A brief technology guide for staff transition

How to handle your nonprofit's technology when staff members leave

You already know that your staff members are your greatest assets, and you've got a great group of people who are passionate about your cause. That's probably why you never want to think about that time when they might leave. But people do leave, and your organization needs to be ready to handle it.

This brief guide is a great place for you to get started in managing the technology side of your staff transitions.

Before Transition happens

Documentation:

- Document your technology strategy:
  - How the technology helps you accomplish your mission
  - Key functionalities of this technology
- Document your vendor-relations:
  - Terms of Agreement for each vendor
  - Contact information of each vendor for:
    - Technical support
    - Account information
    - Billing
    - Any other relevant contacts
  - The vendor costs and what is covered by that cost
- Document your Training:
  - List the training that the employee received while on the job
  - List essential trainings that the employee came in with
  - Find out if training is still available:
    - Cost of training
    - How one would go about being trained again

Plan interim period:

- Plan how tech duties would be redistributed
- Be prepared to train current staff on the duties they will be performing in the interim

While Transitioning Is Happening

Contact Vendors

- Verify that you have a copy of the current agreement with each vendor
- Inform the vendor of relevant account contact changes
- Get updated costs and/or schedules of training

Plan On-boarding Process

- Put together a packet of information for the new staff member. This should include:
    - A brief description of key technologies
    - Contact information for each of the vendors
    - Terms of support and training
- Make a list of the training that the new staff member will need once they begin
- Train interim staff on technologies they will be using

After Staff Leaves

- Delete/Change usernames, passwords and other access. Make sure current staff are informed of changes as appropriate
- Have interim staff begin working on key tasks early to allow for unforeseen complications.

When New Staff Begins

- Contact Vendors, let them know about your new staff
- Follow your on-boarding plan
- Familiarize your new staff with pre-existing strategy and tactics
- After the pre-existing strategy is understood, consider how the new staff may change the strategy and tactics to make your use of technology better.