Transcript
3.9.2020
Technology

Co-Hosts: Brittny Wilson (B) and Nia Wassink (N)

B: I'm Brittny Wilson.
N: And I'm Nia Wassink.
Both: And this is, The Nonprofit Reframe
B: Together, Nia and I have over thirty years of nonprofit experience. We've worked the program side, the business side, and everything in between.
N: We are reframing the nonprofit experience by challenging the status quo because we know that nonprofits and their staff are undervalued, under-resourced and unrelenting.

B: Welcome back everyone!
N: Happy Monday folks!
B: Glad to be here. How was your weekend?
N: It was lovely. I suddenly have no idea what I did, but this morning was great, because I took the morning off to just so I could get my household in order and it feels so much better.
B: So we are recording this earlier than when it's going to air.
N: That is true. You're not listening to us live folks, we're so sorry to tell you.
B: And right now we have probably what a good three inches of snow on the ground?
N: At least. I think four to six.
B: So I am going to, my future self, I just hope that when this airs, we are in spring time.
N: That's some high hopes!
B: I know.
N: But we we can wish for it.
B: I know well it's so funny because out here in Colorado we still have at least two if not three more months of snow.
N: Yes for sure. Well and we have these teaser weekends, like a few weeks ago where it was like in the 70s and amazing.
B: It was so beautiful.
N: Yeah.
B: It's always this time of year, always every year, that I asked my husband why the hell we live in Colorado.
N: It's better than Ohio!
B: Hey now!
N: I will also say it's better than Michigan!
B: Okay.
N: I left there for a reason.
B: Okay, okay. Yes. Let's not make this just an Ohio thing and it's true I am looking out the window and the sun is shining.

N: It is.

B: And thirty two degrees here does not feel like thirty two degrees in the Midwest.

N: Oh gosh no, no. Because it's always sunny!

B: Always sunny!

N: Yeah.

B: But hopefully we are nearing that spring weather.

N: Yes. I'm looking at our schedule of when this is going to air. I just want to congratulate you on a fantastic gala happened this weekend!

B: Yay! Thank you so much! We had such a great event. I hope we don't have to delete this part. And I'm knocking on wood I don't want to jinx anything either. Alright, so what we're talking about today?

N: (sings) Let's talk about tech baby, let's talk about you and me, let's talk about all the shitty, software that nonprofits use.

B: Oh my god!

N: That was awful!

B: That was amazing, that was that I did not see it coming. I loved it. I wish everybody could have seen it because there was dancing and hand movements that went along with it. One day, we will videotape.

N: Oh gosh, that would be awful.

B: When we get big enough that we have a VIP society…

N: Is that like our legacy giving society?

B: You have to put it in the universe or it doesn't happen, okay?

N: Okay.

B: So we're going to have this VIP fan group and they're going to get access to the videos of our taping, so they can see stuff like what just happened. Because that was priceless and worth $29.95 a month. I don't know.

N: Wow, that more than the Murderino club.

B: I don't know, I don't know! Alright tech, tech, tech, tech, tech

N: So let's just level set here and recognize that 90% of nonprofits have absolutely shitty tech infrastructure.

B: At least ten years old, whatever they're using.

N: Oh gosh, and it hinders the sector so much. It really gets under my skin that we are not investing in technology the way we should. The way that would allow us to really grow our programs and our impact and all the wonderful things that we should be doing.

B: In my opinion, it is one of the, if not the main reason, that makes our sector look unprofessional or not sophisticated.

N: Oh absolutely, yeah. I was actually working with a client doing year end statements and the number of angry emails we got back because their data was so awful. I mean I couldn't even count and so now I'm having to do all this clean up and be like, oh yeah I'm so sorry we didn't enter that donation right and gosh, sorry our system glitched here.

B: That's why I hate doing those statements.

N: They're awful.

B: I'd almost rather just not do them. I'd rather get the five people who are ticked off because they need a statement, than the fifty people ticked off because we have their address wrong or something about their information is inaccurate.

N: well and that's like the convergence of having bad technology and then bad data.

B: Right, you're only as good as your data.

N: And you're only as smart as your data.

B: Absolutely.

