Technology Planning in Smaller Organizations or Nonprofits

(This is quite practical material...)

Before we begin: See http://www.nten.org/

Why Undertake Technology Planning?

Source: Podolsky, 2003 Wired for Good

- Planning can ensure technology supports the mission and strategic goals
- Planning is an opportunity to improve existing processes
  - Need to think about processes, without technological considerations
- Planning creates organizational learning.
- Planning focuses on the now as well as the future.
Why Technology Planning?

- Planning enables the organization to target resources
- Planning establishes a framework and a process for making decisions
- Planning creates a historical record
  - Organizational documentation
- Planning provides a basis for fund-raising
  - If you are trying to get funds to support technology, the first question a donor might ask is “do you have a technology plan?”

Some Technology Planning Myths

- **It is only about technology**
  - It is about how technology helps to achieve your mission and goals. It is about organizational processes and information flows.
- A technology plan will save money or conversely will result in expenditures.
  - Each statement may be true or false. Major cost of writing a plan is staff time.
- A technology plan can be developed in a couple of weeks.
  - The time varies depending on resources and scope of the plan. Typical nonprofit: 6-12 months.
- You need to be an expert in technology to write a plan
  - Better to be led by a person who has the big-picture of the organization
A Proposed Technology Planning Cycle

Source: Podolsky, 2003 Wired for Good (p. 9)

1. Plan
2. Do
3. Study
4. Act

1. Plan
   - Select issues and processes that will be addressed
   - Document the current processes chosen
   - Identify possible problems in current processes or possible improvements to the processes
   - Develop workable action plan
     - This probably will recommend a phased approach
     - A gradual implementation helps staff adjust
   - Determine measures for evaluating success

2. Do

3. Study

4. Act
A Proposed Technology Planning Cycle
Source: Podolsky, 2003 Wired for Good (p. 9)

1. Plan
2. Do
   - Implement the plan
   - Monitor milestones or success measures
3. Study
4. Act

3. Study
   - Evaluate – did the technology implemented improve things? Why or why not?
   - Unintentional consequences?
   - Do any changes need to be made?
   - Do the success measures work?
4. Act
A Proposed Technology Planning Cycle
Source: Podolsky, 2003 Wired for Good (p. 9)

1. Plan
2. Do
3. Study
4. Act
   - Reflect
   - Assess results
   - Celebrate and advertise successes
   - Recommend changes
   - Standardize new processes
   - Update planning documentation as needed
   - Eventually, go back to step 1

The Traditional Systems Development Life Cycle (SDLC)
Common IT Applications in Nonprofit Settings
(source: Finholt and Lu, http://www.crew.umich.edu/publications/01-03.pdf)

- Email
- Accounting
- Office software
- Collaborative work tools
- Membership and donor management
- Human resource software
- E-commerce software for collecting donations or selling products
- Volunteer management software
- Web management
- Check out http://www.ebase.org/

Components of the “Total Cost of Technology Ownership”
Source: Podolsky, 2003 Wired for Good (p. 9)

- Purchase price of hardware and software
- User training/Professional development
- Hardware and software support and maintenance
- Donations
- Connectivity
- Policy development (acceptable use, security, etc.)
Assessing Organizational Readiness for Technology Planning

- Are the organizational mission statement and strategic goals for organization well defined?

- Do you have support and commitment from the board?

- Do you have active support and involvement from the executive director?
Assessing Organizational Readiness
Source: Podolsky, 2003 Wired for Good (Ch 3)

- Are the organizational mission statement and strategic goals for organization well defined?
  - Nonprofit school - not totally ready. New director, still getting a full understanding of organization.

- Do you have support and commitment from the board?
  - Nonprofit school – yes, total commitment.

- Do you have active support and involvement from the executive director?
  - Nonprofit school – yes, total commitment. Also from the main office manager who realizes she needs help.

Assessing Organizational Readiness
Source: Podolsky, 2003 Wired for Good (Ch 3)

- Are you able to make technology planning an organizational priority?

- Can you allocate sufficient staff resources for both planning and implementation?
Assessing Organizational Readiness
Source: Podolsky, 2003 Wired for Good (Ch 3)

- Are you able to make technology planning an organizational priority?
  - Nonprofit school – yes, trying to. However it is really difficult given the transition year with new director, and staff are really working hard. Hard to find the time.

- Can you allocate sufficient staff resources for both planning and implementation?
  - Nonprofit school – this is a real challenge. Staff are somewhat overworked. Trying to do this with volunteer (parent) support – IT committee.

Assessing Organizational Readiness
Source: Podolsky, 2003 Wired for Good (Ch 3)

- Do you have a skilled project manager who can be the team leader, coordinating the planning and implementation activities?

