



Carnegie Mellon University

Gathering Information

Agenda

- Questions?
- Characterizing IT use in Nonprofits
- Ways of gathering information
 - Interviewing
 - Observation
 - Analysis-driven
- The primacy of *mission*

Technology in Organizations

- How does IT impact organizations?
- E.g.
 - IT helps organizations to _____?
 - IT requires organizations to _____?

Technology in Organizations

- If you are looking to help an organization to use technology, what do you first need to know about them?

Assessing Technology in Organizations

To broadly understand an organization, gather information broadly about their:

1. Organization
2. Program
3. Staff
4. Facilities
5. Technology infrastructure
6. Technology management
7. Technology planning
8. Internal & external communications
9. Information management
10. Business systems

Assessing Technology in Organizations

- *Review the Context Description Chart*

Characterizing NonProfits' Use of Technology

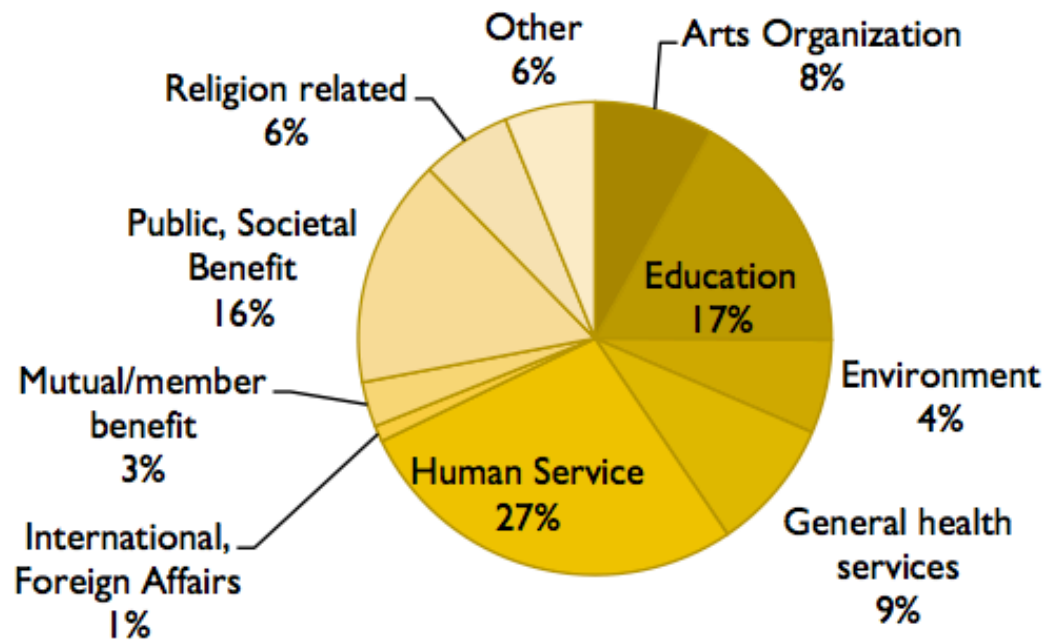
Southwest Pennsylvania Data

Nonprofits

- What is a nonprofit?
 - Incorporation status
 - Tax status
- Where does revenue come from?

