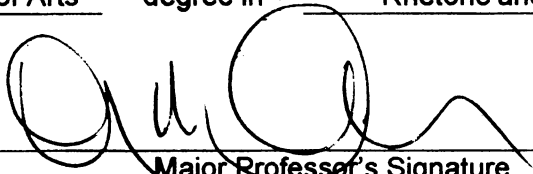This is to certify that the
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UNDERSTANDING CONTENT MANAGEMENT IN SMALL
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MOVING BEYOND SINGLE SOURCING TO SINGLE ORGANIZATIONS:
UNDERSTANDING CONTENT MANAGEMENT IN SMALL NONPROFITS

By

Grace Adele Bernhardt

A THESIS

Submitted to
Michigan State University
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ABSTRACT

MOVING BEYOND SINGLE SOURCING TO SINGLE ORGANIZATIONS:

UNDERSTANDING CONTENT MANAGEMENT IN SMALL NONPROFITS

By

Grace Adele Bernhardt

Reporting on a content management project undertaken within a small nonprofit, the author suggests that while writing and content management have received separate treatment within the technical and professional writing literature, they are actually intricately intertwined. While designing systems to help the organization write, the author sought answers to seemingly simple questions in an attempt to draw larger conclusions about how an understanding of writing and knowledge work within small nonprofits may contribute to our conceptions of where, when, and how writing happens.

The author proposes that small nonprofits need customized, flexible, and scalable solutions for content management that allow them to address issues such as high employee and volunteer turnover, tight budgets, and time constraints. As small organizations look for ways to manage inter-organizational information and streamline the writing process, technical communicators will play a key role in helping these organizations to understand their specialized needs and develop customized solutions.

ACKNOWLEDGEMENTS

I had a lot of help and support writing this thesis.

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INTRODUCTION: PROJECT OVERVIEW

This thesis builds on a WIDE[1]-sponsored inquiry project started in the summer of 2006 with a small nonprofit organization that serves women in a mid-sized community in the Midwestern United States (hereinafter, 'the Center'[2]). The observations from this initial investigation suggested the Center's significant content management and writing needs. An August 2006 recommendation report written to the Center outlined possible strategies to help Center staff think about improvements to workflow and writing processes within the organization and offered to help with implementation (See Appendix A).

With the Center's agreement, a call was sent out for an intern to work with the Center to develop a system for managing their information and to develop a system for how the organization can and should write. I responded to this opportunity, and my involvement in the project began in September 2006 and stemmed from my interest in gaining experience with this sort of higher-level conceptual work of designing information structures and systems to improve workflow within workplaces. I was also interested in working closely with a nonprofit to help them improve their ability to write grants. My familiarity with grant writing and my understanding of content management strategies made me a good fit for this internship.

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[1] The Writing in Digital Environments (WIDE) Center is a research center located on the Michigan State University Campus. The Center is funded and co-sponsored by the MSU Foundation and the College of Arts & Letters.
[2] Details regarding the nonprofit have been altered.

My research questions at the beginning of the project were designed to uncover the process, perception, function, and value of the writing done on a daily basis within this organization in order to identify ways of improving workflows and content management at the Center. My questions included:

1. Who writes?

2. What do they write?

3. How do writers at the Center understand this work?

4. How is knowledge created, stored, and shared at the Center?

5. How could knowledge creation, storage, and sharing be improved?

6. How might writing and knowledge work differ in nonprofits from those recognized in corporate settings?

I sought answers to these seemingly simple questions in an attempt to draw larger conclusions about how an understanding of writing and knowledge work within small nonprofits may contribute to our conceptions of where, when, and how writing happens. In what follows, I show how writing in small nonprofits and content management, two topics that have received separate treatment within the technical and professional writing literature, are actually intricately intertwined.

Using a case study to demonstrate the connections between the two topics, I articulate how this recognition creates new opportunities for technical communicators to craft information tools and artifacts that can help nonprofit organizations to mediate the high-stakes activities of writing. In the course of

their daily work, nonprofit staff may find it difficult to recognize the connections between how they organize the content they produce and the work needed to produce new pieces of written communication. Nonprofit staff may have a hard time seeing that their ability to write in an efficient manner is associated with their ability to set up a system for creating, storing, sharing, managing, revising, and producing content, and vice versa. By understanding both the content management needs and the value and function of writing within nonprofits, technical communicators can begin to help organizations build systems and adopt writing practices and processes that support workflows and content development and distribution.

In the following sections, I provide an overview of the scholarship that informs my research; describe my method and the Center in detail; provide an overview of the content management strategies and writing processes in place when I began this project; describe the system, tools, and processes implemented at the Center; present the findings and conclusions gathered from my research; suggest the implications of this work; and identify areas for future research that will deepen our understanding of the content management and writing needs of nonprofits.

SEEMINGLY DISTINCT: HOW THE FIELD TALKS ABOUT WRITING

AND CONTENT MANAGEMENT

Towards Understanding Writing in Nonprofits

Writing is a key organizational activity that consumes time and human resources, often overwhelming small organizations like community agencies and nonprofits. For these organizations that are often short-staffed and reliant on volunteers on a daily basis, writing becomes central to advocacy work and marketing the services of an organization. Moreover, writing is often the means by which a nonprofit promotes itself in order to receive funding for projects. For nonprofits, writing well isn't primarily about grammar or style, it's about whether the writing accomplishes the work it is intended to—getting a grant, soliciting a donation, discovering a way to help a community member. However, as Jeff Grabill (2007) indicates,

> Those who write in communities to create change write through and with a range of advanced information technologies. This is required of even the smallest and least structured organizations, in large part because of the need to demonstrate expertise to public audiences. (pp. 81-82)

For nonprofits, writing is very focused on being able to understand and cater communication to an audience to achieve a given purpose, and in the end, the success of writing in a nonprofit is measured by the action it helps achieve. This often high-stakes activity of writing is not done without strategic use of a number

of technologies; therefore, writing in nonprofits cannot be understood unless we also look at how these organizations manage content.

Before exploring work in the field of Technical Communication and Professional Writing that examines the value, function, and process of writing and content management, it is important to establish what is meant by the term nonprofit, as this term is often misunderstood. This discussion will start with a brief background on nonprofits generally. I will then provide an overview of how nonprofits use technology, as it is difficult to separate any discussion of writing and content management from a discussion of technology use.

Defining Nonprofits

Under the United States tax code, an organization can be classified into one of over 20 categories of 501(c) corporations with tax-exempt status (*IRS*). Organizations classified under Section 501(c)(3) are considered "charitable" nonprofits and must operate exclusively for "charitable, religious, educational, scientific, literary, testing for public safety, fostering national or international amateur sports competition" and/or "The prevention of cruelty to children or animals (*IRS Publication 557*, p. 16). Charitable nonprofits comprise close to 60% of the 1.4 million 501(c) organizations in the United States and include "a diverse group of organizations, both in size and mission, which range from hospitals and human service organizations to advocacy groups and chambers of commerce" (*Nonprofit Sector in Brief,* p. 1).

There are important distinctions to make within the category of 501(c)(3) organizations, as not all charitable nonprofits look the same in terms of organizational structure and monetary constraints. The National Council of Nonprofit Associations' 2003 report entitled *The United States Nonprofit Sector* states that

> it is important to note that the overwhelming majority of registered
>
> charitable nonprofit organizations (66 percent or 548,777) are small in size
>
> and often volunteer-led. They are not reflected in the data because their
>
> revenues did not exceed $25,000 in 2003. From your local PTA to youth
>
> sports leagues to rescue squads, these organizations are at work every
>
> day. Your community is enriched by the role and presence of these critical
>
> nonprofits. (p. 1)

Regardless of their size and budget, nonprofits do critical work within the communities they serve.

In describing nonprofits, it is also important to understand the ways in which nonprofits differ from corporate or for-profit workplaces. In his work looking at how to improve the service learning initiatives within technical and professional writing courses, Robert McEachern (2001) has examined the characteristics that shape the organizational culture within nonprofits. Citing the work of Mike Allison and Jude Kaye of CompassPoint Nonprofit Services and Sandra Larson of Sandra Larson Consulting, McEachern summarizes six characteristics of nonprofits: 1) Passion for mission; 2) Chief executive wears too many hats; 3)

Atmosphere of scarcity; 4) Individuals have mixed skill levels, and 5) Participation of volunteers (p. 216). McEachern suggests that being aware of these characteristics from the start can help instructors to provide students with more guidance and ultimately exercise more control over the service learning experience. These characteristics will also prove essential in understanding the writing process and the content management needs of the nonprofit described in this case study.

In our work with nonprofits, we must be conscious of the differences between organizations of varying sizes and infrastructures. Furthermore, we must take these differences into consideration when venturing conclusions about the value and function of writing in various workplaces[3]. Moreover, in an increasingly digital and networked world in which people write using computers, we must understand how nonprofits are currently using technology to carry out their daily work.

Technology Use by Nonprofits

In 2000, the Bayer Center for Nonprofit Management began surveying nonprofits in the Pittsburgh area about their technology use. This survey has been completed biannually since then and the 2006 comparison of results from the four surveys has revealed "uneven progress of technology use by a sample of nonprofits" but "the technology infrastructure available to most nonprofits has

---

[3] Along these lines, I intend for the conclusions I draw in this thesis to apply most directly to small nonprofits. The content management needs of nonprofits with more staff members and larger budgets may more closely resemble that of for-profit corporations; future research is needed in this respect.

improved significantly overall" (p. 1). Discussion of the 2006 results indicates that the survey respondents are representative of the national population of nonprofits, in that responding organizations tend to operate on a budget less than $1 million (p. 4) and over half run on a small staff of fewer than 7 full time employees (p. 5).

The portion of the results from the 2006 survey most relevant to this thesis project show that nonprofits are making increasing use of local area networks. While some respondents were unsure what type of network was in use at their organization, the Bayer Center indicates that "The vast majority (70%) of these respondents [those unsure of their network type] have staff sizes under 10. Most likely, these are peer-to-peer networks and the balance are clientserver networks" (p. 25).

The Bayer Center survey also asks respondents about their use of databases for three main tasks—client management, fundraising and volunteer management. The overall findings were:

- In managing client information, use of database software has increased over the life of the survey, although it decreased nominally from 2004 to 2006. More organizations use custom databases (58%) than vertical market software (42%) specific to managing client and program information. This ratio is exactly the same as in 2004. (p. 33)

- In fundraising, more than half of organizations manage their donor information with database software. Manual and spreadsheet systems,

8

however, have shown a short-term rebound. Again, nonprofits are split

between using vertical market (58%), and custom applications (42%). (p.

33)

- Manual systems for volunteer management remain at almost a third of

   organizations. There is some evidence that organizations that had been

   using manual systems are at least using spreadsheets to track their

   volunteers. The majority of applications for volunteer management tend to

   be custom-designed (56%). (p. 34)

What is interesting to note here is the consistent need for custom-designed

solutions. The Bayer Center explains that

Managing client information often drives organizations to use a custom

database solution (built in Access or FileMaker for example) because the

combination of reporting requirements and the development of new

programs make it difficult to meet all needs through off-the-shelf software.

(p. 33)

Moreover, in the discussion of survey results, the authors indicate, "We hesitate

to report (because it sounds like a short-term setup for long-term problems) that

8% of organizations report using their fundraising software to manage client

information" (p. 34), suggesting that nonprofits often use software in unintended

ways. While this survey is limited to a sample of nonprofits in one geographical

region of the United States and provides mostly quantitative data, the results do

highlight some of the challenges that nonprofits face when using technology to accomplish their everyday work.

Researchers have also looked at the use and value of information and communication technologies (ICTs) for nonprofits. Reporting on data from a 1999 survey of voluntary organizations (the equivalent of nonprofits) in the United Kingdom, Eleanor Burt and John A. Taylor (2000) indicated that few organizations use ICTs to their full potential (p. 134). Burt and Taylor found the limited use of networking technologies surprising, as they see great rewards inherent in networks:

> For organizations able to use information and communication technologies (ICTs) effectively, the benefits extend beyond conventional enhancements of administrative and operational efficiency and effectiveness. Embedded within electronic networks is the potential to reshape organizations internally, reconfigure relationships across networks of organizations, and redefine relationships with individual citizens. (p. 132)

To examine more closely why voluntary organizations might resist these technologies, Burt and Taylor took a detailed look at two organizations that showed significant use of ICTs. Burt and Taylor found that the values of the two organizations affected how they used information technologies, and in addition, the technologies had the power to change "relationships within the organizations, between the organizations and other institutions, and between the organizations and their members, supporters, and clients" (p. 142). Burt and Taylor suggest

that historically held values such as locality and autonomy may explain a voluntary organization's hesitance to adopt new technologies (or to adopt them to the fullest extent).

