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**WHO'S HERE TODAY? (TURN ON VIDEO & WAVE WHEN I SAY YOUR ORG NAME)**

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**THIS HAS BEEN/IS CHALLENGING. BUT THERE IS SOME UPSIDE.**

- "Forced" digital transformation can serve us long-term
- Benefits to building some remote/hybrid work "muscle"
- Resilience and readiness for next time (knock on wood)
- An opportunity to re-assess priorities, align, & look for opportunities to add new value

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**POLL TIME!**

Which best describes your current working situation?

- ALL staff are back in the workplace (or never left!)
- Hybrid – some time in office, some time at home
- Most staff are still working remotely

This Photo by Unknown Author is licensed under CC BY-NC-ND

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**IF YOU'VE BEEN HERE BEFORE...**



- What's changed for YOU?
- What's changed for your ORG?
- What has changed in TECHNOLOGY?
- What questions, lessons ideas are you bringing?

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**TODAY'S AGENDA**



- Why technology matters
- Tech planning: What, why, how?
  - Resources to help
  - Establish team & set goals
  - Assess current state
- Get started planning!

*Don't worry - we will take a brief break at the halfway mark!*

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**WHY TECH MATTERS**

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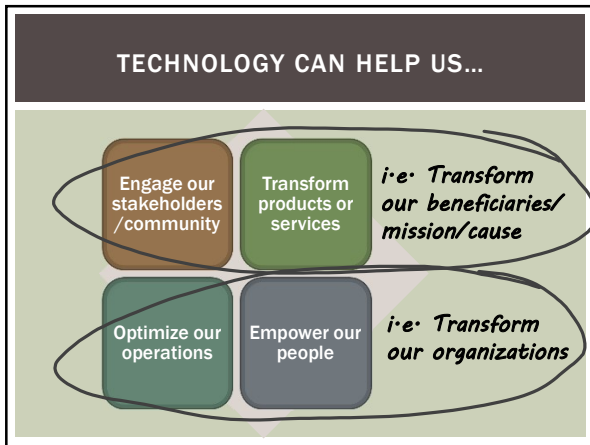
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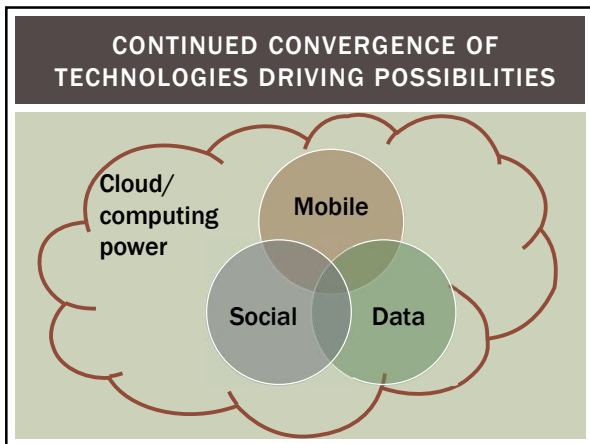
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### SOCIAL TOOLS EVOLVE, BUT USE CONTINUES. STORYTELLING BY VIDEO & PAID SPEND KEY



- 72% of Americans use some type of social media<sup>1</sup>
- Paid spend essential
- By 2022, videos will account for 82% of online traffic<sup>2</sup>
- Video drives 62% more engagement than photos<sup>3</sup>

Source: 1) PewInternet.org 2) Cisco Annual Internet Report , 3) CIG Digital marketing

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14

### EVERYONE IS ON MOBILE. ALL THE TIME. ARE YOU MEETING THEM THERE?



- 97% of Americans own a cellphone, 85% own a smartphone (as of Feb 2021)
- More than 50% of web traffic comes from mobile devices (not including tablets!)<sup>2</sup>
- 42% of emails are opened on a mobile phone or tablet<sup>3</sup>
- Text message open rates blow away email open rates

This Photo: by Unknown Author is licensed under CC BY-NC-ND  
Sources: 1. newsresearch.org/Internet 2. Statista 3. Litmus State of Email Engagement

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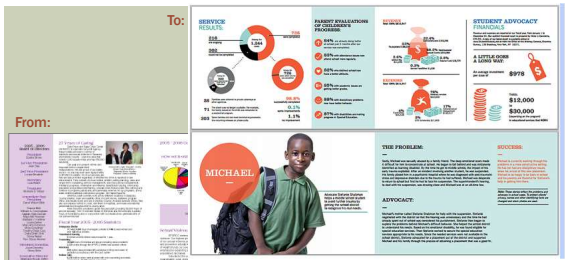
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### THE WAYS WE CAN AND ARE EXPECTED TO USE DATA ARE EVOLVING



