Organizational Technology Self Assessment

Thank you for participating in this survey. The Bayer Center for Nonprofit Management is updating benchmarks around different combinations of agency type, size and other factors. We may also wish to contact you to follow up on questions or to let you know about products and services that address problems you’ve noted in your responses. (Please return completed form by July 9, 2004)

718 Fifth Avenue, 4th Floor • Pittsburgh, PA 15219-3009 • 412-227-6814 Fax: 412-227-4097 • www.rmu.edu/bcnm

Organization Name __________________________________________________________ Date ____________________

Completed by ___________________________________________________________ Title __________________________

Address _____________________________________________________________________________________________________

Web Site URL: ___________________________________________________________ E-mail: __________________________

Phone: ( ) ___________________________ Fax: ( ) __________________________

Part A: About your organization: Please complete this section to the best of your knowledge. For questions 1 through 4, your answers should be consistent with your agency’s IRS Form 990 filing.

1) Our overall agency operating budget is $_______________________ for the fiscal year ending (month/year) _______/_______.

2) Our technology budget is $________________________   or   ☐ We don’t track technology expenses separately.

3) Number of Full-time Equivalent (FTE) employees (FTE = total hours worked by all staff/40) ________________.

4) Organization can best be classified as: (Check all that apply. These categories are taken from the National Taxonomy of Exempt Entities (NTEE). Additional information is at http://nccs.urban.org/ntee-cc/index.htm)

☐ Arts, Culture, and Humanities
☐ Education
☐ Environment and Animals
☐ Health
☐ Human Services
☐ International, Foreign Affairs
☐ Mutual/Membership Benefit
☐ Public, Societal Benefit
☐ Religion Related
☐ Unknown, Unclassified

5) Our founding year/ 501(c)(3) ruling year is _____________________.

6) Organizational innovation: Compared with others in our field, our organization tends to be: (check all that apply)

☐ First to initiate new services
☐ First to identify new client populations
☐ First to develop new ways to incorporate technology into operations
☐ At the leading edge of technological innovation

7) We have a written technology plan that is integrated into the overall strategic plan and mission of the organization. (check only one)

☐ We have a strategic plan that addresses technology
☐ We have a strategic plan, but it doesn’t address technology
☐ We have a technology plan independent of our strategic plan
☐ We have neither a strategic plan nor a technology plan
☐ Don’t know/not sure

8) Internally, technology management in our organization is the responsibility of: (Identify the primary source of internal technology decision making; who decides what gets purchased and what gets thrown away? Check all that apply)

☐ Don’t know/not sure
☐ A designated staff person with part-time technology responsibilities
☐ MIS Dept with two or more employees
☐ Unofficial staff interested in technology
☐ Finance Department
☐ Executive Director
☐ A staff person with full-time technology responsibilities
☐ Other ____________________________

9) We wish to make the following changes in our computer systems: (check all that apply)

☐ No changes are necessary; everything is under control.
☐ Hardware
☐ Software
☐ Training and Utilization

Minor improvement in: ☐ ☐ ☐

Major improvement in: ☐ ☐ ☐
10) For what percentage of staff positions are required technology skills listed in job descriptions and included in employee evaluations. (Count positions if the required technology skills are a written part of their job description, and their supervisor regularly evaluates those skills.)

- None
- 1-33%
- 34-66%
- 67-100%

11) My organization would be interested in learning more about: (Please indicate the products and services you believe are important to your organization in the future.)

- Creating an overall technology plan and budget
- Technical support providers/resources
- Creating a communications/marketing plan addressing issues and opportunities of the Internet
- Creating a networked office
- Purchasing hardware
- Accessing the Internet
- Purchasing specific software packages
- Creating a disaster recovery plan for our Information Technology in case of fire, flood, theft or virus attack
- Staff training for specific applications
- Group purchasing with other nonprofits to leverage costs

12) Do you have a technology evaluation and planning committee? (Choose the first Yes option if your agency has a technology committee AND at least one board member participates in any capacity.)

- Yes, and at least one board member participates
- Yes, but no board member participates
- No
- Don't know

13) Technology has substantially changed how we operate: (Check only one box where 1 = strongly disagree and 6 = strongly agree.)

- Strongly Disagree
- 1
- 2
- 3
- 4
- 5
- 6
- Strongly Agree

14) Our biggest challenge with technology is: (Describe the issues and challenges facing your organization’s use of technology.)

__________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________

15) What is your organization’s technology dream or next big step?

