

Technology Leadership Academy

Module 2: Planning for Technology



Fall 2013

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Review Module 1

Appropriate

Focus on Data

Address Resistance, Gain Uptake

Team, Inventories, Benchmark, Communicate



Planning

Benefits

Cycle

Vision



Benefits

You know where you are going
Everyone else knows too!
Reduced ambiguity & guessing
Supports coordination

Planning Cycle



ENVISION

Create the Team, Create a Vision Statement

ASSESS

Current Tech and Organizational Readiness

PRIORITIZE

Goals, Tech Projects

ACT

Understand TCO/TVO, ROI, Implement

EVALUATE & REVISE

Tech Projects, Goals, Strategies, Tactics

Crafting a Vision

Keep focus on mission

Look at what's working

Identify opportunities for growth

If we had unlimited resources,
how could technology best support us in
reaching our goals and fulfilling our mission?



Planning

Outline

Roadmap

Goals

Projects



Plan Outline Sections

1. Introduction
2. Evaluation Process
3. Technology Initiatives
4. Update Plans
5. Implementation Plan
6. Budgets
- Appendices

Strategic Technology Plan

Plans should cover 3 years, 2014 - 2017.

1. Introduction

- 1.1. Introduction Narrative
- 1.2. Mission
- 1.3. Technology Vision
- 1.4. Organizational Overview - includes primary program areas
- 1.5. Technology Attitudes

2. Evaluation Process

- 2.1. Involved Parties - includes members of the Technology Team and each ones Role in the planning process, including Board of Directors and primary Technology Contractors
- 2.2. Protocol for Decision Making - discussion of how decisions related to technology are made

3. Technology Initiatives - details the initiatives the organization plans to develop and/or maintain, listed in priority order, including logic models for the top 3-4

Roadmap

By Phase:

Activities

Tips

Resources

John Kenyon Consulting
2013

Technology Planning Roadmap

This road map outlines the components of each section of your technology plan, including tips & resources for ensuring your plan is as comprehensive as possible.

When you are finished, your plan will be useful not only as an internal tool for your organization but also as a document to share with funders who may be interested in supporting your strategic use of technology to meet your mission. Remember that it will continue to evolve and should be updated on an ongoing basis as needed, at least annually.

Additional technology planning resources: <http://www.connectingup.org>
<http://www.nten.org/>; <http://idealware.org/>; <http://techsoup.org>

Phase 1: Technology Team, Decision Making & Inventories

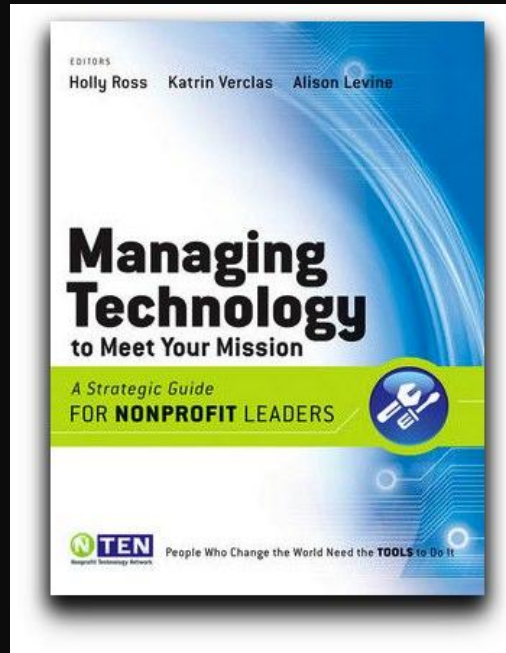
Activity 1: Create your tech team, choose team members - include each one's role in the planning process.

Activity 2: Create a protocol for communication and decision-making among your team members. Create meeting schedule.

Activity 3: Perform an inventory of resources available to the organization - technology hardware, software, and staff skills as well as the Determining Your Organization's Current Stage of Technology Questionnaire (MTMM p. 19-24).

