



Using Technology  
to **BUILD CAPACITY**

a guide



# *USING TECHNOLOGY TO BUILD CAPACITY GUIDE*



## What is included in this guide?

**This guide will dive into these main areas of using Technology to Build Capacity:**

1. Introduction to Technology as a Capacity Builder
2. Readiness
3. Data Documentation
4. Planning
5. Impact Measurement
6. Needs Assessment
7. Implementation

Print the guide out and work with your staff to fill out each section.

## Acknowledgments

This guide is based off of a presentation done by the databank, gbc & MAP for Nonprofits called "Technology as Strategy Workshop", and a presentation by Tom Lehman titled "Technology as Strategy". The content and worksheets in this guide were created in part by:

Tom Lehman, *Lehman Associates*

Karen Graham, *MAP for Nonprofits* (at the time of presentation - currently with *Idealware*)

Chris Hanson, *thedatabank, gbc*

Sarah Bonvallet, *thedatabank, gbc*

Amanda Bingham, *thedatabank, gbc*

Krysten Alberg, *thedatabank, gbc*

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# *INTRODUCTION*



## What does it mean to think of Technology as a Capacity Builder?

There are many definitions of capacity building, and capacity building can mean different things to different organizations. For the purpose of this guide, when we talk about capacity building, we define it as:

Capacity building is a process of change over time to strengthen an organization's ability to deliver more impact. When an organization looks at capacity building, they are evaluating where they are currently and focusing on areas, specifically with their technology, that can maximize their time most efficiently. In short, it is about enabling organizations to better achieve their own strategic goals & objectives over time by focusing on currently underutilized technology.

There are many areas where organizations can build capacity outside of their technology use. But as a technology company, we will be focusing on that area for this guide.

In order to build capacity, thinking about your technology strategically is more important than ever before.

You have a mission, but as your organization grows and changes, the resources you have to deliver that mission may need to be adapted, expanded, or replaced. Organizations can use their technology to help grow capacity. When organizations are pressed for time or resources, they often pick a technology tool that's "good enough for now" and end up with something that doesn't actually help them manage their time or resources.

So how should you look at technology more strategically?

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# *USING TECHNOLOGY STRATEGICALLY*



In the simplest terms, it means looking at the technology in your organization in the same way you would your staff and other organizational resources. When you put technology in the same category as people (human resources) and money (capital), you can see more clearly how all of these resources are intertwined – they all have power to differentiate the organization and steer its course.

## **Think about it like this:**

Technology as another office supply – You need a new database because it isn't meeting your organizational needs. It is clunky, cumbersome, and staff don't like using it. You need more ability within the tool to create your own donation forms and make email templates.

Technology as a strategic, capacity building tool - You need a new database for all of the reasons above, and with the ability to create your own donation forms and email templates you are able to do two more online fundraising campaigns a year, which will help your organization raise 2x more to fund X program. This program will service X number of new clients.

Using the capacity building structured format, you are not only looking at the immediate needs of how technology will help your organization, but you are also considering how it will impact the goals of the organization over time.

When you are looking to purchase a new tool, we cannot stress enough the importance of knowing your organization's strategic goals, and thinking about the specific ways in which your technology is going to be used to achieve those goals.

## **Is your organization ready for this step?**

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# *TAKING YOUR FIRST STEP*



Using your technology hand in hand with your strategic plan is an important piece of increasing organizational efficiency, but it also takes a lot of work and time upfront. However, once you've invested that time, you'll find that your return on that investment was well worth the effort.

**Before moving on with this guide, you'll need to make sure you have:**

**Staff Buy-In:** This isn't a one-person project. All key decision makers in your organization need to be involved from the beginning, along with those who are using your technology. This way, from the beginning, everyone understands the value of the tools and how they help your mission.

**A Strategic Plan:** Before you can figure out what kind of technology you need, you first need to know what you're trying to achieve. What are your organizational goals? What kind of impact do you want to be seeing over the next 3-5 years?

Everyone involved needs to understand strategic goals and what they need to achieve those goals. Your strategic plan and the goals in achieving that plan should be a part of your day to day work. It should be a living document that is revisited frequently.