__________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________

Part B: Technology Inventory and Resources: If you feel that you have a good understanding of how technology is used in your organization, please complete this section. If you are unsure, please place a check mark in question #1 and return the survey.

1) I am not comfortable answering these questions and am returning the survey at this time.

2) Last year, what percentage of staff received some formal technology training as part of their job? (Training can be classroom or computer based, but there needs to be a curriculum. Check only one.)

- None
- 1-33%
- 34-66%
- 67-100%

3) What percentage of staff use the Internet (Web and e-mail) as part of their jobs? (What percentage of staff both require and use Internet access as part of their work for the agency? Check only one.)

- None
- 1-33%
- 34-66%
- 67-100%

4) We use the following types, ages and quantities of computer(s): (Indicate the number of machines in use in any administrative or program delivery capacity – including client-oriented computer lab. Age should indicate date of manufacture, not date received.)

<table>
<thead>
<tr>
<th>Type of Computer</th>
<th>Desks</th>
<th>Laptops</th>
</tr>
</thead>
<tbody>
<tr>
<td>Macintosh</td>
<td>______</td>
<td>______</td>
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<tr>
<td>PC: older than 5 years</td>
<td>______</td>
<td>______</td>
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<tr>
<td>PC: 3-5 years old</td>
<td>______</td>
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<tr>
<td>PC: 1-3 years old</td>
<td>______</td>
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<tr>
<td>PC: under 1 year old</td>
<td>______</td>
<td>______</td>
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<tr>
<td>Other (please specify)</td>
<td>______</td>
<td>______</td>
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</tbody>
</table>

5) What percentage of your computers use the following operating system(s)?

- % Windows 98 or older
- % Windows 2000
- % Windows ME
- % Windows XP
- % Mac OS
- % Other (specify)

6) Do you provide remote access for truly mobile staff members? (Those who work the majority of their time in the field, not in a satellite office.)

- Laptop
- PDA
- Cell Phone
- Citrix
- Data Access through ASP
- Pager
- Terminal Services
- PCAnywhere
- Other (specify)
7) What type of Internet connection does your organization have?

- We don't have an Internet connection at this time.
- We have one, but I'm not sure what it is.
- Dial-up modem on individual machine(s)
- Shared modem (multiple staff share modem from their desks)
- Fixed wireless
- Broadband (ISDN, DSL, Cable, T1, etc.)

<table>
<thead>
<tr>
<th># of computers with always-on access</th>
<th># without always-on access</th>
<th>Speed</th>
</tr>
</thead>
<tbody>
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</table>

Do you have a firewall? ____________________________

If yes, what kind of firewall? □ Hardware □ Software

8) We provide internal email addresses to staff. (Check Yes if staff have addresses with a standardized domain name (e.g. userid@orgname.org))

- Yes
- No
- Don't Know/Not Sure

9) We use the following Local Area Network (LAN) Network Operating System(s): (How are computers connected for file and print sharing? If more than one fixed site, indicate number of sites that use the particular NOS)

- None
- Novell Netware
- Windows NT
- Windows 2003
- Linux
- Other __________________________

10) What hardware does your organization use? (Check all that apply)

- Telephone system with voice mail (Check if your organization uses voice mail)
- Telephone call management/automation (Call center, automated attendant, or other advanced telephone system features.)
- Fax machine (At least one stand-alone fax machine – combination printer/fax machines qualify.)
- Scanner (Any scanner for Optical Character Recognition (OCR) or imaging.)
- CD ROM burner (Can you make your own CDs anywhere in the agency?)
- Single bin laser printer (Any laser printer that uses only one tray at a time.)
- Multi bin laser printer – including envelope feeders (Users can specify one of several available paper trays for their print jobs.)
- Ink jet or other color printers (Any ink jet or bubble jet type printer)
- Specialty printers (Any ticket printing, label or other printers built for a specific task.)
- Networked copier (Copier that allows printing capability from users desk)
- LCD projector (Any projectors for computer or video)
- Digital camera (Any still or motion picture camera producing electronic images)
- Jazz/Zip drives (Any removable high-density storage)
- Tape backup (The ability to back up data from one or more computers to tape)
- DVD (Digital Video Disk burner or player)
- Other (please specify) __________________________

11) We use the following communication channels to maintain contact with key constituent groups (organization members, donors, clients, board, staff, advocates, etc.). (Please check one and only one box to indicate your level of use for outgoing communications. If your organization does not use a given channel, please check N/A.)