**To:**

- SERVICE DELIVERY:** 80% of service providers use data to improve service delivery.
- MARKETING:** 75% of marketers use data to improve marketing.
- OPERATIONS:** 65% of operations managers use data to improve operations.
- SALES:** 55% of sales managers use data to improve sales.
- FINANCE:** 45% of finance managers use data to improve finance.
- HR:** 35% of HR managers use data to improve HR.
- LEGAL:** 25% of legal managers use data to improve legal.
- COMPLIANCE:** 15% of compliance managers use data to improve compliance.

**From:**

- DATA SOURCES:** 80% of data comes from internal sources, 20% from external sources.
- DATA TYPES:** 70% of data is structured, 30% is unstructured.
- DATA VOLUME:** 50% of data is stored in the cloud, 50% on-premise.
- DATA ANALYSIS:** 60% of data is analyzed using machine learning, 40% using traditional methods.
- DATA SECURITY:** 90% of data is protected by encryption, 10% is not.
- DATA GOVERNANCE:** 85% of data is governed, 15% is not.

**MICHAEL**

Student Advocacy's 2013 annual report by Susan  
 Haines. Source: able-altruist.softwareadvice.com/4-steps-to-creating-infographic-annual-reports-0714/

Image Source: nonprofitworld.com

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**THE WAYS WE CAN AND ARE EXPECTED TO USE DATA ARE EVOLVING**

**“What is happening?” “What will happen?”**

**“What happened?”**

YTD Operating Results

Category	2019 Actual	2020 Budget	2020 Actual
Revenue	\$1.0	\$1.1	\$1.0
Expenses	\$0.9	\$0.9	\$0.9
Surplus	\$0.1	\$0.2	\$0.1

Revenue by Service Type

Service Type	Revenue	% of Total
Healthy Child	\$358,117	35%
Financial	\$218,124	21%
Day Care	\$183,152	18%
Practical Summer	\$148,607	15%

YTD Early Childhood Enrollment - Full Time

Day	2019 Enrollment	2020 Budget	2020 Enrollment	Maximum Capacity
Mon	12	15	13	15
Tue	15	18	16	18
Wed	18	21	19	21
Thu	21	24	22	24
Fri	24	27	25	27

YTD Early Childhood Enrollment - Part Time

Day	2019 Enrollment	2020 Budget	2020 Enrollment	Maximum Capacity
Mon	12	15	13	15
Tue	15	18	16	18
Wed	18	21	19	21
Thu	21	24	22	24
Fri	24	27	25	27

Source: [www.accessnow.me](http://www.accessnow.me), [www.talkingpts.org](http://www.talkingpts.org)

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**TECHNOLOGY – USED STRATEGICALLY – HAS THE POTENTIAL TO CHANGE LIVES.**

Messages 877-877

To find the closest summer meals site near you, please reply back with your city, state, and zip code.

500 1st ave, have mt, 59501

(1/4) Your nearest Summer Meals Site is Havre Boys & Girls Club, 500 1st Ave, Havre 59501. Phone 800-808-4752. Lunch 12:00 PM to 1:15 PM, M-F and PM Snack 3:00

[nokidhungry.org/blog/summer-meals](http://nokidhungry.org/blog/summer-meals)

Accessnow.me

Barry Allen

Hi, I'm Cynthia's teacher. I will be sending you messages about Cynthia. If you have any questions about Cynthia's care, please reply to this number to send me a message. Thank you!

That is wonderful! How we can be more involved with Cynthia's school experience. Thank you so much!