The authors question how long organizations that do not adopt these valuable technologies will be able to exist in a world of changing social, economic, and political environments that create greater competition for funding and higher expectations for the services provided (pp. 132, 138). Burt and Taylor offer one of the few analyses of technology adoption by nonprofits. However, the authors focus mainly on how these technologies can transform organizations from within and change their relationships inside and outside the organization. There is less emphasis on how these technologies might improve an organization's ability to manage content and thereby better their written communications.

To date, the work focused on technology use by nonprofits has been more quantitative than qualitative or descriptive, as discussions focus on the number of organizations using technology and less on the how and why organizations do or should use technology in their work. While the work of The Bayer Center and others highlights the issues that nonprofits face when incorporating technology use into their workflows, the potential for technology solutions (such as strategies for managing electronically stored content) to improve the writing process within small nonprofits has yet to be explicitly discussed.

Current Conceptions of Content Management

Even in our broader discussions of content management, the connections between content management and improving the writing process have been tenuous. Within technical and professional communication, the discussion of content management has ebbed and waned, but seems to have reached a high point in 2003, when *Technical Communication* published a special issue on the topic of single sourcing. While the field has shown interest in examining how content can be created, managed, and distributed in ways that reduce workload and improve efficient document production, our attention has been narrowly focused within two areas: 1) content management via single sourcing methods and 2) content management for large organizations with highly distributed workflows.

Increasingly, however, organizations of all sizes and structure must create, store, share, manage, revise, and produce content for both paper-based and digital distribution. Bob Boiko, a self-described "teacher, consultant, writer, programmer, and itinerant businessman" and author of the *Content Management Bible*, pinpoints three main reasons why businesses and organizations should adopt content management strategies (2005, p. x). Boiko believes content management is important because

- Content management is at the core of e-business;
- Content management can alleviate symptoms of information frenzy; and

- Content management is essential to work in the Information Age. (pp. xl-xlvii)

By suggesting that content management is necessary as a result of the time we find ourselves living in, Boiko suggests that organizations of all sizes and types will need to take up this work. While Boiko paints a quickly changing picture of today's business world, he suggests that the Information Age is not yet upon us, but that we are quickly approaching the era in which information has specific and measurable value, and organizations will need to implement systems for content management if they want to participate in the new information economy (pp. xlv-xlvii). Boiko offers his book and the suggested methods for content management as a way to organize and present content in ways that make both customers and content creators happy (p. xlv).

Ann Rockley and her associates Pamela Kostur and Steve Manning have written extensively on the application of content management strategies in their co-authored book, *Managing Enterprise Content*. Like Boiko (2005), Rockley et al. (2003) point to the dangers of content that is developed in an *ad hoc* manner and suggest that organizations adopt a "unified content strategy," a method for coordinating content development across an entire enterprise. An early proponent of single sourcing methods of content reuse, Rockley has influenced technical communication's discussion of content management strategies (cf. Albers, 2003; Clark, 2002; Eble, 2003; Kramer, 2003; Wiles, 2003; Williams, 2003). However, as both Boiko and Rockley reveal, what is largely absent from

our discussions of content management is a consideration of information technology solutions that meet the needs of small businesses and nonprofits.

The Value of Writing in the Workplace

Like the work described above on content management, much of the research on the value added by good writing practices looks at technical documentation in large, corporate organizations and measures value in terms of increased sales and decreased costs (see Redish, 1995; Spencer, 1995; Mead, 1998), and increasingly, benefits to the user (see Carliner, 2003). A survey of business leaders conducted by The National Commission on Writing for America's Families, Schools, and Colleges found that writing is an essential skill valued by corporate executives in the workplace. The survey highlighted several findings, including the fact that "writing appears to be a "marker" attribute of high-skill, high-wage, professional work" (p. 19). Respondents indicated that "People who cannot write and communicate clearly will not be hired and are unlikely to last long enough to be considered for promotion" (p. 3). Overall, the Commission concluded from survey responses that "Writing consists of the ability to say things correctly, to say them well, and to say them in a way that makes sense (i.e., grammar, rhetoric, and logic)" (p. 19). In what can be taken as a sign of the value placed on good writing, survey results indicate that "More than 40 percent of responding firms offer or require training for salaried employees with writing deficiencies" (p. 4).

The application of these survey results is limited in that the respondents were all corporate executives. Little research focuses on what writing looks like in nonprofits, despite the fact that written communication is key to the livelihoods of these organizations that do such important work. Nonprofits rely on writing both from a marketing standpoint and in terms of soliciting support for an organization's cause through advocacy and grant writing. Anne Beaufort's (2000) ethnographic research examining the development of two writers within a nonprofit (known as JRC) contributes an analysis of the value of writing within a particular discourse community. Beaufort reports

> . . . the more central a text was to serving JRC's goals, the greater its importance. And a text's importance in turn affected how much time and other resources were allocated for the creation of the text as well as who was involved in producing the text. Texts of high importance—for example, a grant proposal to the Department of Education requesting $3 million in funding for a workplace literacy program—the executive director and an external grant writer would be involved in producing during a period of weeks. (p. 195)

Beaufort's observations clearly show that writing is highly valued by JRC because it is the means by which JRC maintains their very existence. Beaufort highlights JRC's reliance on effective writing to ensure adequate support for the organization's work:

Because JRC is financially dependent on funds raised through donation or grant, any texts related to fund-raising or the request of services are the most critical to JRC's functioning: grant proposals, program reports, letters of intent to foundations, or letters of request for services. (p. 195)

By examining these critical genres, we can build a clear understanding of what effective writing looks like within nonprofits, allowing technical communicators to effectively counsel organizations in need of help with their communication processes and documentation management. In turn, nonprofits and organizations can leverage writing to more efficiently meet goals and create change.

While Beaufort's contributions to our understanding of writing in nonprofit settings are substantial and enlightening, Beaufort describes JRC as a "medium-sized nonprofit with approximately 50 full-time employees, a client base of about 300 students at any one time, and an annual budget greater than $3 million" (2000, p. 191). JRC operates on a budget similar to that of a large, for-profit corporation, and therefore, JRC may not provide insight that is particularly applicable or useful for understanding writing in small nonprofits with 10 or fewer employees that operate with funding of less than $100,000.

Aside from Beaufort, McEachern (2001) is one of the few researchers in technical and professional communication that has stated this research need so bluntly—McEachern states, "As scholars, we need to focus more of our research on writing in nonprofit organizations" (p. 222). McEachern is only able to point to one article that examines the life of a writer with a nonprofit organization

(Turnbull, 1998) and can only identify one other group of authors, Leigh Henson and Kristene Sutliff (1998), who make any mention of the lack of research on writing in nonprofits. In the nearly six years since McEachern wrote, few authors have taken on the subject.

One available study in the field of technical communication that looks at small 501(c)(3) nonprofits is the work of Rebecca Walton. In her Masters Thesis titled *Technical Communication and the Needs of Small 501(c)(3) Organizations*, Walton looks to determine the needs of small nonprofits and suggests how technical communicators are able to serve nonprofits in productive ways. Walton operationalizes "small" organizations as those with an annual budget of $5 million or less and she looks specifically at ten 501(c)(3) organizations of varied mission and maturity. Walton's findings focus on the need for and value of documentation; specifically, she found that

- . . . organizations often ignore the need for documentation until a problem develops and only rarely develop documentation to meet anticipated needs . . . many stakeholders know their organization needs more documentation, but stakeholders do not make the time to develop it. These stakeholders may believe that documentation does not support their mission or that their other duties are more directly mission-related. (p. 66)
- . . . small nonprofit organizations need documentation that
    - o Serves as a useful tool for stakeholders

- o Promotes a common understanding of important information

- o Provides proof of activities, expenses, and outcomes (p. 67)

Walton describes how technical communicators can effectively help meet these needs of small nonprofits by

(1) creating tools such as templates and checklists to enable organizational stakeholders to more easily develop documentation, (2) clearly explaining how documentation can support an organization's mission, and (3) building upon outdated or broad documentation to develop useful, detailed guidelines. (p. 70)

Finally, Walton points to a number of interesting areas for future research involving nonprofits and technical communication. Walton calls for research on "documentation management at small nonprofit organizations" and "knowledge management at small nonprofit organizations" as she feels that "The analysis of practices in recordkeeping, server organization, documentation security and distribution, filing, document flow, and other knowledge management areas could uncover a broad expanse of needs that technical communicators could meet" (p. 72). The project detailed here begins to answer Walton's call.

Bridging the Gap: Technical Communicators, Writing, and Content Management

As this case study reveals, small nonprofits have unique content management needs and the workflows and content produced by nonprofits differ in many ways from that produced by large for-profit corporations. Unlike in large

organizations where Rockley et al. suggest that "authors lack awareness of what others are doing elsewhere in the organization" (2003, p. 7), small nonprofits with few employees may experience the opposite phenomenon—a workplace with "too many cooks in the kitchen" working together to get things done, each member being involved in some way with almost every project. At the same time, nonprofits often rely on the help of volunteers who come and go on a regular basis, creating the need for a system that is easy to learn and flexible enough to accommodate high turnover rates.

Moreover, many small nonprofits, which operate on small, tight budgets, are unable to afford commercial Content Management Systems (which can range from $50 a month to upwards of $100,000 a year according to PC Magazine). On the other hand, nonprofits may not have the technical support available to make an open-source tool a viable option. Along this same line, many of these CMS have a steep learning curve that may not be suitable if the level technological savvy of a nonprofit's staff is low. These unique needs call for customized solutions that technical communicators are qualified to recommend, yet little, if any, research within technical communication has examined solutions that are low-cost, low-tech, and simple for users to learn and use.

Technical communicators will play a key role in helping these organizations understand their specialized needs and develop customized content-management solutions that streamline the authoring process. In this pivotal work, technical communicators will lead organizations through the

processes of content audits (Rockley, 2003), information modeling (Kostur, 2000), and the implementation of new information technologies (Sapienza, 2002; Slattery, 2005). In the process, technical communicators may become better able to answer the questions posed by Cheryl Geisler et al. (2001) regarding working professionals' use of systems for document management (p. 292) and the influence of new technologies on the patterns of communication within existing communities (p. 294). Moreover, these new roles allow technical communicators to enjoy a new relationship with technology work while employing their skill in rhetoric.

The Technical Communicator's Relationship to Technology

There are a number of technologies that have developed as organizations have discovered the need for content management. Among these technologies are markup languages such as XML, information architecture models like DITA, and Document Type Definitions. Filipp Sapienza (2002) has argued that "XML will require technical communicators to become more intimately knowledgeable about computing skills and environments because XML integrates different types of information for multiple audiences" (p. 168).

It is clear that as content and information management continue to become a key focus for organizations, the technical communicators' relationship with technology must also change. Technical communicators will not need to master every technology or risk reverting to the role of "tool jockeys," but rather they must be able to critically analyze the capabilities of various technologies. As

JoAnn Hackos (2002) warns, we must keep in mind that "Content management is not just about tools and technology" (p. 9). Instead of viewing "technology as tool" or as a "cure all" for solving problems, technical communicators must study technology, getting to know each technology's strengths and weaknesses in different situations. As Bonnie Nardi and Vicki O'Day (1999) suggested in their discussion of the limits of the "technology as tool" metaphor, it is time to "move beyond the human-machine dyad, expanding our perspective to include the network of relationships, values, and motivations involved in technology use" (p. 30). Adopting this stance in content management work will allow technical communicators to reliably recommend the appropriate technology for use in addressing an organization's content development and management needs.

In line with this expansive approach to technology, expert consultants in the content management field such as Boiko, Hackos, and Rockley have suggested that rather than using a particular technology as a starting point, technical communicators must first examine the context of the organization and build an information model that details the content life cycle within the organization, noting both content types and workflow needs. Therefore, before a technology solution can be chosen, organizations will require the expertise of a technical communicator to act as a mediator between the available technologies and the situation presenting itself within the organization. Technical communicators must understand and communicate to organizations that technology is not *the* solution, but rather something that can be used once the needs of an organization are fully understood.