<table>
<thead>
<tr>
<th>Print</th>
<th>Fax</th>
<th>Voice Mail</th>
<th>Broadcast Fax (one fax to many people)</th>
<th>ICQ, Chat, IM</th>
<th>Conference Calls</th>
<th>Phone</th>
<th>E-mail</th>
<th>Web page</th>
<th>Interactive or e-commerce oriented web page</th>
<th>Video Conferencing</th>
<th>Text Messaging</th>
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</thead>
<tbody>
<tr>
<td>□</td>
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12) What basic productivity software packages are in regular use? (Check all that apply – if you have standardized on a package, check only one.)

- Microsoft Office (Word, Excel, etc.) version: _____________
- Corel Office (WordPerfect, Quattro, etc.) version: ___________
- Lotus Office (WordPro/AmiPro, 123, etc) version: _____
- Open Source package (Star Office, Open Office)___________
For the next three questions, indicate how your organization handles accounting (13) database management (14) and technology management (15) issues. If you don’t do a task, place an “X” in N/A; Xs are appropriate for manual (paper and pencil) and spreadsheet solutions. Please indicate the software or vendor for Software and Outsourced solutions.

13) How does your organization manage the following accounting tasks? (See instructions above. Common software packages include Great Plains, QuickBooks, Peachtree and others.)

<table>
<thead>
<tr>
<th>Accounting Tasks</th>
<th>N/A</th>
<th>Manually</th>
<th>Spreadsheet</th>
<th>Accounting Software (specify)</th>
<th>Outsourced (specify)</th>
<th>Other (specify)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Ledger</td>
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<tr>
<td>Accounts Receivable</td>
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<tr>
<td>Accounts Payable</td>
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<td>Payroll</td>
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<td>Budgeting</td>
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<td>Cash flow</td>
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<tr>
<td>Inventory</td>
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</tbody>
</table>

14) How does your organization manage the following database/list management tasks? Common software packages include Donor Perfect, GiftMaker Pro, ResultsPlus, MSAccess, and others. The task QA/RU refers to Quality Assurance/Resource Utilization; Contract Performance refers to any performance-based or other contractual reporting tasks.)

<table>
<thead>
<tr>
<th>List Management Tasks</th>
<th>N/A</th>
<th>Manually</th>
<th>Spreadsheet</th>
<th>Database Software (specify)</th>
<th>Outsourced (specify)</th>
<th>Other (specify)</th>
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</thead>
<tbody>
<tr>
<td>Client Management</td>
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<td>Fundraising</td>
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<td>Volunteers</td>
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<td>Ticketing/point of sale</td>
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<tr>
<td>QA/RU accreditation</td>
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<tr>
<td>Contract Performance</td>
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<tr>
<td>Other</td>
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<td>(specify)</td>
</tr>
</tbody>
</table>

15) How does your organization handle the following technology management tasks?

<table>
<thead>
<tr>
<th>Tech Management Tasks</th>
<th>N/A</th>
<th>Manually</th>
<th>Software (specify)</th>
<th>Outsourced (specify)</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Backup</td>
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<tr>
<td>Antivirus</td>
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<tr>
<td>User Account Management (network/workstation)</td>
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<tr>
<td>Network Auditing/Logging</td>
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</table>

16) We use the following resource(s) for technology training: (Where does staff go for training on the technology they use in their jobs?)

- ☐ We don’t have a formal training plan; people learn on their own.
- ☐ Peer support
  - ☐ Commercial classroom-based providers (specify: ____________________________)
  - ☐ Internet-based or distance learning training providers (specify: ____________)
  - ☐ Computer Based Training (CBT) or video (specify: __________________________)
  - ☐ Books, periodicals, self-paced learning (specify: __________________________)
- ☐ In-house MIS staff
- ☐ Volunteers to our agency
- ☐ Friends and family of staff
  - ☐ Technical support contracts with one or more providers (specify: ______________)

17) What Technical Support Providers do you use? (What’s the go-to solution for any problems with technology?)

- ☐ We have no formal approach to support; staff do the best they can.  ☐ In-house MIS staff
- ☐ We contract for technical support on an as-needed basis.  ☐ Volunteers to our agency
- ☐ Technical support contracts with one or more providers (specify: __________________________)
  - ☐ Friends and family of staff

Please return completed survey by July 9 in the enclosed postage-paid envelope or via fax to 412-227-4097.

Thank you for your assistance.

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