[Talkingpts.org](http://Talkingpts.org)

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**TECH PLANNING HELPS REALIZE IT VALUE & DRIVE IMPACT**

**Innovation: Drive impact w/ IT**

- IT adds strategic value
- Tech directly involved in serving clients
- Tools for the sector

**Integration: Enhance services**

- IT is a business enabler
- Software improves service delivery
- Web sites & databases personalize

**Infrastructure: Get stable**  
Foundation of operational efficiency

- IT is an efficient cost
- You have the basic tools in place
- Stable & Secure

*Tech planning enables this journey*

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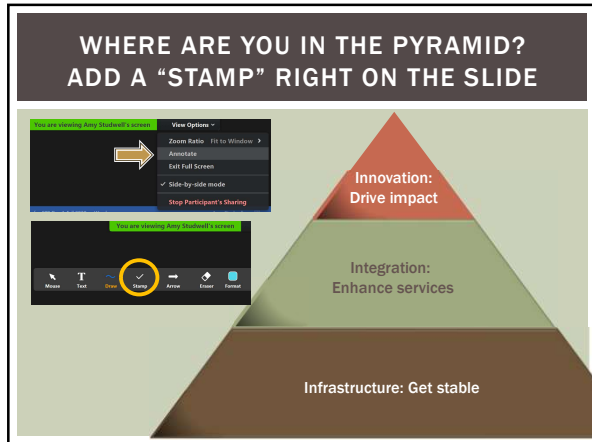
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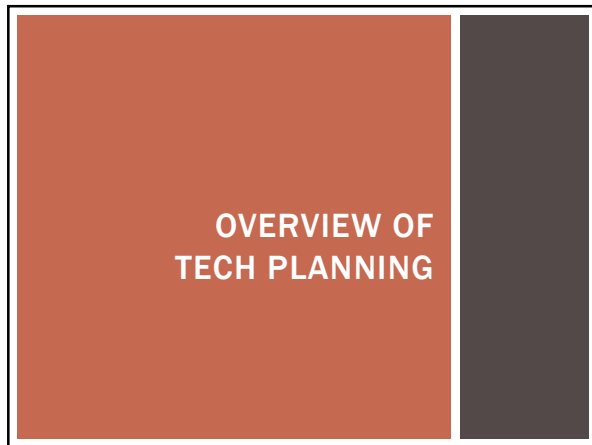
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Staying on Track:  
 3. Strategic Technology Program: Process Overview and Status Tracker

Getting Started:  
 4. Strategic Technology Program Description  
 5. An Introduction to Strategic Technology Planning  
 6. Building a Strategic Technology Planning Team

Resources for Training - Day 1 Prep  
 7. Sample Hardware Inventory  
 8. IT Benchmarking Assessment - NTEN Tech Accelerate and Instructions for Tech Accelerate  
 9. Stable & Secure Computing Benchmarks

Resources for Training - Day 2  
 10. Create a Logic Model Worksheet  
 11. Technology Project Prioritization Framework  
 12. Define Your Functional Requirements Worksheet

Writing the Plan: Technology Plan and Budget Templates  
 13. Strategic Technology Plan Template  
 14. Strategic Technology Budget Template  
 15. Sample Strategic Technology Plan  
 16. Sample Strategic Technology Budget

General Resources:  
 17. Directions and Parking Instructions  
 18. Strategic Technology Training Workbook

**RESOURCES TO HELP**

Available at:  
[Tinyurl.com/NSPTech21](https://tinyurl.com/NSPTech21)

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**STAGE 1: ENVISION**

Build a team  
 Review goals

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**1ST THINGS FIRST:  
 FOCUS ON MISSION & GOALS**

1. Determine who you'll invite to your team, why and how
2. 1<sup>st</sup> thing you'll do with your team: Review your mission
3. Discuss & capture your organization's key, strategic goals over the next 1-3 years?

*...Increase clients served / diversity of clients served, Improve financial stability, Enhance organization's visibility...*

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**REVIEW MISSION & GOALS, CONT.**

- **Then, add technology:**
  - How can technology help you reach your goals?
  - Where does technology intersect with your goals?
  - Is there any place where technology is *in the way* of your goals?

*...Use client database to reduce time spent on manual processes, Use web site to sell/promote services, Offer improved tech training & support to staff...*

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**ORGANIZATION "HEADSTART" TIME**

1. Join breakout room
2. Turn on video and/or share screens
3. Discuss → → →
4. At end, click "Leave breakout room." **NOT** "Leave meeting"

*NOTE! Chat is still visible to full meeting during breakout, but recording will be paused.*

**YOUR TURN: Get Grounded in Mission & Goals**  
 Refer to the examples on the previous page to help you think through your goals. Only once you have your goals captured should you think about how technology could help you achieve them.

Your mission:

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Key goals in the next 1-5 years to help you achieve that mission (Only 3-5 are strategic):

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How can technology help you achieve the goals above? What are the opportunities?