N: So over and over and over again, I'm working with clients and we're talking about how we can use our technology better and smarter, and how we can use it to better segment and better acknowledge our donors and better understand our programs and effectiveness. And then we actually get to the data and it's useless, it's so awful and…

B: Because twenty different people have been inputting data over the last twenty years.

N: And there's no data management system in place.

B: Or no consistency.

N: Yes.

B: Hey, this is best practices, every time you create a new record you have to do it this way.

N: Right

B: You know, make sure especially people who are in the household that have two different last names.

N: Yes.

B: And so how is that entered into your database, so when you pull it, it has you know Jane Smith with John…

N: Jones?

B: No, all I could think of was John Oliver. With John Oliver.

N: yeah, yeah, yeah. How about the people who get angry because you didn't know they got divorced?

B: Or how about the people who have passed, that are deceased.

N: Oh that one always makes me really sad.

B: I know it breaks my heart!

N: Yeah.

B: It breaks my heart. And that's why when we're talking about something that is based on relationships.

N: Yeah.

B: And relationship building, which is fundraising. You have to know that information.

N: You really, really do. The number of times that I go into an organization and I ask for their donor data and I get like a spreadsheet out of Quickbooks.

B: Yeah

N: Oh, it drives me crazy. I mean you clearly are not doing any kind of donor cultivation and stewardship with this data because it's accounting data.

B: I think you're actually waiting for my donor data right now.

N: I kind of am.

B: Which I don't have! This is, look here's a real world situation right now.

N: Tell me about it.

B: Because I did one event using Crowdrise, and I did another event using a different platform, and so now I have to take that information and I have to upload it to my brand new database, that we just got last year, and I don't know how to do that, so I've got to learn how to do that, upload it. It's just so tiresome.

N: Yes, well it's interesting I often have conversations with clients about their fundraising and what they know from their past fundraising efforts and they will immediately show me the financial results. And I'm like, yeah but I also want to know about your donor behavior, so we want to look at retention rates and upgrade rates, and do you have an event where people are coming in and then never giving again?

B: Yeah

N: Which is going to tell us a lot about that event, and they can't get me that. Like that data does not exist or nobody knows how to pull it, and so they're not making decisions based on their donors behavior, they're basing it purely on the financial results.

B: Well because you're lucky if they even have one person within the organization that actually knows how to use the software.

N: Right.

B: And then, even then they probably only know how to use about 20% of it, of its capability.

N: And it's probably the Board Chair's nephew who got hired on at 23. So they're like, oh you're young, here do all of our tech for us.

B: Yes. Have you ever been assigned to be the default, in house IT person, just based on your age?

N: Well that I mean I'm also a little tech suavy, inside joke for folks who listened to the last one! So yeah, I mean I've got a pretty decent base knowledge of tech and how it works and my parents and grandparents will attest to that because I'm their in house IT person, but that becomes my default and it's really hard when you're also say, like executive director.

B: And like maybe have other things that you're supposed to be doing.

N: Right. I'm like okay, well I was going to go like get a large donation, but sure I would love to reset your password in our email system for you.

B: I have been that person too, it always astounds me. I don't feel like I'm the most tech savvy person, but maybe I say try turning it off and turning it back on and then that works and then Walla, I'm the new IT person!

N: That's so funny actually, this weekend I was doing a board retreat and the site that they had the retreat at had one of those really fancy touch screen, like big screens. I know it was so nice, like definite upgrade for most of my nonprofit retreat locations, but I kept accidentally hitting it with my finger.

B: Like a smartboard? Is that what those are called?

N: Yeah, I think so.

B: Now they have them in schools.

N: Yeah, so it's got my PowerPoint on it and I accidentally kept touching the screen, which would then like close it out. And so their tech person comes running up and can't figure it out and I was like what if I just like unplugged the HDMI and plugged it back in and it worked!

B: See, step one there you go. That's all the knowledge you need to know to be an IT person within the nonprofit world.

N: Oh yeah. I will never forget one time when we got a donation of used computers from a law firm and like they had called us in advance to say that they had all these computers that they were like decommissioning and that you know they would wipe them so we have to buy software and all that but we haven't for free. And I was like well like how old are they, and they were like oh there it they're year old, we get new computers every year.

B: What?

N: I almost cried. I couldn't, I couldn't imagine!

B: What?

