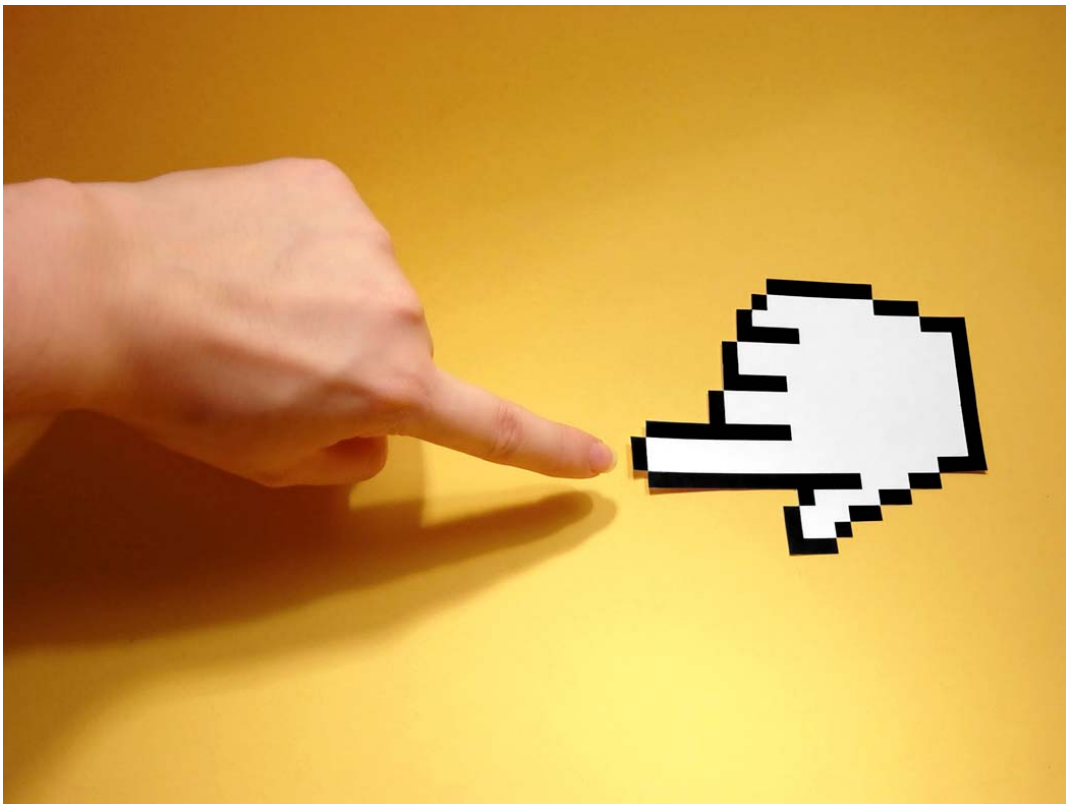


Survival Guide for Technology Planning for Nonprofits



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T E C H S O U P C A N A D A

Making Technology Accessible to the Nonprofit Sector in Canada



T E C H S O U P C A N A D A

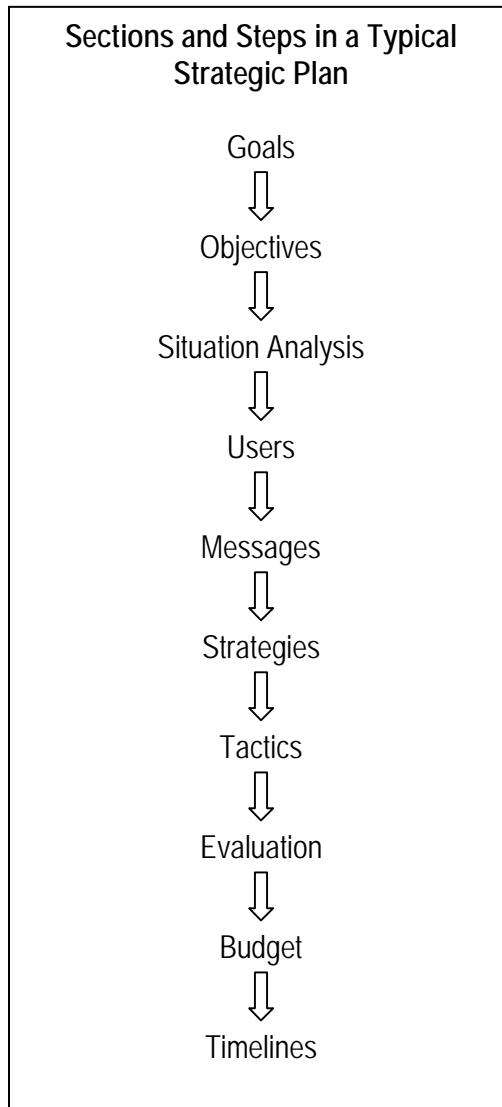
Making Technology Accessible to the Nonprofit Sector in Canada

