

## Report on Communication Strategies and Information Technology

### Mexico City, Mexico 2-4 April 2001

WINGS Peer Learning Meetings are informal meetings designed to support the exchange of experience and ideas among the senior staff of associations of grantmakers and philanthropy support organizations. Participants shape the agenda and lead the meeting discussions.

The WINGS Peer Learning Meeting on Communication Strategies and Information Technology took place April 2-4, 2001 and was hosted by the Centro Mexicano para la Filantropía (CEMEFI) in Mexico City. Fifteen participants from 10 countries took part in the meeting. The countries represented were Brazil, Canada, Colombia, Germany, Jamaica, New Zealand, Mexico, the Philippines, Russia and the United States. The majority of participants at this meeting were from associations of grantmakers. A resource person from the Benton Foundation in the US with expertise in the field of information technology (Michael Litz) also participated in the meeting.

This summary reflects the discussions at the Mexico Peer Learning meeting. It is not intended as a definitive text on communication strategies and the use of information technology by associations of grantmakers and support organizations supporting philanthropy. However it does provide very helpful substantive and procedural guidelines for developing an effective communications strategy to promote philanthropy. It does provide an overview of the field of knowledge management and a review of the options available for the optimum use of information technology.

The following themes were discussed at the meeting:

- What is Communication?
- Goals & Objectives of Internal and External Communications Programs  
What types of strategic communications goals do we have? What communication issues are specific to grantmaker associations that are different than those of other types of organizations? How do we ensure that our communications goals tie to the organization's overall strategic goals? How to develop good positioning statements? How to reconcile differing perceptions of communication goals and strategies between board and staff? What types of information do we use [inputs] and what do we disseminate [outputs]? How do we gather the information we need? What specific results do we want and how do we measure success?
- Internal Communications Strategies: Working with Members, Board Members, and Staff  
Determine needs for information & communication; Gather & use data from members & other sources; Types of messages; Channels or media of communication; Best practices and achievements (products, etc.); Greatest challenges, worst experiences/problems; Policies (who decides what?); Staffing & sustainability (funding); Evaluation & feedback
- External Communications Strategies: Working with NGOs, Government, Academia, General Public, Media and Business  
Determine needs for information & communication; Gather & use data from members & other sources; Types of messages (marketing, culture of giving, public relations); Channels or medium of communication; Best practices and achievements; Greatest challenges, worst experiences/ problems; Policies (who decides what?); Staffing & sustainability (funding); Evaluation & feedback
- Strategic Issues Related to Information Technology (IT)  
Knowledge Management; Challenges and opportunities offered by IT; Becoming an information management organization; IT Planning; Implications for communications and public relations directors of associations and support organizations
- Applications of IT - A Discussion of Tools and Techniques  
IT opportunities now and in the future; Improving the effectiveness of website & other

communications tools; What technologies are being used and how are they being used? What has been effective/ineffective? What other technologies could be utilized to improve communications in the future?

- Best Practices in Communications Strategies for Grantmaker Associations & Support Organizations - Summary of Key Elements  
Best practices related to planning, evaluation, and development of a communications strategy; Funding communications activities; Effective use of websites & other technology

## **What is Communication?**

Communication is a complex process and grantmaker associations often underestimate the complexity of their communications work. When asked, "What is communication?" participants in the peer learning meeting gave a variety of responses as noted below:

- Communication is getting messages across to a targeted audience. (This is why it is important that your message be consistent and clear.)
- Communication can be understood as communication between the association and its members and communication between the organization and the public.
- Communication is educational.
- Communication involves the exchange of information. But be aware of your role and responsibility as both a giver and a recipient of information; communication is a two-way street.
- Communication requires an understanding of the message sent.
- Communication means sharing information.
- Communication can be used to marshal resources (people, time, money).
- It is important to identify the purpose of each communication effort.
- Communication is something that should be evaluated. Do not assume that if people have been informed that they will act. It is important to obtain feedback from the people with whom you communicate.
- Messages should be related to the mission of the organization and should help people identify with the mission of the organization.
- Communication is the understanding of what other people need.
- Communication should be understood as a "competence of senses" (Foucault); it is an interpretation.
- Communication takes place through personal and cultural lenses.
- Communication is a proposal or offer you make.
- Approaches to communication need to be constantly reviewed and tested (using focus groups, message testing, etc.) to determine how the audience has understood your messages. (One should also resist the temptation of thinking that it is the audience's fault if they do not understand your message.)
- Communication is a process of seduction.

## **Goals & Objectives of Internal and External Communications Programs**

*"To engage in dialogue, one must first ask and then listen."* Machada

[Where Goals and Objectives "Fit" in a Strategic Plan](#)

- Vision
- Mission statement
- Goals
- Objectives
- Strategy
- Message development

Associations and organizations in different cultural and political contexts articulate various understandings and usage of terms related to the goals and objectives for their organization. These, in turn, affect how they describe and develop their communications programs. For example, the goal of some organizations is to promote sustainable NGOs and sustainable households and families; but others identify their goal as promoting and supporting grantmakers, the foundation sector, or giving in their respective countries. Still others formulate their goal as consolidating their organization's position as the foremost representative of all those involved in social investment.