**A Budget:** Many times, free or cheap tools aren't enough to meet all of your needs for your technology. They may be clunky, difficult to use or missing certain functionality that would make your job easier or more efficient. Understand what specific tools and features you will need to do your job well. To figure out a true budget, look at how much you're currently spending on tools, including staff time used to make those tools work (how many hours are being lost due to cumbersome tools?).

If you have these three things in place, you are ready to continue on with this guide.

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# READINESS ASSESSMENT

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## Instructions:

Use the checklist below to determine if your organization is ready to build capacity with technology. **Yes** answers mean you may be ready to move forward with implementing a capacity building solution. **No** answers indicate areas that might prevent you from effective planning and implementation.

If you have mostly No answers, don't be discouraged! We have a Needs Assessment sheet on pages 6 & 7 to help you explore the ways that you can begin to build capacity with your technology and share the potential value with key stakeholders.

## Questions:

Yes

No

1. Does your current technology hinder your ability to do your job effectively?

2. Do you have a written technology plan?

3. Are both leaders and staff involved in technology decisions? (vs. IT staff/provider deciding?)

4. Are board members supportive of technology needs?

5. Are funds budgeted for replacements and upgrades?

6. Has technology been used to improve services?

7. Do staff have a positive attitude towards technology?

8. Does your organization's dedicate staff time to learning and experimentation?

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# DATA DOCUMENTATION

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## Instructions:

Before you begin building capacity with technology, it is important to know what tools and data you currently have at your organization. Not only is it important for strategic purposes, it can help prevent data/efficiency loss in the event of staff transitions.

Use this worksheet to help document all of your tools and data sources. Data sources can include locations such as Excel files, your current database/CRM, mailing lists, etc.

Data Source	Data Location/ Name	File Admin	How Data Supports Mission
Excel Document	MonthlyDonors.csv	Jane Smith	Sustaining donors fund our Plant Education program, which is core to our mission
Email Program	Subscription Lists	John Doe	Keeping in touch with supporters helps them feel more in touch with the work we do

**EXAMPLE**



# PLANNING

## Instructions:

Finish the statement below - dream big! Once you've filled it in, answer the questions following it to explore how you can strategically use technology to achieve this.

## Statement:

*It would be amazing if our organization had the capacity to...*

## Questions:

1. How could we use our current technology more effectively to achieve this goal?
2. What new technology could we explore to help achieve this goal? (*example: events & ticketing software, a drag and drop email editor, etc.*)
3. What makes our organization different from the other 1.5 million nonprofits out there? How do we market those differences?





# PLANNING



## Questions:

4. How can we use our current technologies or a new technology to help our organization stand out?
5. List any current frustrations you have with your current technology, and give specific examples. (*example: No way to save searches or reports, many duplicate records, confusing to navigate, etc.*)

## Before moving on:

Often times, frustrations and concerns about capabilities of a software are a product of staff not having efficient training. Before giving up on your current software, contact your vendor with your list of wants from your software and frustrations with it. You may find that there are features you didn't know about or easier ways of doing tedious tasks. It never hurts to ask!



# *IMPACT MEASUREMENT*



## Identifying Outputs and Outcomes

In order amplify mission impact, organizations need to refine what is measured, gather and store data efficiently, and also be able to create understanding from that information so leaders can take action.

The process starts with identifying **measurable outputs** (for example, classes and programs) connected to **measurable outcomes** (the specific, short-term results of those outputs). These outcomes add up to your overall impact, the tangible and intangible long-term effect of your work. These typically tie directly to your mission.

Your outcomes may change as your work proceeds, but this worksheet can help you clarify your goals and progress toward them.

**To keep your mission front and center as you fill in this worksheet, write your organization's mission statement here:**

Along with your mission, it's important to keep your stakeholders in mind as you work through your outcomes. **List 3-5 of your organization's major stakeholders.**

- 1.
- 2.
- 3.
- 4.
- 5.



# *IMPACT MEASUREMENT*



## Questions:

What are your top 5 desired outcomes of your organization's work and which output(s) do they relate to? (ex. Program: New literacy program for K-6th grade students; Outcome: 95% of students reading at or above grade level after participation.)

1.

2.

3.

4.

5.