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Technology Visioning Worksheets

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GOAL(S)

What do you want to achieve to move your not-for-profit organization closer to fulfilling its mission?

OBJECTIVE 1

What concrete, measurable, specific and achievable (within a certain timeframe) “targets” are you aiming at? These are shorter-term than your goals.

OBJECTIVE 2

What concrete, measurable, specific and achievable (within a certain timeframe) “targets” are you aiming at? These are shorter-term than your goals.

STRATEGY 1A

What is one general approach to achieving Objective 1?

STRATEGY 1B

What is another general approach to achieving Objective 1?

STRATEGY 2A

What is one general approach to achieving Objective 2?

STRATEGY 2B

What is another general approach to achieving Objective 2?

Tactic 1A-1

What specific tools will we use?

Tactic 1A-3

What specific tools will we use?

Tactic 1B-2

What specific tools will we use?

Tactic 2A-1

What specific tools will we use?

Tactic 2B-1

What specific tools will we use?

Tactic 1A-2

What specific tools will we use?

Tactic 1B-1

What specific tools will we use?

Tactic 1B-3

What specific tools will we use?

Tactic 2A-2

What specific tools will we use?

Tactic 2B-2

What specific tools will we use?

DEFINING SUCCESS: ORGANIZATIONAL GOALS

Q: How will the world be different when our program/mission is implemented?

DEFINING SUCCESS: OBJECTIVE(S)

Q: What are the concrete, specific and achievable targets, or 'mini-goals,' you need to achieve before you can reach your ultimate goal(s)? What is the timeline you have set for achieving each objective?

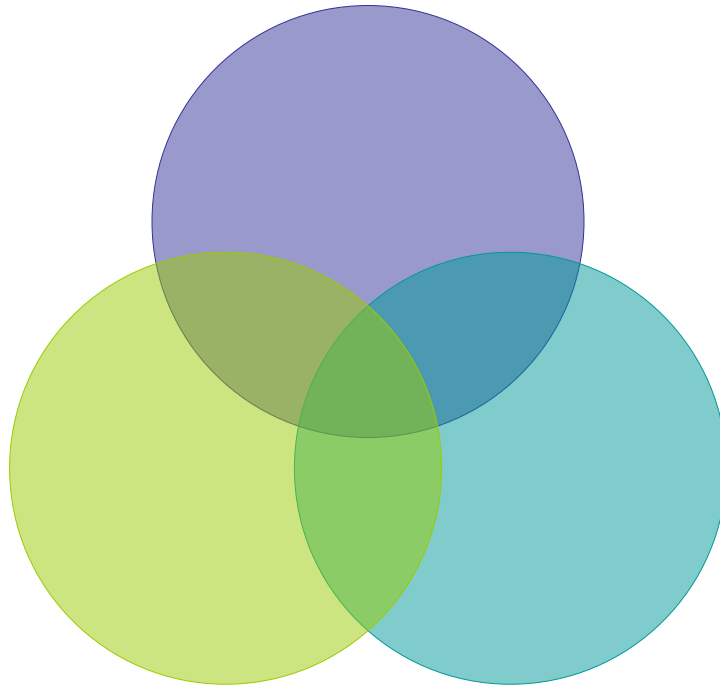
Examples / Suggestions:

- Reduce administrative costs
- Improve administrative efficiency
- Improve organizational capacity
- Increase organizational exposure
- Improve internal communication
- Improve external communication
- Increase capacity to raise funds
- Generate revenue
- Expand our service offering
- Build our resource base

SITUATION ANALYSIS: STRATEGIC TECHNOLOGY USE CONTINUUM

Q: How well are we doing in each of the following areas? Can we succeed in meeting our objectives and achieving our goals with our current technology situation? Which area needs the most attention or support?

