**Strategic Technology Program: Process Overview & Status Tracker**

This document is intended to serve two main purposes: 1) To give you clarity on what’s required to complete the technology planning process over the next six months, and 2) To serve as a status-tracking tool to help you, your team, and your consultant ensure your technology planning process is on track. Use it to fuel discussions in internal team meetings and when meeting with your consultant. Your consultant may also periodically request and refer to this to help him check-in on your progress and share status updates with NSP staff.

For ease of use, this document is divided into 3 main timeframes\*:

1. *Before* Day 1 of the training
2. *Between* Day 1 and Day 2 of the training (~5-7 weeks between the two sessions, typically)
3. *After* Day 2 of the training (which is then broken down by month through the 6 months you have access to your consultant)

*\* Please note that the timeframes provided here are guidelines intended to help make the technology planning process as manageable as possible for your team in the months ahead, but we understand that some organizations may need to make adjustments based on organizational priorities, key team member’s schedules, and consultant availability.*

***Before* Day 1 of the workshop, please complete the following tasks:**

| **✓** | **Task & Sub-tasks** | **Progress Notes/Next Steps** |
| --- | --- | --- |
|  | Ensure everyone on your tech planning team has read the following articles and brings questions to the first meeting with your consultant.   * The [Strategic Technology Program Description](https://www.hfpgnonprofitsupportprogram.org/application/files/3215/5119/6911/ST_Spring2019_Desc1.pdf) * The “[Introduction to Strategic Technology Planning](http://nsp.hfpg.org/Portals/17/Uploads/Documents/Event-Materials/Strategic-Technology/6_ST_Intro.pdf)” article * The “[Building a Strategic Technology Planning Team](http://nsp.hfpg.org/Portals/17/Uploads/Documents/Build_Strat_Tech_Plan_Team_3.pdf)” article |  |
|  | Meet *at least once* with your assigned consultant; discuss questions raised by pre-reads above & begin the planning process |  |
|  | Complete the following assessments:   * An inventory of your existing technology assets including computers, tablets, and other agency equipment like projectors, cameras, cell phones...   + To help with your inventory of computers (including laptops) and software, use one or more of the following resources. You can ask your consultant for more information if you do not have someone on your staff who is comfortable using one of these tools to complete this step:     - Run the free Belarc Advisor tool (<http://belarc.com/free_download.html>) on all machines *individually* and print/save results for each machine (works OK if you are a small organization with very few computers),   OR   * + - Run the free (ad-supported) Spiceworks inventory tool ([spiceworks.com/free-pc-network-inventory-software/](https://www.spiceworks.com/free-pc-network-inventory-software/)), which should capture all computers turned on *and* connected to your network at the time of use (best if you have several computers, they are networked, and you want to speed-up the inventory task),   OR   * + - Collect the details “manually” from each computer, collecting the details in a simple form like [this example](http://nsp.hfpg.org/Portals/17/Uploads/Documents/Event-Materials/Strategic-Technology/7_ST_Sample_HdWare_Inventory.pdf). * Work on an overall assessment of how your organization uses technology:   + Complete the [TechSoup IT Assessment](http://www.hfpgnonprofitsupportprogram.org/what-we-offer/workshops/strategic-technology-program-spring-2019) questionnaire (all 6 tabs/sections) and share the results with your consultant   + Read the [Stable & Secure Computing Benchmarks](http://nsp.hfpg.org/Portals/17/Uploads/Documents/Event-Materials/Strategic-Technology/9_ST_Computing_Benchmarks.pdf) and make note of anything you don’t understand to discuss with your IT staff and/or your tech planning consultant. Consider how your organization stacks up to these benchmarks… Are there areas you will need to address? |  |
|  | Give your consultant the following documents if you have not already:   * Your organization’s strategic plan and/or key organizational goals (as determined in annual planning) * Hardware & Software Inventory – Either the Belarc reports, Spiceworks report, or the simple form mentioned above * Results of your TechSoup IT Assessment questionnaire (see above) * A list of your existing technology vendors (ex: tech support, web development, cloud software providers, hosting providers, etc.) * Your current technology budget with as much detail as possible |  |
| ***\*\* Attend 1st day of training \*\**** | | |