Mix of non-profits in the region

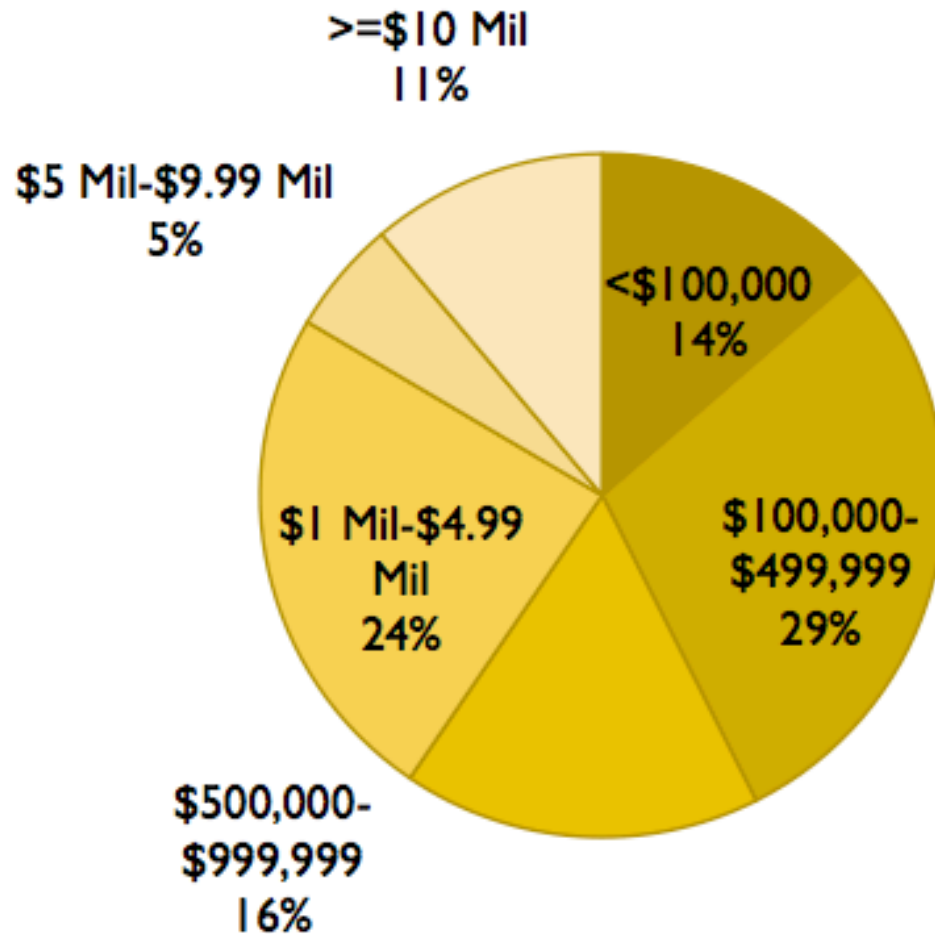
Respondents by Organization Type



The charts on the next few slides are take from: Forster, Jeffrey et al, 2010 Southwestern Pennsylvania Nonprofit Technology Survey – Bayer Center for Nonprofit Management, Robert Morris University.