Participants agreed that "objectives" differ from "goals" by being SMART:

- **S**pecific
- **M**easurable
- **A**ttainable
- **R**esults-oriented
- **T**ime-limited

#### Target Audiences for Associations of Grantmakers

Grantmaker associations and support organizations need to address the interests and needs of a variety of target audiences. Different communications tools, languages, and messages are needed for each of these various groups.

- Members
- Board
- Media
- NGOs
- Public
- Government
- Business
- Staff
- Corporate Citizen
- Professional Advisor
- Other Donors
- Academics/Researchers

Identifying and researching target audiences and message development aimed at these specific audiences are key to the communications work of associations. The phrase "unity in variety" was coined as a good approach to thinking about communications messages.

#### Communication Tips for Associations:

- Communicating the values of the association or organization to all audiences is a very

important first step.

- Communicate the value of membership to association members. (Draw primarily from the field of marketing.)
- Don't communicate messages that are too sophisticated.
- Have a clear vision of what your communications work should achieve.
- Narrow the range of target audiences and concentrate on specific groups rather than spread organizational resources too thin.
- Help members to understand that associations are a medium through which members can promote their cause(s).
- Consider how much you are trying to promote communication among your members and whether this communication needs to involve you or not.

### **Internal Communications Strategies: Working with Members, Board and Staff**

Few associations or support organizations have staff dedicated to developing or sustaining a communications program. Of the 15 organizations represented at the Mexico meeting, nine (60%) had no staff working exclusively on communications, either internal or external; only three organizations had one person assigned full time to communications. While all associations wanted to improve their communications strategies and develop better programs, most did not have the resources to hire a staff person who would work exclusively in this area. As a result, much of their communications work was ad hoc, uncoordinated and unfocused.

#### Communication Tools for Internal Audiences

Associations used various communication tools to reach their three primary internal audiences. The table below lists those tools from most frequently to least frequently used.

#### **Tools Used for Information Dissemination to Members, Board and Staff**

<b>Medium</b>	<b>Members</b>	<b>Board</b>	<b>Staff</b>
Sample/Templates:			
Letters	1	0	0
Admin Tools	15	0	15
E-mail	14	14	14
Member Directory	14	2	0
Workshops/Seminars	13	6	6
Brochure	10	0	0
Publications/Books	9+1	0	0
Meetings	9	8	2
Newsletter:			
Electronic	9	2	3
Print	8	1	0
Website:			
Member	7		
Public	10	1	

Speeches - Templates	7	2	1
Fact Sheets	6	2	1
Fax	5	0	2
Newspaper Articles	5	7	3
Telephone: Direct Conference Calls	5	7 2	3 0
Magazine	4	0	0
Membership Packages	4	3	4
Announcement Board - Notice Board	3		3
Radio/Commercial TV	1	1	0
Video Teleconferencing/Cell Phones	1		0
CDs	1	1	0
Annual Report		3	
Bulletin/Flyer			

#### Types of Messages Produced for Internal Audiences

- Logistical Info
- Financial (Spending by the Sector; Donations to the Sector)
- Legal Updates
- General News on the Sector
- Members' News
- Sectoral Issues
- Issue Advocacy
- Questions/Answers
- Information on Philanthropy
- Lists - Publications
- Feedback
- Program Information
- Meeting Meetings
- Political Position Papers
- How Tos for Grantmakers
- Ethics/Codes/Standards
- Best Practices

#### How to Identify the Needs of Different Target Audiences

1. Conduct evaluations and needs assessments.
2. Use surveys.
  - To request information on the type of information or services a particular group needs
  - To evaluate existing services
  - To determine if the association is over-serving or under-serving its members
3. Collect stories and anecdotes on how the organization has assisted (or hindered) other organizations in their work.

4. Hold monthly meetings.
5. Personal contact
  - *Examples from Practice: Private Foundations Canada (PFC) has a policy of meeting face-to-face with all new members within three months of their joining PFC.*
6. Create a database to track members' requests for information and assistance.
7. Present a members' report at the organization's annual meeting.
8. Incorporate this goal into the organization's strategic planning process and plan.

### Best Practices in Internal Communications

- Communicate regularly on a schedule members and others can rely upon (for example, set expectations for weekly electronic newsletter, for updating website, etc.) and meet them.
- Create opportunities for anonymous communication (through surveys, votes). This results in increased and more authentic feedback on the association's work and services.
- Use the website to facilitate connections and dialogue between grantmakers and grantseekers.
  - *Examples from Practice: The Council on Foundations (COF) is creating a forum for questions and discussions between grantmakers and grantseekers on its website.*
- Use outsourcing and the Internet in innovative ways.
  - *Examples from Practice: Private Foundations Canada (PFC) uses a daily service to scan electronic media to identify articles about various topics (using keywords such as philanthropy) and the names of each of its members. This service costs \$100/month and often allows PFC to surprise its members by knowing details of the member's local activities.*
- Website of the week
  - *Examples from Practice: Each week, Private Foundations Canada (PFC) highlights a website from the list of links on its website.*
- Communicate short, direct, and targeted information (KISS = Keep It Short and Simple).
- Create systems in which non-technical people are able to publish to the website (content management system).
- Create a system for oversight of content on the associations' website (through a senior editor or creating distributive systems which include multiple editors and one administrator).
- Offer media training for staff so they can provide basic responses as necessary to members.
  - *Examples from Practice: Community Foundations of Canada, The Benton Foundation, and CEMEFI all use the technique of creating template speeches for their staff or members.*

