

Staffing ePhilanthropy

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Having a plan that identifies communications, development, and technology goals is critical.

Wanted: ePhilanthropy director. Nonprofit organization seeks a qualified ePhilanthropy director to spearhead online fundraising, advocacy, marketing and communications efforts. Successful candidate will possess the technical skills of a Vint Cerf or Bill Gates, the business insight of Warren Buffett or Jack Welch, and the commitment to social justice and values of Mahatma Gandhi or Mother Theresa. Duties include all aspects of planning, implementing, delivering, and evaluating income-producing and mindshare-improvement services. Early stages will involve fundraising for start-up funds and developing a comprehensive business plan. Pay in low to mid twenties, depending on experience.

While a little fanciful, the preceding job advertisement is not as far-fetched as you might think. Depending on the size of the organization, the executive director, development director, or human resource department might have an ePhilanthropy plan in hand when they write a job description like this. Without truly understanding the work to be done, they will assemble a list of attributes on paper and hope for the best. In this chapter, we will take a broader and, hopefully, more realistic look at staffing an ePhilanthropy effort and examine some common problems in attracting and keeping the right people for the job.

HAVING THE RIGHT FOUNDATION

Before you start hiring, it is necessary to know what that person (or those people) is (are) going to do. Our assumption is that you will have carefully read the rest of the book and possess some idea of the media and messages you plan to use, the audience you hope to engage, and the actions you want them to take. To simplify matters a bit, we will break the ePhilanthropy plan into three broad areas: development, communications, and technology. Although responsibility can shift between these departments, and new areas might be added, these three tend to cover the major tasks you will need to staff in your overall effort.

Breaking your ePhilanthropy plan into smaller sections mirrors the departmental structure of many nonprofits and helps clarify reporting and support functions. The key requirements of each type of plan are as follows.

Development Plan

The *development plan*, sometimes called the *institutional advancement plan*, describes the function, methods, and goals of the fundraising effort. Knowing both the direction of the fundraising effort and the frequency and types of transactions allows you to identify where human intervention—and staff time—should be allotted.

To better organize the work, many development offices are divided into two divisions: fundraising and advancement services. The fundraising part of the shop directs the donor-facing activities such as developing the message, targeting different segments, and planning the types of appeals and actions most compelling to donors. This is what most people think about when they hear the word *fundraising*.

The advancement services division addresses the “back of the shop” side of fundraising. *implements* the plans developed by the fundraising side. Activities (and often job titles) include gift processing, prospect research, report writing, volunteer tracking, database maintenance, and related tasks. Even the smallest fundraising office will have advancement services tasks, even if the tasks are being performed by fundraisers.

Communications and Marketing Plan

Admittedly, separating communications from development can be difficult. We recommend treating them as distinct activities when planning for staff allocations. Based on the size and independence of the effort, along with other organizational concerns, we give them a distinct place in the agency hierarchy.

Your communications plan can address multiple messages and channels. In addition to good writing skills, you will have to deploy and manage graphic design, layout, image editing, and other technical activities.

Likewise, in addition to packaging message content (whether it is in print, Web pages, e-mail messages, or faxes), communications staff often take responsibility for delivering them.

Technology Plan

Whether it is its own department or a component of another division, *information services (IS)* is going to play a significant role in supporting ePhilanthropy. The technology plan is the *de facto* charter for IS. In addition to addressing core infrastructure and support issues for your agency in general, as well as the specific needs of your ePhilanthropy effort, a good technology plan effectively addresses the people side of the equation. This encompasses mundane tasks of unpacking desktops and connecting them to the network as well as the more subtle needs of managing work groups, the applications and the files staff need to do their work.

Staffing infrastructure support is more complex than for development and communications. Although the work product, if not the results, of communications and development staff can be quantified—new content created, gifts processed—the most

efficient infrastructure is never seen. A good network is just there when you connect. Developing the right staff size to effectively create infrastructure support is a challenge: understaffing will eventually cause problems as software bugs combine with hardware failures in a cascade that shuts the system down for long periods. Inversely, over-staffing wastes money that could be better spent on mission.