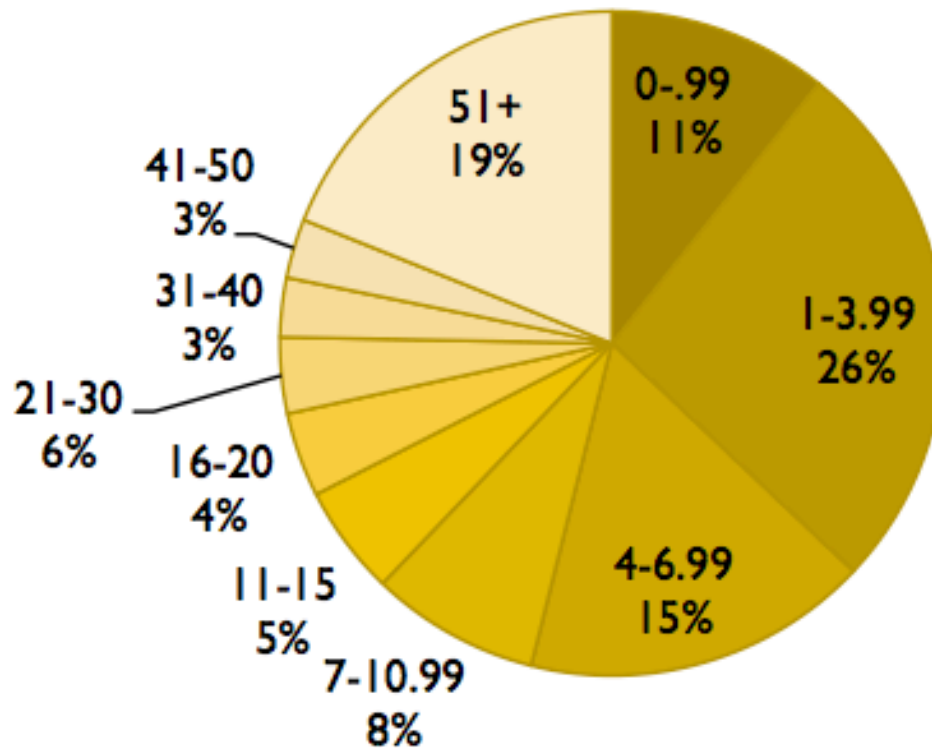
Budget Size

Survey Respondents by Budget Size



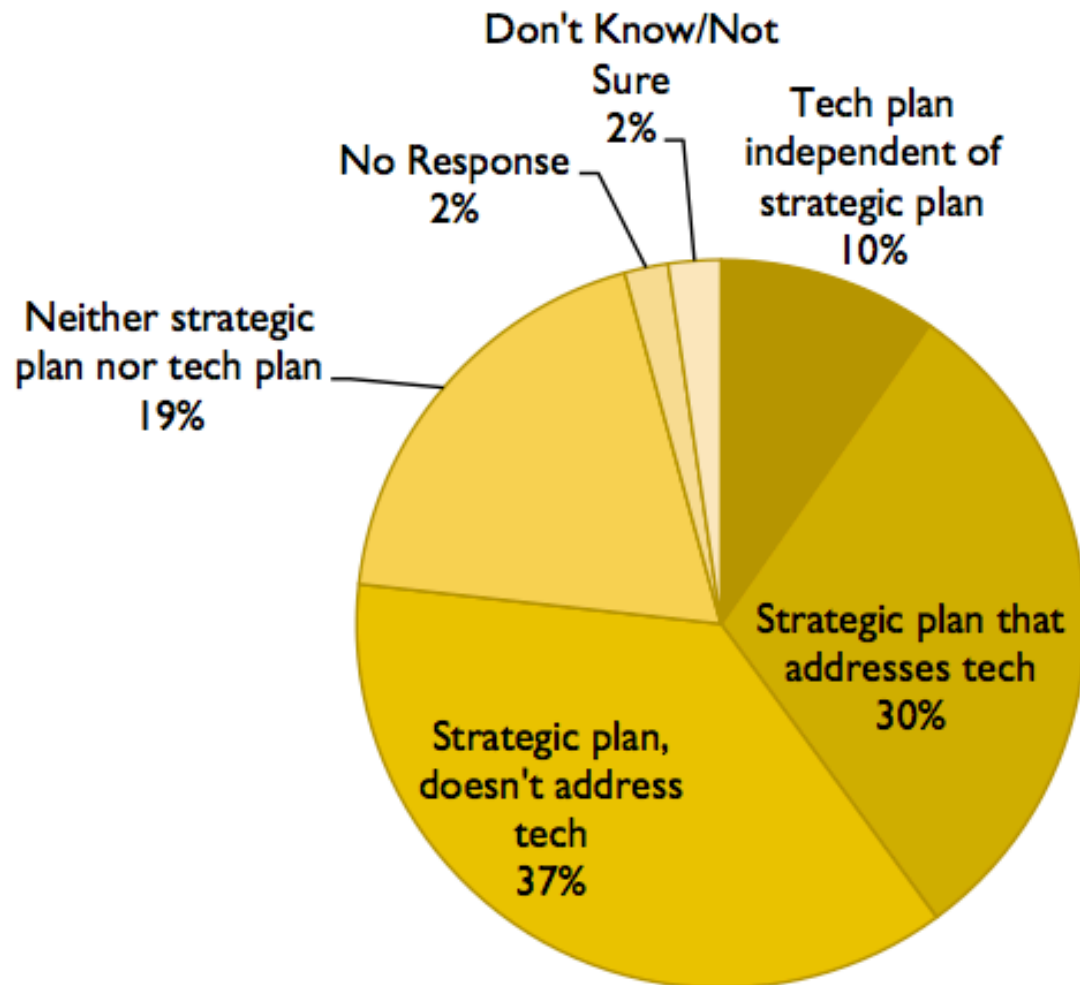
Staff size

Survey Respondents by Staff Size (FTEs)



Tech Planning

Technology Planning



Accidental techie

What is an “accidental techie”?

