

W rkshop

Make Technology Work for You

If your organization is in a state of virtual anxiety over the array of high-tech possibilities, Workshop can help allay your concerns. The challenge is to adapt technology to your organization, not vice versa. To offer some tips on how to make technology work for you, we've sought the wisdom of two cyber wizards:

- Jayne Cravens is manager of The Virtual Volunteering Project and TxServe at the University of Texas at Austin. She writes about building a database; recruiting volunteers; and communicating via e-mail. In each case, organizations need a clear understanding of what they hope to accomplish by using technology. For example, when building a database, the first step is to find out what each staff member wants to do with it, says Cravens. "Development staff may want a list of volunteers each quarter who have also made financial contributions; the executive director may want to occasionally see what city and county officials have attended the organization's events; and the marketing staff may want to know weekly who or what referred people who call your organization."

- Jeanette Cates, Phd., CEO of TechTamers.com, is a technology implementation expert and professional speaker who works with organizations who want to innovate and prosper online. She writes about virtual conferencing and selecting software. Software doesn't raise alarms, but you may be intimidated by virtual conferencing. Don't be. She describes a familiar scenario, with a twist: "You are sitting in your office, talking with the other committee members," she says. "You show them the latest brochure for the upcoming fund-raising campaign. One of them circles and suggests a change in the graphics and another corrects a spelling error. You agree on the changes to be made and the meeting adjourns. What's unusual about that? None of you was in the same city! You've just had a virtual conference."

These articles are full of practical tips and a wealth of Internet sites that offer information. We hope you'll find the answers to questions and the encouragement to forge ahead into cyberspace. ♦

Workshop, a standing feature of Volunteer Leadership, offers how-to tips and valuable insights on selected topics. If you'd like to be a guest editor or want to suggest topics for future coverage, write to Volunteer Leadership Workshop, The Points of Light Foundation, 1400 I St. NW, Suite 800, Washington, D.C. 20005; fax 202-729-8100; e-mail: vleader@earthlink.net

Software Checklist

Before choosing software, Jeanette Cates says an organization should answer the following questions:

- What reports do I need?
- What charts/graphs should it produce?
- Does it take input from our existing packages without added effort?
- Will it run with our current equipment?
- How often is it updated and what is the cost of the updates?
- How broadly is it used? Are we likely to have others we can talk to about the tricks and tips?
- What types of assistance are offered for installation and training?
- Are there third party references (books, courses, trainers, user groups)?
- Can we program macros or other automatic functions?

Virtual Volunteering

By Jayne Cravens

There are thousands of people out there surfing the Internet, actively searching for volunteer opportunities they can complete via home or work computers. They are everyone from tech-savvy teenagers who don't have transportation, to lawyers, human resources managers, marketing directors, agriculturists, Web designers, database designers, graphic designers and other professionals hoping to donate expertise to nonprofit organizations and those they serve. In fact, there are many more people who want to devote time and effort via the Internet than there are online volunteering opportunities!

Enter the Virtual Volunteering Project (<http://www.serviceleader.org/vv/>), which has worked since 1996 to encourage and assist organizations in the development and success of volunteer activities that can be completed, in whole or in part, via the Internet. The Project provides the critical resources to help both organizations and volunteers engage in effective, meaningful, mission-based online service. The Virtual Volunteering Project defines two forms of online volunteering:

Tech Assistance

One form is technical assistance to staff or other volunteers at an agency. Examples include:

- Conducting online research: finding information for a grant proposal or newsletter or using online phone books and Web sites to update contact information for a database.
- Providing professional expertise: answering an agency's questions regarding accounting, management or legal issues, writing a speech, setting up a video conferencing event,

designing a Web site, translating a document into another language, etc.;

- Helping with advocacy, such as preparing legislative alerts to be sent via e-mail;
- Volunteer management assistance: supervising other volunteers in the aforementioned activities, checking in with volunteers via e-mail, etc.

Direct Contact

The other form of online volunteering is direct contact between an online volunteer and a client or recipient of service. Some examples:

- Electronically visit with someone who is homebound, in a hospital or a rest home;
- Provide online mentoring and instruction, such as helping students with homework questions or helping an adult learn a skill or find a job;
- Supervise or moderate an agency-sponsored chat room, e-mail discussion group or newsgroup;
- Work with other volunteers and clients to create a collaborative project, such as writing about the news of their neighborhood, school, special interest group, etc., to post on a Web site or use in printed material.

Many organizations find a combination of onsite and online tasks for volunteers works best for everyone involved (volunteers, staff, clients).

Volunteer assignments can have different levels of "virtuality." For instance, one volunteer may interact with clients online but meet onsite with a staff member regularly; another may talk with a client via e-mail in addition to regular face-to-face visits.

