



# 6 Steps to Evaluate and Optimize Your Organization's Use of Digital Tools

Digital tools have the potential to revolutionize the operation of any organization, while at the same time befuddling even the most tech-savvy people. As the Nonprofit Adviser for the Vermont Digital Economy Project, I have had the pleasure of working one-on-one with more than 120 nonprofit organizations of all types, methodically evaluating their current use of technology, and strategizing how various online tools can assist the organization in becoming more effective, efficient and resilient. While each nonprofit has its own unique needs and challenges, my method of evaluation was similar for each. I encourage all organizations -- large and small -- to consider using this approach to improve their use of digital technologies.

My approach involves the following 6 steps:

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## 1) Learn about the organization and the staff

My first step is always to spend time learning about the organization’s mission and work. I do this by visiting their website and social media pages to understand how they communicate their message. This is an important step, because the best digital tools to use will vary depending on what an organization is looking to achieve. Before meeting one-on-one, I also ask members of the nonprofit to [take a survey](#), which helps both me and the organizations get a better sense of their comfort with and knowledge of a variety of digital tools. It includes questions on both the organization itself as well as its use of technology:

### The Organization:

- What is your organization’s mission?
  - What are your goals as an organization?



- What kind of work do you do?
- What do you count as a “success”?
- What can technology, extra money, or extra volunteers help you achieve?
- Who is your audience?
  - What does your audience expect of you? What are you looking to have your audience do?
  - Where are they located, geographically?
  - What are their ages? What about other demographic information such as gender, income level, interests, etc.?

#### The Technology:

- How do you currently manage tasks?
- What is the current organizational comfort level with technology?
- What technologies have you found to be effective?
- How much capacity do you have to implement new strategies and use technology, both in terms of time and personnel?

Talking through the questions on [the survey](#) helps me to have a meaningful conversation about an organization’s mission and goals, perceived audiences, comfort with and effectiveness using their current digital tools, and, finally, how the organization currently manage tasks. My goal is to discover areas in which digital tools can make the organization more efficient, empowered, effective and, for those who work there, happier.

## 2) Assess and build digital literacy

Most organizations are currently using some digital tools, yet are intimidated by others, such as the idea of the “cloud,” using social media, or managing their own web presence. For this reason, I find that when advising a group, demystifying the technology they currently use is as important as the technical assistance I provide. Without such comfort and confidence, the long-term capacity of a group to continue to adopt and effectively use digital tools is greatly diminished. Learning how to think about digital tools is the first step in effectively using them.

To this end, when talking with an organization about its use of digital tools, I find it helpful to think about technology in the following way:

1. **Technology cannot solve everything:** Technology provides tools that hopefully make certain tasks easier, or more efficient. However, it is not a magic bullet, and needs to be understood and managed with the same thoughtfulness and care that every other aspect of an organization is managed.
2. **Digital tools should complement – not replace – your existing efforts:** Sending out an email newsletter does not mean that an organization should stop sending out a printed newsletter. Online donation solicitations are important, but so are face-to-face meetings with potential donors. While technology gives you the opportunity to reach a wider audience, it is imperative to not lose track of an organization’s original audience in the process.



3. **It's ok to mess up. In fact that's how you learn:** Technology is constantly changing. Keeping up with it means experimenting, trying new things, and figuring out what works for your organization. If you are constantly in fear of breaking something, you will never learn to understand it, and you will not be able to move forward to learn new tools as they come along. Everyone who uses digital tools makes mistakes, but by learning how to move forward, they become more familiar with the tools themselves.
4. **If you don't understand something, search for it on the web:** Chances are, you're not the only one who has had the question you are having. Even typing the question into Google can usually yield a helpful response, and if not, you will probably find a website with a community of people who are focused on the technology you're searching for an answer on, where you can ask your question on a message board or in a forum.
5. **Be prepared to dedicate resources to technology planning, training and upkeep:** Because technology is constantly evolving, learning how to do something once and then stopping will not yield the best results. It is important to stay up to date with new developments, updates, and trends. Doing so will help keep your organization moving forward.

### 3) Review the organization's current use of digital tools

The next step is to help the nonprofit determine how effective their digital tools are and how well these tools are meeting the organization's needs.

I start by reviewing the organization's website, if they have one. We begin with the basics, not by diving into Search Engine Optimization or other more technical aspects. In evaluating an organization's website, I look at the basic usability for the user and the organization, content, and integration of digital tools. Here are a few questions to ask about your organization's website, to help you understand whether it is in good hands:

- Do you have a website?
  - What role does your website play in your overall communication strategy?
  - How central is it to other aspects of your strategy?
  - How consistent is the look, feel and messaging across the website and other aspects of your communication strategy? (Do you use the same font/colors/tag-lines, etc?)
- Can you add and edit content on your own, or do you contract this out?
  - If you do it internally, are you reliant on one person for this service, or can multiple people add/edit content?
  - Overall, is this process easy or difficult to learn?
  - Are you afraid of "breaking" the website every time you make a change?
- How well structured is your site? How easy is it to use/navigate?
  - If somebody were to draw out a map or outline of your site, would they be able to easily place each page within a larger framework?
  - How easy is it to get back to the home page of the website when you're on an inner page?
  - Do the menus stay the same across the site?