The Technical Communicator's Skill in Rhetoric

In this new role of coordinating the information needs of an organization, technical communicators can also use their background in rhetoric to create strategies for content management that meet the needs of individuals and organizations. Sapienza (2002) emphasizes the importance of rhetorical skill in addition to technical know-how in the design of systems. In describing the task of designing a content management system for surgery dictations within a hospital, Sapienza states,

> While one can appreciate the technical wizardry necessary to put together this system, I claim that this kind of task should and likely will require the involvement of technical communicators. I say "should" because surgery opnote management is not only a logistical problem requiring computer skills, but also involves matters of genre, audience, and rhetorical effectiveness in emergency situations. Information must be timely—the notion of *kairos* comes to mind—and stored in one source so that updates are consistent and accurate. (p. 156)

Technical communicators will still need to use their backgrounds in rhetoric to effectively design systems that are tailored to specific situations and users.

Using this dual-pronged approach combining an understanding of technology and rhetoric, technical communicators can increase the scope of their work and create value-added solutions for organizations. William Hart-Davidson

(2001) contends that technical communicators' skills in audience analysis and their ability to recognize context-specific patterns of behavior make them ideal for the tasks of designing information technology that caters to a wide range of users—that is, technical communicators can provide "information products that are as customized as necessary and as generalized as possible" (p. 151). In this way, technical communicators can assess the needs of an organization and then tailor a content management approach in a way that is useful and relevant to the organization *currently* but that can also be revised, built upon, or expanded in the future as the organization and its content needs evolve. In this way, technical communicators can assist organizations of all sizes by providing an IT infrastructure to support content and communication.

The Dual Nature of Technical Communication

In borrowing the term "gardener" from Nardi and O'Day (1999) to describe this new capacity-building role that is key to IT development environments, Hart-Davidson (2001) suggests a high-level work of coordination and interpretation. As Hart-Davidson explains, "Gardeners translate ideas and processes to make continuous improvements to workplace practice" (p. 154), and this strategic work requires both technical know-how as well as writing and communication skills. Hart-Davidson argues that technical communicators can help fulfill this second requirement by positioning themselves as coordinators within design teams. In this way, technical communicators can contribute to an organization by helping to

provide long-term solutions for an organization's most precious assets—information and content.

It is in this role as both assessor and evaluator that technical communicators will come to truly enact the dual nature of their job title. In carrying out the work of content management, technical communicators are required to be both adept at understanding the technology options available and adapting a technology to specific, local concerns (the "technical" aspect), but it is ultimately an ability to fully appreciate an organization's content that allows technical communicators to improve an organization's abilities to communicate both internally and externally (the "communicator" aspect). The ability to recognize the connections between users, their use of content, and the design of technical solutions makes technical communicators a valuable asset to any organization. At the same time, technical communicators as content managers are able to draw on a range of skills, applying them in ways that allow them to be both technical and rhetorical.

Therefore, because of their ability to understand technology, communication, and the writing process, technical communicators are in a unique position to do valuable work within nonprofits. This work can help us to better understand the relationships between writing and content management in nonprofits. Specifically, this thesis project points to areas in which technical communicators can contribute to these workplaces not by necessarily writing a particular document, but by helping these organizations to design tools and

develop processes that allow them to improve their writing. These tools and processes should allow nonprofits to store materials in a way that allows writers to easily locate content and reuse it as appropriate. Ultimately, nonprofits may come to recognize that strategies for content management serve the same purpose as many of their written communication pieces do—sustainability.

In the next section, I describe the methods that allowed me to understand writing at the Center. Then, I outline the process undertaken in designing a set of systems for document development and management.

METHODS

Case Study Setting: The Center

The Center is a small nonprofit organization that serves community members in a mid-sized city in the Midwestern United States. The Center's self-proclaimed goal is to provide services that are not currently being provided in the community and to complement the services being provided by other agencies/organizations. The Center's mission is to provide personal and career counseling, support groups, employment services, workshops, and the services of an attorney. The Center provides services regardless of a person's ability to pay.

The Center is located in a 1,000 square foot building that was purchased "as-is" and converted with volunteer labor from a house into 3 offices, a small reception area, and a mid-size meeting room. The Center plans to expand into a larger building next door that is under renovation as of this writing. The Center is located on a main street and along a major bus route, nestled in a location that allows them to serve several area communities.

The community served by the Center is struggling in many ways—recent population loss, high poverty rates, and above average unemployment rates. According to the 2005 American Community Survey estimate, the city consists of 119,675 people, a number that has decreased by approximately 7,600 people since the 1990 Census. Approximately 18.1% of families and 24.4% of

individuals in the city live below the poverty level; both of these statistics indicate

a poverty level that is higher than the national average of 10.2% and 13.3%

respectively (2005 American Community Survey). The median household income

is estimated at $34,367 and the per capita income is $17,888; these numbers are

below the U.S. median of $46,242 and the U.S. per capita income of $25,035.

According to the U.S. Department of Labor, 6.5% of the city's population are

unemployed as of January 2007, a rate that wavered between 5 and 6.9% in the

previous 6 months. This number is below the state's unemployment rate of 6.9%

in January 2007, but above the region's unemployment rate of 5.0% and the

nation's unemployment rate of 4.6% (U.S. Department of Labor).

The Center was incorporated as a nonprofit organization in April 2003 and

after extensive building renovations completed by community volunteers, opened

its doors to serve women in June 2005. The Center is governed by a board of

directors consisting of women who have demonstrated leadership in the

community. Two of the current board members are women who have received

employment services from the Center. The Center has served approximately 400

people since June 2005 and currently runs on an annual budget of less than

$50,000, but the Center's co-directors project a budget of more than twice that

amount for the year 2007.

The Center is currently staffed by two co-directors (one of whom serves in

a volunteer capacity), two licensed social workers, an attorney, students from

local universities, and over 20 additional volunteers. The Co-Directors, Paige

Somers[4] (hereinafter "PS") and Rita Grant (hereinafter "RG"), are active and involved members of the Center and of the community. Only one co-director staffs the Center full-time, while the other holds a full-time position outside of the Center and contributes her time on a volunteer basis. Both co-directors have over 20 years of experience working with the unemployed in a variety of settings.

In her role as Center co-director, PS oversees the daily operations of the Center, supervises interns and volunteers, coordinates workshops and facilitators, handles the Center finances, and works with community partners and referral sources. PS works closely with local educational institutions, domestic violence shelters, and with a homeless shelter. PS provides personal and career counseling to clients who are going through all types of life transitions including career changes and job loss. She facilitates the weekly job seeker support group and teaches an assertiveness class.

RG is a co-director and co-founder of the Center. She has extensive experience working as a counselor job placement professional, job coach, job developer, researcher, educator, and advocate. Over the past 20 years, she has worked with hundreds of clients in a variety of settings to help them find and follow their career dreams and develop resumes that showcase their experience and talents.

In her role as Center co-director, RG is responsible for grant writing, fundraising, soliciting donations, building renovations, and supervising interns

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[4] All names are pseudonyms.

and volunteers. At the Center, she works individually with clients on academic planning, resume writing, interviewing, and job seeking skills. She developed the curriculum for a job seekers group that has helped dozens of clients find employment.

Procedures

In order to address my research questions, including "Who writes?" and "What do they write?" I needed to talk with Center staff and perform a content audit. Rockley et al. (2003) explain that a content audit is "an accounting of the information in your organization . . . The purpose of a content audit is to analyze how content is used, reused, and delivered to its various audiences" (p. 104). As a first step, I collected examples of the most common types of writing/content. I then talked with Center staff to explore the following questions:

1. What are the most common types of writing (genres) produced?

2. Are there any types of writing that the organization foresees needing to do in the future?

3. How are writing tasks assigned, tracked, and approved?

4. How can document development practices or processes be characterized?

5. To what extent is writing collaborative? Who writes what? Who gives final approval?

From the answers to these questions, I was able to gauge attitudes toward writing at the Center. While collecting these initial writing samples, I also inquired regarding the process of content creation, contribution, review, approval, and delivery to answer my research question, "How is knowledge created, stored, and shared at the Center?" I looked for discrepancies between the descriptions of different employees and look for common roadblocks in the workflow system. From the information collected during this stage, I was able to identify areas for improvement.

Next, I looked at the audiences for the writing samples, examining the characteristics of each audience and generalizing about their expectations and needs by asking:

1.   Who are the main audiences for the Center's communication pieces?

2.   Are communications tailored for different audiences? Do they need to be?

3.   What are the needs and expectations of different audiences?

Lastly, I surveyed the content management systems in place (digital and non-digital) to determine the organizational structures in place. I did this research by talking to staff and by digging around (in paper and computer folders, in file drawers, binders). My questions included:

1. What systems are in place currently for the storage, transfer, delivery, reuse, and archival of content?

2. Who needs access to what content? Do they need simultaneous access?

3. In what areas could content be handled more efficiently?

Once I had a clearer picture of both the organization's writing process and the content types produced, I then needed to consider the tasks ahead of me.

1. Where is content similar/different across writing samples? Where does it need to be?

2. Where is work being needlessly re-done?

3. How can content be stored to allow ease of access, storage, and reuse?

4. How can processes be made repeatable and transparent?

By posing these questions early in my work with the Center, I was able to understand how and where writing occurs at the Center and identify their specific content management needs.

Deliverables

The deliverables for this project consisted of 1) the implementation of a Windows folder system on the Center's shared network drive; 2) accompanying user documentation (See Appendix B); 3) a set of recommended file naming conventions and accompanying user documentation (See Appendix C); 4)

boilerplate or stock language for use in grant proposals, saved in separate Word documents by topic (e.g., mission, accomplishments, project descriptions); and 5) a guide to grant writing at the Center intended for use in training new writers (See Appendix D).

Evaluation of System

Several months after implementing the folder system on the shared network, I completed open-ended interviews with RG and PS to gauge the effectiveness and acceptance of the folder system and the file naming conventions. A set of 12 questions were asked of RG and a set of 9 questions (a subset of the 12 questions) were asked of PS (See Appendix E).

Approximately four months after implementing the folder system on the shared drive, I also reviewed the status of files saved on the shared drive, local drives, and desktops of the Center's three computers. I looked inside folders to see if documents were out of place and reviewed desktops and local drives for stray files. I also reviewed the names of files created after the date of the staff meeting where file naming conventions were introduced to see if file names conform to the conventions I recommended.

To obtain feedback on the guide to grant writing and boilerplate language, I conducted an interview by email with a volunteer who was learning to write grants for the Center. The questions were meant to gauge the usefulness of various parts of the guide.

My purpose in evaluating the content management strategies put into place at the Center was to assess the ways in which the systems had been adapted to fit the local needs of the Center's staff. I was also attempting to determine if their workflows had been noticeably improved as a result of these new strategies, and more specifically, if any of the strategies had helped the organization to create, store, share, manage, revise, and produce content for both paper-based and digital distribution.

In the next two sections, I describe the results of my initial inquiry into how the Center was writing and storing content prior to my involvement there. This understanding was prerequisite to the next step of my work of designing a content management strategy and tools for streamlining the grant writing process.

UNDERSTANDING WRITING AT THE CENTER

Writing is a key activity at the Center. Interns from the local university and staff members who provide counseling services write keep written records of their interactions with clients. Clients who come in for employment assistance receive help with writing a variety of genres including resumes, cover letters, and job applications. However, the bulk of writing is aimed at soliciting funding for services offered by the Center. This writing takes two main forms—more traditional grant proposals, and what the Center calls "solicitation letters," which are letters written to individuals and businesses in the community asking for donations of money, supplies, or labor.

The writing done to solicit funding is an essential activity for many nonprofits, and while the Center has made a conscious effort not to rely on grant monies for the bulk of their program funding, the Center does expend a significant amount of time and effort on the grant writing process. By virtue of being located in a city experiencing economic downturns and a state with tightening budgets and a struggling economy, the Center recognizes that it has the opportunity to serve a larger population in need of employment and economic self-sufficiency services. The economy also results in more organizations vying for an ever-shrinking pot of money, making obtaining grant monies even more difficult. The Center recognizes the challenges that stand before them and realistically looks to grant funding to supplement their private donations and fundraising efforts.

From initial interviews and observations completed by other WIDE project leaders, it became clear that writers at the Center understand grant writing to be a complex and demanding activity for staff, interns, and volunteers. Moreover, limited time is available to spend on grant writing projects, and interns and volunteers who are able to assist with writing projects are often temporary workers, spending a semester or a few months at the Center before ending their commitment there. To contribute in meaningful ways, interns and volunteers must be quickly brought up to speed on the grant writing process at the Center.

