Technology Planning and Assessment

HOW HEALTHY IS YOUR NONPROFIT IT INFRASTRUCTURE?

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TechBridge  
ATLANTA'S npower PROGRAM

Healthcare Georgia Foundation  
grantmaking for health
Why Have a Technology Plan?

The nonprofit industry is competitive, and not just for donations and volunteers. Nonprofits need to compete for grants and other resources, staff talent, community loyalty and simple awareness of your organization and its mission.

The bottom line is that with most businesses today, you need a technology plan for your organization — a plan that shows how you can put the Internet and technology to work for you.

Yes, technology can be expensive. But your plan is more than a simple wish list of hardware, software and Internet services you'd like to have. It's a strategy document, helping you think through what your organization needs and how it can be obtained with the resources you have.

Nonprofit organizations often suffer with low-quality, high-maintenance systems that sap both productivity and resources.

Computer systems used by nonprofits rarely get the planning, auditing, and steady improvement that they need. Taking simple, inexpensive steps often leads to major improvements, but few nonprofits know where to start.

And you will find your work worth the effort. A well thought out technology plan can help you:

- Increase efficiency in your daily operations
- Manage your budget and spend money more effectively
- Build an online community and boost fundraising efforts
- Give donors more confidence in your organization
- Protect your organization from the impacts of employee turnover
- Avoid crisis by reducing the chance of lost data and capabilities.

Having a technology plan will provide you with an element of sustainability for the future. It will keep you in the race to stay competitive with your peers.

Getting Started

Effective technology planning is an involved process. It takes a commitment of time and resources from senior managers and other staff. In order to make good decisions, an organization also needs to understand key aspects of technology.

But through technology planning, organizations can make significant gains. Sound technology management leads to greater productivity, increased staff morale, and improved service to clients through having computers that work, networks that give access to information, and applications that are appropriate for an organization's mission.

Information can transform organizations by giving them the tools to understand the environment they're working in, to measure the effectiveness of their actions, and to consider opposing information from other groups and policy makers. Technology is uniquely positioned to harness the power of information.

Technology planning is a process.

Here are the seven components critical to a technology plan for nonprofits, as outlined by TechSoup, a San Francisco-based nonprofit that provides technology advice and assistance to other nonprofits:
1. Establish leadership and support for your technology plan.

By setting up a technology team, and involving the board of directors, management, and staff in establishing goals, you can unite the entire organization behind your technology plan.

2. Assess your current resources.

Analyze your existing technology system for how well it is working, what you can save and what you can build on.

There are two methods to begin assessing your organizations technical condition. The first is doing a self-assessment and the other is to partner with an outside organization familiar with technology assessments to come in and evaluate your current infrastructure and make recommendations.

3. Define your needs.

What new technology solutions do you need, and what can they help you do that you cannot do already? How can the Internet improve your operation? Are there any Americans with Disabilities Act (ADA) needs for your organization? Clearly defining your needs will help you in developing an effective technology plan.

4. Explore solutions.

The next step is to research existing technology options and decide on ones that meet your needs at a minimum cost. What are your technology options? What Internet services are cost-effective and could make your jobs easier? This phase of technology planning requires the most technical knowledge. It may be worth your time to bring in a technical consultant.

5. Put your plan in writing.

Your written plan should document your current resources, needs, solutions and planned uses, as well as your budget. It should be a plan of action, concisely written and specifically tailored to your organization.

6. Develop a funding strategy.

Your technology plan will guide you in determining how much money you need to raise, and perhaps how to raise it. Many nonprofit leaders today recommend following a 70/30 rule for spending: For every dollar budgeted for technology, 30 cents goes to actual hardware and software purchases and the remaining 70 cents for training and support.

7. Implement the plan and a timeline.

By setting a timeline, assigning responsibilities and evaluating your progress, you will make your technology plan a reality.