Ready or Not?

Before an organization decides to involve online volunteers, it should:

- Already successfully involve volunteers in traditional, face-to-face settings. It should have an established system for volunteer recruitment, screening, training, matching to assignments, feedback and evaluation.
- Have a staff and board already committed to the success of current volunteer activities.
- Have one person who is ultimately responsible for volunteer management, and this person should have regular access to his or her own e-mail account through the agency. The same person who is in charge of managing the current volunteer program should also manage the virtual volunteering component.
- Already have asked for and compiled e-mail addresses of volunteers as supporters (on application forms, via phone, on sign up sheets, on pledge cards, etc.).
- Have a volunteer manager committed to reading and responding to e-mails within 48 hours of receipt, and who can regularly access the Virtual Volunteering Web site for advice and information on involving volunteers virtually.

Getting Started

Via its Web site, the Virtual Volunteering Project provides free, in-depth resources that detail how to successfully introduce a virtual volunteering program to an organization and how to effectively manage such a program. The resources also include suggestions for involving people with disabilities in virtual volunteering programs, online safety guidelines, information about online culture and examples of more than 100 organizations successfully involving online volunteers. ♦

Evaluating Software

By Jeanette Cates

Regardless of the type of software you are considering, there are three steps that you should take to make a wise choice that works for your organization:

- decide on what you need;
- ask for referrals; and
- invest in training.

By following these three steps, you'll ensure that you have the best possible choice for your organization.

Decide Your Needs

Too often, we go out and purchase the first package that comes to mind—then find that it cannot do what we require. We compromise our needs and feel that technology is running our lives. To prevent this, you make a list all of your hopes and dreams for the software—before you start looking.

Meet together with everyone who will use the software or the output from the software. Ideally, this will be in a room face-to-face. But it may be online via e-mail or in a virtual conference. Ask the participants to “dream big” about what they would like to have. Are there reports they would like to see? Other software that needs to feed into this package? Charts that would be helpful? Automatic functions that could save time? List each of these.

Then ask everyone to vote on the most important features of the software. One of my favorite ways of doing this is to give each participant 10 points to use. They can put all of their points on one feature or spread them around. The features that get the most points will be your requirements. List all of the features in their order of preference.

Seek Referrals

There are other nonprofits using software that may meet your requirements. Ask them for the names of the packages that they use and how satisfied they are with them. Be forewarned: even if 80% of the nonprofits are using a package, it doesn't necessarily mean they are pleased with it or that it meets your requirements. You can ask local businesses for referrals, but take their advice with a grain of salt. They are not working with the same resources you are.

Choosing and using software is a necessary part of any efficient operation ... especially in the nonprofit world, where people and money are scarce.

When you have located one or two software packages that meet your requirements, ask the salesperson for the name of other nonprofits using it. Talk to the people who use it every day and to the people who use the reports it generates. If there are requirements from your list that it didn't meet, ask the salesperson if there are ways to work around it or if they have plans to upgrade for that feature. If upgrades are planned, ask when.

One category of software to consider is ASP—application service providers. These online sources are

providing software online, which saves you the hassle of installing and upgrading the software on each computer. You pay by the workstation, at a lesser cost than purchasing an entire package. There are already ASPs providing office automation software for nonprofits. One such site is zworkz.com which lists numerous packages you can use through the online connection, without having to invest in the shrink-wrapped package.

Invest in Training

Once you've made your decision, make the commitment to use the software and all of its features. Bring in an expert in the software to help you set it up. That will save you time and make it more likely that you will start properly from the beginning. That will also save you time in the long run—from having to correct errors because you didn't understand how to use it most effectively.

Plan to bring in a trainer on a regular, recurring basis. At the beginning you are not prepared to learn all of the features. As you learn more, you will be ready to expand that knowledge. This is when the training is most needed. By having someone come in every quarter, you are sure to continue to expand your knowledge of the capabilities of the software. Likewise, having e-mail access to the trainer between sessions provides a ready reference for those quick questions you have.

Choosing and using software is a necessary part of any efficient operation. Especially in the nonprofit world, where people and money are scarce, you need to use the technology more effectively. Be sure you are using the right software! ♦

Basic Database Principles for Tracking People

By Jayne Cravens

Just as for-profit businesses gather and analyze data about current and potential customers, nonprofit agencies should track information about people too—volunteers, clients, potential supporters, current donors and event attendees. Tracking this information can help every component of an organization's outreach, from fund raising to volunteer recruitment. Regardless of your computer, staff or database resources and budget, there are basic things any group can do to build a good, valuable database to track people:

Limit the number of people who input, change or delete database information. This cuts down on duplicate records, data conflicts, etc. However, all staff members have a responsibility to provide names, address changes, etc. for the database.