As mentioned previously, the Center is staffed by one full-time co-director. This co-director does *not* do the majority of the grant writing; rather, she contributes to grant proposals by compiling budgets and putting the grant application together. She also occasionally serves as an editor and reviewer of the writing of other grant writers. RG oversees grant-writing projects at the Center. During the summer months when interns and volunteers are able to assist in more substantive ways, RG coordinates and supervises the work of those writers.

RG indicated that many of these writers do not have significant experience with grant writing, and moreover, it is difficult to coordinate the work of interns and volunteers with no systems in place for systematic storage and tracking of progress on collaborative writing projects done over time. In addition, with a worker-base that is often in flux, projects started by one intern may be inherited

by another, making the ability to store grant-related documents in a central place even more important.

As I began to understand the work done at the Center, I began to see that their workflows are *ad hoc*. As is often the case with small businesses and nonprofits, each staff member, intern, and volunteer wears many "hats," fulfilling various roles simultaneously. While an intern may be helping to co-facilitate a support group and meeting with clients one-on-one, he or she may also be helping to search for grant opportunities or writing a grant proposal. On any given day, he or she may be positioned at the reception desk, answering phone calls and greeting visitors. While this work environment encourages a team effort, it can also lead to disjointed, just-in-time methods of content creation. For the Center, time is the most valuable resource, and so, a streamlined writing process that allows them to maximize their return on time spent applying for grants is optimal. As Hackos (1994) indicates, "By instituting a sound and comprehensive publications-development process, you will be on the right path to sustaining the quality of your publications" (p. 20).

UNDERSTANDING CONTENT STORAGE AND SHARING

After examining the current processes in place for writing, I then surveyed the systems in place for storing and accessing the content produced at the Center. As I talked with Center staff about their work, it became clear that the Center has struggled with being able to track and identify drafts of documents. When I looked at the file system on the Center's computers, it became clear that the way their digital documents were stored electronically mirrored the *ad hoc* way that work got done—there was little infrastructure in place to guide individuals and each user stored files in a unique way. Files could be found on the local hard drives and desktops of the Center's three computers. Confirming the survey findings of the Bayer Center regarding use of local area networks by small nonprofits, the organization did have a shared drive set up via a peer-to-peer network; however, files were rarely (and usually not purposefully) stored there.

It became clear that the Center needed a systematic way to store digital content that would allow staff and volunteers to store documents in a central location that all users could have access to using one of the Center's computers. After surveying the technological skills of users and the resources available, it seemed that a simple solution for utilizing the Center's shared drive was the best place to start. To ensure this was a practical and feasible option, I contacted the volunteer who helps with the maintenance of the computers at the Center to make sure there were not any networking issues that I should be aware of that

would prevent the systematic and regular use of the shared drive. The volunteer expressed that he was glad that I would be getting involved with the management of the Center's computers and assured me that there was adequate space on the shared drive. With this physical infrastructure in place, I proceeded to design a system for organizing the Center's electronic materials in a manner that supports daily writing tasks and matches the way that staff members conceive of their work.

In the next two sections, I describe the folder system that was designed for organizing the Center's shared network drive as well as the training documents and tools that were created to streamline the grant writing process.

A USER-CENTERED APPROACH TO CONTENT MANAGEMENT

Designing a Customized Content Management Strategy

After understanding the writing processes and methods currently in place for storing electronic documents at the Center, I decided to begin my work by designing a conceptual map of the content that needed to be stored on the shared drive. As consultants such as Kostur, Boiko, and Rockley have advised, after you have a clear understanding of the content you will be working with, you must devise a set of structures or a model that represents both the arrangement of content within documents and the relationships between documents. Boiko (2005) advises content managers to identify a structure, or "the set of named relationships within, between, and beyond individual pieces of content" (p. 21) while Rockley and Kostur (2003) have advocated a technique called "information modeling" that involves developing a "framework that guides authors, reviewers, and architects in creating, reviewing, managing, and publishing content" (p. 181). In both cases, content must be understood conceptually before a system for management can be implemented.

To build an information model for the Center's content, I looked back at the information I had collected regarding the services the Center offers and the types of writing that is done in keeping the organization alive. I identified the common tasks undertaken by staff, the genres of writing produced, and the types of services offered by the Center. It is important to note that many commercial CMS follow a model that assigns access to the system based on a user profile.
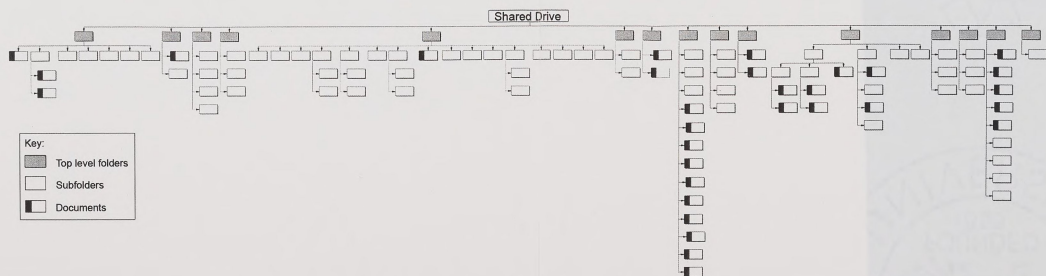
Figure 1. Diagram depicting hierarchy of folder system.

Key:
- Top level folders
- Subfolders
- Documents

Shared Drive

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However, due to the lack of highly differentiated job responsibilities, any method for content management at the Center could not be centered on user roles like "writer" or "editor," but rather, had to be structured by the different types of tasks essential to the functioning of the Center.

Keeping this in mind, I then created a diagram depicting a hierarchical folder system that reflected these various workflows, writing products and tasks, and outreach services (See Figure 1, an early version of the diagram with text labels removed, and Figure 2, an up-close view of one section of the diagram). As Boiko (2005) notes, there are several ways to think about how to structure content—"Just as many different kinds of geographic maps describe the same territory, many different kinds of structures describe the same content base" (p. 24). Ultimately, I decided to organize content by type, by user, and by user task because I knew that the system had to accommodate a variety of users whose tasks varied from day-to-day.

According to Boiko, among the challenges of defining and applying structure to content is understanding content in its entirety and providing a flexible solution (2005, p. 26). To ensure that I had not missed any important content types or areas of the Center's work, I set up a time with RG and PS to look over the preliminary structures (Figure 1) that I had outlined. The system I devised was inherently flexible and the information model could be altered quickly and easily, as any folder could be renamed, deleted, or moved at any time. This quality made it easy to tweak the system from the information
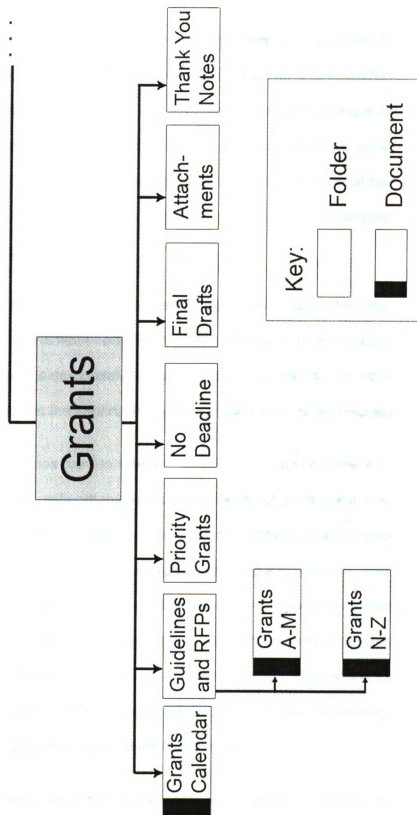
Figure 2. Grants folder and subfolders.

modeling stage and throughout the implementation process. For example, the first information model prototype had a folder for financial information; when the Co-Directors raised concerns about this information being available to anyone working on one of the Center's two public computers, we decided to delete the folder and keep this information stored solely on PS's local hard drive. This flexibility may also prove helpful in the future as the organization expands its services.

Before implementing the system, I also obtained feedback from RG and PS on the names I had given to the various folders to ensure that my terminology made sense and matched the ways that they talk about their work. Boiko (2005) emphasizes the important function of naming in content management:

> *Names* provide simple, memorable, useful containers in which to collect and unify otherwise disparate pieces of information. You can look at content management as the art of adding names to information. Content is information that you organize around a specific purpose for a specific use. The key to the organization and use of content is *naming* . . . Names provide simple, memorable, *useful* containers in which to collect and unify otherwise disparate pieces of information. That's why I say that content and content management are no more than discovering and successfully applying names to information. (p. 47)

Along these lines, the Co-Directors and I agreed to rename the folder that would store documents created by clients from "Client Work" to "Client Resumes and

Cover Letters," as RG and PS indicated that resumes and cover letters are the main types of content produced by clients using the Center's computers.

After collecting all of their suggested changes, I revised the model of the folder system structure and then obtained final approval before setting up the folders up on the shared drive. The Co-Directors trusted to me to sort the content lurking about on the local drives of the two public computers. I sorted as much of the content as I felt confident; then sat down with RG to do some further sorting. To sort the content on the computer in PS's office, I sat down with her and had her guide me through the various folders and files stored on her local drive. This task of sorting the various documents written and used by the Center required me to consider not only how to classify a given piece of content but also to think in terms of workflow to estimate how a particular genre is used within the Center.

As luck would have it, a staff meeting was scheduled shortly after my completion of the work necessary to set up the initial folder system. For this meeting, I gave a short PowerPoint presentation (See Appendix F) complete with screen shots of the new folder set up and an overview of how to use the system. I also made recommendations for file naming conventions that would make it easier to identify and search for files. Staff members left the meeting with handouts containing step-by-step instructions on how to access and save to the shared drive and also a detailed description and examples of the new file naming conventions (See Appendix C).

Feedback from staff members at the meeting was positive; remarks were made about how they had needed a way to organize their files and how this would facilitate their work. The Co-Directors had even begun to use the system earlier that week; a friendly debate was raised over where the Application for prospective Board Members would go—in the "Administrative Resources" folder or in the "Board of Directors" folder? It was decided that since it is Board related, it would go in the Board of Directors folder. RG also inquired as to whether she could save a letter that was being sent to multiple Kroger's grocery stores but that was composed in one Word document as "ltr_kroger_11_03_06." I encouraged her to make adjustments to the file naming conventions as she saw fit and explained that the purpose was to facilitate work at the Center by encouraging a consistency that was flexible enough to deal with unusual cases.

Revisions to the Folder System

Over the next several months, occasional changes were made to the system as staff began to use the new folders. For example, within the "Administrative Resources" folder, subfolders were added for "Mailing Lists and Labels," "Calendars," and "Receipts." This added level of granularity in the sorting of material reduced the number of documents that would have to be visually scanned by the user when attempting to locate a file.

Within the "Grants" folder, we had originally created a subfolder named "Final Drafts" for holding completed grant applications and a subfolder named "Guidelines, RFPs and Applications" for the storage of materials and forms that

detailed the process for applying for specific grants. It was later decided that applications within the "Final Drafts" folder could be further sorted into subfolders by topic—that is, all applications pertaining to the Center's job-related workshops would be stored in one folder, while applications pertaining to the Center's parenting classes would be stored in another, etc. Within the "Guidelines, RFPs, and Application" folder, however, documents would be further sorted into subfolders by the granting agency. For example, the Center regularly applies for grant monies from the City, so a subfolder was created to hold past and future application forms and guidelines that provide information on the City's grant opportunities.

As described above, throughout the process of designing and implementing the new folder system, I involved the actual users and sought their feedback at each step. This approach has been advocated by Robert Johnson, in his book *User-Centered Technology: A Rhetorical Theory for Computers and other Mundane Artifacts*, where he explains the "user-centered" approach to technology design:

> In a user-centered approach to technology, users are active participants in the design, development, implementation, and maintenance of the technology. This is not meant to imply that users are the sole or dominant forces in technology development. Rather, they are allowed to take part in a *negotiated process of technology design, development, and use* that has only rarely been practiced. Users are *encouraged and invited* to "have a

say," in other words, and thus they are physically or discursively present in the decision-making processes of technological development. (1998, p. 32)

As Johnson notes, this approach gives significant power to users and allows users and designers to "value each other's knowledge and accept the responsibilities of technological design and development in new, shared ways" (p. 33). While these purposes were certainly in mind, I chose this approach for a couple of additional reasons.