### Challenges to Developing a Successful Internal Communications Program

- Survey fatigue
- Lack of staffing (especially communications staff)
- Language and language Skills
- Feedback
- Lack of promotional tools for members
- Convincing Board members of the need for communication program
- Getting people to read information provided either electronically or in print
- Adapting the "Message"
- Adapting the language (Terminology)
- Information overload
- Diverse needs of different target groups
- High expectations of our audiences

- Inadequate staff knowledge
- Meeting deadlines/expectations
- Implementation of appropriate technology

### Establishing Communication Policies

It is not always easy to develop appropriate and necessary communications policies given the diverse interests and audiences of a grantmaker association or support organization. Important questions to ask when developing policies about internal communications include:

- Who is responsible for developing communications policies overall?
- Who develops the organization's messages?
- Who selects the appropriate communication channel?
- Does a system of authorization exist?
- Is there a need for an editorial committee on staff or on the Board?
- Is the communication policy of the organization consistent with its strategic plan?
- Is there a quality control process in place?
- Are regular reports/feedback on the impacts of the organization's communication work produced?
- Does any system exist for controlling or vetting the messages that are sent out?
- Is it clear who is the official voice of the organization and on which subject(s) other staff may make statements?
- Is the system structured in such a way so as to avoid bottlenecks (where the completion of important and often time-sensitive tasks is slowed down due to over-reliance on one person)?
  - *Examples from Practice: At CEMEFI, the Director of Communications develops or modifies messages and chooses media that will be used.*
  - *Examples from Practice: The communication strategy of the Centro Colombiano de Responsabilidad Empresarial (CCRE) is reviewed annually by its board and, in the interim, the organization's Editorial Committee reviews messages.*

### **Internal Communications - Top 9 Lessons Learned**

- 1. Regularity and frequency of communication is key.**
- 2. Objectives should be SMART (Specific, Measurable, Attainable, Results-Oriented, Time-Limited).**
- 3. Feedback (anonymous) is important.**
- 4. First ask, then listen.**
- 5. Encourage media training for spokesperson and staff.**
- 6. Have written communication policies.**
- 7. Create a communication plan consistent with the mission and goals of the organization.**
- 8. Keep staff informed.**
- 9. Adapt language to different audiences.**

**External Communications Strategies: Working with NGOs, Government, Academia, the General Public, Media and Business**

## External Communication Strategy: Working with NGOs

Working with a wide variety of external audiences requires creativity, flexibility and attentiveness to the special needs and interests of each of these audiences. Nearly all of the grantmaker associations and support organizations represented at the Mexico meeting interacted to a greater or lesser degree with each of the external audiences identified above. The following pages summarize ways that associations have determined what type of information is needed or wanted by a particular audience, what information they make available, the types of messages they develop, the communication channels they use and the "best practices" they have discovered along the way.

Determine needs for communication & information	<ul style="list-style-type: none"> <li>• Relate mission to activity</li> <li>• Relate NGOs with promoting volunteer</li> </ul>
Gather & use members' data	<ul style="list-style-type: none"> <li>• Database information on members</li> <li>• Surveys</li> <li>• Tax returns</li> </ul>
Types of messages	<ul style="list-style-type: none"> <li>• Research</li> <li>• Share what the association and its members have learned through their work; this is a good role for an association</li> </ul>
Channels for communication	<ul style="list-style-type: none"> <li>• Annual reports</li> <li>• Bulletin</li> <li>• Newsletters</li> <li>• Website</li> <li>• E-mail</li> <li>• Forums</li> <li>• Networks</li> <li>• Face-to-Face Meetings</li> </ul>
Best practices	<ul style="list-style-type: none"> <li>• Build relationships with journalism students through internships at NGOs</li> <li>• Offer Journalism awards for teachers and students</li> <li>• Involve research fellows in association's work (on research projects)</li> </ul>
Challenges	<ul style="list-style-type: none"> <li>• Avoid information brokerage (though some associations provide information to NGOs on grantmakers as a source of revenue).</li> </ul>

## External Communications Strategies: Interacting with Government

Determine needs for communication & information	<ul style="list-style-type: none"> <li>• Take advantage of our understanding the sector</li> <li>• Building trust is important</li> <li>• Maintain a healthy suspicion of government</li> </ul>
Gather & use members' data	<ul style="list-style-type: none"> <li>• Annual reports</li> <li>• Annual tax returns</li> </ul>