Tools - Technology
tools and applications



Skills - Effectively use
technology

Support - Rationale and
support for a technology-
based project

SITUATION ANALYSIS

Q: what is helping us/hindering us in reaching our objectives, thus, our goals?

	Internal Strengths	Internal Challenges
Infrastructure – Including technology		
Skills – Including technology		
Attitudes – Including toward technology		
Resources – Including technology		
Other		
	External Opportunities	External Threats
Clients – broad levels of understanding/engagement, attitudes		
Policy – trends, restrictions, upcoming debates or decisions		
Funders – knowledge of technology, possibility for further funding		
Allies		
Opponents		
Other		

USER PROFILE

	Group 1	Group 2	Group 3
Demographics: Age; Gender; Location; Income; Education			
What goals do we share with our users?			
What do our users offer us to help achieve our goals and objectives?			
What specifically do we want our users to do for us?			
What do our users expect to get from us?			
What do our users need to be able to support our goals?			
What is the best or most effective way to communicate with our users?			

DEFINING SUCCESS: STRATEGIES

Q: Keeping your user groups in mind, what tools or approaches could help you achieve your objectives? Are there specific technology-related tools or approaches that would help you? What are they?

Examples / Suggestions

- Build and maintain a web site
- Gather and research information online
- Publish papers and reports
- Manage events
- Run an online community
- Conduct online fundraising and / or donor relations
- Collaborate and meet with external partners and organizations
- Implement basic office applications such as e--mail, word processing, and spreadsheets
- Implement specialized office applications such as accounting, graphic design, desktop publishing, and presentations
- Coordinate internal scheduling and task management
- Manage and / or recruit volunteers
- Publish an e-newsletter
- Conduct e-commerce and / or online auctions
- Market your organization online
- Deliver training to staff members and / or clients
- Manage a membership or client database

1.

2.

3.

4.

DEFINING SUCCESS: TACTICS

Q: What specific internal and external steps does your organization need to take to be able to effectively implement *one of the technology-related strategies* noted above? Think in terms of human, financial and hard resources you will need.

1. Technology Infrastructure Needs

2. Technology Skills Needs

3. Technology Implementation Needs

4. Non-technology-related Needs

DEFINING SUCCESS: BUDGET CONSIDERATIONS

Q: What will it cost to implement the identified tactics? Is this a one-time investment? Monthly investment? Annual, on-going investment?