N: And of course we have this hot pot hodgepodge of like four different kinds of PC's, five Mac computers that had been donated of various generations. To have us all on the same computer that was made in the last decade? What an upgrade!

B: And this goes back to the conversation that we had many, many moons ago about overhead. This is what we're talking about! Let us use the donations to upgrade our technology!

N: Yes.

B: It is going to further the mission. I feel like it just stifles us, it stifles the work.

N: Totally.

B: Nothing integrates.

N: Nothing integrates. Well like you said you are using three different pieces of software for your various types of events and so then it's all manual imports and uploads and it's a mess.

B: Because there probably is something that integrates them all, but…

N: You can afford it.

B: We can't afford it. We don't even have a budget line item for tech.

N: Right

B: Most of the time.

N: Right. Yeah, and definitely not upgrades of tech. It's like maintaining current subscriptions.

B: Yes, exactly yeah.

N: I will say that I think some nonprofits will say that without having done the research. I mean I know you have to talk about this, but you know I'll go in and work with clients and they're like oh gosh we can't afford this and the other. And I'm like well actually there are a number of pieces of software that do you what you're talking about for the same price you're currently paying for this other software, with less functionality. And so we just need to like realize that software goes, not bad, what's the word I'm trying to find? It gets outdated.

B: Yes.

N: And certain companies don't stay up to date with what's happening in nonprofits and in fundraising and so we need to make the shift.

B: Absolutely! Well the position that I'm in right now, one of the first things I did, is took the donor database from, what's it called where it lives on your computer, I like how I don't even know what it's called. To where it's in the cloud, well a cloud based version and I'm thinking, what I can't even access this from home?

N: Yeah.

B: No, let's get with the times.

N: Exactly, and how work happens. Right, like you're not just fundraising in your office.

B: Right! Of course, of course. Well and it then affects all these other aspects such as marketing.

N: Oh yeah.

B: I will never forget, I had sent out this email last year before our gala and a board member called me up and she said, it was just an email with a buy your tickets, Blah, blah, blah and I had sent it to her mom and her mom had already bought a table.

N: Okay.

B: And she said I'm sure you didn't mean to, but you sent this email out. You sent it to my mom, she already bought tickets to the event and I'm thinking, yeah, I don't have that kind of sophistication.

N: Right.

B: Right. I recognize that I should not, if I had that capability to segment, I would have

N: Right, right.

B: I'm just lucky that I got an email out.

N: Right.

B: With emails that work, you know?

N: Yeah

B: And so since then, since we got the new database and stuff like that. We've increased our capabilities but that's the thing that people's default is that we're somehow dumb.

N: I know that a special trigger for you

B: I know it is, I know I own it.

N: Yeah, totally. But it is hard because the technology exists, just most organizations aren't leveraging it.

B: Exactly, yeah exactly. Well it is just the fact that I throughout my career I've never met people as resourceful, as passionate, as intelligent and as talented, as those that I've met in this sector.

N: Yes.

B: And sometimes, I don't know, people's preconceived notions are the opposite.

N: Yeah, I will also say though that within nonprofits, I think because of that like scrappiness, that we also assume that features don't exist when they really do.

B: I agree.

N: Let me tell you, if you are using any kind of donor CRM, there is an import feature. Stop manually importing massive batches of donations.

B: Yes

N: You're going to be making mistakes. You are going to be taking somebody a shit ton of time when you should be importing them.

B: Absolutely, and I can't tell you how many times that I've said there should be a way to do this and somebody says, no, no I don't know how to do that and then once you actually call the company, that's the problem, it just takes time.

N: It takes time

B: And then that, that knowledge is not transferred, you lose that institutional knowledge with turnover.

N: Yeah

B: And so you have one person that finally is getting to understand the software and how to use it and the different abilities it has and then they leave.

N: Yeah.

B: And there's no cross training.

N: Right.

B: I mean how much in all the different, you know this kind of goes under hiring, but still under all the different positions that you've had how many times did you actually have the ability to cross train with the person that was in the position before you.

N: One.