### **Outcome 1:**

To whom this outcome matters most (ex. *Which stakeholder? individuals you serve, taxpayers, staff*)

Why this outcome matters to them:

Data you are gathering to track progress toward this outcome:

Where that data is located and who has access to it:



# *IMPACT MEASUREMENT*



## **Outcome 2:**

To whom this outcome matters most:

Why this outcome matters to them:

Data you are gathering to track progress toward this outcome:

Where that data is located and who has access to it:

## **Outcome 3:**

To whom this outcome matters most:

Why this outcome matters to them:

Data you are gathering to track progress toward this outcome:

Where that data is located and who has access to it:

## **Outcome 4:**

To whom this outcome matters most:

Why this outcome matters to them:

Data you are gathering to track progress toward this outcome:

Where that data is located and who has access to it:



# *IMPACT MEASUREMENT*



## **Outcome 5:**

To whom this outcome matters most:

Why this outcome matters to them:

Data you are gathering to track progress toward this outcome:

Where that data is located and who has access to it:

## **Additional Questions To Consider:**

How will you demonstrate or report your organization's effectiveness to the audiences most invested in your outcomes (example: *an infographic or other visualization, interactive dashboard, presentation*)

In assessing your outcomes, did you discover any desired outcomes for which you haven't been collecting data?

What processes can you implement to make sure you are gathering the right data?



# *NEEDS ASSESSMENT*



## Instructions:

If you've been filling out these worksheets in order, then by this point you should have a pretty clear picture if your current technology is fitting your needs or if it needs to be configured or replaced. If you need to configure your current technology or invest in something new, make sure to fill this out first.

## Questions:

1. Are you currently able to efficiently measure the results and impact of your organization with the technology and tools that you have?
2. Think back on your frustrations of current technology from the Planning section. What opportunities are lost due to your current challenges? What else could you do if these problems were solved? (*example: # of additional clients served, \$ amount of additional funds raised, etc.*)
3. Again, thinking about your frustrations, what specific functionality is missing? (*example: saved searches, online web forms, etc.*)



# *NEEDS ASSESSMENT*



## Questions continued:

4. What is the impact to your organization and your community when you don't reach your goals?

5. Thinking about your current technology, how much does it cost your per month for these resources? Take into consideration subscriptions fees, staff time, vendor services, etc

6. If you were to purchase a new technology, does your staff have time to dedicate to training on it?

*If you answered no, now is not a good time to invest in a new technology. If your staff don't have time to dedicate to learning how to use the tool efficiently, it is likely going to become just as much of a frustration as your current solution.*

7. How much time do you have to dedicate to a new technology selection process? Knowing your time budget is just as important as knowing how much money you have to spend. Keep in mind set-up for many databases can take six weeks or more, depending on the amount of custom work it needs.



# IMPLEMENTATION



## Instructions:

Your ability to build capacity with technology will depend on organizational culture, change management, and available resources. Keep that in mind as you answer the following questions.

## Questions:

1. What are some barriers to embracing capacity building technology in your organization, and how might you overcome them? (*examples: cost, staff time for training, resistance to change*)
  
2. What are some strengths to embracing capacity building technology in your organization, and how might you use them? (*examples: staff members are fast learners, passion about org, urgency of situation*)
  
3. What is one thing you could do immediately to move in a positive direction? (*example: begin a conversation with key staff about capacity building, track staff time wasted on cumbersome technology, etc.*)



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# ABOUT THE DATABANK



## Who is the databank, gbc?

thedatabank, gbc's strategic CRM solutions focus on your unique challenges for impact you can measure. We craft capacity building software solutions that help your nonprofit or social sector organization overcome its information challenges and accomplish its mission.

### We Are More Than Just Software

**Passion:** Our passion for progressive change makes us your ally as well as your solution provider.

**Experience:** We've been creating CRM software since 1998. Two decades of innovation testifies to our ability to bring creative, thoughtful, real solutions to your needs.

**Service:** Our commitment to service is the most frequent compliment we get from clients - we have a client support satisfaction rating of 99.5%. We know service is crucial to your successful use of technology.

## How do I get in touch?

We would love to begin a conversation with you about how we can help craft a technology solution for your organization that fits with your organization's goals.

Visit our website:

[www.thedatabank.com/schedule-a-free-consultation](http://www.thedatabank.com/schedule-a-free-consultation)

Call: 1-877-603-0296 (toll-free) or 612-455-2255

Email: [info@thedatabank.com](mailto:info@thedatabank.com)