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Handout is available at [www.tinyurl.com/NSPTech21](http://www.tinyurl.com/NSPTech21)

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**STAGE 2: ASSESS**

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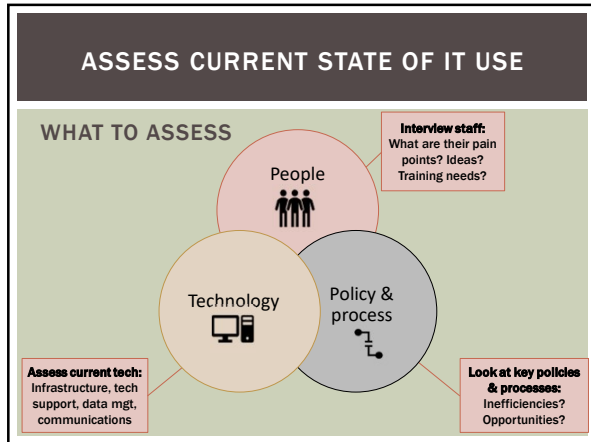
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### ASSESS TECH: INFRASTRUCTURE QUESTIONS TO ANSWER (& DOCUMENT)

Flickr credit: Eurlief

- Have many computers do we have?
- What is "make/model" of our hardware?
- What software is installed?
- What software do we actually use?
- How are we connected to the internet?

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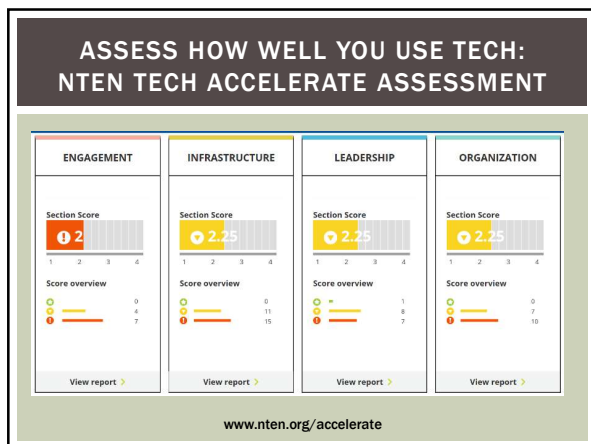
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**ASSESS HOW WELL YOU USE TECH:  
STABLE & SECURE BENCHMARKS**

Check yourselves against the Stable & Secure Benchmarks...

1. Computer Lifecycle	8. Malware Protection
2. Operating Systems for Computers and Servers	9. Secure Internet Browsing
3. Network Environment	10. Data Security
4. Reliable Internet Connection	11. Documentation
5. Firewall Protection	12. Technology Support
6. Secure Wireless Networks	13. Physical Security
7. Backup & Restore Process	14. Power and Surge Protection
	15. Password policies & Multi-Factor Authentication ("MFA")

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**STABLE & SECURE:  
SPOTLIGHT ON CYBERSECURITY**



- Put security policies in place
- Train staff to recognize phishing & other forms of cyberattack
- Enable Multi-Factor Authentication (MFA)
- Password manager and/or Single Sign-on
- Strong, up-to-date firewall
- Consider cyber insurance

Free IT Security Guide & Checklist:  
[offers.techimpact.org/it-security-guide-checklist](https://offers.techimpact.org/it-security-guide-checklist)

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**POLL TIME!**

Which best describes your use of passwords? (be honest!)

- Pretty much use the same password everywhere
- Use different ones, but have them all written down in a file/in a notebook/on post-it notes stuck to my PC
- Use a password manager
- Other: Chat us the detail!



This Photo by Unknown Author is licensed under CC BY NC ND

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**ASSESS PEOPLE**

- 1. Consider your tech support & staffing**
  - Is IT responsibility in the right places?
  - Is your access to tech support sufficient & effective?
- 2. Assess staff IT training needs & perceptions**
  - Staff surveys to get at training needs & IT needs/perceptions
  - Consider what the IT "core competencies" are for your org
- 3. Gather stakeholder perceptions & attitudes**
  - Determine who your key stakeholder groups are
  - Survey about perceptions, needs, opportunities
  - Look for themes & anomalies in responses

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**TOOLS TO HELP W/ PEOPLE ASSESSMENT:  
STAKEHOLDER PERCEPTIONS**

Staff Perceptions & IT Training Needs...