- Who in your organization is happy with the website? Who is not? Why, or why not?
- How old is the design on your website? How does it compare to current web trends? In other words, when you compare the way your site looks to other sites across the internet, what sort of impression does it give?
- Have you tested how your website looks across a large variety of web browsers (Internet Explorer, Firefox, Google Chrome, Safari, etc.)?
- How does your website look on a computer vs. on a mobile phone or tablet? (In other words, is your website responsive?)
- Can visitors share content from the website with the click of button (for instance, through a “Facebook share” button)?
- Can visitors donate online via a credit card?
- Do you pay for web hosting/server space? (As a nonprofit, you can get free server/hosting space through Dreamhost: [http://wiki.dreamhost.com/Non-profit\\_Discount](http://wiki.dreamhost.com/Non-profit_Discount))
- Does your website ends in .ORG? (.COM stands for “commercial,” and is therefore not ideal for a nonprofit.)
- Do you use Google Analytics or another service to measure the effectiveness of your website?
  - If so, how many visitors do you get on your site?
  - What do your visitors look at on the site? What is most important to them? Is this content easy to find?
- Does your organization have a least one email address that ends in @yourdomain.org?
- What content management system does your website use? Some examples are:
  - Wordpress
  - Drupal
  - Joomla
  - Weebly
  - iPage
  - Wix
  - No content management system (hard-coded HTML)

I take a similar approach to reviewing their social media pages, mailing lists, and other tools. A thorough assessment of an organization’s use of digital tools can be found in the survey, but to begin with, it is important for an organization to consider what tools it is currently using, and what sort of comfort level each employee feels with each tool. As an organization, it is important for you to ask yourself the following questions:

- **Website:** How is the content on your website managed? Who has access and knows how to make changes? How easy is it for somebody unfamiliar with the site to find the information he/she is looking for?
- **Email:** Do you use an email system like MailChimp or Constant Contact, or do you send them out through a mail merge or one at a time? Do you personalize each email, for example with a “hello [name]”?



- **Newsletters:** Do you send out e-newsletters? If so, how frequently? What do you use to do so? How are they formatted, and what is the content like? Do you track open rates and click-through, and if so, how does it inform your next e-newsletter?
- **Social Media:** What social media platforms is your organization on? Facebook? Twitter? YouTube? Instagram? Others? How frequently do you post, and what type of content do you post? Who is posting it? Do you have an overarching strategy set out, or are you “winging” it?
- **Managing Databases:** How/where do you store your constituents’ contact info? Is it easily accessible and usable?
- **Online Backup:** Where do you save and back up files? Do you have an in-house server? Do you simply back up to an external hard drive? Or do you save files to the cloud using something like DropBox?
- **Video:** Has your organization ever posted videos? If so, on what platforms (YouTube, Vimeo, etc.)? What sort of response did it get, and how did it fit into your organization’s mission and objectives? Did you edit this video before posting? If so, what sort of editing techniques and software did you use?
- **Fundraising:** How have you used digital tools to enhance your fundraising? Can people donate to your organization by clicking on a “donate now” button on your site? Is the process simple, or complex? Do you use a third-party service like PayPal or Network For Good? How does your email and social media strategy fit into your fundraising strategy?
- **Mapping and Data Visualization:** There are a variety of online tools that can help with mapping information, such as Google Maps. There are others that simply help, through graphs, infographics and charts, to visualize data. What have you used of these, and to what purpose?
- **Photo editing:** Do you use a photo editing software? If so, what, and how does it help your organization?

For more information about this step, check out the articles below:

- [IBM Experts Help Vermont 211 Structure New Website](#): goes over the importance of website usability, and what that means.
- [How One Library Is Building a Usable and Inclusive New Website](#): explains a technique for creating a usable website.
- [Scheduling Posts: A Time Management Tip for Using Facebook](#): how to save time working with Facebook by using a scheduling feature.
- [How to Reach Your Facebook Fans](#): helps you understand how Facebook decides what posts are shown to what people.
- [The Value of a Facebook Like](#): the difference between the number of likes a Facebook page has, and the value of those likes.
- [What the End of Support for Windows XP Means for an Organization](#): describes the importance of making sure your computers are up to date

## 4) Identify tools that can make an organization more efficient, saving time and money



Digital tools can vastly improve the efficiency of an organization, in terms of both time and money. To do this, I ask organizations to first identify the various work flows within the organization and between the organization and its audience or beneficiaries. For example, how does somebody sign up for a mailing list? If somebody adds their name to a list on paper, what happens to that? How is it entered into the system? After the mailing address is entered, what is it used for, and how?

Once the workflows are identified, I ask the organization to make a list of the most expensive or most time-consuming areas and start with those. For example, it may be time consuming to produce a mail-merge to send an email to the members of an organization's audience within a certain geographic location, if the process is not automated. I then assist the nonprofit in finding ways to automate or otherwise streamline these processes. In the example I just provided, there are [constituent management systems](#) that can help make this process run more smoothly. These items may not be the lowest hanging fruit, however, finding solutions to them will have the greatest impact in terms of both time and money and probably also make the organization more effective.