It is difficult to determine when a well-functioning system is overstaffed and when levels are appropriate to activity. Similarly, a downsized support effort might function well until failures begin to overwhelm staff skills and time.

THE ISHIKAWA FISHBONE

The *Ishikawa fishbone analysis* is a process design tool that can help you analyze ePhilanthropy procedures and begin identifying staffing needs. Exhibit 4.1 shows the process design of an online registration. It is named after Kaoru Ishikawa (1915–1989), who pioneered quality management processes in Japan. It is often used as a brainstorming tool in solving problems, but it is also useful in micro (analyzing a specific task) and macro (working with a department-level initiative) process design.

Simply put, the fishbone analysis takes a task or activity, such as processing registrations for a benefit dinner, and identifies four primary components—usually method, materials, money, and manpower. (There is a charming tradition of alliteration; the titles and number of ribs can vary according to need.) To create the fishbone, make the task a horizontal line, representing the backbone. From the spine draw two diagonal lines upward and two downward. These are the ribs, and represent the four components. On each rib you can add additional branches representing sub-components.

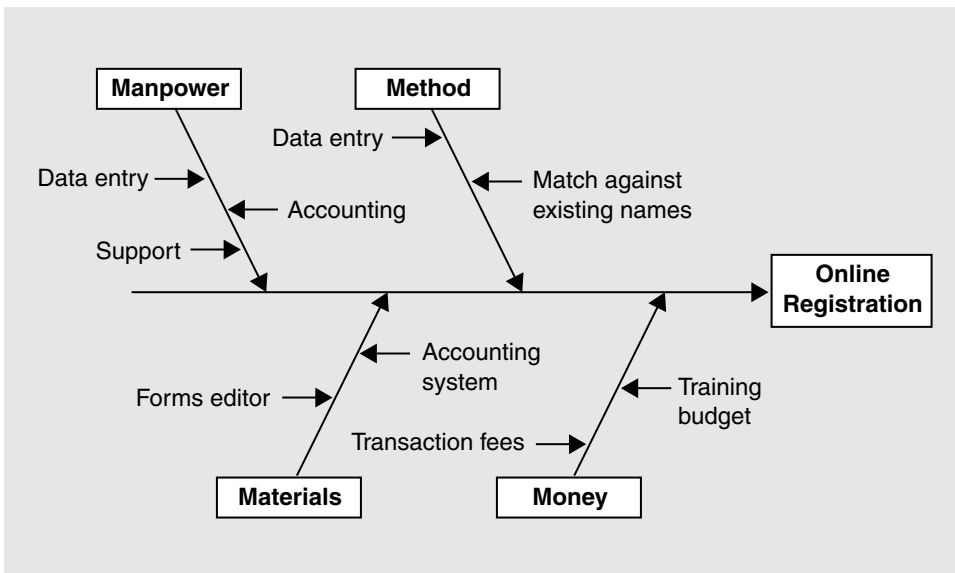


EXHIBIT 4.1 Ishikawa Fishbone

For our event registration example, we can list direct and indirect costs on the money rib—the method will describe the steps that a registration goes through once the user presses *submit* on the Web page. The materials can include the Web and local software applications used in processing the registration. On the people side, we are able to list the steps that require human intervention and the amount of time that each transaction requires. The selection of software might have eliminated the need to type in an attendee's name, but it might still fall to a clever human to make the final determination of who is who. Therefore, determining the need for and level of human intervention must be understood before you start your staffing plan.

Working at the macro level, you will have an idea of where staffing is required (development, communications, or IS) and some estimate of the time involved. At the micro level you can pinpoint the actual business process.

DEPARTMENTS, TEAMS, AND TITLES

Once you have identified staff tasks within development, communications, IS, and possibly other departments, it is time to identify job descriptions and titles. The non-profit world has a long tradition of elaborate and ambiguous job titles. The technology world is not immune from this affliction.

