise.

"In every organization we work with there is at least one, sometimes maybe more, diamonds in the rough, people that could be amazing technology product managers," says Dorman.

Early On, Implement an "MVP"

Often, staffers see new tech as a challenge. To make them feel more at ease, product managers suggest starting a tech upgrade with a "minimally viable product," or "MVP." Translation: Roll out a program or feature that is easy to use, but makes staffers' jobs easier immediately.

"Organizations need to move from seeing technology as something they need to figure out to something that can be used to further the mission."

When the Center for Action and Contemplation was looking for ways to use tech that would improve things for its overburdened customer management team, it made sure that timesaving



communications tools were included in its initial Salesforce upgrade.

“We made a decision to choose upgrades early on that had a high ROI for the staff,” says Robie. “That goes a long way toward creating excitement, buy-in, and optimism about the future you’re building with the help of technology.”

Assign Responsibility

Thomas quickly realized that 350.org needed to change its approach to technology. She started with an organization-wide assessment of how digital work was managed. And then, based on her recommendations, the organization restructured. An IT support position was created to manage things like Gmail and Slack and to help with hardware problems. And that job became part of operations. Social media and video production moved under communications. Then she looked for the kinds of technology that need to be managed and could evolve to help really advance the mission of the organization.

She found technologies like the customer relationship management or CRM software, tools used for organizing, campaigns, the website, and other systems that needed to evolve and change over time. These systems help the organization with its most fundamental work —

“We found new ways of following our donors throughout their life cycle, and developed new ideas of cultivating them, by breaking down the walls of all those silos we previously had in place.”

reaching people with its message and organizing them to act. She put those technologies under the product team and soon had a new title: chief product officer.

Thomas tried to reimagine the management of digital technology as if the organization was starting anew, not one that layered technology over an older organization with traditional siloed departments. Many for-profit companies are ahead of the nonprofit sector when it comes to taking this product management approach says Chris Zezza, also a partner and consultant at The Build Tank. Manufacturing companies pioneered it, then it was adopted by tech companies and now financial-services firms are investing heavily in the approach, he says.

The age of an organization can also play a big role in how it approaches technology, says Jenny Friedler, head of product and design at New York Media. Prior to that she was the senior director of the digital product lab at Planned Parenthood Federation of America and had other private sector positions. Older organizations often see new technology as a threat, or a burden, or a necessary evil, she says. New technologies are often layered over existing structures that don’t make much sense for how a business or organization operates today. Those groups may have the biggest challenges in developing product teams, but also may have the most to gain, she says.

“Organizations need to move from seeing technology as something they need to figure out to something that can be used to further the mission,” Friedler says.

Don’t Put Your Tech in Silos

When the National Resources Defense Council needed to replace its customer database vendor two years ago, it took a larger look at its overall technology strategy to learn whether it could improve its digital operations. The environmental group realized it could do more by connecting its business and fundraising operations with that database.

“Our product team was able to look at various parts of our operations. It saw similarities in the ways different staff teams were handling data about donors and prospects,” says Kate McKenney, senior director of data and digital technology. “We found new ways of following our donors throughout their life cycle, and developed news ideas of cultivating them, by breaking down the walls of all those silos we previously had in place.”



Understand How People Use Systems

At 350.org, the organization had a lot to gain from making such a change. It is a vast organization that has staff in 26 countries. It actively organizes in 70 countries and works with partner organizations and networks in 188 countries. Its volunteers and partners use dozens of languages. It is very important that partners and volunteers can organize their own events, develop their own contact lists, and that there is feedback and tracking of how many people stay engaged.

“For that to work on a global scale, it’s such a mad task,” Thomas says.

When Thomas started, the systems that their field organizers used were managed by very junior employees who could devote only a small amount of their time to helping people work through problems. These systems were fundamental to helping the nonprofit achieve its mission — organizing people around the world to push for reducing carbon emissions. But junior employees didn’t have the power to ensure the systems were responsive to the needs of organizers. They barely had time to help fix problems. “There was a lot of frustration on both sides,” says Thomas.

That is not uncommon, says Dorman. When he works with companies, he begins by watching how people use technology. He talks to them about what works and what doesn’t and the kinds of changes they would like to see. “There are 20 different ways to make a significant impact that is going to save them time or increase the reach of the organization,” he says.

Include Product Managers in Planning

At 350.org, Thomas has a product team of 13 — soon to be 18. Her employees work closely with the people that use the technology and learn about their frustrations and how they would prefer to use the technology. They pilot software and work to customize it and also conduct trainings to make sure people are using the software to their best advantage. And, most importantly, members of the product team are part of the planning process when campaigns or other projects are being developed.

Product team members are involved from the start. That way the group won’t find itself rolling out an organizing strategy only to learn that the technology doesn’t work the way the group needs. “We’re planning a big mobiliza-

tion for the end of this year, and we're really in the loop from day one," says Thomas. "We're there giving guidance and letting them know our options for the tool sets and what isn't what isn't possible."

One example: 350.org's #AfrikaVuka campaign to halt the development of fossil fuel infrastructure in Africa. The organization needed a system that would allow people in countries across the continent to organize, promote, and track anti-fossil fuel protests that took place at the end of May. The product team tested the technology system before the launch of the campaign and identified several problems. That early testing allowed the product team to improve the mapping of events and the ability to search for events and to fix fields on certain forms that were not working properly — all be-

fore the system went live. The changes ensured a smoother launch and helped 350.org's volunteers and organizers be more effective.

Thomas is also part of the leadership team which allows her to both get support from the organization's other leaders and have the authority to make significant modifications. "It's a lot harder to make large-scale change if you are not at that level," she says.

Others in the organization have been more open to these changes because her team members are ambassadors for the new approach. "It's a hard concept to sell," Thomas says. But as they have more conversations and learn more about how technology can be put to work for them, more people are excited about the benefits. "They are like, 'Oh my God, can you do this and this and this. This is so helpful.'"

TAKEAWAYS

- Nonprofits need to categorize the types of technology they use and develop a plan to manage them.
- Charities should prioritize systems that have the biggest impact on their mission.
- Product teams are an effective way to manage technology that can be customized.
- Groups can often identify existing employees to staff a product team.
- To ensure technology works smoothly in new projects, product managers should be part of planning and decision making.

THE CHRONICLE OF
PHILANTHROPY®

1255 Twenty-Third Street, N.W.
Washington, D.C. 20037
(202) 466-1200 | philanthropy.com
Copyright ©2019