First, as a newcomer to this organization, while I attempted to come up to speed quickly with the organization's mission and daily work, ultimately, it was the Co-Directors who had the breadth of knowledge that was essential for designing a system that could strategically accommodate the Center's content and workflows. The content audit performed could only reveal to me the content that I was able to uncover through talking with staff and searching around the computer system; the Co-Directors could point out the less visible aspects of their work and writing. By presenting my proposed information model to the Co-Directors before the implementation of the new system, both parties could examine the work of the Center from a holistic point of view, and a comparison of our conceptions of the Center's work produced a more complete information model to inform the system design.

Secondly, as the time span of my involvement with the Center was limited to one school year, I knew that the Center staff would eventually need to be able

to take full responsibility for the maintenance of the system I designed. While I could oversee and make changes to the system initially, the system had to be designed in a way that allowed for easy maintenance and sustainability after I was no longer working with the Center. By combining the use of the metaphor of "folders" within the Windows operating system with the logic of a traditional filing cabinet, I hoped to reduce the learning curve while maintaining a great deal of flexibility in the new system.

By starting out with a clear conception of the Center's content life cycle and the needs of individuals writing within the organization, I was able to customize a system that was easy to learn, flexible, and revisable. Keeping the user involved throughout the design and implementation process helped ensure that the system reflected the Center's work and was sustainable.

Feedback on the Folder System

Approximately three months after the folder system was implemented, I met with RG to talk about the new system and the file naming conventions that had been put in place. I asked her a series of twelve questions (See Appendix E). Overall, RG expressed that the system saves her time and is helpful because it makes it easier to find documents. She indicated that some documents have seemed to "disappear" since being transferred into the new folders, but for the most part, she is able to locate documents quickly. RG indicated that she has relied mostly on memory to use the system and has not referenced the user

documentation that was passed out at the staff meeting; however, RG asked for an additional copy of the guide to put in their grant writing training binder.

RG mentioned that not everyone follows the system; occasionally she will notice a resume floating in the top directory, but she is not sure how this happens because she is not there during the day. RG remarked that she has been the only person using the "Grants" folders and therefore has not gotten a chance to truly test out the system in terms of its ability to support collaborative writing tasks. She explained that during the summer, when there were several people working on grant writing, it was chaotic in terms of keeping drafts straight and locating files electronically, but since the implementation of the system, she has been the only one working on grants. She believes adding additional users will really test the system's capabilities.

During this interview, RG indicated that she has not added any new folders to the system because she was not sure how to do this. She considers herself computer literate, but she indicated that her assistant at her full-time job does most of this type of work on her computer system. Regardless, RG indicated that she has not really found a need to make new folders so it has not been an issue. We agreed that I would put together a written tutorial for how to create and rename folders for future reference.

With regard to the suggested file naming conventions, RG said that she did not have a copy of the file naming guide, so she has not stuck as close to the suggestions as she could have. She has been careful to include "grant" and the

month and year in the names of her files, but she believes that other staff members have not been as careful. RG thinks that the file naming conventions have been helpful to a degree in terms of making it easier to track drafts or find documents, but that sometimes she has to look in a few places to find the document she needs. Overall, she believes the file naming conventions will be even more helpful during the summer months when the number of volunteers and interns increases.

Approximately five months after the folder system was implemented, I completed a similar interview with PS. PS indicated that the new folder system makes it a lot easier to find documents and she feels that the system has worked great. She indicated that the system can be "a little intimidating" when a user first sits down to use the system, but that with a little time, the system is easy to use. PS indicated that she learned to use the system using trial-and-error and that she did not remember to use the handout that was given at the initial training session. She indicated that one issue they had shortly after the new system was put into place was that one of the folders got moved into another folder mistakenly and then temporarily 'lost.' PS has also noticed that occasionally a volunteer will save something in the wrong folder.

PS indicated that she hasn't made many changes to the way she names files as she feels she has always named files in a descriptive manner. She also indicated that because everyone works so independently at the Center, she

doesn't have a good sense of whether others have used the file naming conventions.

Overall, both RG and PS seem to find the folder system useful. In both cases, their criteria for measuring the success of the system seemed to be that it helped them to find documents more quickly. Both users also seemed to suggest that the new system could sometimes make it possible to think that a document had been 'lost' when in fact it was placed in the wrong folder or in a place the user had not looked.

In addition to conducting face-to-face interviews with both of the Co-Directors, I also received feedback by email from one of the Center's interns. The intern remarked, "the new folder system works great. It is very easy to use, however, there is so much information on the drive that it is hard to find certain documents at times. I believe much of the material is under the wrong file, which is mostly our own fault for saving it under the wrong file." The intern indicated that she taught herself how to use the system, and that the "folder system is pretty easy to navigate through on my own, it just took some time to get used to."

In addition to interviews with staff and one intern, I also reviewed the shared drive, local drives, and desktops of the Center's three computers. I looked inside folders to see if documents were out of place and reviewed desktops and local drives for stray files. I also reviewed the names of files created after the date of the staff meeting where file naming conventions were introduced to see if file names conform to the conventions I recommended. For the most part,

documents appear to be making it to the appropriate folders and within the "Grants" folder, documents appear to be named in more logical ways. It is difficult to make any definite conclusions, as RG indicated that she has tried to do "upkeep" of the shared drive, moving files to their appropriate folders when she has noticed one or two lurking out on the main directory.

The folder system and file naming conventions should prove useful for RG in managing the grant writing process. Over the summer months when the Center worked with several interns, it was difficult to track versions of electronic documents that had been printed out and there was no systematic way of tracking who was working on which grant. With the new system, grant related materials are stored within one folder, and RG should no longer have to search across the Center's computers to find the current draft of a proposal.

DESIGNING TOOLS AND PROCESSES FOR GRANT WRITING

With a system for managing the storage and retrieval of electronic documents in place, I then began to work with RG to develop tools to assist her and other grant writers at the Center. These tools were focused on creating processes that could work well within the new content management strategy and provide some relief for the Co-Directors.

Guide to Grant Writing

RG expressed to me that when working with new interns and volunteers, she often spends significant time trying to get them on track and up to speed with the process of grant writing. It became clear to me that many of the Center's grant writing needs could be alleviated through training tools for teaching new interns and volunteers about the process of grant writing. To lessen the burden on RG to transfer her knowledge of grant writing to others, I put together a "Guide to Grant Writing at the Center" (See Appendix D) that RG tweaked for the final version.

This guide is part practical and part strategic in that it explains the basics of proposal writing but also gives rhetorically-oriented advice on how to write persuasively and effectively for an audience of granting agencies. The guide provides Center-specific information on where to find previous grant proposals, commonly requested attachments, boilerplate language, and guidelines for working with RG to finalize drafts before submission. The guide also provides tips

on how to research grant opportunities, a task that interns had had varying degrees of success with over the summer. This guide should become a stand-alone document that can be given to new volunteers and interns to provide initial training that allows RG and PS to concentrate on their own projects.

Feedback on Guide to Grant Writing

There was a limited opportunity to test out the usefulness of this guide, as RG has been the primary person working on grant writing for the Center. The Center recently added a volunteer to help with grant writing and we provided him with access to the guide. When asked whether the guide was useful in helping him understand grant writing at the Center, the volunteer responded

> Definitely. Particularly since I'm doing this work off-site with limited in-person interaction with the Center, it helped me to understand where the Center was in terms of the purposes of their grants, the logistics in where certain information was and who would handle certain information. Case in point, in reading the Barbato book, I was reading about budgets and had never really prepared a formal budget before, hence I trembled a bit. But learning that [RG] and [PS] handle those completely allowed me to focus more on the content in the body of the proposal. Things like that, spurred on by small but impactful (sic) inclusions in the guide, were especially helpful in understanding the focus on what *I* needed to do and what I should leave to others.

Asked to specify which parts of the guide were most and least useful, the volunteer indicated that

> For me, the information on what to ask before and after writing the proposal didn't come in quite as handy as it probably would for someone else, but mainly for reasons dictated above. My role doesn't yet allow me to contact grant agencies to learn about their funding priorities or things of that nature, but I don't know if RG or PS will want me to do this in the future. If not, this is likely still handy for anyone doing future grant writing for the Center, so long as they do allow grant writers to perform these functions.
>
> The rest was extremely helpful . . . . To be honest, I'm not sure if I could name a part that was more useful than the others, just that as a whole, it put things in a fairly convenient nutshell.

When asked how he used the Guide while drafting his grant application, the volunteer indicated that

> I actually didn't reference the guide as much as I expected to, mainly because [the granting agency] had their own detailed outline for what they wanted included. Still, the common sections breakdown was helpful in trying to find any elements that may have been missing from initial drafts.

Overall, the grant-writing guide seems to have provided the volunteer with the Center-specific information it was intended to and seems to have helped the volunteer learn about the Center from a distance. The usefulness of this guide to

other volunteers and interns remains to be seen, but it seems likely that it will serve as an initial introduction to the writing process at the Center.

Boilerplate Language

At the end of the inquiry project started during the summer of 2006, WIDE had recommended that the Center develop boilerplate language that could be reused across proposals. After gathering copies of recently submitted grant proposals, I pulled content from within the common sections of a grant proposal and then created individual Word files that contained content from that particular section. For example, I created a file to contain information on the history of the Center, another that contained descriptions of the various programs offered by the Center, and another that detailed the qualifications of the Center's Co-Directors and staff.

I reviewed these files with RG, identified content that was out-of-date or that had been updated for a very recently written proposal, and decided on revisions to be made. This boilerplate language should provide useful for both RG and other writers, as it can provide a starting point for drafting and save on time spent searching across previously written proposals for language used in past grant applications.

Feedback on Boilerplate Language

We have had a limited opportunity to test out this tool as RG has been the primary person working on grant writing for the Center. The Center recently

added a volunteer and we provided him with access to the boilerplate language before he began to work on writing a grant proposal. After the volunteer had completed drafting his first grant proposal, I sought his feedback via email. The volunteer indicated that due to the fact that he was working from a distance and not in the Center, his "usage of the stock language was limited, but was mostly helpful for writing need statements and background on the Center. It was also particularly helpful in including information on what made the Center unique."

In addition, when asked how he altered the stock language, the volunteer indicated that

I did make some alterations in most of the sections I used for the sake of consistency. [My advisor] informed me that first person plural was usually the best POV to use in a proposal, and some of the cut and paste sections I had taken were written in first person, and some referenced the Center in third person. For consistency to fit with [my advisor's] recommendation, I altered most stock language that was in third person to first person POV. . . . To be honest, I don't think I used any parts verbatim, but this happened because of the tailoring to [the funding agency's] outline and funding priorities.

Overall, this feedback seems to suggest that the boilerplate language achieved the goal of providing a base for tailoring content to the needs of a given grant application. However, the volunteer also expressed some concern at the way the grant writing process proceeded:

One thing that also got in the way of using this section breakdown [from the Guide to Grant Writing] was my communication with [RG]. For example, I wasn't sure if she wanted specific items included for measurable outcomes, the scope of the projects the grant would fund, etc., so she simply told me to take what was in the grant for the [Foundation]. This was where a lot of the copy/paste confusion came in because, even though I ended up editing some of the prose from the grant, it seemed I was doing a lot more copy and paste than I anticipated and was worried it didn't allow me to use my writing skills and/or the grant writing guide to their fullest potentials.

It is interesting to note this tension between the volunteer's conception of grant writing and the Center's process of content reuse. As nonprofits begin to adapt methods for content management that allow them to reuse content, they will need to think carefully about how and when to use this content. Technical communicators can stress to writers in organizations that effective content reuse is not merely cut and paste between documents, but rather strategic reuse of content that is consistent across writing products or that can be tweaked to fit new writing situations.

CONCLUSIONS

This thesis project responds to the calls of McEachern, Walton, and others for research that examines writing within nonprofit settings. By providing a rich account and analysis of one experience implementing a system for content management and tools and training documents to aid in the grant writing process, this case study traces the challenges that the Center faces as they write. The work presented here suggests how technical communicators might work within nonprofits to design technology solutions that can help these organizations to manage content and thereby work towards improving the writing process.