Roadmap

Resources



Process Roadmap

Form Team

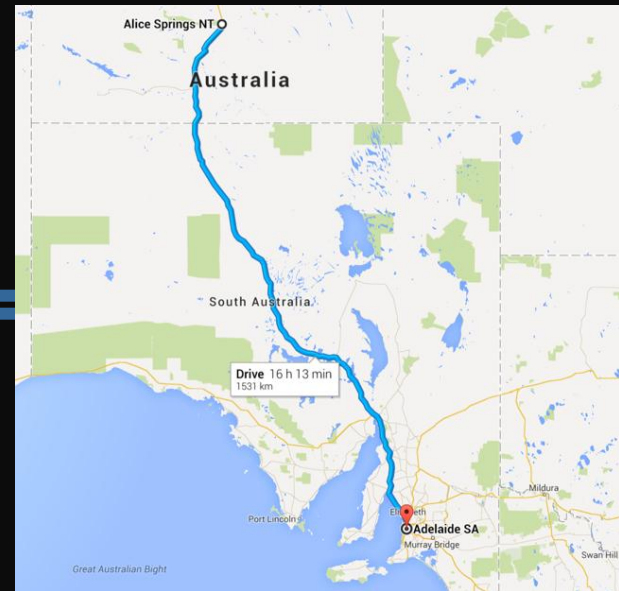
Articulate Vision, Roles, Decision Making

Conduct Hardware/Software/Skills Audit

Brainstorm, List All Projects

Prioritize

Detail Technology Initiatives (Logic Models)



Process Roadmap

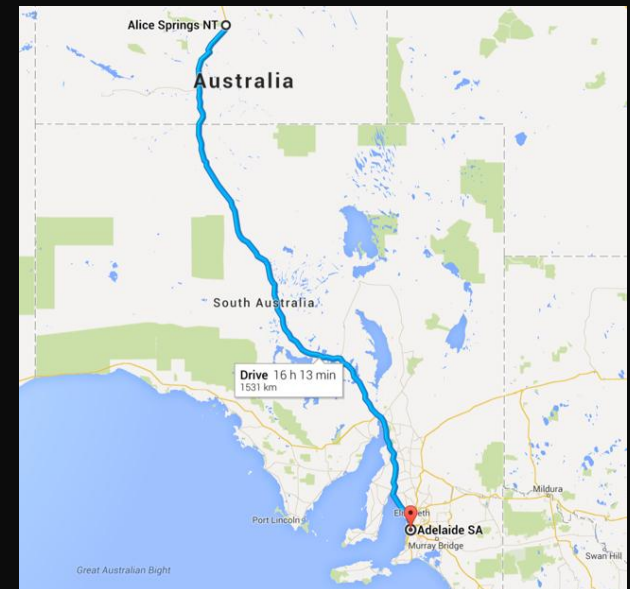
Detail Technology Initiatives (Logic Models)

Create Implementation Plans, Timelines

Create Budgets

Write Introduction

Finalize Plan



Strategic vs. Operational Goals



Strategic Goal

What we want to achieve - Good Health

Operational Goals

How we are are going to achieve it -

- Good Nutrition, Exercise, Stress Management

Strategic vs. Operational Goals



Strategic Goals

- Engage more diverse audiences
- Regularly assess progress on our engagement

Strategic vs. Operational Goals



Operational Goals

Ask community members for ideas

Conduct outreach to specific communities of color within and outside of our networks

Craft specific outreach messages for Latino, African-American, Asian-American, Native Peoples and other audiences we identify

Conduct Quarterly Assessment of progress

Evaluation: How many before & after? Results? % Change?

Long vs. Short-term Goals

Long Term Goal

Website revision to improve navigation, content management, interactivity

Short-Term Goals

Research, select & implement online donation service

Research, select & implement bulk email service

Integrate both into website on every page

Begin planning process for website revision



Technology Goals



Key Business Goals

Without thinking about tech,
just your mission & programs

How tech can help you reach them. Can you:

Be more efficient?

Broaden your reach?

Communicate more effectively?

Share stories in more engaging ways?

Engage new audiences?

Dreaming Big

Process to help _____

to _____.

Because _____

Dreaming Big

Process to
allow patients
to
request animal therapy visits.
Because
it's more flexible and customized
for the patient and volunteers

Dreaming Big

Process to help _____

to _____.