Keep two things in mind when identifying job descriptions and titles:

1. *Group related tasks together.* In matching related tasks, remember that outputs can be very different from process. For example, in the past, your volunteer recruitment effort may have involved deciphering hand-written interest cards collected at events. The person performing data entry from these cards may have developed super-human powers in handwriting analysis. With online volunteer recruitment, volunteers type their interest information into your system. There is still an important role for interpretation, but the skills, and perhaps the person, are different.
2. *Use established job-title conventions.* New job titles should be consistent with existing positions. Creating a new IS *director's* position—when other staff with similar responsibilities and authority are called managers or coordinators—will create confusion and potential resentment. Similarly, creating an IS assistant's position with power and accountability equal to a program director will have risks. Typically, organizations with more established development and communications programs will have existing job titles such as director of development, major gifts officers, advancement services director, and so on. Technology positions have only recently become requirements in the nonprofit universe, so there are fewer traditions to draw upon.

As technology has become more ingrained into the full range of business functions, the need for technology support has grown proportionally. Where the ratio of technical support staff to PC users used to be 1 to 50, the average is now closer to 1 to 30. Technical support staff maintain the hardware, software, and basic infrastructure. They might also provide basic software support and conduct training sessions for new employees on new and established software programs. On the technology side of the shop, who does what will be determined by project complexity and organiza-

tional size. The larger the organization or the ePhilanthropy project, the more specialization is required. With a larger staff, you will need to include more traditional supervision and management.

TECHNOLOGY JOBS

The nonprofit sector has substantial experience when it comes to hiring and managing development and communications staff. For your ePhilanthropy effort, the challenges are on the technology side of the equation. ePhilanthropy is uncharted. Nonprofits can follow established guidelines in the areas of development and communications, but you should expect longer *start-up* time and expense in the technological aspects, and more pitfalls in the *operations* phase as you put your plan into action.

One metaphor we use to distinguish *start-up* from *operations* issues is the hobby of model railroading. This pastime often involves two distinct personality types—some railroaders like to build, others like to operate.

For model railroad *builders*, creating the layout, attaching track, connecting switches and otherwise planning and assembling the components is the attraction. These hobbyists love to solve problems and receive great satisfaction from making their vision a reality. Once in operation, the hobby is not as satisfying, and so the enthusiast begins planning the expansion or redesign of the elaborate diorama. Technicians enamored with the start-up phase are driven in a similar way.

The model railroad *operator* loves to run trains. Once the layout is complete, the operator is attaching engines to cars and starting complex schedules of trains running sophisticated circuits. Operational efficiencies are the primary draw, and the greatest satisfaction comes from making things run well. Likewise, some people are more attracted to making the technological side of the organization run smoothly.

The psychological profile of the model railroader is exaggerated for clarity, but it does exist and is paralleled in the technology world. Understanding this mindset will affect how you hire and keep technical staff. Recognizing the motivations and interests of builders and operators will help you in managing them on an ongoing basis.

Keep in mind that builders tend to gravitate to consulting positions and operators crave administrative jobs. It seems obvious, but because many nonprofit technology staff tend to gravitate into their roles, they might not realize their preferences for a long time. As an ePhilanthropy manager, you may have to intervene when you notice that the network administrator is happy only when replacing the server—or, by contrast, fights every upgrade as being unnecessary.

The practical solution when you have staff in the wrong position is to help builders become more project oriented and to hire additional help for major implementations or upgrades. When hiring new staff, think about the type of personality that would be the best fit, and ask the kinds of questions that help you understand where a candidate would fit in.

Depending on your organization's current infrastructure and the complexity of your ePhilanthropy plan, your staffing plan may require both builders and operators. Typical building chores include server installation and upgrades, network expansion and enhancements, including firewalls, security, and application development. Operations and maintenance chores include keeping those things working smoothly adding

and deleting users, running backups and protecting the system from viruses, as well as managing e-mail bounces. Building and operations jobs also extend into the traditional development/advancement services and communications/marketing arenas.

IN-HOUSE VERSUS OUTSOURCING

One serious question to ask is, “How do I hire all of these builders and keep them happy?” The answer is either “Don’t,” or “Hire on a project basis with the understanding that the employee will move on after completion.” This second answer implies that the builder’s manager is aware of and is assisting the employee’s career path.