B: Exactly

N: Yeah, yeah. I'll never get this because it, oh gosh, this was so funny. So we adopted some program database, which was amazing, because when I started with this organization everything was hard copy. We had an old access database, which was painful to use and it would store just the basics. And then everything else was hard copy, I mean we went through so much paper right it was astronomical. And so we finally implemented this database to where our volunteers had the ability to like go in and input things and they could also see stuff about what's going on the backend. Our case managers had that same sort of access, and up front it was a lot of training right like we had this volunteer base who'd been with the organization, some for over a decade and we're suddenly upending the work that they were doing. But I will never forget this this one woman she was in her eighties she came to every single training session we offered, she came to every single office hours we offer to learn the database and she was a frigging pro at it.

B: That's amazing.

N: And boy did we highlight the shit out of her.

B: Yeah.

N: Like if she could learn it anybody can, and she was she was so great about it. But because we were one of the first programs in Colorado that adopted this, we had to create those manuals, both for our volunteers and for our staff. And I had a great team of staff who really put some time into doing that and we posted on our website. A year ago, mind you I have not worked in that job for three years, so a year ago I get an email to my new business account asking me if I can help them with the software. And I thought it was like for like a consulting gig. and so I get on a call with this woman and I'm like I would just love to know like how you found out about me. She's like yeah you know you're really hard to track down, I found your user guide and then I had to find you on LinkedIn because your old email didn't work and blah, blah, blah, blah blah. So yeah can you come implement that for us. She found the user guide that we had put together like five years before, and that the worst part is like that was like the gold standard.

B: Right

N: Like that was the only thing that existed out there.

B: Yeah.

N: And luckily I had a great team who could put that together and we did widely share it with any programs who asked. But if you don't have that team, then you're floundering and then you have these inconsistencies and people who don't know how to use the system, and so then they find work around and it just gets all messed up.

B: Absolutely and you brought it such a good point about program database. I mean so many of the different places that I've worked those are different. You have your donor databasem you have your program database...

N: And they shall not meet.

B: Yes, exactly. And so I know this it goes back to when we are talking about grants and you're trying to pull out data from a different database, that the administrative staff does not even have access to...

N: Right.

B: Let alone know how to use it.

N: Right.

B: And then you're relying on them, to have somebody who knows it well enough to be able to pull the information, so even if let's say you've got your donor database dialed in, then you might still have problems with the program database.

N: Yeah.

B: And vice versa.

N: Well I was working with a client and they were talking through their program data and we're working on some evaluation tools for them, and they bring out the spreadsheet and I was like where are you generating this data from? And they're like, oh well we don't trust our database, there are some glitches in it, so we do this manually. And I was like, okay so when their glitches in databases it's probably because of the data entry issue, it's not like adding in random children that you're not serving.

B: Right, exactly.

N: You need to fix the source of the problem, don't just find this work around in a spreadsheet.

B: Yes, exactly. And that happens all too often.

N: Oh my gosh, it's such a mess.

B: So what are some of our takeaways?

N: One tip, when you are out there looking for technology, we do have some great programs available to nonprofits through Techsoup, sometimes directly with the software we can get it either free or significantly discounted.

B: Oh! I want to bring something up, that reminds me, just because you get something discounted, does not mean that it is the program you should use.

N: That was my but!

B: Ahhhh! I just stole it from you!

N: Yes, you need to really vet the software and make sure that it truly meets your needs. It is worth paying more for software that's going to have all the functionality you need, then to go for the cheaper thing that's going to require an extra spreadsheet.

B: I run into that so often when I come into organizations and I'm like why are you using the system, it seems so inefficient and it doesn't meet your needs? Well, we have a special deal with them where we get 75% off.

N: Yeah.

B: It doesn't matter!

N: Or how about the free software, that isn't really free because you have to spend thousands of dollars setting it up and then on-going training because it's so not intuitive and it's a beast to try to manage.

B: To customize it for your own needs.

N: Drives me crazy, company who I will not mention by name. But Hey, if you do want to get mentioned by name in association with this content, come sponsor the nonprofit reframe podcast!

B: Oh! There you go, yes, yes! Because I get hit up by the sales people all the time.

N: Yeah.

B: I mean multiple every week, and they all are kind of the same but with something just different about them.

N: I used to really like hone in on that because I work in so many different organizations systems and so I've got the ones that I know really well and I should probably leverage that better. The most frustrating thing to me as a consultant is when they require a different email for every login and so now I've got seventeen different email accounts that I've created just so that I can log in for my seventeen different clients, into their systems. I know that this is a very specific problem that probably most of you don't experience, but it really irks me.