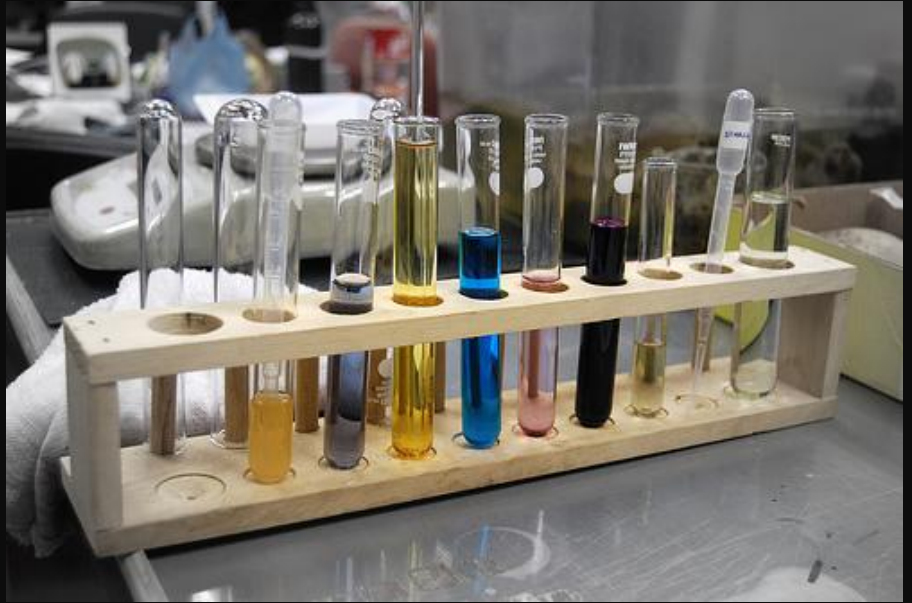
Because _____

Tech Projects

Small Experiments

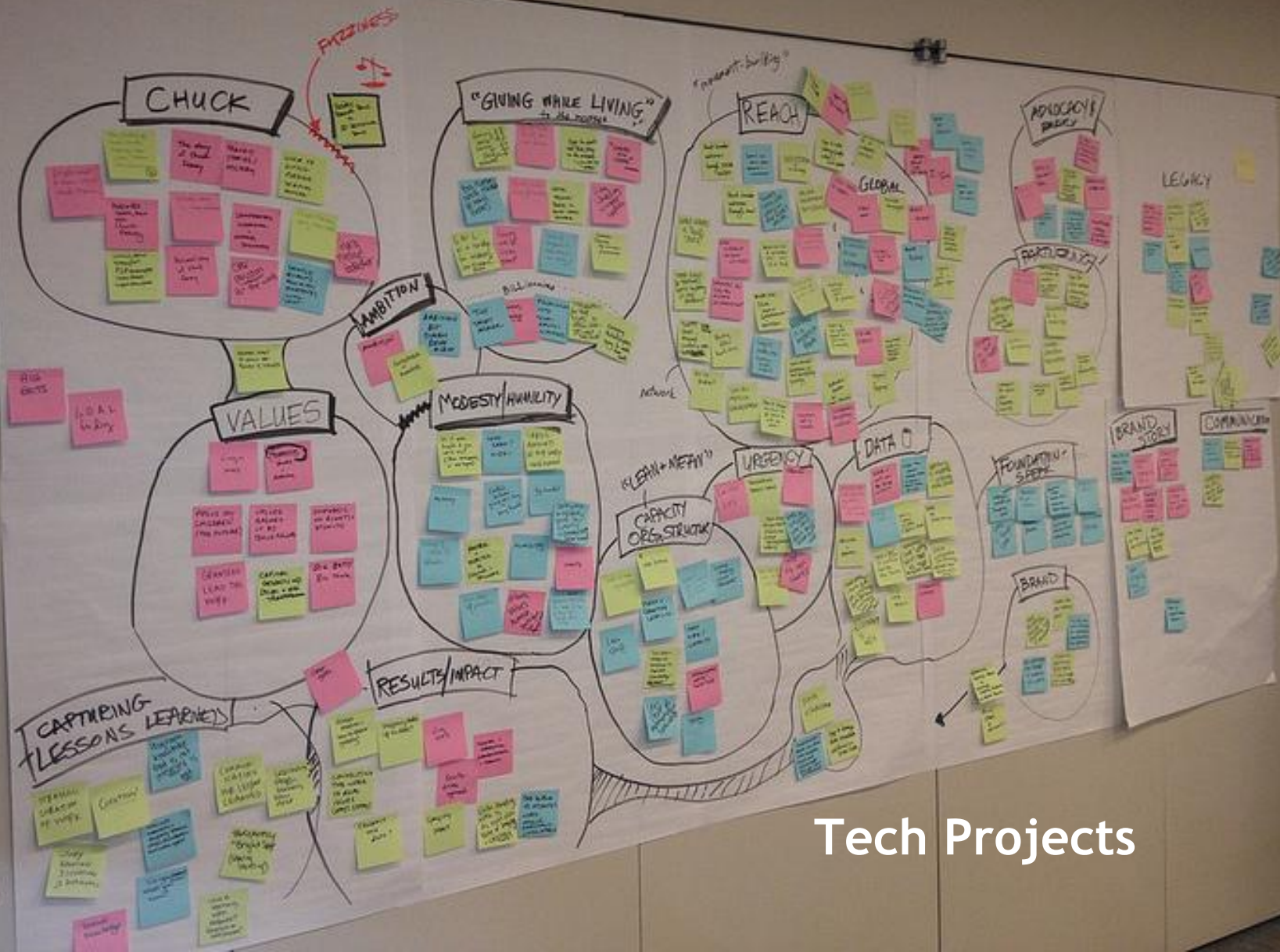
Focus:

