



Case Study:

Technology Assessment for a Human Services Organization

The client's core functions were hampered by outdated technology. The Bayer Center gave them a clear road map to improvement.

The Client

Like so many nonprofit organizations, this client's success was outstripping its capacity. The organization had a networked organizational chart (it was the regional branch of a national nonprofit, with a number of local offices) but was not adequately networked through IT. Each local office saw heavy client traffic (and, coming along with it, heavy data entry) at the same time of day – and repeatedly, at that time of day, the outdated server would crash. Irritated staff would resort to doing data entry on paper, which inevitably led to some data loss, quality control issues, and late inputs.

These issues, along with the upcoming roll-out of a new program model, prompted the organization to request the Bayer Center to provide a comprehensive technology assessment. The organization wanted to be confident that technology could enable, not hinder, all of their amazing programming – present and future.

Our Work

Bayer Center consultants began the assessment with in-person visits and discussions to evaluate current capacity and staff needs. The consultants then presented the client with an assessment report, detailing their findings and recommendations in a comprehensive list of categories, ranging from software and databases to technology operations and governance (including planning, policies, budgeting, and staffing). Wherever possible, the recommendations had specific actionable steps attached to them – for example, a list of 13 specific high and low priority changes to the website. One of the report's appendices provided sample IT policy language that could be tailored to the needs of the organization.

As well as recommending increased staffing and contracted IT support, the recommendations included creating a standing Technology Committee. The committee would be a way to change the organization's culture to proactive technology planning and budgeting.

The Result

The organization had the willpower and patience to use the assessment to leverage important changes. In a follow-up six months after the report, they had completed 90% of the recommended hardware and software changes, had hired a technology support person, and had completed a major upgrade of administrative services and capabilities. They reported of the engagement "We were pleased with your staff's ability to get a thorough grasp on our agency's needs in such a short time period." These are hallmarks of a successful consulting engagement: not only recommendations that are informed, accurate, and specific, but also a client who has ability to take initiative, follow up and make the assessment work for them.

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