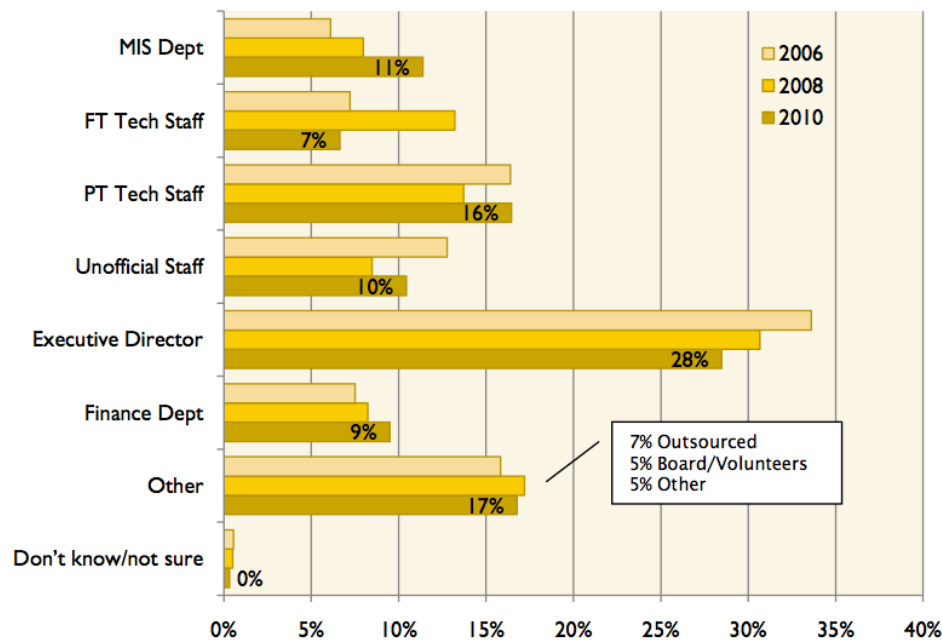


Accidental techie

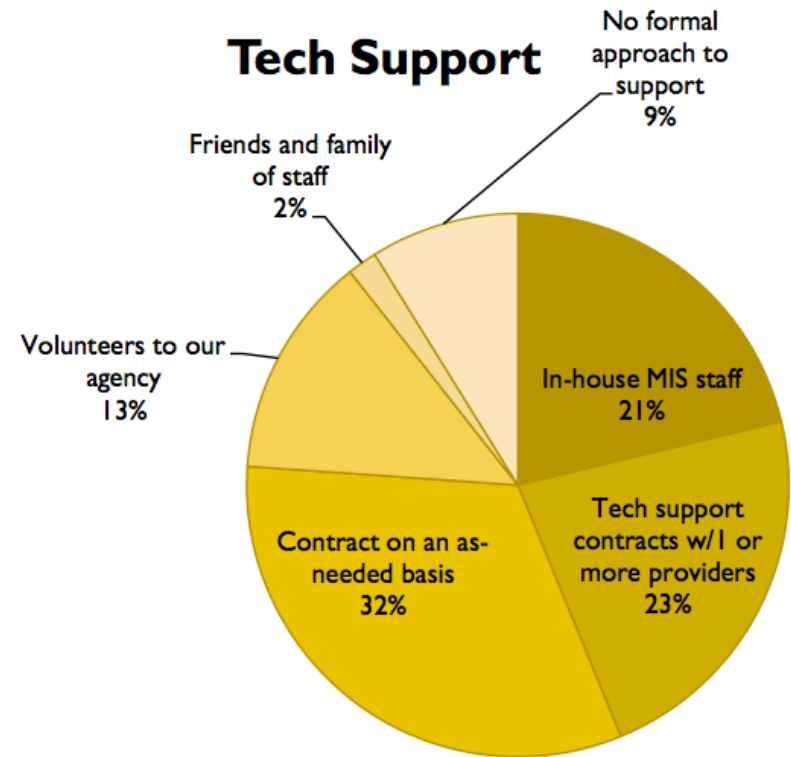
- One or more employees who demonstrate interest or competency in one area of IT become the de facto technology staff for the organization.
- The notion of the “accidental techie” is commonplace in small businesses and nonprofits.