To implement technology solutions
that support good work flow processes



Flickr photo: steven_wong

Brainstorm



Tech Projects

Prioritizing

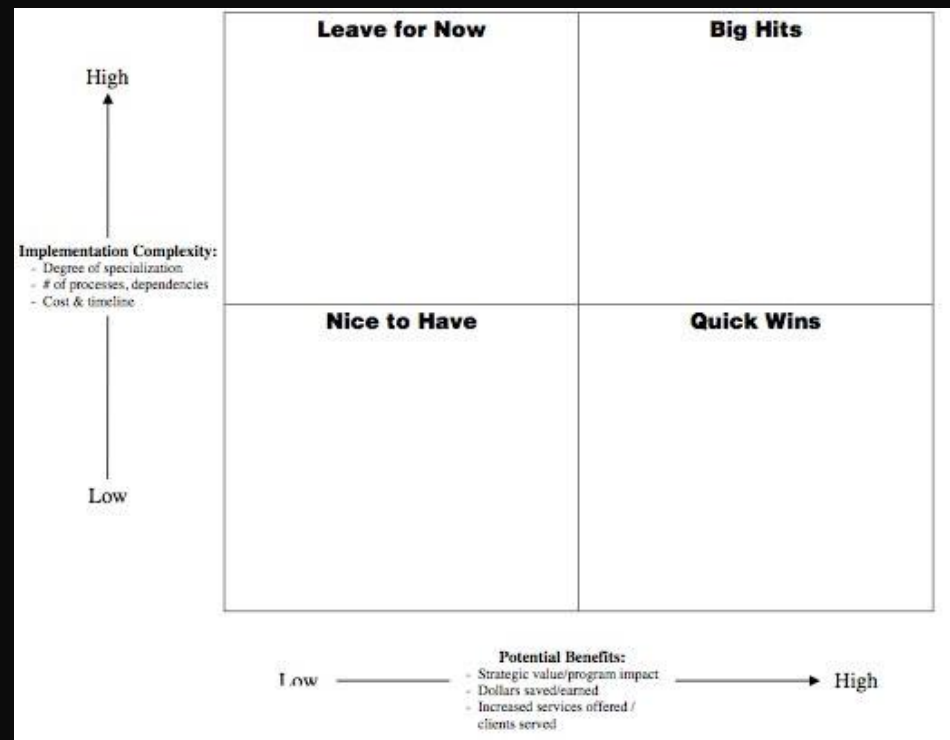
Need

Ease

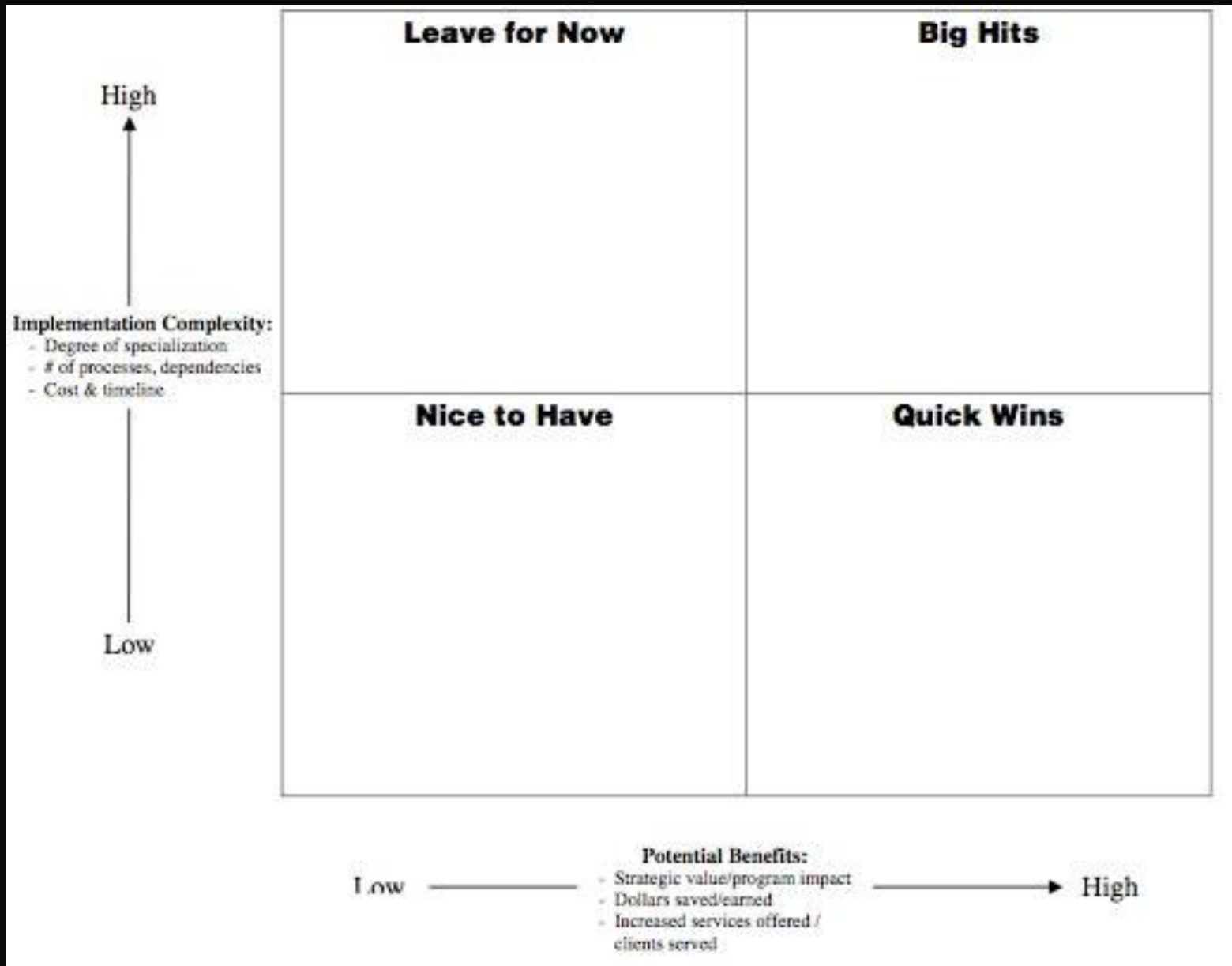
Affordability

Ability

Non-Dependency



Prioritizing



Reflection

A scenic landscape of a fjord with snow-capped mountains and a blue sky with clouds. The water is calm and reflects the surrounding scenery. The mountains are rugged and covered in patches of snow. The sky is a deep blue with wispy white clouds.

What questions do I have about
brainstorming and prioritizing?

Logic Model

OBJECTIVES What basic goal(s) have you set for this technology strategy?	ACTIVITIES What do you do to implement this strategy?	RESOURCES What will you need to implement the strategy?	OUTCOMES What will success look like. What will change as a result of your efforts?	OUTPUTS (Indicators) What are some concrete (measurable) 'results' of the initiative?
Create & implement a social media strategy to increase public awareness, strengthen current ties and engage new stakeholders	<u>Listening</u> Setup Google Alerts Technorati Search RSS Reader <u>Participating</u> Read, Comment on blogs Monitor comments <u>Sharing Story</u> Learn more about how npos are using Blogs, YouTube, Flickr, podcasts, etc.	<u>Listening</u> Research Monitoring <u>Participating</u> Time to read posts/comments Time to make posts/comments <u>Sharing Story</u> Identify stories to be told Identify authors Create content (text and images) Transfer content Monitor Statistics	<u>Immediate:</u> Better awareness of our focus area Better awareness of attitudes/ conversations <u>Intermediate:</u> Recognized participant in blogosphere Increased comments on our blog(s) <u>Longer-term:</u> Improved awareness of organization/programs Attraction of new prospects/donors/advocates	Number of favorable/unfavorable mentions Number of comments left on other blogs Number of comments left on our blog Website Traffic from Facebook, Twitter, etc. Number of replies/ comments/posts to each Unique visits to related website pages Click-throughs on email with related content