Not hiring is synonymous with outsourcing. *Outsourcing* is the practice of contracting with a provider to supply staff and services for a specified business function. Hiring a moving company to relocate file cabinets from one end of your office to the other is an example of outsourcing. You could do the job yourself, but the contractor provides skill and tools that you might not have. Contracting with a janitorial service to empty the wastebaskets and vacuum the floor is also outsourcing. The janitorial service supplies, manages, and pays staff to come to your office and perform a mutually agreed upon set of tasks.

For technology projects that require building or installing new applications and systems, outsourcing can be an attractive option. You are hiring a company (or person) to perform a job that needs to be done only once. Their day-to-day job is to perform the miracles that you will need only occasionally. Operations tasks, like the janitorial service, put the contractor in charge of chores that you and your staff don’t have time to do and that don’t contribute directly to your mission. The most common task outsourced in an ePhilanthropy effort is in hardware and infrastructure support. Typically, this involves engaging a firm to install, maintain, and replace all desktop and possibly server hardware on a regular basis. Depending on the size of the agency, this can vary from one or two days per week for one person to full-time staff working at your office.

However, there is a dark side to outsourcing. The principal risks are overpaying and losing control. The key element to success here is management involvement and understanding. Overpaying for a system implementation project almost always originates from scope creep—the expansion of the goals of the project beyond the original understanding. Overages in ongoing contracts are defined as paying more for the service than you could hire for and manage on your own.

The best way to manage scope creep is to have negotiated a comprehensive range of work that is measurable against the original plan. From a staffing perspective, it is important to have someone internally who understands the plan, is connected to your agency’s mission, and who knows the work being performed. The first two are fairly simple characteristics to look for in developing a successful liaison. Developing staff expertise may seem counterintuitive—why spend time learning what you are paying someone else to do? However, not being able to understand what your agency is buying means that you could be held hostage to a contractor who is not necessarily committed to your best interests.

Similarly, not knowing what an outsourced builder or operator is doing means that you might not have control of the work. Again, the answer is in knowledge. Developing management skills in the business and technology of ePhilanthropy will help you maintain control over operations and make sure the work is connected to your

mission. These skills can be gained through hiring the right manager or through developing a learning plan for existing staff. Skill development can originate from traditional sources such as classes and seminars, but it can also be achieved from peer learning, contractors, and expert staff. Most contractors, and indeed regular employees, enjoy teaching their colleagues about their expertise. Make training responsibilities part of all job descriptions.

Contractors and Employees

The further a task is from being essential to the ePhilanthropy project, the more likely it can be outsourced. Hardware maintenance, back-office transaction processing, and other activities are some of these. For some tasks central to the project, potential employees might ask if they can work as contractors. Often, these are people who have learned their skills on the job and are trying to advance their careers by becoming consultants. It can be an attractive arrangement: the bookkeeping of paying a contractor might be easier than issuing a tax receipt to an employee. There is also the perception that a contractor can be terminated more readily. Finally, your staff increases while the official staffing budget stays unchanged.

There is a legal risk to classifying a position as a contract slot instead of as an employee. The test for this focuses mainly on control. When you specify work hours location, and provide close supervision, the position is more likely to resemble that of an employee. However, when contractors supply their own tools (computers, software tools, etc.), provide a product that is either accepted or returned, and determine the manner of work, the position is appropriately classified as contractual.

For smaller ePhilanthropy projects, deciding whether a position is employment based or contractual will not make a great deal of difference. As long as the job description is appropriate to the task and there is adequate management and evaluation of the work, your ePhilanthropy effort will have the human resources necessary for the goals you have set. U.S. law has a slight bias toward classifying jobs as employment based. Employment laws in other countries will vary. In either case, when considering contractors, particularly for ongoing or operations tasks, it is prudent to seek qualified counsel in making the final determination. Remember, it is better to invest time and money up front to make the correct classification than to read about your mistake in the newspaper.

MANAGING

Hiring

Where you advertise depends on the job description. More and more metropolitan areas have nonprofit-focused employment services, both print and Web-based. Advertising your job opening in a nonprofit environment means that you will be more likely to attract applicants who understand the ethos and exigencies of the nonprofit world. EPhilanthropy job descriptions should be consistent with the rest of your agency's positions. The description should indicate the tasks to be performed, physical requirement necessary, and whom the position supervises and reports to.