There is a sense of urgency and immediacy to this work. As Burt and Taylor (2000) noted, nonprofits must adopt technology solutions in order to remain competitive and to make efficient use of limited resources. Those organizations that are unable to recognize the value of technology in their work may be quickly left behind. However, currently available 'off-the-shelf' products do not adequately meet the needs of nonprofits. My experience at the Center confirms previous research on technology use by nonprofits and suggests that small nonprofits need customized, flexible, and scalable solutions that allow them to address the issues that McEachern (2001) identified such as high employee and volunteer turnover, tight budgets, and time constraints.

Content-management solutions that account for the unique characteristics of nonprofits will also promote writing processes that are sensitive to these constraints. The conclusions and implications of this work can help us to build a clearer understanding of the content management needs of small nonprofits and may help us to identify new methods for understanding the purpose and design of these systems for all business types.

Work with nonprofits can also help us to better appreciate how writing functions as a knowledge tool, and more specifically, this research can help us to understand how small nonprofits can leverage writing to more efficiently meet goals and create change within the communities they serve. In the following section, I discuss in depth how this case and future studies which look at content management in nonprofits might help us to move beyond the notion of single sourcing as the primary method for streamlining content development and suggest ways in which technical communicators might begin to develop best practices for content management strategies that meet the needs of smaller organizations.

IMPLICATIONS

As I previously mentioned, our discussions of content management within technical communication have focused on single sourcing, or methods for reuse of content that involve modular writing and storing of "chunks" in databases. In accordance, large organizations with numerous employees and departments have adopted single sourcing methods on a variety of levels. However, we should be careful not to think of single sourcing as the only method for helping organizations to write in an efficient, organized, and strategic way. Rather, when we begin to recognize the connections between an organization's ability to manage content and their ability to write, we can design solutions that coordinate these activities in ways that meet the needs of individual organizations.

Extending our Focus beyond Single Sourcing to Single Organizations

On the surface, the work I have done at the Center may appear to be more along the lines of "document management" or "document development" work since the solutions implemented were aimed at instituting ways to store and track whole documents and at helping the Center to improve their writing process. However, the impetus for putting these systems into place was the identification of a lack of control over documents in terms of both storage and tracking. Documents were scattered across the Center's three computers on local drives, on the desktop, and in "My Documents" folders (that in fact no one could claim ownership of). Grant proposals were started by one intern, continued months later by a volunteer, and eventually made their way to the Co-Directors,

often in the form of multiple drafts, stored in multiple places. Content was overwhelming the organization, making it difficult for the Co-Directors to play their administrative roles. They needed a way to manage multiple drafts, multiple writers, and multiple workflows—they needed a way to manage content.

The Center did not have money in their budget to spend on a software package. Based on my assessment of their technological savvy, I knew they also needed something simple; if I implemented something too technical or with too high of a learning curve, they would most likely not use it, nor would they trust me to continue to work with them. Moreover, the Center's website is hosted by a community organization that makes use of a CMS and they use Yahoo and their Internet Service Provider for their email accounts. Therefore, for the most part, the Center's Web content management needs were being attended to and moreover, staff members were not in a position to put in the time or effort required to learn to use a Web Content Management System.

These factors put the focus on the content produced on a daily basis in the Center. To get a sense of the various types of documents staff were writing and using to do the work of the Center, I completed a "content audit" as Rockley advises but I also talked to the Co-Directors directly to get a sense of their needs and their common tasks. My goal in talking to the users was to focus on developing a people-friendly solution for their needs. People-friendly could also be qualified—the system I designed had to be Co-Directors-friendly. It had to be something they could learn quickly, something I could set up for them that would

be easy to maintain and update as they began to use it, and eventually, it had to be something I could see them being able to update and customize as their organization grows and their needs shift.

One-Size Fits Who?

My experience working with the Center to develop methods that worked in the context of their work suggests a concept that is seemingly missing from our discussions of content management--the concept of scalability. Most Content Management Systems are designed for mid-to-large sized corporations with numerous employees and various departments responsible for specialized work within the business. What if you are a small organization, with 2-3 employees total, all who split the tasks of writing? A system for managing the content produced, stored, accessed, reused is needed, just as much as a large office needs a way to organize their work. While Boiko (2005) devotes a chapter of his book to "Doing CM Projects Simply" (pp. 202-218), few other scholars have considered the content management needs of small organizations. Absent from our scholarship is a focus on the value that technical communicators can provide to small organizations, especially nonprofits, whose very livelihood often depends on their ability to "keep it together" as they establish themselves and their services within the community.

In large-scale corporations, content management (namely single sourcing) helps ensure consistency across documents and product cycles and allows *departments* (or at least *teams* of writers) to share content. In small nonprofits,

content management is a way of controlling the work that goes on daily as people circulate in and out and allows content to be shared across *individuals*. In the case of the Center, using the folder metaphor inherent in Windows was a simple and easy-to-understand way to encourage organization of content and allow for multiple staff members of varying technological savvy to have access to files.

Hart-Davidson (2001) suggests that "more and more, the exchange value of an information product is associated with aspects of quality that technical communicators have the expertise to look after: customization for specialized or niche audiences, ease of use, and scalability" (p. 145). These abilities of the technical communicator can be extended to include the facility to build customized, simple, fitted solutions for content management in their organizations. In this work, technical communicators can act as a gardener, "tak[ing] on the responsibility of *customizing* software tools for local conditions and *assisting* their co-workers in using the tools" (Nardi and O'Day, emphasis in original, p. 141).

Towards Scalability in Content Management

Technical communicators can help organizations to identify and adopt content management strategies that are scalable on two levels--inter-organizationally (across organizations) and intra-organizationally (within organizations). Intra-organizational scalability is the ability of a product to work over time within a business as it expands. As employees and products are

added, a scalable content management strategy would expand and be customizable as new needs arise.

As technical communicators working in nonprofit contexts to address issues of scalability, there are several questions we can ask. These might include questions like:

- How can content management tools meet organizational needs aside from website management?
- How can content management tools be used for internal and external communication?
- What kinds of information can be stored in content management systems?
- What, if anything, do organizations gain when they use a content management system to manage more of their information?

In some cases, Enterprise Content Management Systems (ECMS) may help us to think through most of these concerns. ECMS are being used by many corporations for compliance reasons as a result of new laws that regulate information management. ECMS also are used to build infrastructure. ECMS allow for centralized management of

- Information not intended for web delivery only,
- Information across departments,
- Information thru intranet, and
- Paper and electronic documents.

As ECMS suggest, for the most part, content management system scalability is conceived in terms of the capacity to scale-up, not down. That is, if your company is growing, your system for content management can grow with you and handle more employees and more content.

Little attention has been given to inter-organizational scalability, or the ability of content management strategies to work well across organizations of different sizes, structures, purposes, and products, among other things. As this case study of one small nonprofit suggests, technical communicators can help to design new solutions for organizations with few employees and little or no money to spend on new technology. Technical communicators can also help address concerns like the design of easy-to-use, low-tech systems that require little technical support during initial set up, during user training, and during use over time. Technical communicators may also use their skills to lead training sessions as well as to develop user documentation.

Towards Best Practices for Content Management

In working within organizations of various sizes with different needs, resources, and purposes, technical communicators can begin to suggest best practices for content management in nonprofits. The project implemented here suggests that content management may need to occur in small steps. First, it is essential that the technical communicator observe and work within the organization to identify their needs (in an optimal situation, the technical communicator would be a part of a nonprofit's staff before beginning the content

management project). Then, with this understanding, the technical communicator can begin to work with staff within the organization to set about designing solutions. Finally, once a solid plan is in place, implementation can begin with the acknowledgement by both parties that revisions will likely need to occur before the system is stable and closely customized to the organization.

Moreover, what this stepwise approach suggests is that this work is inherently collaborative. As Grabill (2007) states,

> Rhetoric is no longer the terrain of the individual rhetor speaking or writing to 'the public.' Although I realize that this subject position has not been the default for some time, this rhetoric *requires* collaboration of a breadth and depth perhaps not seen before (or made visible in previous scholarship). The design of information technologies to enable effective use is not something that 'everyday people' can do by themselves, nor is it possible for designers and scientists working on their own. The writing practices of citizens engaged in community action requires the collaboration of large numbers of people (and tools and infrastructures). . . . Rhetoric has always enabled this type of productivity, and indeed, as Janet Atwill (1998) has argued, the art's purpose is to enable the transgressive acts of the least powerful. The value of any contemporary art of rhetoric will be measured as it always has been—by how useful it (and we) can be for others. (p. 16)

Just as nonprofits often work closely with community members, technical communicators will need to use both their technical and rhetorical expertise as they work alongside staff in nonprofits to design solutions that coordinate content with workflows. By making rhetorical choices that take local contexts and available technology into account, technical communicators can help nonprofits to improve the effectiveness and efficiency of written communication by helping them to identify and address problems in content management and workflows, and develop useful and reusable documents and document development processes. Ultimately, this collaborative work can help nonprofits to better realize their organizational goals and improve the delivery of services to their community.

FUTURE RESEARCH

I have suggested the limitations of current content management strategies designed for large, corporate workforces and argued for an understanding of the connections between the ability to manage content and write in an effective way. Further work may lead us to strategies that work for nonprofit organizations with different staff sizes and varying levels of available funding and technology expertise.

Future research might explore the content management solutions that nonprofits choose and examine how decisions about technology infrastructure are made. A similar study might explore how nonprofits tailor off-the-shelf content management software that is not intended for use by nonprofits and determine which software solutions are best fitted to nonprofit work. Moreover, a number of commercial Content Management Systems have been developed that claim to meet the needs of nonprofits; a future study might examine the design of these systems to identify the features that support writing or evaluate the effects of these systems on an organization's ability to write.

Future partnerships with nonprofits might explore whether organizational structures influence the types of strategies that are adopted by individual organizations for content management. For example, do nonprofits with hierarchical relationships between staff tend to value the same sort of hierarchical structure within their computer systems? Do content management systems that operate on an assumption of hierarchical employee structure work

better for large nonprofits and for-profit corporations than for small nonprofits and small businesses? By focusing our attention on one type of organization, the nonprofit, we might be able to expand outwards and apply new approaches in a variety of settings.

Our involvement with nonprofits offers exciting opportunities for expanding and reconceptualizing the role of technical communicators. Johnson (1998) called for technical communicators and rhetoricians to become more actively involved in discussions of technology design and criticized our failure to participate more fully:

> the blame sits squarely on our shoulders—those of us who participate in the loosely defined disciplines of technical communication and rhetoric. We, for the most part, have not made visible our presence, our potential influence in the sphere of technology studies. (p. 157).

Johnson believes that the key to increasing this influence is through the education of the "*technical rhetorician*: a technical communicator who is trained in the theory and practice of the arts of discourse, and who practices these arts as a responsible member of a greater social order" (p. 158). Content management offers one area where the technical rhetorician can put their skills to use in designing information technology solutions that are fitted to particular organizations and their writing needs. Future research within nonprofits may uncover even more opportunities.

APPENDICES

APPENDIX A

AUGUST 2006 RECOMMENDATION REPORT BY WIDE

(EDITED TO PRESERVE ANONYMITY)

Writing Strategies for the Center

WIDE Research Center
Michigan State University
August, 2006

This document outlines possible strategies to help Center staff think about improvements to workflow and writing processes within the organization. These strategies are based on the time we spent with folks at the Center this summer, but they are also based on our experiences with other organizations and our sense of best practices. We offer them for discussion and will help with implementation.

Grant Seeking Strategies

For all organizations that are successful grant seekers, the processes of looking (and then applying) for grants is strategic. As you might imagine, it begins with the mission statement of the organization (who are we?) and is informed as well by current programs and future programs (what do we do and what do we need to do in the future?).

Staff designated to seek out new funding opportunities, then, should have a clearly articulated, concrete sense of mission and focus in front of them (often literally) when combing databases and file folders looking for opportunities.

The keys are <u>focus</u> and <u>system</u>.

Once a focus has been clearly articulated and is the filter that seekers are using to find new opportunities, the staff who are seeking grants need to use the identical searching strategies. Components of a searching strategy might include:

- A log (diary) in which staff will document where they looked for grants, the search terms used, and in particular, the search terms deemed most effective.
- A shared space (more on this below) that staff can use to access and read each other's logs, and most importantly, share opportunities that may not fit their own search but that might be relevant to a colleague's search.
- Persistence. Searching should be built into people's workflow. Every week, for example, staff might spend at least one hour searching for grant opportunities.
- Adaptation. Strategies should be worked until deemed ineffective; staff should always be looking for ways to tighten and refine their searching.
- Visibility. A central, visible place like a whiteboard is a good site to place grants that need to be written, due dates, and people assigned to them.