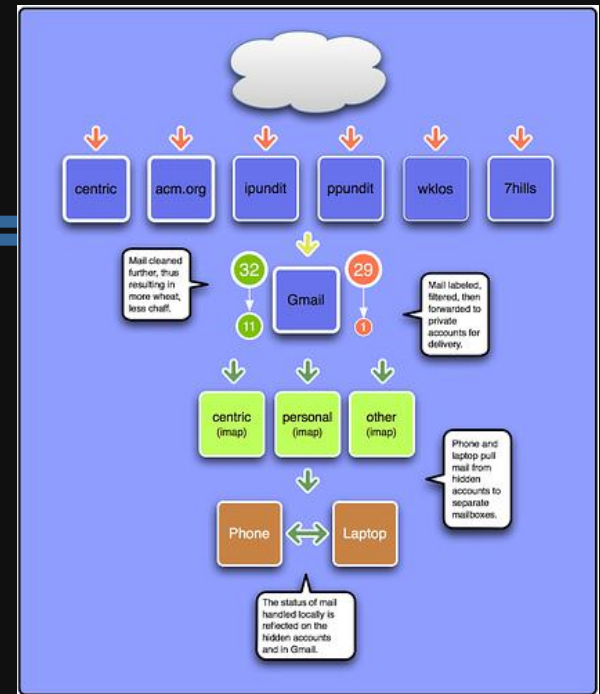
Process Mapping

Map the Process

Find Inefficiencies

Fix Inefficiencies

Look at how tech can support
good processes



Process Mapping

Focus on actual process first

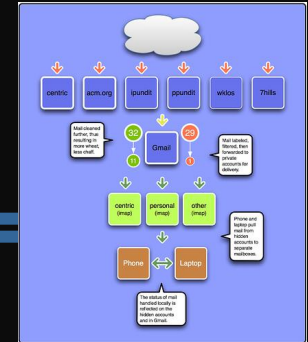
Think about the ideal process
given unlimited resources

Build ideal process, adjust for
current resources

Mapping tool is unimportant - it's the process



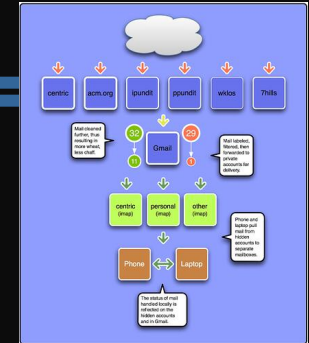
Workflow Mapping Example



Event Registration

- What data is needed for reports, event management, other projects?
- What information is collected?
Can it be grouped by who needs it?
What systems does it go into and for what purpose?

Workflow Mapping Example



Start with outputs

What reports are desired? By whom?

What specifics need to be included?

In what ways does data need to be aggregated/compared?

What decisions/strategies will the data/reports help inform?

Process Mapping

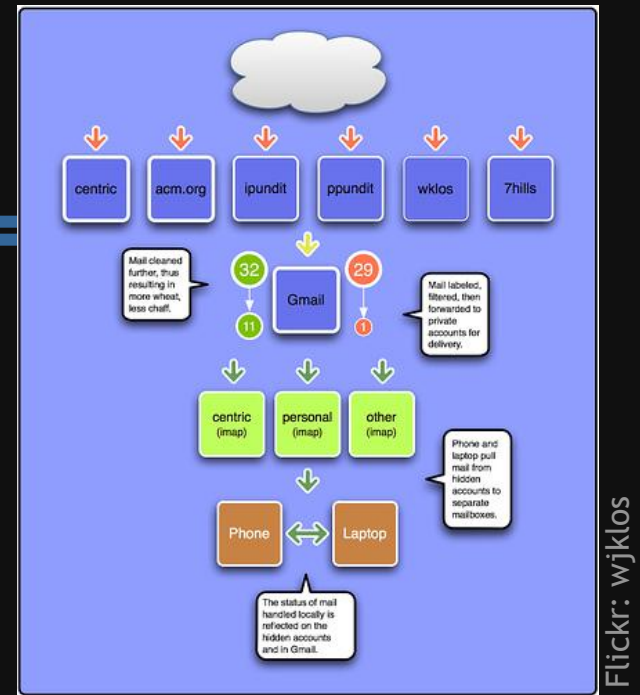
Homework Exercise

Map one part of a process
client intake, intake of
visitor or volunteer

What information comes in?