	<ul style="list-style-type: none"> <li>• Research</li> <li>• Relationship building</li> <li>• Consulting</li> </ul>
Types of messages	<ul style="list-style-type: none"> <li>• Local stories</li> <li>• Research and facts</li> <li>• Information from members</li> </ul>
Channels for communication	<ul style="list-style-type: none"> <li>• Research papers <ul style="list-style-type: none"> <li>○ Association of Foundations - Philippines uses tri-sectoral (business, government, NGOs) conference</li> <li>○ Association of German Foundations used traveling exhibit on foundations in specific regions of Germany</li> </ul> </li> </ul>
Best practices	<ul style="list-style-type: none"> <li>• Use targeted information, such a statistics for a certain district, when meeting with the political representative from that district. (Link the politician's constituency to the association's efforts.)</li> <li>• Represent interests of every member.</li> <li>• Change environment by breaking down preconceptions.</li> </ul>

#### External Communications Strategies: Interacting with Academia

Determine needs for communication & information	<ul style="list-style-type: none"> <li>• Research</li> </ul>
Gather & use members' data	<ul style="list-style-type: none"> <li>• Survey data on member and the sector</li> <li>• Database information on members</li> </ul>
Channels for communication	<ul style="list-style-type: none"> <li>• Meetings</li> <li>• Networking</li> <li>• Research collaboration</li> </ul>
Best practices	<ul style="list-style-type: none"> <li>• Involve academia in research on the sector or offer to cooperate on research.</li> <li>• Offer awards for professors and teachers.</li> <li>• Offer prizes for journalism students.</li> <li>• Support Research fellows.</li> <li>• Offer postgraduate seminars on themes related to philanthropy.</li> <li>• Work closely with universities to incorporate philanthropic principles, examples, and themes into the curriculum.</li> <li>• Assist in the development of mid-career programs at universities.</li> <li>• Build relationships with graduate students and graduate schools.</li> <li>• Collaborate on research of the sector. <ul style="list-style-type: none"> <li>○ Examples from Practice: GIFE (Brazil) offers financial support to MBA students doing research on</li> </ul> </li> </ul>

	philanthropy and civil society. The Benton Foundation operates a Benton Fellow Program.
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External Communications Strategies: Interacting with the Public

Determine needs for communication & information	<ul style="list-style-type: none"> <li>• Identify and reduce misconceptions about the nonprofit sector (through surveys, research)</li> <li>• Relate individual acts to a broader philanthropic movement</li> </ul>
Gather & use members' data	<ul style="list-style-type: none"> <li>• Survey data on members and the sector</li> <li>• Database information on members</li> </ul>
Types of messages	<ul style="list-style-type: none"> <li>• Clarify the work and roles of the 3 sectors and demonstrate how the nonprofit sector fits into the whole</li> </ul>
Channels for communication	<ul style="list-style-type: none"> <li>• Magazine</li> <li>• Websites</li> <li>• TV</li> <li>• Radio</li> <li>• Newspapers <ul style="list-style-type: none"> <li>◦ <i>Examples from Practice: The Centro Colombiano de Responsabilidad Empresarial (CCRE) uses regular newspaper supplements to communicate with the public.</i></li> </ul> </li> <li>• Newsletters</li> <li>• Tri-sectoral (business, government, NGOs) conferences and meetings <ul style="list-style-type: none"> <li>◦ <i>Examples from Practice: The Association of Foundations - Philippines organizes an annual tri-sectoral conference.</i></li> </ul> </li> </ul>
Best practices	<ul style="list-style-type: none"> <li>• Make use of celebrities.</li> <li>• Give prizes to effective grantmakers.</li> <li>• Work effectively and professionally with the media .</li> <li>• Place responses to Frequently Asked Questions (FAQ) on the website.</li> <li>• Prepare materials and information that supplement the work of the media.</li> </ul>
Challenges	<ul style="list-style-type: none"> <li>• Funding</li> <li>• Public resistance and/or lack of interest</li> <li>• The work of the philanthropic sector is difficult to describe</li> <li>• Tendency to over-communicate</li> <li>• Avoid bringing our own internal divisions into the public realm (this only hinders our goals)</li> </ul>