Who does tech management/support?

Technology Management



Tech Support

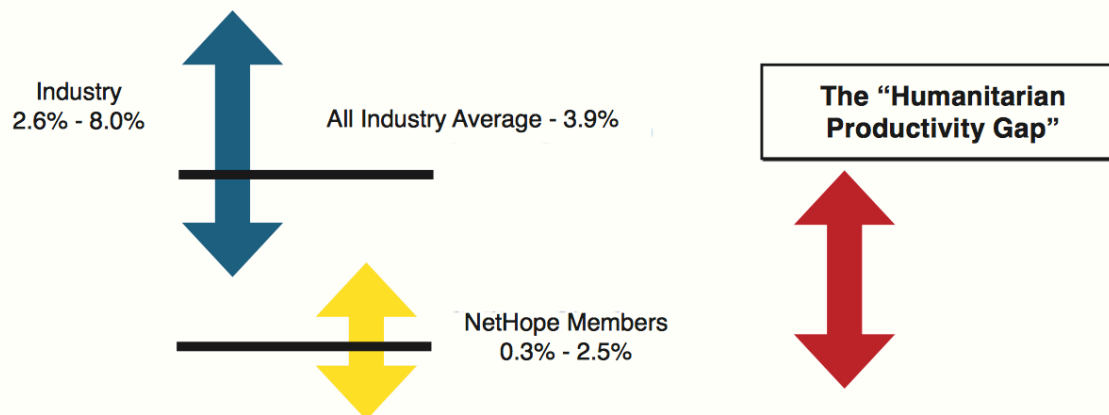


“Humanitarian Productivity Gap”

William Brindley of NetHope:

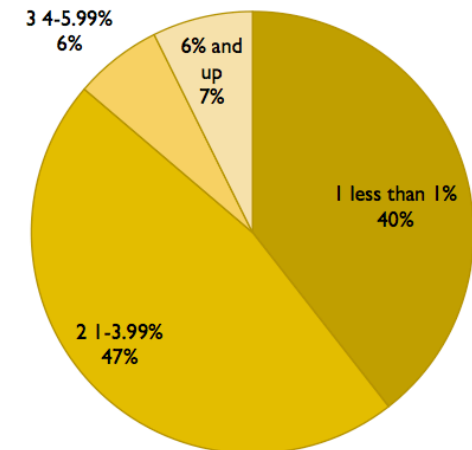
- In business, IT spending is 3.9% of revenue
 - Source: Gartner Group
- NGOs' IT spending is 2% of program revenue
 - Source: NetHope membership survey
- Conclusion: NGOs under invest in technology that could support productivity.

Operating Budget as % of Revenue (2006-2007)



Source: Gartner Group, NetHope

Tech Budget as % of Total Budget



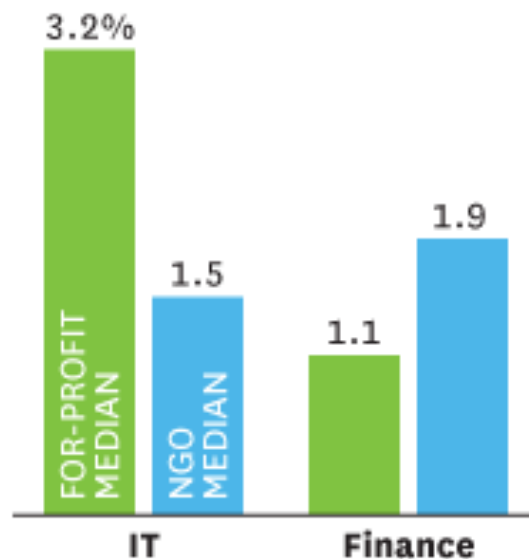
¹ NetHope member survey, October 2006

HBR reports the disparity continues

OVERHEAD COSTS FOR FOR-PROFITS VS. NGOs

On average, global NGOs spend significantly more on finance than for-profit companies, but less on IT.