Can it be grouped by who needs it?

What systems does it go into and for what purpose?



Reflection

How might we approach logic models
and process mapping? ?

Next Steps

Craft Vision

Review Plan Outline

Create Plan Document

Brainstorm

Prioritize



Flickr photo: USACEpublicaffairs

John Kenyon - Nonprofit Technology Educator & Strategist

Nonprofit Technology consulting, training and writing about appropriate, effective solutions.



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תודה
Dankie Gracias
Спасибо شكراً
Köszönjük Merci Takk
Grazie Dziękujemy Terima kasih
Děkujeme Vielen Dank Paldies
Kiitos Täname teid 谢谢
Thank You Tak
感謝您 Obrigado Teşekkür Ederiz
Σας ευχαριστούμε 감사합니다
Bedankt Děkujeme vám
ありがとうございます
Tack

www.johnkenyon.org





<http://www.rgtech.com.au>



Gordon Tan



Case Study: Xavier Children's Support Network



Xavier is a support organisation for families of children aged 0-18 who have high support needs arising from a variety of disabilities



50 staff across two offices

Board had concerns with risk

IT environment had grown organically over time,
not strategically

ICT systems were causing productivity problems:

- Document control issues
- Infrastructure was slow, creating a poor user experience
- Backups not functioning correctly
- Use of slow Microsoft Access Databases
- Lots of manual data handling and double entry between systems

Analysis

- Analysed and documented the existing software systems.

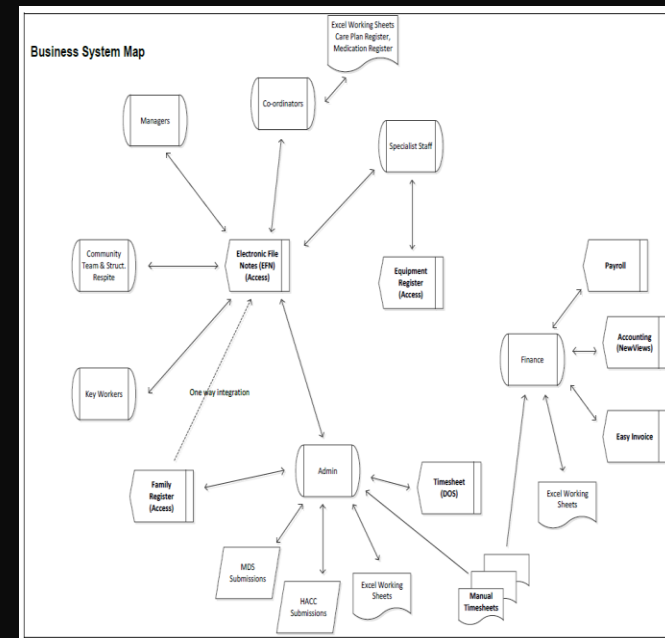


Developed an RFP (Request for Proposal) for

CRM
(Constituent Relationship Management) and

ERP
(Enterprise Resource Planning) vendors

Also considered the option of a custom solution



- Audited all the ICT infrastructure and evaluated Private Cloud options

Solutions



Developed Strategic ICT Plan.

Provided the following key recommendations:

- Infrastructure - Move to different model with new infrastructure
- Support - Implement an effective Outsourced IT solution
- Developed a custom software “ops” system which
 - Replaced multiple Access Databases and Excel sheets
 - Interfaced with SharePoint for document management, intranet
 - Integrated with finance system for improved reporting and removal of double entry
 - Automate the process of timesheet entry over the internet
 - Automates the process of submission to HACC (Home & Community Care) each quarter
- Implement a new SharePoint solution