External Communications Strategies: Interacting with the Media

Determine needs for communication & information	<ul style="list-style-type: none"> <li>• Make the media's job easier</li> </ul>
Gather & use members' data	<ul style="list-style-type: none"> <li>• Survey data on members and sector</li> <li>• Database information on members</li> <li>• Annual Reports and newsletters</li> <li>• Website</li> <li>• Meetings and peer briefings</li> <li>• Local stories</li> <li>• Growth of philanthropy</li> <li>• Frequently Asked Questions (FAQs)</li> </ul>
Types of messages	<ul style="list-style-type: none"> <li>• Local stories</li> <li>• Growth of philanthropy</li> <li>• Frequently Asked Questions (FAQs)</li> </ul>
Channels for communication	<ul style="list-style-type: none"> <li>• Research</li> <li>• Meetings and press briefings</li> <li>• Website</li> <li>• Annual reports &amp; newsletters</li> </ul>
Best practices	<ul style="list-style-type: none"> <li>• Appeal to the media through professionalism.</li> <li>• Position your organization as a liaison with the media and main resource in the field.</li> <li>• Initiate dialogue and invite journalists to take part in activities BEFORE you need them.</li> <li>• Organize discussion forums that bring members and/or NGOs together with journalists to discuss issues of common interest.</li> <li>• Design press kits for the association itself but special press kits can also be prepared for members to assist them in working with the media. In some cases these kits can be prepared so that all a member needs to do is add its own material and it is ready to be distributed. Press kits can also be prepared for special events of various types.</li> <li>• Provide the media with facts and figures.</li> <li>• Prepare materials to supplement the work of the media. Since dramatic events get a great deal of media attention, it is worthwhile to consider ways of piggybacking on such events, for example by offering more detailed information to the media and general public through the Internet or other communication tools.</li> <li>• Press releases</li> <li>• Place responses to frequently asked questions on the website.</li> <li>• Make use of celebrities.</li> <li>• Make use of awards and prizes.</li> <li>• Give feedback to the media when they cover things incorrectly.</li> <li>• This process can actually help build relationships.</li> <li>• Write letters to the editor. <ul style="list-style-type: none"> <li>◦ <i>Examples from Practice: The Association of German</i></li> </ul> </li> </ul>

	<i>Foundations offers a prize to foundations that have done exceptional work. This captures the attention of the media.</i>
Challenges	<ul style="list-style-type: none"> <li>• Avoiding information brokerage</li> </ul>

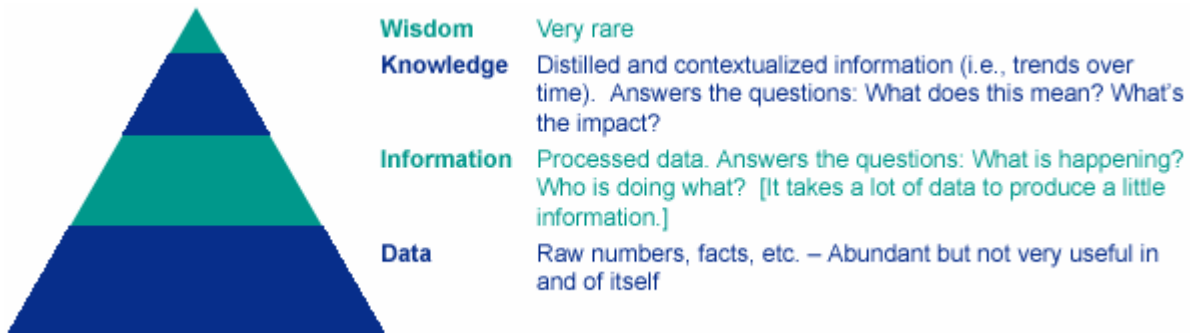
External Communications Strategies: Interacting with Business

Determine needs for communication & information	<ul style="list-style-type: none"> <li>• Partnership between business and philanthropy</li> <li>• Research</li> <li>• Add value to corporations through social investments</li> </ul>
Gather & use members' data	<ul style="list-style-type: none"> <li>• Annual reports</li> <li>• Annual returns</li> <li>• Research</li> <li>• Relationship-building</li> <li>• Consulting</li> </ul>
Types of messages	<ul style="list-style-type: none"> <li>• Networking</li> </ul>
Channels for communication	<ul style="list-style-type: none"> <li>• Good for business</li> </ul>
Best practices	<ul style="list-style-type: none"> <li>• Develop kits to show benefits of corporate giving as well as "How to" kits that make it easy for businesses to begin giving.</li> <li>• Connect business giving programs to local NGOs working in the same field.</li> <li>• Prepare facts and figures that show the value of giving for businesses.</li> <li>• Help corporations measure the benefits of their giving.</li> <li>• Establish giving clubs.</li> <li>• Cultivate a norm of good giving. <ul style="list-style-type: none"> <li>○ <i>Examples from Practice: CEMEFI organizes an award to a corporation that has established a beneficial partnership with a foundation.</i></li> </ul> </li> </ul>
Challenges	<ul style="list-style-type: none"> <li>• Demonstrate to business that investments in the society are a valuable and important part of their business.</li> <li>• Translate the often confusing language of nonprofits for business.</li> </ul>

**External Communications - Top 10 Lessons Learned**

- 1. Teach philanthropy; educate common constituencies**
- 2. Share local stories of successful grantmaking**
- 3. Identify the appropriate role for grantmakers and grantseekers**
- 4. Conduct Market research on target audiences**

5. **Provide facts & figures targeted to local legislative constituencies**
6. **Nurture a positive relationship with government**
7. **Foster relationships with graduate schools/journalists/youth**
8. **Give awards for good communication products/programs**
9. **Provide media training for staff and members; prepare templates of media and public relations tools to assist staff and members**
10. **Position grantmaker associations as the "fountain" of knowledge**



### **Strategic Issues Related to Information Technology (IT)**

The effective use of information and of information technology (IT) are critical to the successful promotion of philanthropy and the institutional strengthening of grantmaker associations and support organizations. Numerous surveys have identified knowledge management (the ability to gather, use and disseminate information effectively) as crucial to effective communication programs. A recent paper by Lucy Bernholtz discusses how foundations in the future will use information as a primary asset just as much as they use their money. [www.blueprintrd.com/text/futurefound.pdf](http://www.blueprintrd.com/text/futurefound.pdf).