B: Yeah that's such a pain in the ass!

N: And they have to assume that there will be people like me who need multiple account accesses.

B: Or the fact that you have to reset that password every sixty days or whatever it is.

N: My bank doesn't even make me do it that often.

B: I know. Or the it's got to be fourteen characters long, I know that's what they're all moving to now.

N: Rourteen though, it's so many

B: It's so many.

N: My brain can't fit that many. I mean I know, I mean get last past #getlastpass, it's awesome, but still it's too many!

B: I know. What about for the organizations? So we said if you need to pay more money to get something that actually works for you, do it because it's going to save you money in the long run. I totally agree. For people who work at a nonprofit, we said if you have the data now use it.

N: Use that data. So let's stop making decisions based on a whim or what is that that HPP, the highest paid person

b: Ohhh

n: Yeah, we need to stop letting the highest paid person make the decisions for our programs, for fundraising and base it on data instead. But that means we have to have good data, so put a data management program into place. I mean that is as simple as one monthly reports, that's going to catch any bad addresses or any missing program data, like you need to have somebody tasked with that who's going to be responsible for ensuring that your data is cleaned regularly. You do not want to be waiting until your instatement time to start having to clean out all your donor accounts.

B: Well you bring up a really great point. So I happen to be on a tech resource team.

N: Whaaat?

B: I have no idea how it happened, but I am there and we're trying to put together a program how we can consult and help different nonprofits with their tech needs. And when we were talking through the process okay we're going to have

you know a discovery call and figure out what the problem is and then we're going to go and we're going to meet with them and I am one of the only people on the team that it has worked in the nonprofit world and I said well I want to make sure that when we go in and we talk to them about what's going on, we're talking to the right person.

N: Yes.

B: Which is usually not the highest paid person in the organization. It's usually one of the lowest paid positions in the organization and I want to lift their voice up because they're the ones that are having to deal with it on a daily basis.

N: Oh totally, yeah. I was just working with a client and we're prepping for their gala or gala or whatever we call it. And it was such a great conversation because they were three from their side and then myself and we're talking through all of these potentialities. So you've got this donor who wants this that and the other, how do we make that happen? Okay we want to offer presale at this rate, to just these people, how do we make that happen? So you had all these great perspectives, problem solving through things well the executive director of like largely sat out there and just kept saying like I got a great team, which she does. But you need those people who are going to be the ones who the donors are yelling at, because they're the ones who are already anticipating that.

B: Yep, exactly. So make sure that their voice is being heard before you go to buy that new shiny object.

N: Yes, yes. I'll just make one more plug for this because we said it before, but to donors, stop giving a shit if nonprofits are spending money on tech, they need to.

B: Yes and I am not as you may know #dontrestrictgifts. I am not a proponent of restricting gifts, but you know what if you want to make a gift it to a nonprofit and you want to say that they should spend that on their tech need, talk to them first and make sure that they need…

N: Maybe they just got a lawfirm to donate a bunch of computers.

B: I'm for that, I think that's a great idea.

N: Yeah, yeah. Well and I think this is also to the big funders like the grantors, who don't want technology included in the budget application. If you want me to send you good program data, I'm going to need a program database to do that, and I'm going to need something really robust, that's going to allow for multiple people to input, that's going to allow for really dynamic reports and that costs money.

B: Yes, exactly. Alright, well I think that pretty much wraps up tech for right now.

N: For now. I'm sure we've got more to talk about we haven't even hit on like tech marketing.

B: Yes

N: Staying up with social media, so we will have more to talk about.

B: If you have any tech horror story, please send it to us we would love to hear from you, we know you do, we know you do I cannot even pretend like you don't.

N: I can't be the only one who has spilled hot chocolate on my husband's computer and fried the whole thing.

B: At least it wasn't your computer, or one from your nonprofit you're working on it because then you wouldn't get another one.

N: That's true, but he made me buy him a new one.

B: Well that's a bummer. Okay, well make sure you check us out on the socials.

N: We're on Facebook, Instagram, not Twitter, what's the other one, Linkedin

B: You can't tweet at us just yet!

N: No, but you can email us at nonprofitreframe@gmail.com

B: And please remember to support your local nonprofits and give and give generously.

N: Have a good one.