In terms of physical requirements, many infrastructure support positions will require the ability to lift computers and monitors, as well as crawling around with

cables and patch cords. By contrast, gift and payment processing, programming, and copy production may have no physical demands at all. Such positions can be a good way for your agency to increase overall diversity. In addition, staff familiar with adaptive technology, such as screen readers, either through necessity or as an additional skill, can help make your Web and overall communications plan more accessible to all users.

You may not have the background or experience to adequately evaluate a candidate's technical skills during an interview. However, you can ask to see examples of work they accomplished in previous positions. Similarly, asking about technical expertise is an appropriate question when checking references. Finally, you might ask a technically qualified co-worker, friend, or volunteer (ask one of your board members if their organization can loan you someone for final interviews) to sit in on the second interview. When interviewing internal candidates who might not have experience with the selected ePhilanthropy solution, it is important to assess how well they can master new tasks. Indeed, the solutions that you have selected will soon be obsolete, so your entire ePhilanthropy team will need the ability to learn new things and apply them to the goals of the plan.

Keeping Employees Fresh

Lifelong learning is a key objective for all employees in the nonprofit world. In addition to a staff member's capacity to learn and use new ideas and technologies, it is important for the organization to provide learning opportunities. Classroom and online learning events can help keep staff up to date. Many ePhilanthropy vendors provide specific training on their products. Likewise, you can find commercial (and even nonprofit) training on general technologies such as SQL Server or Java. It is much better to provide training to staff and improve their skills than to assume that they can figure it out on their own. Whenever possible, build the training cost for users and administrators into the implementation budget for any ePhilanthropy solutions.

Another way to keep staff fresh is to allow time for them to participate in user groups and peer learning. Having time to question colleagues in the same agency or at different organizations can provide a broad perspective and may introduce new ideas when they are needed. When face-to-face user groups are not practical, there are a number of online communities where staff can communicate with one another and provide a range of problem solving and support activities.

CONCLUSION

Having good people on your ePhilanthropy team puts the soul into your work. The best plan, the most modern software, and state-of-the-art technology are meaningless without people committed to your mission and knowledgeable about the tools. You may apply a combination of approaches—hiring new people, developing talent from within, or engaging contractors—each approach has risks and benefits. Although your ePhilanthropy projects may be bringing new technologies and ideas into your nonprofit or NGO, the best practices of human resource management remain unchanged.

Having a plan that identifies communications, development, and technology goals is critical. The plan might only indicate that a project manager needs to be hired, but it will ultimately outline job responsibilities and tasks that must be accomplished in

order for the project to be successful. Those tasks and responsibilities form the basis of the job description and subsequent evaluation of the work performed. The technical skills required this month might be obsolete the next, making each staff member's ability to learn and translate new ideas their most important asset. There will always be challenges in hiring and supervising technical employees, but by focusing on how people fit into the process along with materials and money, you can effectively populate your ePhilanthropy plan.

ABOUT THE AUTHOR

Tim Mills-Groninger is the associate executive director of the IT Resource Center, a 20-year-old Chicago-based nonprofit MSO providing computer planning, assessment, training, and technical support services to the nonprofit and government community. His 25-year career in nonprofit technology has involved numerous teaching, staff, and board positions in local and national initiatives. Among his national roles, he was the chairman of the Technology Resource Consortium during the planning and consolidation process with the Nonprofit Management Association and Support Centers of America into the National Alliance for Nonprofit Management. He was part of the National Strategies for Nonprofit Technology (NSNT) project that became the Nonprofit Technology Enterprise Network (N-TEN). He is a contributing editor to the *NonProfit Times*; and he has been a grant reviewer for the Department of Commerce's TIIAP/TOP program, the Ericsson Erica Awards, and other technology grant programs.

He writes and speaks frequently on nonprofit technology issues with a focus on fundraising databases and their role in improving advancement services. He has recently completed a series of workshops demonstrating how different commercial applications solve common fundraising problems. Information about the IT Resource Center is available at <http://www.itresourcecenter.org/>; the *NonProfit Times* is at <http://www.nptimes.com>. You can e-mail Tim at timg@itresourcecenter.org.