Knowledge management is a growing field and a great deal of literature on the subject can be found on the Internet and through other sources. It is based on an understanding that humans work with data, information, and knowledge. The relationship between these elements can be illustrated graphically in the following manner.

It is also important to recognize that there are two kinds of knowledge, tacit and explicit. Tacit knowledge is the more important of the two. About 80% of the knowledge we have is tacit, while only 20% is explicit (i.e., can be captured in a database or on paper). Nonprofit organizations typically make use of, and rely upon, tacit knowledge in their work. This supports the need for networks focused on knowledge-sharing to emphasize face-to-face communication and storytelling. It also suggests that communication abilities and activities are disproportionately important to the nonprofit sector and to the work of grantmaker associations.

Learning to use and adapt various forms of information technology can help with knowledge management and improve the impact of an association's communication, both internal and external.

A number of challenges remain, however, in terms of identifying appropriate information technology tools and applying them in a way that strengthens an association's work with its staff members, board and a variety of public, or external, audiences. There are four key areas in which most associations face a number of stubborn challenges - senior management and Board support, staffing, funding, and integrating electronic communications/information technology into a communications program.

## 1. Senior Management/Board Support

*Challenge:* Board members or senior management are often unfamiliar with and/or do not use the technology themselves.

*Response:*

- Have a peer gradually introduce board members and senior management staff to new technology. Using peers may provide a safer learning environment can encourage them to want to learn. Once they have learned how to use a particular technology, give them the time and the opportunity to explore it on their own.
- Ensure that staff routinely use the same technology in their correspondence with the board and that staff increasingly expect use of the same technology by Board members
- Recognize that the process of changing people's approaches to technology may take years.

*Challenge:* Board members or senior staff are, in principle, enthusiastic about the web, but do not use it themselves.

*Response:*

- If your organization produces an electronic newsletter, include links to the organization's website. This is also a good way of reducing the number of attachments you send to the Board or to members. In all cases, it is critically important for the Executive Director to understand technology and its potential uses by associations of grantmakers.

*Challenge:* Not all board members are connected to the Internet.

*Response:*

- Find a way to obtain E-mail for all board members or adjust the criteria for board membership to include having a personal E-mail address. Explain to the board that, for the sake of efficiency, the primary method of information dissemination is E-mail and that over a certain period of time it will become the sole method of communication.
- Identify a "champion" on the board who understands technology and the cost implications of different choices. If no such person exists, recruit a new board member with these skills.
- Relate IT applications to the communication goals of the organization
- Consider using CD-ROM technology for board materials. For example, prepare a two-page summary of discussion points and agenda items and send board members a CD-ROM containing all of the supporting documentation. CD-ROM technology and CD burners are becoming increasingly inexpensive.
- Organize training in IT for the board or senior staff. Incorporate training on electronic communications in orientation for new board members.

## 2. Staffing

*Challenge:* It is often very difficult for a small organization to find (and retain) staff with the right combination of skills to handle all types of communication and IT needs.

- Response:*
- Think about the complementary skills of staff members and use staff as a unit or team rather than thinking in terms of single positions that need to be (but typically cannot be) filled. If an organization does not have access to an expert in the given area, use peer-to-peer training by the staff.
  - Pay attention to striking a good balance between technical skills and communication/writing skills in your staff. Identify new staff members with good communications skills who could then help some other staff members who need training.
  - Consider carefully what capabilities an organization wants or needs to have onsite and what can be outsourced to others.
  - Consider the possibility of establishing partnerships with other organizations in achieving technology goals. The US-based Regional Associations of Grantmakers (RAGS) do this quite effectively.

*Challenge:* Technology staff often do not understand the substance/content of the association's work.

*Response:* Educate technology staff about the programmatic work of the organization.

### **3. Funding**

IT is often quite expensive and few nonprofit organizations have large budgets for these purposes. It is therefore crucial to gradually build board support for these activities.

*Challenge:* Organizational budgets do not cover website development or redesign.

- Response:*
- Establish a sponsors page on the organization's website and invite current or new sponsors to contribute specific funds toward the establishment of your organization's website. If you choose this approach, make sure that the contractual arrangements and relationship with the sponsor (especially with regard to their understanding of the content of the website) are very clear to both partners from the beginning and/or develop clear policies regarding sponsorships.
  - Look for income-generating components that might be incorporated into the organization's website, such as online advertisements for employment (Minnesota Council on Foundations).
  - Look for government programs that provide funding of IT activities. In many countries, this type of funding is increasingly available.

*Challenge:* Creating an IT budget that permits necessary maintenance, upgrading, and other costs over time.