Give some level of access to everyone on staff. While one person may be in charge of the database, everyone else should have at least limited access—looking up phone numbers, generating reports, etc.

A database should grow. Anyone who comes to a meeting or event, asks for information, is sent material about your organization or company should be put on the database. Those people are the best audience to approach in the future about volunteering, donating, attending an event, etc., because they've voiced an interest in your organization already.

Develop systems that everyone will use to capture information for the database, and make sure this information is inputted in a timely manner. A good rule is that new information is entered in the database no later than 48 hours after it was received.

Decide what information needs to be tracked in order to know what database fields to create. The first step is to find out what each staff member wants to do with the database. A good computerized database should allow you to sort and view information in a variety of ways. For instance, various staff members might want to generate:

- an alphabetical list of education representatives who attended your annual fundraiser;
- personalized letters to donors who have contributed more than \$100;
- a sheet of mailing labels for a particular city or county, sorted by zip code;
- a list of volunteers available on a specific day or time.

A good database allows you to sort and view information in a variety of ways.

Keep design ownership in-house.

The person who is going to use the database most (input information, run reports for other staff, etc.) should be directly involved in the design of your database or the selection of a customized database. That person may be the receptionist rather than the systems administrator. If you must use an outside consultant, make sure that person trains at least two staff members in how to alter the database design and structure as needed, so that you are not completely reliant on the consultant. Or make sure the staff who will use the

database are directly involved in the purchase of a specialized package.

Have security passwords for different levels of use (one for inputting information, one for designing screens, one for viewing confidential information, etc.). This ensures confidentiality as needed, and prevents staff who don't know how to use the system from making an unintentional mistake everyone will regret later.

Backup the database at least twice a week. Keep these backup copies in a safe place. Some companies buy fire-proof safes to store copies; others store the backups at a different location. You should also set criteria for when to destroy or reuse these copies.

In most cases, don't remove someone from your database, even at his or her request. Instead create a category listing people who do not want to be contacted. Why? What if that person is removed, and later, a board member asks if that person, who is a friend, is on the database. You say no and put the person back—and get an angry call later from that person asking why you contacted him or her when that person specifically asked you not to. However, you should regularly search for and remove duplicate records from your database, as well as people who have moved outside of your targeted area, are deceased or have had an incorrect address in your system for a year or more.

The most important component in a good database system is people who understand the importance of gathering information and of thinking proactively and who are dedicated to keeping the information up-to-date. More information about databases can be found at www.coyotecom.com/database/. ♦

Virtual Conferencing

By Jeanette Cates

Video conferencing systems have been around for 30 years. But only recently has the technology become available and affordable enough that we can all use it.

There are several components to an internet-based conference. Depending on the software you are using and the speed of your connection, you'll have access to text chats, shared whiteboard space, shared software applications and live audio and video. Each of these components has hardware or software associated with it.

What You Need

You need to have your hardware in place before you start the conference. If you plan to use video conferencing, you'll need a video camera and a video digitizing board at each location. The digitizing board takes the analog signal from the camera and translates it into a digital signal that the computer can understand. You have two choices with a video digitizer. You can purchase a board that installs in your computer, then a video camera that plugs into the board. Or you can purchase a camera that has a built-in video digitizer. These special cameras are generally less than \$100 and plug into your serial, parallel or USB port. If you prefer to install the board, you can use any type of video camera, although those designed for computers are easier to handle.

For the audio portion of the conference you need a microphone and speakers, as well as a sound card. Your sound card should be full-duplex so that it can process incoming and outgoing sound at the same time. (You probably already have this if you have a computer that is less than two years old or one with "video-gaming" capa-

bilities.) The microphone and speakers can be as simple or as complex as you like. Keep in mind that the human voice doesn't need to be stereo, so simple—and inexpensive—is fine. If you plan to have a group of people gathered around a microphone at one of the locations, you'll want an omnidirectional microphone; otherwise a unidirectional mike will be fine.

The final piece is the software. There are numerous free and inexpensive software packages for conferencing. Like any other software, it's best if you list what you are looking for, then choose the software. For example, one of the most popular packages only lets you talk with one other person at a time, even though up to eight people can have a text chat or share documents on the whiteboard. Another lets you see and converse with up to eight people simultaneously, but it's not as widely used in a business setting. Remember that simpler is usually easier. So start with a basic package like NetMeeting, which is free and has lots of support available, and increase your capabilities only when you need to.

What to expect

If you're looking for television quality video, you'll be disappointed. Because of the different types of line speeds, video conferencing can be disconcerting when you first begin. To maximize the video, keep your movements on camera to a minimum. Put a plain background behind you with no movement. Reduce the size of your video window to increase the quality of the video.

