



# Before You Start NEEDS AS FOR CO DECISIO

By Denise Vesuvio

**T**he decision to add computer services to an office is a major step for any organization. The investment of staff and money is costly, even with proper planning and effective decision-making. The cost of not making a wise and thoughtful decision is enormous.

Many nonprofits have realized too late that even a free computer drains both staff and the organization's finances. It is common to hear recipients of a donated computer bemoan the fact that after making a major investment to use the free computer, it still is not meeting their needs. hindsight shows that they could have purchased a computer for the money they spent trying to adapt the free computer.

There is an eight-step process that—if followed completely—can keep this from happening to you. It is a needs assessment and must be completed by you and your staff. Collectively, you must agree you will not start the needs assessment with the assumption that you will computerize. Objectivity is critical to this exercise.

## The Eight Steps

1. Make a commitment to conduct the

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needs assessment.

2. Conduct an assessment of the organization's information process.
3. Orient and train your staff to the language, terminology and features of computers.
4. Study alternatives to achieving the goal of adding computer services to your organization.
5. Evaluate the alternatives.
6. Develop specifications for the system or service that is ideal for your organization.
7. Review and analyze the prices you obtain from vendors.
8. Plan the next step.

## First, Answer These Questions:

Before you begin, answering the following questions (in writing) will help you prepare for the needs assessment process. They were compiled by Marc Rotenberg of the Public Interest Computer Association who's an expert in advising nonprofits on computerizing their systems.

1. What is the purpose of your organization?
2. Is there someone who can help your organization get started in computerizing? (This person can be from a nonprofit that is computerized or a computer user group.)
3. Does your organization do a lot of writing?
4. Can your organization afford a computer?
5. How does your staff feel about a computer purchase?

6. Does your organization currently pay for computer services, either for list management or word processing?
7. Who in your organization can take responsibility for system selection, software development and staff training?
8. What will happen if your organization purchases a computer and it doesn't work?
9. What is your organization's plan for expansion?
10. What does your organization expect from a computer three months, six months and a year after its purchase?

Some of the answers will prepare you better for the needs assessment process, and others may suggest that now is *not* the time to conduct the assessment. If you do decide to postpone the needs assessment, make a commitment to review the questions at a future date.

If you are now ready to begin the requirements and needs assessment, follow these eight steps:

## Step 1. Plan to Plan.

As the manager, you must insure that your organization allocates appropriate resources to a needs assessment within a specified timeframe. The process requires that staff have enough time to complete this assignment. It may mean putting other projects on hold until the assessment is complete. If that is not possible, postpone the process for another time.

If it is a good time for a needs assessment, set a timeframe for completing and reviewing each step and stick to it.

## Follow This 8-Step

# ASSESSMENT PUTER MAKING

### Step 2. Describe Your Organization's Information Processes.

First, devise a form or procedure for staff to record their information-generating tasks that might consist of some of the following products:

- One-time letters and memos
- Contracts and variable paragraph letters
- Standard forms
- Reports
- Tables and statistics
- Lists and data files
- Graphs and charts
- Computer programs

Leave room for evaluating your future workload. Are there new service programs your organization will be providing? Where are the expected growth areas in your organization? Write the answers down.

This exercise provides a skeletal framework for determining the percentage of staff time devoted to repetitive typing tasks, list duplication, compiling statistical information and other tasks. It will help define the computer services needed to support your operation and the required capacity of the system.

### Step 3. Learn the Language.

This is the time for you and other staff to orient yourselves to a computer's components, jargon and terminology. An understanding of computer language is necessary when it comes time to write the specifications for the computer system you will need.

To do this, read computer magazines and books, attend basic computer training classes, borrow time on someone else's computer, visit computer shops. Also schedule visits to other organizations with a computer to see it operate and talk to its users.

Remember, you are going through this process to learn. Admit your ignorance and take every opportunity to ask questions. You are preparing yourselves to be in a position to ask good questions when talking with vendors.

### Step 4. Study Alternatives.

Start considering various methods for achieving your goal. At least one of the alternatives should be not to purchase a computer. Your major consideration is cost effectiveness.

Your review of the alternatives should include

- Timesharing—renting access time on someone else's computer
- Outside sources—paying for word processing, mailing lists and other computerized services
- Manual system—maintaining or improving your current noncomputerized system
- Lease or rental agreement—contracting with a vendor to provide the computer and other equipment for a specified time and amount

Rate each alternative by the following criteria: capital costs; personnel costs; maintenance costs; ability to meet current objectives; flexibility/capacity; flexibility/format. Be sure to search carefully for hid-

den costs and benefits associated with each.

Other considerations at this point:

- Possible configuration and number of work stations
- Type of storage—hard disk or floppy disk
- Software options for each required system
- Dot-matrix or letter-perfect printer
- Amount of memory required for the system
- Specific features needs for the word processor, data base management, spreadsheet and/or telecommunications software.

### Step 5. Evaluate the Alternatives.

Establish criteria for making a decision. Learn how other administrators have approached the problem.

### Step 6. Write Up Specifications.

Be clear about what you want your machine and software to do and specify it to the vendor.

Spend time compiling an excellent list of vendors that represent a cross-section of potential equipment.

### Step 7. Review the Bids.

Develop a list of specific questions you will ask during your visit to each vendor. Allocate enough time to test the equipment. Take note of those questions that are not answered completely or that the vendor sidesteps. It could be an indication that the system does not provide you with all the features you are seeking. Encourage your staff to share all concerns they have for each system.

Compare your requirements and budget with the price information (bids) you receive from vendors.

### Step 8. Plan the Next Step.

Whether or not you decide to purchase a system, the next step still is to plan your next move. If you purchase a computer, consider a training schedule and evaluation of the system within your organization. This will allow you to build your computer system according to office needs and to include staff by supporting computer comfort.

If your decision is not to buy now, plan a time to do another needs assessment.

*Source for this article:* Basic Computer Knowledge for Nonprofits: Everything You Need to Know Made Easy by VOLUNTEER—The National Center and The Taft Group. (See resource box in this section.)