Planning Process Discussion

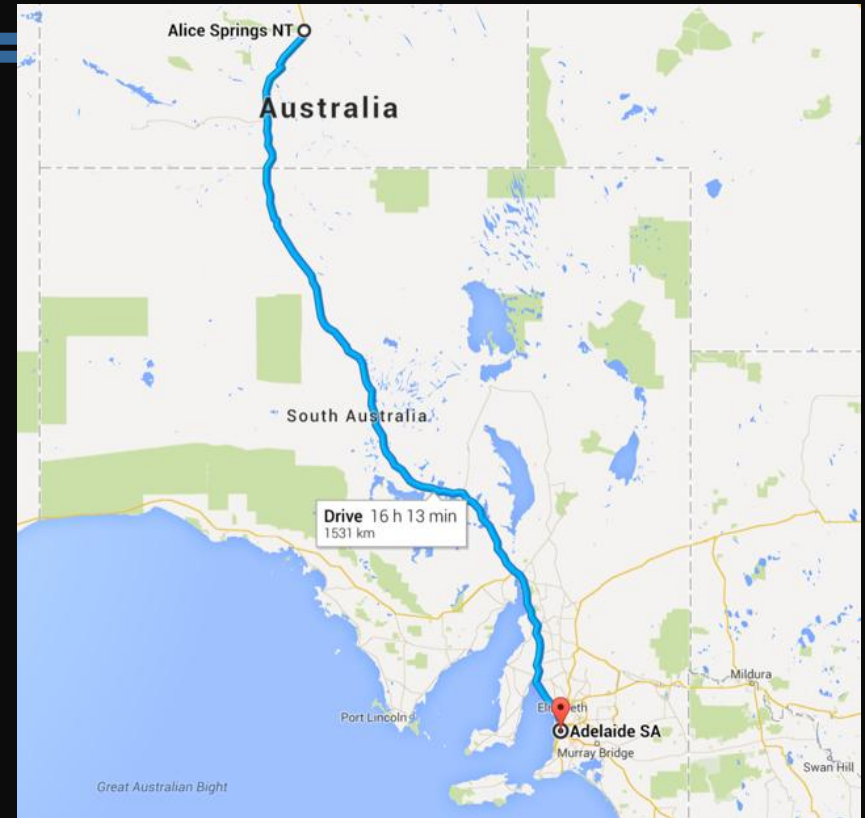
Getting from
A to B

Resources

Supporters

Challenges/Roadblocks

Timeframe



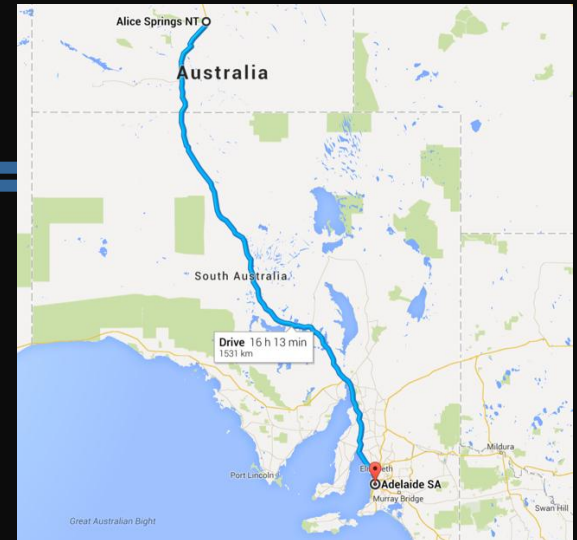
Planning Process

Experienced Planners:

How you got the planning process started within your organisation?

What were the critical initiatives to keep the process going?

What roadblocks did you encounter, how did you overcome them?



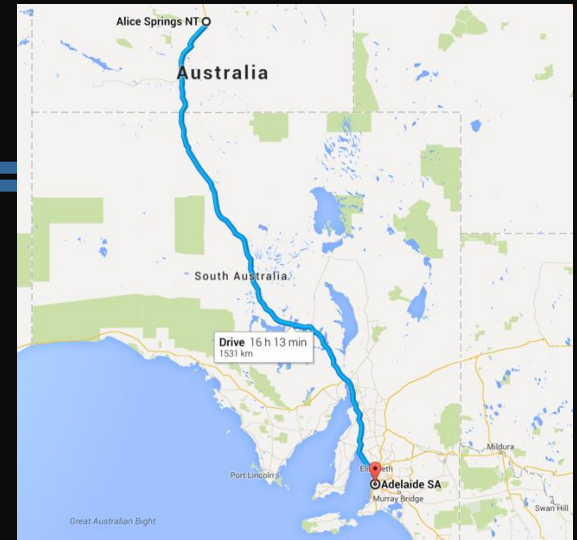
Planning Process

What do you need to start the planning process?
To keep it going?

How can you address/mitigate roadblocks?

What will you need to complete this process?

During brainstorming, you may come up with projects that you don't have all the skills/knowledge you need - how to identify resources - trainings, consultants, etc.



Thank You!





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