Creating Your Technology Vision

It is extremely important to understand how "business" is conducted in the organization before making any strategic technology recommendations / decisions. Understanding and documenting the underlying "business processes" that make an organization go is the first step to any long term meaningful changes in organizational behavior.

Strategic planning takes as its catalyst the long term mission and goals of the organization. This is not just about operational stability, but about proactively examining solutions that help the organization move to new level of service or efficiency.

It is important to think through short term and long term planning. Define those tasks/projects that can be accomplished immediately versus those that can be done long term and with more careful planning.

Despite the rapid rate of technology change and growth, consider where you would like to see your organization in three years and then consider that when deriving your technology plan.
Basic Components of a Technology Plan

Your technology plan should open with a short description of your organization that will set the context for your technology needs. This organizational profile should include your mission and vision as well as practical details on your current work. This will ground the technology plan in your mission and will remind everyone, from your staff and board to potential funders, that this is not just about technology. It is about equipping your organization to better achieve its mission.

Next you should include a summary of the current state of technology in your organization. Then provide an overview of how technology will further your organization’s mission. What is your long-range vision for technology use? While this isn’t necessarily an essential part of the plan, this section can give an overview of your technology goals as they relate to your organization’s mission.

The body of your technology plan includes a description of the technology projects you will undertake. For each project, you will want to provide the following information:

- **Description:** A brief description of what it is you plan to do.
- **Benefits:** What will this project enable your organization to do that you could not do before? It helps to describe the benefits up front, so that it is clear how much of a priority the project is. A description of the benefits will also be useful if you show your technology plan to funders, since it may convince them of the importance of the technology investment you describe.
- **Tasks:** What tasks will it take to complete this project? Listing the tasks will be extremely useful in establishing a timeline and beginning the implementation.
- **Cost:** At the end of your description of a project, list the costs associated with each step.
- **Budget:** No technology plan is complete without a budget. Creating a budget is the only way to tell whether or not your plan is practical.
- **Timeline:** A timeline would include the phases of work and the deadlines for implementation of your plan.

There are many technology focus areas that need to be addressed as part of your technology plan. When looking at these areas it is important to document an analysis of your current IT environment and specifics about your future or proposed environment. These areas of focus include:

- **IT Support:** There is an inherent risk to the organization having all IT matters controlled by one individual. Thorough documentation of your IT infrastructure is vital to an organization. There needs to be a central location for documentation concerning the infrastructure (stored onsite and offsite) with at least two other contacts for your local office. The documentation should contain network and systems topology, accounts and passwords, contacts for vendors, and internal contacts for your organization.
- **Workstations / Servers / Printers (Hardware):** Take a basic inventory of the computers and software in your organization. A hardware inventory worksheet can give you a sense of the overall capacity and range of workstations in your organization.
- **Network Infrastructure:** A diagram of your current network is needed including the identification of all network equipment. From there, a future / proposed network diagram can be produced identifying a list of new hardware to be purchased.
- **Internet Connectivity:** Is the current connection speed to the Internet adequate for your organization? If it is not, you could increase to a larger DSL line, move to a T1 line, or to an even faster Metro Ethernet connection.
- **Remote Access:** If remote access back to your office server or computer is necessary while away from the office, then consider setting up a secure virtual private network (VPN) tunnel for such access.
- **Email:** Is your current email provider meeting the needs of your organization? A move to Microsoft Exchange provides email across multiple devices, calendar sharing, and resource scheduling.
- **Website:** Are you hosting your own website or do you have your website hosted remotely? Do you have easy access to make your own changes to the content of your website?
- **Backup / Disaster Recovery:** Backups of your organizations critical data is paramount. It is not a matter of if your hard drive will crash, but when it will crash. Losing vital data could place your organization at risk. A good backup and disaster recovery plan is critical.
• **Virus Protection:** With the onslaught of spyware and viruses on the Internet, virus protection is important to maintain security and uptime for you and your staff.

• **Security:** Network and workstation security is important in preventing data theft and tampering.