The audio will be good enough for a conversation. Use the text to post questions to the group or to have side

conversations that would clutter the audio.

As at any meeting, you'll want to assign someone to take notes and indicate action items. Likewise, prepare any visuals you plan to show on the shared whiteboard.

Word to the wise: The use of Internet-based conferences will increase—for meetings, short presentations, training and to archive conference presentations for later viewing. The sooner you become involved with the new wave of virtual conferencing, the easier it will be to remain in the lead. ♦

Take a Look

Here are some general information URLs for virtual conferencing:

- Meeting by Wire, www.meetingbywire.com/, gives tips and ideas on distance meetings and conferences.

- NetMeeting, www.microsoft.com/windows/netmeeting/ (Windows only software) for information about online video conferencing with commonly available free software.

- To see a movie of people using NetMeeting: www.zdnet.com/zdnet/callforhelp/projects/story/0,3650,2156481,00.html.

- IQuick guide to Net Meeting, <http://netconference.about.com/internet/netconference/library/weekly/aa081699.htm>.

- CU-SeeMe (Windows or Macintosh), www.cuseemeworld.com/; free trial, full price: \$69.

- IVisit (Windows or Macintosh), www.ivisit.com/; Video chat software for multiple users, free.

Communicating Online

By Jayne Cravens

Volunteer managers are using the Internet more and more to work with volunteers and potential volunteers, and they are experiencing a variety of online communicators. In order to communicate effectively via e-mail, it is necessary to pay attention to the dynamics of online culture.

Some write e-mails exactly as they talk, using punctuation and "smileys" to show emotion or expression. Some write formally. Some write short and to the point. Some write often.

Some interpret silence as approval, others as disapproval. Some e-mail you, and then call on the phone, as they aren't absolutely certain of Internet technology. Some write e-mails littered with punctuation, spelling and sentence structure errors, but are very articulate on the telephone or in person.

Seeking Nominations for the 2000 Awards for Excellence in Corporate Community Service

The Awards for Excellence honor companies that demonstrate exceptional commitment to community service and support employee volunteer programs that target serious social problems.

The 2000 nomination forms for the Awards for Excellence in Corporate Community Service are due on August 1, 2000 and are available on our website at <http://www.pointsoflight.org>, by e-mail at awards@pointsoflight.org, by fax on request at 1-888-229-3460 or by calling the Recognition Hotline at (202) 729-8184.

Some are not completely aware of all of the functions on their e-mail software (setting line length, type size, having a signature, setting the default to reply to the sender rather than everyone, etc.) Some are "documentors," and some are "snippers": Some feel it is necessary to keep the full reply even if it is the sixth message passed. Others like to respond in a concise manner, so much so that it can be hard to figure out what they are responding or referring to which may not be a culture difference, as much as a difference in e-mail systems or the person's technical know how.

Whether using e-mail, a bulletin board or a chat room, communicating in a text-only format can be a challenge. Written online exchanges can't tell us everything about a person, and can even be unintentionally misleading. Sometimes, you have to interpret people's written communication and even assist them in being more clear and effective online.

Working Together Online, (www.web.net), offers some of the best advice regarding communicating with volunteers—or anyone—online: "Never make assumptions about what you are reading. Learn to move slowly in what feels like a very fast medium."

A great way to learn the nuances of communicating with people online is to become a part of an online discussion group. You can start by joining an online group specifically for volunteer managers, such as CYBERVPM (www.cybervpm.com).

If you work with young people, you might consider joining a discussion group of a TV show that's popular with teens, and observe how youth

interact with each other via written communications. You can also join groups that interest you personally—one for a particular hobby, your favorite author, a sports team you follow or even a political issue.

Bookmarks

You can find online discussion groups for just about any subject you can think of at these Web sites:

- www.liszt.com
- www.lsoft.com/catalist.html
- www.tile.net
- www.neosoft.com/cgi-bin/paml_search/
- www.remarq.com
- www.dejanews.com

As you observe (or "lurk") on these groups, notice the variety of ways people relate to each other via written communications, the differences in communication styles among people of different age groups, professions or geographic areas. The more you read, the more comfortable you will become at your own abilities to communicate online.

The Virtual Volunteering Project (www.serviceleader.org/vv/) links to a variety of online resources to help volunteer managers learn about the dynamics of online culture, as well as how to facilitate online groups via e-mail or via live chat. This information shys away from "techy" talk and concentrates more on the human elements and language needed to successfully engage people online.

The site also links to many other resources on the subject of online culture, online facilitation and online volunteer management. ♦