***Between* Day 1 and Day 2 of the Training Workshops, please complete the following tasks:**

| **✓** | **Task & Sub-tasks** | **Progress Notes/Next Steps** |
| --- | --- | --- |
|  | Ensure your full technology planning team is in place, if you hadn’t already done so |  |
|  | Meet at least twice more with your consultant, and likely more than that with your internal tech planning team (you can also schedule *calls* with your consultant) |  |
|  | Complete the following aspects of assessment (discussed in Day 1 of training):   * Gather a technology perceptions and IT training survey from each of your staff (required) and perceptions surveys from *other* key stakeholder groups like board members, clients, etc. (encouraged) * Conduct business process analysis (i.e. “process mapping) for any processes that are key business drivers and critical to your organization * Create a list of all data management systems you use, including purpose they serve and who in the agency uses them (ex: donor management, financial management, client tracking, etc.); share with your consultant * Create a list of all communications systems you use, including purpose they serve and who in the agency uses them (ex: web site/content management system, social media and/or social media management/measurement tools, email marketing/e-newsletter tools); share with your consultant |  |
|  | Develop a list of potential projects to address in your technology plan, grounded in the assessment results above (we will begin prioritizing these in Day 2 of training) |  |
|  | Write sections 1 & 2 of your technology plan   * Section 1: Introduction * Section 2: Evaluation Process |  |
|  | Read the following two sections in your workbook so you can make the most of in-class time to work on this activity with your colleagues:   * Logic Model Process * Selecting & Working Effectively with Technology Vendors |  |
| ***\*\* Attend 2nd day of training \*\****  Please bring: 1) A list of your organization’s likely technology projects, 2) Your class workbook, 3) A current copy of this status tracker. | | |

***AFTER* Day 2 of the Training Workshop, please complete the following tasks:**

*Timeframes are intended as guidelines to ensure you complete your plan by the due date, but you can move more quickly if preferred!*

| **✓** | **Task & Sub-tasks** | **Progress Notes/Next Steps** |
| --- | --- | --- |
| In OR BY Month 3: | | |
|  | Complete 2 or more logic models for “big investment” projects; review w/ consultant |  |
|  | Prioritize projects using the prioritization framework |  |
|  | Start work on Section 3 of your plan (focus on “Status”); your consultant can assist |  |
|  | Start researching vendor options and contacting vendors – your consultant can help by sitting in on these calls with you if given enough notice |  |
| In OR BY Month 4: | | |
|  | Get bids/quotes from vendors as needed (ensure they cover costs for all 3 years of your plan); compare features, costs, timeline, and service-levels between vendors |  |
|  | Start developing a budget and timeline, using vendor bids to inform your estimates |  |
| In OR BY Month 5: | | |
|  | Finalize your vendor choices |  |
|  | Refine and update budget with final vendors/quotes |  |
|  | Enter contracts with vendors as needed |  |
|  | Refine and update timeline |  |
|  | Identify additional funding sources to help you fully implement your tech plan |  |
|  | Complete section 3 of your plan: “Resolution” and “Implementation” portions; your consultant can assist you as needed with this section |  |
|  | Complete section 4 of your technology plan (Summary List of Technology Projects) |  |
| In OR BY Month 6: | | |
|  | Write the Executive Summary of your plan |  |
|  | Edit completed plan |  |
|  | Assemble full document with all requested attachments/appendices |  |
|  | Review with your consultant. *Once Consultant okays it…* |  |
|  | Request and complete grant application form from HFPG |  |
|  | Submit complete package with technology plan and all required attachments |  |