• **Intranet:** Using an internal portal such as Microsoft SharePoint can provide an organization with a place to easily share information and collaborate on important projects whether in the office or working remotely.

• **Applications / Software:** A software inventory worksheet can give you an overview of the software resources and how they are distributed on different computers.

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**What's Next?**

Now it is time to implement the solution by establishing an action plan. Setting a timeline, assigning responsibilities and evaluating your progress will make your action plan a reality.

As the poet Robert Burns once said, "The best laid plans of mice and men go oft awry..." The sad truth is that many technology plans sit on a shelf and are never carried out. Implementation is not automatic. It requires conscious planning in its own right. Even if you have been working with a consultant all along to do your technology plan, managing the implementation is your organization’s task. Only you can think through who can carry out different aspects of the plan and when they will do it.

The following elements are key to a successful implementation:

• **Designate a point person:** One person should be in charge of overseeing the process. This is not necessarily a technical role, but a management role. This person may also communicate with and oversee consultants who implement parts of the plan. They will report back periodically to the technology team and to management.

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**Break projects into tasks:** Make sure the individual steps are clear so you can monitor progress.

• **Assign responsibilities:** Make clear which staff member will carry out which task.

• **Establish a timeline:** Set milestones and target dates for different phases of your plan.

• **Evaluate your success:** Evaluation should be built into any planning process, and technology planning is no exception. Decide beforehand what indicators of success you will look for. Build evaluation checkpoints into your timeline.

• **Update your technology plan:** A technology plan should be a living, breathing document. As new needs and priorities come up, modify the plan accordingly! If one technology project does not help you as you hoped, you are free to go back to the plan to rethink and rewrite.

Following the successful completion of a technology plan or even the first project within your plan, consideration needs to be given to training the staff on the best way they can use the new technology. Staff training is key to effective technology use and staff acceptance. The technology may be great, but if the staff does not know how to use it, this can lead to frustration and disuse.

Another consideration is how you and your organization plan on taking care of the new technology infrastructure. Regular system administration is needed on all aspects of your infrastructure. Typically, this is best handled by an outside technology organization who can utilize routine, scheduled maintenance in more of a proactive approach rather than a reactive approach to break-fix situations.

Consider the life-span of the technology you are purchasing. Sometimes going the cheapest route does not always yield good short-term results.

Your new technology infrastructure may result in the need to have your insurance evaluated. Proper insurance coverage will pay for itself in the event of theft or a disaster.

Keeping your newly planned infrastructure healthy and active results in increased operational effectiveness for you and your organization.

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**Special Thanks:**

Healthcare Georgia Foundation would like to recognize those that contributed to this publication, including the Consultants at TechBridge.

**Adapted From the Following:**


Resources to Assist You

The resources listed on this page can assist you with moving forward with your own technology assessment and planning. Whether you plan on moving forward on your own or reaching out to an outside organization for assistance.

### Internet Sites

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### Sponsoring Organizations

#### About TechBridge:

Our mission is to help other nonprofits leverage technology to better serve the community.

We help nonprofits use technology to:

- Solve mission-critical initiatives
- Improve communications with funders and donors
- Increase operating efficiencies

TechBridge is an Atlanta-based nonprofit that puts technology know-how in the hands of other nonprofits. An affiliate of the NPWower Network, we have one mission – to help nonprofits use technology to better serve our community.

In 2007, TechBridge reached its 280th nonprofit client with the technology support they need, saving them an estimated $1m in service fees in 2007 alone. In addition, since inception TechBridge has facilitated the donation of over $6 million in free Microsoft software.

#### About Healthcare Georgia Foundation:

Our mission is to advance the health of all Georgians and to expand access to affordable, quality healthcare for underserved individuals and communities.

We help nonprofits use technology to:

- Protect and promote the health of individuals, families and communities
- Improve the availability, quality, appropriateness and financing of healthcare services
- Integrate and coordinate efforts to improve health and healthcare services.

For further information and support, please contact TechBridge using the contact information on this page.