Another virtue of a strategy that looks like this is that it is possible to implement this strategy with a staff that turns over regularly (e.g., interns). The key is focus, systematic workflows, and very good communication strategies.

Grant and other Organizational Writing Process Strategies

Once grants are identified, another strategy must be developed and implemented in order to write effective proposals—and to write them in a relatively painless way. In the case of the Center, it seems imperative that the organization write good boilerplate, good templates, and work on a way to have shared electronic spaces for your work (I can talk with you about this third issue, in particular, when we meet).

Boilerplate is simply text that is reused often. In the case of proposal (and report) writing, there is often a fair amount of boilerplate. The most likely candidates are statements about the Center's mission, its purpose, and background information on its programs. Other likely boilerplate might include staff biographies and measures (arguments about) of effectiveness and outcomes. Some aspects of budget and financial statements can be boilerplated. When we observed grant writing processes this summer, we saw many opportunities where having boilerplate would have helped your interns. It is also a way of controlling quality for you.

Templates are slightly different. Templates are standard formats into which content can be "poured." Having templates will be useful if there are grant programs to which you regularly apply or grants that have a similar logic to them—as proposals often do—but no standard format. Another virtue of templates is that they can be used as models for novice writers (as in "see, this is what a proposal looks like.").

Other possible strategies might include

- Workshops: One might focus on "the rhetoric of proposing," which is something we could do with or for you. Others are more pragmatic writing workshops. We might imagine a three-part process, one to divide up the work and to look at models of other grant proposals, a second one where people bring initial rough drafts, and a third one where polishing and editing is accomplished collaboratively.
- A shared electronic workspace. Some kind of centralized and private space that is only accessible to the interns and staff might be useful for a number of reasons, such as providing a location for boilerplate and templates (and grant seeking logs). Such a space would also enable people to work from home or off-site more effectively given the limited workspace in the Center.

Intern Hiring to Implement Strategies

Expanding the skill set of the organization, particularly in terms of the interns, seems essential. In addition to psychology and counseling interns—and in some cases instead of them—consider seeking interns who specialize in communications, use of information technologies for communications, and other, needed skill sets.

APPENDIX B

USER DOCUMENTATION

The Center's File Folder System
11/3/2006

Guide to Folder Structure on the Shared Drive

To access the Shared Drive:
- Click on "My Computer"
- Click on "SharedDrive on 'Front Office Computer (Compaqpresario)' (S:)"

Choosing a folder:
- Folders on the top level of the Shared Drive represent the various areas of work done at the Center.
- Some folders contain subfolders that further sort materials by year or topic, so pay attention to those as well.
- Save your files to the most relevant folder.

Tips for saving to folders:
- Make sure you are saving to the appropriate folder.
- Make sure you are following the File Naming Conventions (see reference card for details).

For Clients:
- Please create a new folder with your name (LastName_FirstName – Smith_Jane) in the **"Client Work"** folder if you need to save something to this computer.

For Volunteers and Interns:
- If you need to save something that does not fall under one of the existing folders or is non-Center related, please create a folder with your name (LastName_FirstName – Smith_Jane) in the **"Volunteers and Interns"** folder and save your work there.

APPENDIX C

RECOMMENDED FILE NAMING CONVENTIONS

File Naming Conventions

For Saving New Files on the Shared Drive

- No spaces—use underscore (_) instead
  - To insert an underscore, press *Ctrl* + *hyphen*
- No hyphens (-), exclamation points (!), or question marks (?)
- Use all lowercase letters
- Use date to indicate version (mmddyy format)
- Use file name that reflects
  - what type of document it is (letter, list, flyer, proposal, etc.),
  - the subject or addressee (job-related, Smith), and
  - the date (mmddyy format)
- Examples of how to name files:
  - "list_job_openings_102106" instead of "jobs list" or
  - "ltr_smith_112006" instead of "solicitation letter" or
  - "proposal_mattel_091406" instead of "grant app"

File Naming Conventions for Common Documents:

- If naming a letter, use "ltr_addressee's name_date"
  - "ltr_smith_091206"
- If naming a grant proposal, use "proposal_granting agency name_date"
  - "proposal_statefarm_092506"
- If naming a flyer, use "flyer_date"
  - "flyer_101506"

APPENDIX D

GUIDE TO GRANT WRITING AT THE CENTER

The Center's
Guide to Grant and Proposal Writing

What is the purpose of a grant proposal?

The purpose of a grant proposal is twofold. The primary purpose is to obtain funding for a proposed project. However, even if a grant is not funded, a grant can also help an organization to gain visibility in the community and with the granting agency. Oftentimes, a young nonprofit organization will apply for a grant knowing full well that they most likely will not receive funding; however, simply submitting a proposal can help put the nonprofit's name and cause out there and on the radar of philanthropists and grant funders. In this way, grant writing can be thought of as a form of relationship building. At the Center, we are at a point where our grant writing is for the purpose of getting funding for programs, infrastructure, and building renovations.

What are the common sections of a grant proposal?

(In order of appearance in a grant proposal, however pay attention to the requirements of the specific granting organization or agency. Page lengths are suggestions, again you'll need to follow specific guidelines for each proposal).

Cover Letter (length: 1-2 pages)
> The cover letter is used to preview the contents of the proposal, to make reference to previous conversations or connections with the agency, and to put the project into context. You should mention the basics of the proposal, such as the name of the project proposed and the amount of money being requested. Also include ways for the agency to contact the Center. This letter is signed by RG and/or PS.

Cover Page (length: one page)
> Think of the cover page like a title page for an academic paper. It should contain the name of the granting agency to which the proposal is being submitted, the title of the proposed project, the Center's name and contact information, and the date. **Note:** Many grants have their own cover page that is required, with their own specific requirements.

Executive Summary (length: less than a page)
> The executive summary is a quick but informative and persuasive summary of the proposed project that comes at the beginning of the grant proposal. Someone reviewing your executive summary should be able to get a sense of the entire project including its goals and objectives. In this section, state how much money you are asking for and convince the reader that they should be compelled to continue reading further. This is a key part of the grant proposal and your reader may judge the entire

document based on this section! Some writers find this section easiest to write once all other sections are written; others write it first to focus their thinking.

Introduction or Overview (length: less than a page)
The introduction should tell the reader about the Center. In this section, include a brief history of the Center, the mission statement, a summary of the number of the staff, volunteers, and interns, the number of clients served and any relevant accomplishments.

Statement of need (length: ½ page - 2 pages)
The statement of need section (also known as a need statement, problem statement, or description of current situation) is where you make your strongest arguments regarding a demand for the Center's services. Describe the problem or opportunity at hand in a way that will interest the granting agency. Do not emphasize the monetary needs of the Center; rather, emphasize the needs of women in the community. Make sure the scope of the problem you are describing is not out of reach, but rather is manageable and a concern to the local community that the Center can address.

Project Description
In this section, describe the plan for addressing the problem or opportunity described in the statement of need. Convince the reader that the Center is the most qualified and capable of carrying out the proposed project. There are four subsections of the Project Description: goals and objectives, methods, evaluation methods, and sustainability.

1.   Goals and Objectives (length: no more than a page)

Goals are predictions of what you hope will happen at end of the proposed project

Objectives are more specific than goals; objectives are the steps you will take to achieve the goals you have set for the project. When possible, state specific numbers of people that will be impacted by the project (e.g., 20 women will find full time employment).

2.   Methods (length: as long as needed)

The methods section tells the reader how you will carry out the proposed project and meet the goals and objectives you have set. This includes describing who will carry out the project and a timeline for the project.

3.   Evaluation methods or Outcomes Assessment (length: one paragraph to one page)

Evaluation methods are the part of the narrative where you describe how you will know if your project was a success. Suggest how you will know if you have met your goals and objectives. Be as specific as possible because well-developed evaluation methods will set a proposal apart from other grant seekers who have not thought through to the end of the proposed project.

4. Sustainability / Avenues for future funding (length: 1 – 2 paragraphs)

Use this section to convince the granting agency that you are committed to finding funding for the project indefinitely. Describe where you will seek funding.

Budget (length: one page)
The budget details how much it will cost to carry out the proposed project. This section will be handled by PS or RG.

Conclusion (length: 1 – 3 paragraphs)
Leave your reader with a clear picture of the proposed project, what it will achieve, and what is needed to make it happen.

Attachments (length: as needed)
Attachments include both documents requested by the granting agency and documents to support your argument. Attachments might include
- Biographies of project leaders or Center staff,
- A list of the Board of Directors, with affiliations
- Letters of support,
- A copy of the 501(c)(3) letter from the IRS,
- Articles of Incorporation,
- By-Laws,
- Current agency budget,
- Most recent audit, IRS Form 990
- Organizational chart,
- Annual report,
- Current marketing brochures, pamphlets, newsletters or
- A list of other funders.

Be careful to follow the granting agency's guidelines regarding attachments. Some granting agencies will allow you to provide unlimited supporting documents, others specify a maximum.

Where can I find language from previous grant proposals (written by the Center) to use as an example or to edit for the proposal I am writing?

Stock language that can be used or adapted to fit the grant you are writing can be found in the "Stock Language" folder, which is located in the "Grants" folder on the shared drive.

Where can I find copies of the attachments that are commonly requested?

Copies of documents that are commonly requested by granting agencies can be found in the "Attachments" folder, which is located in the "Grants" folder on the shared drive. Make sure that you have the documents corresponding to the correct year. Some grants require the current year's information, others require the last two years, some want a complete list since the inception of the organization.

Where can I find a current list of agencies and people who support the Center?

This list is constantly changing, so it is best to ask PS or RG if it has changed since the last newsletter was published. If it has not, you can obtain a list of funders from the newsletters that are relevant to that year. An electronic copy of the newsletters is kept in the Newsletters Folder on the Shared Drive. PS has information on any additional funds received since publication of the most recent newsletter.

Where can I find a copy of the Common Grant Application cover sheet?

The Common Grant Application cover sheet can be found in the "Guidelines, RFPs, and Applications" folder, which is located in the "Grants" folder on the shared drive. This sheet is used for many of the grants offered by foundations in the state. There is a listing of all of the foundations that use the CGA in the CGA.

Where can I find the grants that the Center is currently applying for?

A three-ring binder is kept near the mail trays by the printer in 1710. This binder has grant information organized by the date due for the remainder of the 2007 year. There is information about the funding organization, the grant guidelines, copy of the proposal, due date, etc. This is the place to start when looking for grants to work on. The grants in the notebook have been deemed appropriate for funding for the Center.

Researching for Grant Opportunities on the Internet

Finding grant databases

Aside from doing a general search using Google, there are a number of free databases available on the Internet that collect and list current grant opportunities. One of the librarians at MSU has compiled a web site listing grant opportunities that is expansive and updated religiously.

Some places to start:

The Grantsmanship Center's List of the Top Giving Foundations in Michigan:
http://tgci.com/funding/top.asp?statename=Michigan&statecode=MI

The Grants.gov portal
Browse by category: http://www.grants.gov/search/category.do

MSU Grant Database
http://www.lib.msu.edu/harris23/grants/index.htm
For nonprofits: http://www.lib.msu.edu/harris23/grants/2sgalpha.htm

Finding relevant grant opportunities

Once you have found a database or are ready to search on Google, it's important that you find grant opportunities that fit well with the types of projects and programs that the Center offers or would like to offer. Search for granting agencies that fund causes such as "improving economic self sufficiency," "after school programs for girls," "unemployment assistance" or something else directly related to the project you are writing about.

Questions to Ask Before, During, and After Writing a Grant Proposal

Before You Start Writing

<u>Have I done sufficient research on the grant opportunity to make sure that the Center qualifies for the grant, first, and second, that the proposed project fits within the scope of projects that the agency is willing to fund?</u>

Almost half the work of grant writing comes before you actually sit down to write. This work includes
1. finding grant opportunities,
2. learning about the grant to make sure that the Center qualifies for the grant,
3. learning about the granting agency to see where their interests lie (unemployment services, certain age populations, general population, homelessness),
4. making sure your project "fits" with the grant guidelines (in terms of amount of funding needed, types of projects agency is willing to fund, populations the agency is looking to serve) and with the types of projects typically funded by an agency (past projects funded, examples of projects they are interested in, new versus ongoing projects).