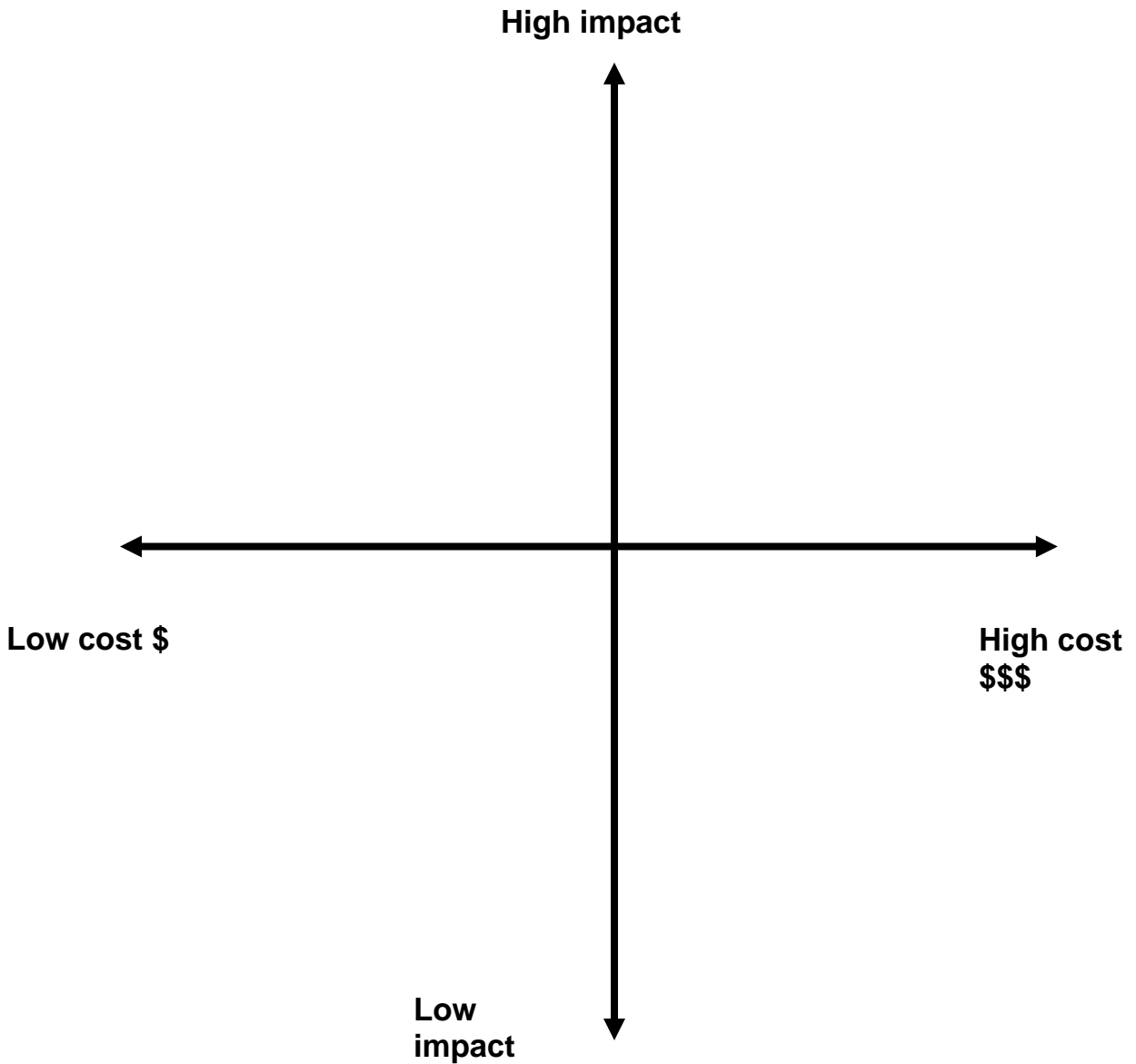
1. Technology Infrastructure Needs

2. Technology Skills Needs

3. Technology Campaign Needs

4. Non-technology-related Needs

SETTING PRIORITIES for TECHNOLOGY STRATEGIES



STRATEGIC VISIONING TIPS AND ADVICE

Things to consider when envisioning technology projects:

1. Understand what your target audience needs
2. Use technology in service of your mission
3. Do your research before you implement new technology programs
4. Plan to evaluate your technology projects
5. Start small
6. Consider strategic (even unlikely) partnerships
7. Appreciate how technology can support and draw-on staff resources
8. Commit to making a website more than a simple online brochure
9. Invest in online community-building
10. Include marketing outreach in all technology-based projects
11. Use viral marketing and other Internet-specific techniques when appropriate
12. Build on open standards – don't get sucked into proprietary software

Strategic Technology Plan Template

Overview

This section is intended to provide a overview of your organization and its strategic goals. It is also intended to make a link between your strategic goals and your technology goals.

About Our Organization

A quick description of what your organization does and who it serves. It might also include a copy of your mission statement.

Organizational Goals

A bullet list of the goals / objectives in your organization's current strategic plan. If you don't have a current strategic plan, a list of program areas and projects could be included here.

Technology Goals

A mapping between your strategic goals and your tech goals. This can be done in table format as outlined in the following example:

<i>Goals from strat plan</i>	<i>Technology related goals</i>
Improve service to clients by making it easier from staff in all program areas to work together on client cases.	Upgrade organizational database systems so that they can be used as an integrated case management system across all program areas.
Increase number of past clients that stay connected to the organization as donors or volunteers.	Create monthly e-newsletter that informs past clients of happenings and volunteer opportunities in our organization.
<i>And so on ...</i>	

Technology Assessment

This section describes the current state of technology within your organization.

Technology Assets

A bullet list or table describing where an organization has strengths and assets in terms of technology. Should include infrastructure, staff and volunteers, contractor relationships, databases and other internal systems, web sites and online systems.

Technology Gaps

A bullet list or table describing technology gaps.

Technology Infrastructure

This section should describe the infrastructure that an organization has – computers, internet connections, printers, etc.