- Response:*
- When planning your organization's IT budget recognize that the first-time cost of equipment is only 30-50% of the cost of the equipment, over its lifetime. The rest is labor, repairs, etc. Base all budget decisions on true costs, including the recurring costs of staff training, board training, and repairs.
  - Collect information about how much it costs for our organizations to be ineffective.
  - Add a technology line item to the organization's annual budget.
  - Share a host for your website.

- Buy the URL of the website early on and purchase all versions (.org, .com, and .net).

#### **4. Integrating E-Communication into an Organization's Overall Communications Program**

*Challenge:* Compared to electronic publishing, costs of regular publishing are high, yet members are not accustomed to using electronic resources.

*Response:*

- Gradually phase out some print materials in order to prepare members for using electronic versions of texts.
- Print and distribute in hard copy a good excerpt of a text or resource and then direct people to the web for the full-length version.

*Challenge:* Communications staff and technology staff do not work together effectively. For example, communications staff may be under one supervisor and technology staff under another.

*Response:*

- Encourage cooperation between the communications program and the technical staff and, if possible, integrate these individuals under one supervisor.
- Provide basic IT training to communications staff so they can ask the right questions of technical staff. Work to reverse the idea that experts can only understand technology.
- Recognize that technology staff and programmatic staff think differently about problems. Programmatic staff tend to be more concerned with the final outcomes as a whole, while technical staff tend to want to rapidly find a solution to the specific problem of the moment.
- Educate technology staff about the programmatic work of the organization.
- Involve a technology person at the beginning of every planning process to ensure that the organization is making good technology choices.

#### **Applications of Information Technology - A Discussion of Tools and Techniques**

Associations of grantmakers tend to use a wide variety of tools and have differing degrees of comfort and expertise with each of them. Considerable use of information technology is based on a trial-and-error approach. Participants in the Mexico peer meeting assessed the tools they use and explored the value of investing in multipurpose tools, training for staff, board and members of the association, and discussed how to make the most efficient use of technology.

##### Tools and Techniques Used by Associations of Grantmakers

1. E-mail (including broadcast E-mail)
2. E-mail Newsletters
3. Listservs/E-Groups
4. Websites
5. Teleconferences/Webconferences
6. CD-ROMs

## 7. Intranets/Extranets

### 1. E-mail

*Challenge:* How to encourage people to open and read E-mails when they receive so many.

*Response:*

- Use the title line creatively and accurately to encourage people to open your E-mail.
- Mark mail as urgent (red flag function in Outlook) judiciously so that people do not begin to ignore these messages.

#### Sending E-mail Attachments

Sending a Microsoft Word attachment is useful when you are sending a document on which you wish to receive comments or which you expect people will download and modify. In contrast, the formatting of PDF files is frozen and thus the recipient cannot make any changes to the document. PDF files also require that the user download Adobe Acrobat Reader before the document can be opened. Adobe Acrobat Reader is free and can be downloaded from the Internet. However, in order to create PDF files, one must purchase the Adobe Acrobat software or utilize an application that saves an optional PDF format or prints to PDF.

Attachments are places where viruses live. Always remember to scan all attachments, especially attachments with the ending .exe. Update antiviral software as often as possible. Experts recommend updating the virus guard every week.

#### Linking E-mail and the Internet

Prepare short E-mails containing, for example, the title of a new publication and a brief description. Include a link to the website and send it. Recipients of the E-mail will be able to click on the link and go immediately to a longer description or copy of the publication online, using their Internet browser.

*Useful Resources:* Macromedia Dreamweaver software permits one to prepare text in .html (for use on the Internet) and then add it to an E-mail. Microsoft products such as Outlook and Word can also be used to create HTML-based E-mail.

### 2. E-mail Newsletters

*Challenge:*

- A plain-text E-mail newsletter looks too much like regular E-mails and cannot contain more eye-catching graphics.
- The distribution list of an E-mail newsletter is ever-increasing.
- E-mail and E-mail newsletters are good for one-way communication, but not for the exchange of information.
- Resolving the issue of who has access to the list and who does not is difficult.
- One cannot always be sure how the end-user receives the E-newsletter as its appearance is influenced by the compatibility of the software used by the sender and user and by the way the user has personalized how he/she views

E-mail.

- Response:*
- When initiating an E-mail newsletter, ask people to subscribe rather than automatically signing them up. In addition to the ethical issues, the fact that someone has requested the E-newsletter themselves often makes them value it more.
  - Keep the E-newsletter simple (using simple text) to ensure that everyone can open it.
  - Do not send overly large attachments (often those containing graphics or scanned photographs are very large) as these can significantly slow down or even shut down the E-mail boxes of recipients.
  - Examples from Practice: GIFE (Brazil) produces two newsletters, one for members and one for the public, and has more than 1,000 subscribers. These newsletters are produced in Word and sent as attachments to E-mail messages. In a recent survey, they learned that people prefer short newsletters, no longer than two pages. Within one year, they hope to make the newsletters available on their website.