Before you begin writing, you should always call the granting agency and get confirmation that the project you would like to propose truly fits within their guidelines. Failing to do this can result in wasted time and energy.

<u>Have I noted the deadline to turn in the grant proposal and made sure to leave plenty of time for RG to review my draft?</u>

When you begin work on a grant proposal, be sure to enter it into the "Grants Due" Word document stored in the "Grants" folder on the shared drive. Take note of the deadline, and make plans to get a copy of the final draft of the proposal to RG at least a week before it is due. *All proposals must be approved by RG and PS before being submitted.*

<u>Who is the audience for my grant proposal?</u>

Find out as much as you can about the granting agency and who will be reading your proposal. This means doing some research to find out what projects a granting agency has funded in the past, reading carefully through the grant guidelines, and talking to someone at the granting agency to clear up any questions.

During

What is unique about the project I am proposing?

Granting agencies receive a number of proposals aside from yours. Money is tight and agencies have to be careful in choosing projects that are both unique and well thought-out. It is your job to convince the funder that if they give you the money or supplies you are requesting, the support will be put to good use.

How does the proposed project meet the goals of the granting agency?

Granting agencies like to fund projects that fit with the goals of their organization. Therefore, when looking for funding opportunities, look for agencies that support the mission of the Center.

Are there sections of the proposal that can be reused from previously written grant proposals?

There is no reason to reinvent the wheel when writing sections of a grant proposal that are common across applications. Reusable content can be found in the stock language documents that are stored in the "Stock Language" folder, which can be found in the "Grants" folder on the shared drive. It may be necessary to tweak or modify the stock language to fit the particular proposal you are working on.

After drafting and before submitting

Have I written a grant proposal that is unified and logical?

In a well-written grant proposal, the various sections build upon each other, creating a complete picture in the reader's mind of a well-rounded and thought-out project. It is your job to convince the granting agency that the project you are proposing will be successful and that it will have benefits for the population served. To that end, make sure that
- the introduction gives the reviewer a sense of the Center,
- the need statement is compelling and interesting to read,
- the goals of the project can be met by carrying out the objectives described,
- the methods are realistic,
- the conclusion sums up the project and makes a strong argument for funding the proposed project.

<u>Have I completed all sections of the grant proposal and gathered all the
attachments requested by the granting agency (Or, made a list of documents that
need to be attached before sending)?</u>

Failing to fill out all sections of an application or forgetting to attach the required
documents can delay the consideration of your proposal and tarnish the image of
the Center, or in the worst case, disqualify the proposal all together. Make sure
you have double-checked to make sure you have included all the required pieces
of the proposal or have let RG or PS know what documents still need to be
attached or filled out.

Attachments might include
- Biographies of project leaders or Center staff,
- A list of the Board of Directors with affiliations,
- Letters of support,
- A copy of the 501(c)(3) letter from the IRS,
- Articles of Incorporation,
- By-Laws,
- Current agency budget,
- Most recent audit, IRS Form 990
- Organizational chart,
- Annual report,
- Current marketing brochures, pamphlets, newsletters or
- A list of other funders.

Electronic copies of many of the common attachments can be found in the
"Attachments" subfolder located in the main "Grants" folder.

<u>Have I followed the grant agency's guidelines for structure or format, for length,
and for attachments?</u>

If the granting agency has given specific guidelines for the format, length or for
attachments, be sure to follow them. Some granting agencies will specify a page
limit for the narrative section. Others will only accept applications electronically.
The last thing you want to happen is for your proposal to be thrown out for failure
to follow set guidelines. Oftentimes, you can use the structure of the application
guidelines as an outline for your grant proposal and to keep you on-track.

Some other guidelines to watch out for:
- Limits on the length of the proposal,
- Font size requirements,
- Margin size requirements,
- Single vs. double spacing,
- Limits on the dollar amount you can request,

- Limits regarding attachments,
- Submission requirements
  - paper vs. electronic,
  - Number of copies that need to be submitted,
  - Whether or not copies can be stapled.

Most importantly you want to make sure that your proposal fits within the guidelines of what the funder will fund. Some grantors will not pay for salary, benefits, travel, direct services, infrastructure, building improvements, etc. You want to be certain that you are only asking for things they specifically fund.

<u>Have I done final proofreading and editing to polish the grant proposal?</u>

Careless mistakes in the final draft of a grant proposal will make the Center appear unprofessional and unconcerned with the image of the Center. Run spell check, have another person read thru the proposal, and read the proposal aloud to yourself or to someone else to catch missing words, awkward phrases, or other corrections.

Glossary of Terms

Attachments	Documents often requested by funding agency such as proof of nonprofit status, list of Board members, letters of support; this is also a place for you to include documents to support your argument.
Budget	An accurate estimate for how much it will cost to carry out the proposed project. This section will be completed by PS or RG.
Cover Letter	A one-page letter addressed to the granting agency summarizing the attached proposal The cover letter can establish a more personal tone and make reference to any connections that are especially important.
Cover Page	Similar to a title page included in academic paper. Contains basic information such as the name of the granting agency to which the proposal is being submitted, the title of the proposed project, the Center's name and contact information, and the date.
Evaluation Methods	This is the section in the narrative where you describe how you will know if your project was a success. Be as specific as possible because well-developed evaluation methods will set a proposal apart from other grant seekers who have not thought through to the end of the proposed project.
Executive Summary	A quick but informative and persuasive summary of the proposed project that comes at the beginning of the grant proposal. Someone reviewing your executive summary should be able to get a sense of the entire project including it's goals and objectives. State how much money you are asking for and convince the reader that they should be compelled to continue reading further. This is a key part of the grant proposal and your reader may judge the entire document based on this section! Some writers find this section easiest to write once all other sections are written; others write it first to focus their thinking.
Goals	Goals are predictions of what you hope will happen at end of the proposed project.
Granting agency, grantor, or *funder*	These terms are used interchangeably in this Guide and refer to the person or organization looking to fund projects or causes.

Grant proposal	This is the document that you are writing. See "<u>What is the purpose of a grant proposal?</u> and <u>What are the common sections of a grant proposal?</u> for more details.
Narrative	This is the broad term for the main section of a grant proposal in which you describe the Center and the proposed project. Other common parts of a proposal include a cover letter, a proposed budget, and any attachments.
Objectives	Objectives are more specific than goals; they are the steps you will take in carrying out the proposed project.
Proposed project	This is the project you asking the granting agency to fund or support.
RFP or CFP	Request for Proposals or Call for Proposals. This is the document that a granting agency sends out to ask for interested parties to submit grant proposals.
Statement of need, need statement, problem statement or *current situation*	This is the section of the proposal where you describe a problem or current situation that the Center is looking to solve or address and describe how the granting agency can help the Center improve this situation.
Sustainability	When a granting agency asks you to show sustainability, they are looking for evidence that you have though long-term about how to support the proposed project.
Qualifications	In this section of the narrative, prove how the Center is qualified to carry out the proposed project. Detail what sets the Center apart from other organizations and how Center staff, interns, and volunteers are qualified to carry out the proposed project successfully.

Further Reading

"Writing for a Good Cause: The Complete Guide to Crafting Proposals and Other Persuasive Pieces for Nonprofits."
By Joseph Barbato and Danielle S. Furlich
Fireside publishers, 2000.
- A very accessible overview of grant writing, specific to nonprofits. Much of the advice in this Guide came from reading this book.

"Grant Seeking in an Electronic Age."
By Victoria M. Mikelonis, Signe T. Betsinger and Constance Kampf
Pearson Education publishers, 2004.
- Written for academics, professionals in nonprofits, and K-12 teachers and administrators, this book takes a look at the entire process of grant seeking. Emphasizes a practical approach based on the authors' own experience.

"Writing Proposals: Rhetoric for Managing Change."
By Richard Johnson-Sheehan
Pearson Education publishers, 2002.
- Not specifically focused on writing grant proposals in particular, but much of the general advice on writing the various sections of a proposal still applies.

"Writing Winning Business Proposals."
By Richard C. Freed, Shervin Freed, and Joe Romano
McGraw Hill publishers, 2003.
- Slightly technical and highly detailed look at proposal writing. Tailored more to those writing business proposals but provides a very systematic way for understanding how to write proposals.

APPENDIX E

EVALUATION QUESTIONS

Evaluation Questions

I'd like to talk with you about the folder system and the file naming conventions that we have developed together over the past 5 months. Please be honest with me about what you think has worked, what still needs improvement, and what has and hasn't been useful to you and the work you and others do here at the Center. I want to make it clear that I am not asking you to evaluate me as an intern or worker, but rather I am looking for you to provide feedback on the systems that I have tried to put in place.

Folder System

1.	What has been your experience using the new folder system?

2.	Have you created any new folders?

3.	Have you created any aids or tools to help you to use the new system? Sticky notes, handwritten notes

4.	Have you used the handout that I passed out at the staff meeting where the new system was introduced?

5.	Has the folder system affected your ability to locate files in any way? How?

6.	Has the folder system affected your ability to track the progress of proposal drafts?

7.	Are there any parts of the folder system that you feel need to be altered?

Naming conventions

8.	What has been your experience using the file naming conventions?

9.	Have you used the handout that I passed out at the staff meeting?

10.	Do you have a sense of whether the file naming conventions have been followed?

11. Have the file naming conventions affected your ability to track drafts or to find documents?

12. Has the presence of multiple drafts of proposals (and inability to tell which document was most current document) been affected by new file naming conventions?

APPENDIX F

POWERPOINT PRESENTATION

Slide 1

> # The Center's
> # Shared Drive Folder System
>
> ## November 3, 2006

Slide 2

> **What?**
>
> - A new folder structure on the S: Drive
> - A new system for naming files

Slide 3

Who?

- Staff
- Volunteers
- Interns
- Clients

Slide 4

Why?

- Purpose is to:
  Make files easy to find
  Reduce clutter
  Make your work easier

Slide 5

The Basic Structure

- Folders on the S: drive (shared network drive)
- Folders with subfolders

Slide 6

Top Level Folders

- Grants
- Solicitation Letters
- Newsletters
- Promotional and Marketing Materials
- Articles for Publication
- Administrative Resources
- Workshops and Support Groups
- Fundraising Events
- Volunteers and Interns
- Client Work
- Annual Reports
- Business Incorporation Documents
- Board of Directors

Slide 7

Screenshot

- Deleted due to illegibility

Slide 8

The *Grants* Folder

- Grants folder contains the following
  subfolders:
    Guidelines/RFPs/Applications
    Drafts in progress
    Final drafts
    Priority Grants
    No deadline
   Thank You Notes

Slide 9

Screenshot

● Deleted due to illegibility

Slide 10

Volunteers and Interns **Folder**

● If you need to save something to the computer that does not fall under one of the existing folders, please

create a folder with your name (LastName_FirstName – Smith_Jane) in the "**Volunteers and Interns**" folder

Slide 11

Administrative Resources folder

- Commonly used forms—fax cover, letterhead, mailing lists and labels, intake forms, confidentiality forms
- Logs—phone log, calendar

Slide 12

Workshops and Support Groups folder

- Subfolder for each workshop or group
- Store any materials (agendas, handouts) or flyers in appropriate folder

Slide 13

Client Work folder

- Please have clients
  create a new folder with their name
  (LastName_FirstName – Smith_Jane) in
  the "**Client Work**" folder if they need to
  save something to the computer.

Slide 14

Naming New Files

- No spaces—use underscore (_)
  instead
  To insert an underscore, press *Ctrl +
  hyphen*
- No hyphens (-), exclamation points (!),
  or question marks (?)
- Use all lowercase letters

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Slide 15

Naming Conventions

- Use file name that reflects

    what type of document it is (letter, list, flyer, proposal, etc.),

    the subject or addressee (assertiveness or Smith), and

    the date (mmddyy format)

Slide 16

Examples of File Naming

- Examples of how to name files:

    "list_job_openings_102106" instead of "jobs list" or

    "ltr_smith_112006" instead of "solicitation letter" or

    "proposal_mattel_091406" instead of "grant app"

Slide 17

Reference Cards

- **"File Naming Conventions for Saving New Files on the Shared Drive"** reference card to help you name new files.

- **"Guide to Folder Structure on the Shared Drive"** reference card to help you in finding and saving files.

Slide 18

This is a test run!

- This system is flexible
- Two-week trial
- Give me your feedback!
    Email: graceb@msu.edu
- If you have problems finding a file
    try running a search: right-click on S: Drive and go to "Search..." and type in search terms

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