Below are some examples of how some organizations identified tools to increase efficiencies:

- [Does Your Nonprofit Need a CRM to Manage Its Contacts?](#) the value of, and options for converting multiple databases into a single streamlined Constituent Relationship Management system.
- [Feeding More Vermonters Through Online Coordination](#): how Salvation Farms used digital tools to automate its gleaning program.
- [What An Online Presence Can Do To Help Food Shelves Reach Vermonters In Need](#): what tools some food shelves used to increase donations of both food and money.
- [How a Woodstock Nonprofit Saved \\$1300 a Year Thanks to Digital Tools](#): an organization used various Google tools to save money on email and phone service.

## 5) Identify tools that can increase the effectiveness of the organization

In addition to providing efficiencies, digital tools, if used effectively, may enable an organization to raise more money, offer educational resources to a wider audience, and advocate for a cause or constituents more effectively. In discussing this area with an organization, I focus on who the organization should be reaching but currently is not, and what needs to happen for the organization to be in a better position to achieve its goals. Quite often, leveraging social media is a great way to reach more constituents with very little cost or effort.

There are a few areas in which digital tools can help increase the effectiveness of an organization. These include:

free or reduced cost opportunities for nonprofits

- [Google for Nonprofits](#)
- [Google Places listing on Google Maps and web searches](#)



- [Tech Soup software and hardware discounts](#)
- [Interconnection and Common Good Vermont discount computers for nonprofits](#)
- [Computers for Change discounted computer hardware based in Burlington, VT](#)
- [Free webhosting through Dreamhost](#)
- [Free Email @yourdomain through Google Apps](#)
- [Google Grants](#)

tools for scheduling and promoting events:

- [Doodle Polls for Scheduling](#)
- [Google Calendar](#)
- [Outlook Calendar](#)
- [Facebook Events](#)
- [Front Porch Forum](#)
- [EventBrite](#)
- [Meetup](#)
- [Doodle Polls for Scheduling](#)
- [Google Calendar](#)
- [Outlook Calendar](#)
- [Facebook Events](#)
- [Front Porch Forum](#)
- [EventBrite](#)
- [Meetup](#)

tools for photo/video storage and editing:

- [YouTube.com](#)
- [Vimeo.com](#)
- [Flickr.com](#)
- [Gimp photo editing](#)

tools to recruit and manage volunteers:

- [Volunteermatch.org](#)
- [RewardVolunteers.coop](#)
- [Idealist.org](#)
- [1-800-Volunteer.org](#)
- [Craigslist.com](#)
- [NetworkforGood.org](#)
- [VolunteerSolutions.org](#)
- [Volunteers of America \(VOA.org\)](#)
- [PointsofLight.org](#)

online ads:



- [Google Adwords](#)
- [Facebook Ads](#)

Here are a few great examples of nonprofits exploring the use of new digital tools to increase their effectiveness:

- [How Organizations Can Use Online Tools To Collaborate](#)
- [Google Ad Grants: Free Advertising For Nonprofits](#)
- [How Nonprofits Can Use Video](#)
- [Nonprofits Use Mobile Credit Card App to Boost Donations](#)
- [Use Your Facebook Page to Solicit Donations and Subscriptions Online](#)
- [How a Community Garden Went From Online to On-the-Ground](#)
- [How An Online Game Helps Students Learn about Lake Champlain](#)

## 6) Evaluate available resources and find opportunities to leverage new resources

Vermont is blessed with a growing, vibrant and fun tech community often looking to give back to the communities their employees call home. In this aspect of advising, I [identify locals who can help with social media, website upgrades, or training](#). In the course of the project, tech professions have donated over 400 hours of [web design assistance](#) and 220 hours of social media assistance for nonprofits through [Social Media Surgeries](#).

Finding tech volunteers, either locally or further afield, can help you to create the changes you are looking for in your organization. Often, the best way to find dedicated volunteers is through the personal networks that your organization has already created. Sometimes, though, digital tools can help you find volunteers you would otherwise not have found. In addition to the tools listed above for helping to find volunteers, here are some resources that can help you find more “techie” volunteers:

- **Local Meetups:** Search the [Meetup.com](#) site to find groups who are interested in various aspects of tech. You may be able to find people through these. If you are more ambitious, you could also create a new Meetup for tech volunteers in your area.
- **Twitter:** there are often vibrant communities of techie people on Twitter. Try searching for [#npotech](#) (which stands for “nonprofit tech,”) [#npvt](#) (for nonprofits in Vermont,) or [#btv](#) (for a local community centered around Burlington, Vermont, who may have access to other communities within the state.)
- **Net Squared:** a coalition of local groups organized through Tech Soup that seek to connect people who are interested in technology and social impact. There is a local group for [Burlington, Vermont](#), and if you are ambitious, and there is not one near where you live, you may want to consider starting one in your area.

By focusing on the 6 steps above, a nonprofit can evaluate their own use of digital tools. The result should be a more efficient organization and broader reach for their mission and message.