### 3. Listserv/E-Groups

Listservs are very easy to use, but require a moderator/administrator to approve the registration of new members, encourage exchange, edit or delete overly long or inappropriate messages or messages from non-members, and add/delete people from the list.

Listserv messages are easily archived and new technology permits easy archiving of these documents on the Internet.

### 4. Websites

Websites can contain plain HTML text or complex databases. Websites based on databases can generate outputs in multiple formats and are more efficient over the long term. They are, however, much more expensive to create.

There are various types of websites. Though websites can often contain features of various types, the categories are distinguished by their primary goals and features:

1. **Brochure Site:** static, small, provides information about an organization or activity, amount of traffic to the site is not important
2. **News-Oriented Site:** describes what is happening in the given field, announces events and activities of the organization and its partners, draws its content from many different sources updated regularly, requires an editor, more journalistic in style, usually requires the use of a database, evaluation of success is based on the amount of news and traffic to (and through) the site, this type of site typically has the highest volume of visits or hits
3. **Community Site:** permits online collaboration and builds online communities, based on trust and reciprocity, serves as a repository of content, requires an editor who can help build relationships between members of the community, evaluation of success is based on the amount of activity on the site.

Carefully consider the purpose of the site before you begin development. Answer the question: Why do you need a website?

Taxonomy is important for indexing the site on search engines and portals.

#### Tips when Undertaking Website Development

- Think about the website as a functioning whole.
- Prepare a detailed request for proposals for the technical assistance the organization requires.
- Do not be overly concerned about large costs upfront. Initial consultations are an important part of the process of translating your vision into technology. Changes to the plans later in the development process will increase costs dramatically and slow down the process.
- Use website developers who understand NGO work and the financial constraints in which NGOs work.
- Working with vendors is not always a simple process. It is important to:
  - Look at the previous sites developed by the firm.
  - Remember that it is a negotiation process. They want to give you the least for the most money and you want the most for free. Do not underestimate the time needed to negotiate the deal.
  - Establish a strong relationship with the vendor in which you describe the organization, the problems you wish to address using the website, and the timeframe in which the effort must be completed. Ensure that they are committed to working with you.
  - Consider whether the vendor is offering a fixed-time or fixed-requirement approach. The fixed-requirement approach is typically more advantageous for the organization.
  - Examples from Practice: Centro Colombiano de Responsabilidad Empresarial (CCRE) described a project whereby NGOs and foundations in Colombia created a website portal to help educate them about creating websites.

*Useful Resources: [www.helping.org/nonprofit](http://www.helping.org/nonprofit)*

#### Website as a Fundraising Tool

There are two kinds of online fundraising - one that is aimed at helping institutional funders better understand what the organization does and one that is aimed at raising funds from individual donors.

The Red Cross in the United States raises 3% of its funds through online donations.

*Useful Resources: Credit card processing on the web is expensive, but some free services exist in this field, such as those offered by [www.helping.org](http://www.helping.org).*

#### Selling Publications on the Web

It is important to index publications correctly and on a regular basis so that web users can locate them even if they do not know your website address.

Associations are finding that offering a downloadable PDF version and a book does not necessarily hurt the sale of the book. Many still prefer to have a hard copy for show, graphics, or easier reading. Others have successfully used the teaser approach whereby a longer abstract or sample chapter is available on the website, while the full publication is only offered in published format.

With the use of special software, a website can also be used to have people register for events and conferences.

## 5. Teleconferences/Webconferences

### Common Challenges:

- Visual contact is always better in discussions. Sometimes not being able to see nonverbal cues/behavior leads to misunderstandings.
- Teleconferences can be exhausting.

### Tips for Successful Teleconferences:

- In teleconferences, the preparation of the agenda is crucial to success.
- Teleconferences are best used when a concrete decision needs to be reached.
- Always participate in a teleconference in a room where you cannot be disturbed.
- Teleconferences are useful when participants are working in different time zones, but time zones must be taken into account when planning the teleconference.

### Video- and Internet-based Conferencing:

The advantage of Internet-based conferencing combined with audio is that the group can discuss and review/edit documents in real time.

*Examples from Practice: GIFE (Brazil) has experience using videoconferencing, an approach whereby groups gather and discuss issues and, at the same time, can see one another via satellite images. This approach necessitates the existence of video conferencing facilities that people can access easily.*

*Useful Resources: [www.excite.com](http://www.excite.com) offers a free voice chat feature that is very good. Chat rooms are limited to 10 people.*

## 6. CD-ROMs

### Uses

- CD-ROMs can store many documents in a small and easy-to-use tool. For example, some organizations are beginning to prepare their Annual Reports in CD-ROM format.
  - *Examples from Practice: CEMEFI is preparing to put its Directory of Organizations on CD-ROM.*
- CD-ROMs can be useful communication tools in places where Internet connections are unreliable because they do not require use of the Internet.
- CD-ROMs are also excellent for archiving materials.

It is now also quite simple for an organization to prepare its own CD-ROMs. All that is required is an inexpensive CD writer/burner.

*Useful Resources: [www.helping.org/nonprofit](http://www.helping.org/nonprofit)*