FUNCTION COST AS A PERCENT OF ANNUAL REVENUE

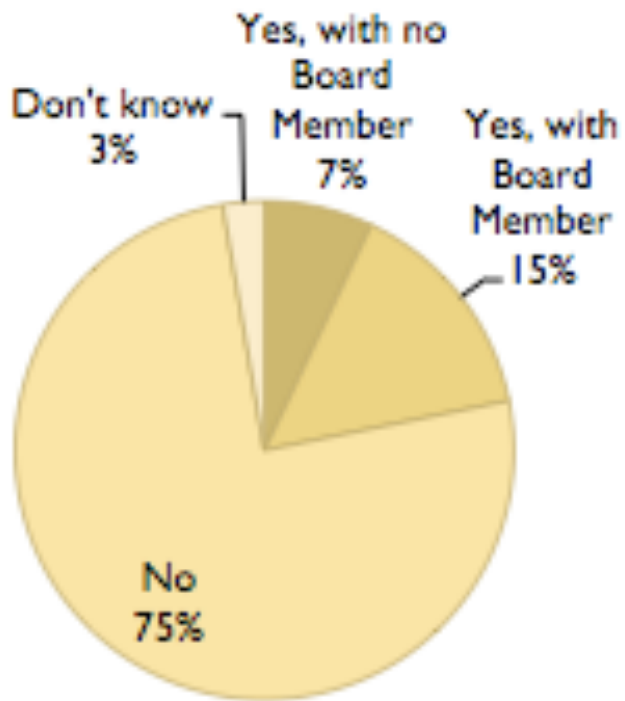


SOURCE APQC OSBCSM
BENCHMARKING DATA & THE
BRIDGESPAN GROUP STUDY HBR.ORG

Source: <http://blogs.hbr.org/2013/04/the-efficiency-trap-of-global/>

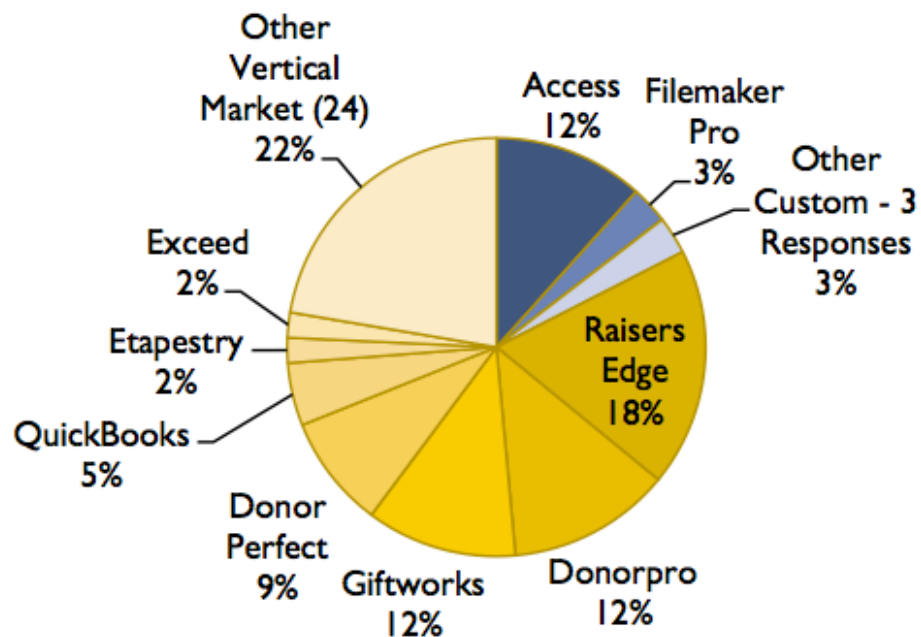
Who does Technology Leadership?