- Do you have access to knowledgeable, objective resources on technology?
  - Might be volunteers, board members, nonprofit technology assistance provider, etc.
## Assessing Organizational Readiness

*Source: Podolsky, 2003 Wired for Good (Ch 3)*

- Do you have a skilled project manager who can be the team leader, coordinating the planning and implementation activities?
  - Nonprofit school – really being done right now by volunteers trying to help. This might be a job some of you want to take on given what you are learning here if you join a nonprofit in the future.

- Do you have access to knowledgeable, objective resources on technology?
  - Might be **volunteers, board members, nonprofit technology assistance provider,** etc.

## Common reasons for resistance to IT planning and responses to them

- *It costs too much!* *Not only will the plan cost money, but technology in general is expensive.*
  - Response: If cost concern is the implementation of the plan, change the plan to implement in stages.
  - Non-profit school – realizes they need to address school administration processes, need new computers, and better LAN system, but can’t do it all. So trying to do this in stages.
Common reasons for resistance to IT planning and responses to them

● *It’s too much work and time! And it is hard, thoughtful work because it addresses issues at the core of the organization. Most agencies are at staff capacity as it is; adding IT planning on top of it is a luxury it can't afford.*

  − Response: Examining the organization’s business strategies is part of the job. Even without IT as the impetus, it is critical that the organization reviews business processes periodically.

Common reasons for resistance to IT planning and responses to them

● *We tried it before and got nothing out of it!*
  − Response: Need to understand what went wrong before. Perhaps the solution did not solve the problem but compounded it.

● *It will distract us from our mission. Technology is not what this agency is about.*
  − Response: Think about return on investment. What needs to be improved in order to provide better services? How can technology help? Is it a disservice to the agency’s clients to NOT examine appropriate tools?
Common reasons for resistance to IT planning and responses to them

- **We lack talented staff in this area. There is no one in the organization who knows anything about technology.**
  - Response: Find other agencies who have implemented technology similar to what you think you want to do. Find out their lessons learned.
  - IT staff can be expensive. Think creatively about providing guidance to existing staff. Collaborating with other agencies, or finding volunteers to help.
  - In nonprofit school, they used volunteers to do much of the work. This planning document is critical to act as a hand-off from year-to-year committees.

Common reasons for resistance to IT planning and responses to them

- I'm uncomfortable with technology... Fear of looking “dumb”
  - Response: Training is important – need to consider how that will be accomplished.
  - These are natural concerns and try and include these people in the decision-making process.
  - **In the nonprofit school planning work I did, I was constantly making it clear that we want this to HELP improve the key office staff person's job. Also – important to treat these people with real respect. She's the expert on the business, and I tried to treat her as the real knowledge person, which she was!**
Initiating the IT Planning Process: Key Steps  
(Source: Wired for Good, Chapter 5)

- Develop a team & determine roles/responsibilities
  - In nonprofit school, we had several volunteers with different skills
    - One knows the phone system, building wiring
    - One knows hardware and wireless technologies
    - One knows computer equipment (although some are Apple’s and none of us knew those machines very well)
    - One understands IT planning and database planning and design
    - Key staff member was committed and WANTED to do this
    - Director was supportive.

- Develop a time-line for plan development
  - In nonprofit school – a loose goal is to have it done by the summer for implementation
  - More on this in Wired for Good
    Chapter 6 (building the team),
    Chapter 7 (leadership roles and responsibilities)
    Chapter 8 (Working with consultants and volunteers)

Review the Comprehensive Technology Plan document structure

- Look at Resource A in Wired for Good book, page 243

- Good example of an over all technology plan for an organization

- The idea is that this would become a “living document” -- and is particularly important to pass on from one IT committee to another if the nonprofit is utilizing volunteers to support it.
Comprehensive Technology Plan – Key sections

- III. Business analysis (current, future improvements, measures of success)
  - This is what we will do in the next class – how to document organizational processes (DFDs)

- IV. Network services
  - Public website – this would be any planning documentation you produced in your website design. These questions you’d want to address if you were doing this for an agency yourself; Expanding now to external services like Facebook? Google?

  - Internal website (Intranet) – If you had a LAN, you could actually have a completely internal website for sharing information

- IV. Network services (continued)
  - Current and proposed shared databases
    – Our future database work fits in here…

  - Email services (add new technologies here too – IM?)

- V. Equipment (hardware) inventory

- VI. Software inventory (current and future)

- VII. Network: LAN/WAN narrative

- VIII. Other technologies (e.g., phone system)
Comprehensive Technology Plan – Key sections

- X. Security plan
  - Disaster recovery plan
  - Antivirus, etc.

- XI. Technology support plan
- XII. Training plan
- XIII. Evaluation and improvement strategy
- XIV. Acceptable use policy
- XV. Budget

Next Steps in this Class

- We’re going to go over and do several DFD exercises

- Over the next few classes, and in the Relational Database development effort, we will be working on two sections of this document:
  - III. Business analysis
  - IV. Network Services, Part C – Shared Databases

- Goal: Should an organization (A) fix (improve) the existing system? (B) Build a new one from scratch, or (C) buy/use an off-the-shelf package (not really an option)?