Overview

Provide an overview of existing systems. For small organizations, all that is needed is a simple table like the one below.

<i>Item</i>	<i>Description</i>	<i>Replacement</i>
Desktop computers	Four desktop computers. All are P4 systems running Windows purchased in 2005.	Replace in late 2011 with new machines. Consider moving to Linux at this time.
Laptop computers	One laptop shared amongst all staff. Purchased in 2004.	Replace in late 2010.
Servers	None	None
Internet connection	Dedicated ADSL connection shared over the LAN.	Ongoing cost.
Printers	One black and white laser printer shared amongst all four computers.	As needed.
LAN	Local area network in place for all computers. Peer to peer network within office.	Replace as needed. Consider wireless for guests next year.
<i>Add more as needed ...</i>		

Additional information

Provide additional information about technology infrastructure needs. Questions to consider include:

- *How many staff need full time computer access? How many additional computers are needed for part time staff and volunteer computer access?*
- *How many locations does the organization have? Do all locations have a LAN, a printer and high speed Internet access?*
- *Are there areas where software upgrades and replacements are needed?*
- *What is the plan for providing technical support for staff and volunteers?*

Training and Support

This section describes the approach that will be taken to providing training and support within an organization. Issues and challenges to consider in this section include:

- *Providing ongoing training to deal with turnover of staff and volunteers.*
- *Defining baseline technology skill sets and a method for ensuring that relevant staff and volunteers have these skills.*
- *Creating a process for writing technology training objectives into staff members' personal development plans or other annual planning/evaluation processes.*
- *Accommodating different learning styles by offering access to different kinds of training – mentoring, mini-classes, formal classroom training, self-paced online training. Most kinds of training can be found from outside training providers, which keeps costs low and quality high.*
- *Promoting just in time learning by keeping a collection of up to date reference books and offering staff and volunteers a collection of technical support bookmarks that provide useful reference material.*

Web Site and Online

This section describes an organization's current and future web site and online strategy.

Audience

A brief profile of the main audiences that the organization is trying to reach online. Also, a description of the information and services that these audiences are seeking on the web site?

Web site description

An overview of the baseline functions needed to meet the needs of the audiences described above (e.g. a calendar of workshop dates or an enewsletter). This can be done using a simple bullet list or table.

Web site upgrades

Description of new features and functions need to be added to the web site in order to meet objectives outlined in the strategic tech goals section of the plan.

Web site marketing

Description of methods that are or will be used to regularly market and promote the web site.

Strategic Tech Projects

This section provides a list of strategic technology projects that an organization is planning during the period covered by the plan. Each project should include a short description, a budget estimate and information about how to get a full project plan.

Action Plan

This section provides describes all of the tasks required to implement your technology plan.

Name	Task	Due by
<i>Alice</i>	<i>Web site upgrades implemented.</i>	<i>Q3 - 04</i>
<i>Jim</i>	<i>Computer replacement process undertaken.</i>	<i>Q4 - 05</i>




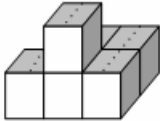




Technology Budget

This section provides a high level technology budget. To make things simple, just base the top line of this budget on the TCO calculations described in the Toolkit. An example is provided here:

<i>Item</i>	<i>2004</i>	<i>2005</i>	<i>2006</i>	<i>Notes</i>
Infrastructure and support	\$12,000	\$12,000	\$12,000	Four people / workstations x TCO cost of \$250/month per workstation.
Web site – baseline	\$5,000	\$5,000	\$5,000	Hosting and freelance webmaster
Web site - upgrades	\$2,000	\$0	\$0	New e-newsletter system
Strat project – new database	\$0	\$12,000	\$2,000	Implementation in 2005 and training in 2006
<i>Total</i>	<i>\$19,000</i>	<i>\$29,000</i>	<i>\$19,000</i>	

Suggested External Partnership Model

Developed by: Ontario IMIT Network

ACTIVITY	PARTNER
Business Requirements Gathering and Documentation	 Volunteer Board Member
User Requirements Documentation and Project Management Support	  Individual Consultant Volunteer Board Member
Hardware and Software	 Large IT Company
Technical Development and Implementation	  Charities and Non-profits Small IT Company
Daily Updates and Maintenance	 Volunteer
Ongoing Maintenance, Upgrades, and Support	 Charities and Non-profits