Technology Committee

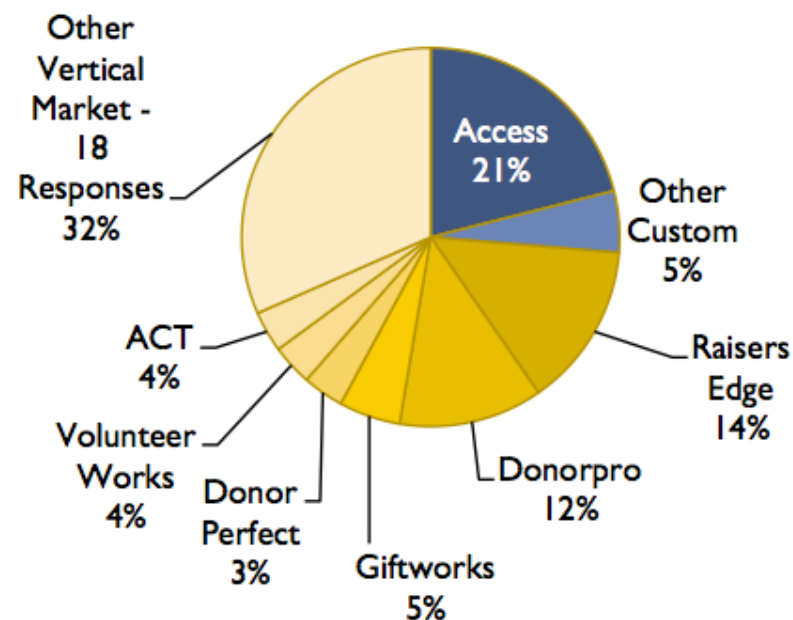


Information Management

Fundraising Software Detail



Volunteer Management Software Detail



Observation

- Apprenticing with the Customer
 - What did you learn from the reading?

Designer as apprentice

- Teaching ability is not needed
 - workers are not necessarily teachers
 - viability of verbal protocol
- Seeing the work reveals what matters
- Seeing the work reveals the details
- Seeing the work reveals structure
 - looking over multiple events, multiple tasks
- The apprentice can learn from the master's experience

Apprenticeship to gather insight

- The designer must be responsible for seeing work structure
- Designers must articulate their understanding
- The designer's job is to improve work
- The designer has a specific focus

(Non) Pitfalls

- The paper lists some pitfalls that are not pitfalls for our consulting
- Interviewer
 - We will use interviewing as well as observation / "apprenticing"
- Personal friend
 - Going off-topic can be very useful in a consulting engagement.
 - We will discuss the value of shared understanding, trust, and social capital next week.

Making organizational decisions

- When the Qatar Foundation offered Carnegie Mellon money to open a campus in Qatar, why did it decide to do it?
- If Sony offered Carnegie Mellon money to open robot manufacturing plant, how should it decide whether to do it?

Primacy of Mission

- Every well-run business, organization, and project requires a shared imagination
- This is what allows people to make complex decisions when there are no simple rules.
- It keeps the group moving in concert.
- When we're talking about a shared result, we call it a vision.
- When we're talking about a shared understanding of what the organization does to achieve a result, we call it a mission statement.

Primacy of Mission

- Every organization will have a mission, that will provide a shared purpose for guiding work and decision making.
- A well-run non-profit will only do that which supports its mission, and will not spend its resources and time in that which does not support its mission.
- For you to be effective, you have to understand how technology can be used to support their mission.
- Supporting their mission is the **only** reason for them to adopt any new technology.

Family Services of Western PA

To foster the capacities and skills in families and individuals to direct their own lives and create a productive, caring community.

Shafallah

The Shafallah is a Center of Excellence that provides comprehensive services and care to individuals with developmental learning challenges, their families, and the community. We nurture the acquisition and application of unique skills and talents through the commitment of a dedicated team of professionals

Shafallah, <http://www.shafallah.org.qa/mission.htm>,
17 Jan 2007

Calliope

*To present and preserve folk music in
western PA*

Understanding Mission

- Do you have experience in creating a mission statement?
- Have you worked in organizations where you were aware of its mission and had to make decisions accordingly?

Review: Initial Consulting Steps

0. Understand your role and goals
1. Do research prior to the consulting engagement
 - Research the organization
 - Research baseline data in the sector
 - Research best practices
2. Establish a working relationship
3. Use interviews and observation to gather a broad understanding of the organization
 - Clearly understand their mission

Next
Week

Next: Analyzing the situation

Review Calendar / Homework