- **Ask questions like:**
  - What are primary goals or tasks you do in your job?
  - What is working well in your ability to do your job?
  - Major barriers, constraints, or pain points?
- Adjust questions for different stakeholder groups

*Who are your key stakeholders in this process?  
What do you want to ask them?*

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**ORGANIZATION "HEADSTART" TIME**

1. Join breakout room
2. Turn on video (if you can)
3. Discuss → → →
4. At end, click "Leave breakout room," **NOT** "Leave meeting"

**TO DISCUSS:**

- 1) Who are your key stakeholders?
- 2) What do you want to ask them?
- 3) HOW will you ask them?

*NOTE! Chat is still visible to full meeting during breakout but recording will be paused*

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## ASSESS: POLICIES & PROCESS

**Look at organizational policies**

- Do the needed policies exist? Are they written down?
  - Ex: Telework policies, acceptable use policies; data security policy; social media policy
- Is staff aware of the policies?
- Do you train staff & volunteers on policies as part of regular course of business? i.e. at orientation?

Telework Information  
Employee approval for telework must complete all the information on this page. The following table describes the telework terms to be observed, as agreed upon by the employee and the employee's supervisor.

Assignment:  
Please check the box or complete the following table.

My usual work location is at the OIG. I sometimes utilize full-time telework on alternate occasions (e.g. illness, absence, travel) or if directed by my supervisor.

<small>Location</small> The employee agrees to work at the following location:	
<small>Teleworking Days</small> The employee will telework on the following days:	
<small>Work Hours</small> The employee agrees to work during the following hours:	
<small>Assignments</small> The following assignments are to be completed by the employee teleworking:	
<small>Equipment</small> The following equipment is being provided to the employee for teleworking (e.g. computer, printer):	
<small>Services</small> The following services are being provided to the employee for teleworking (e.g. internet, phone):	

Sample telework agreement from [www.prepareresponse.org/resources](http://www.prepareresponse.org/resources)

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## POLL TIME!

Does your organization have an acceptable use policy for your tech?

- Yes
- No
- I don't know



This Photo by Unknown Author is licensed under CC BY-NC-ND

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## ASSESS: ORGANIZATIONAL PROCESSES



**Evaluate key business processes:**

- What processes are the main drivers of our organization? (ex: client intake, billing, training)
- Which processes are most time-consuming / involve the greatest number of staff?

Flickr credit: Jurvetson

Are there opportunities to improve/automate/redesign key processes (especially those related to key goals)?

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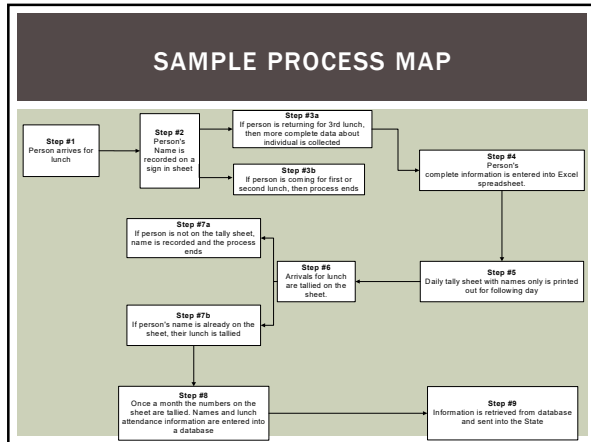
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### ORGANIZATION "HEADSTART" TIME

1. Join breakout room
2. Turn on video (if you can)
3. Discuss → → →
4. At end, click "Leave breakout room," **NOT** "Leave meeting"

You can ask for help if you get stuck:

1. Click Ask for Help in the meeting controls.
2. Confirm that you would like assistance by clicking Invite Host.

You can invite the host to this Breakout Room for assistance.

**TO DISCUSS:**

- 1) What processes are the main business drivers at your org?
- 2) Which processes feel like they need to be redesigned/improved?
- 3) Begin discussing/"mapping" the steps of process as-is today (as time allows)
- 4) Who should be involved in mapping this process after today?

**NOTE!** Chat is still visible to full meeting in breakouts, but recording will be paused

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### “AT-A-GLANCE” EXECUTIVE ASSESSMENT

**Twice a year, ask:**

- Is our technology...
  - Stable and secure?
  - Meeting organization and client needs?
  - Causing excessive frustration or complaint?
- What are we doing to advance mission through tech?
- Is tech responsibility in the right places?
- Are there trends I should pay attention to? What are private sector businesses adopting?



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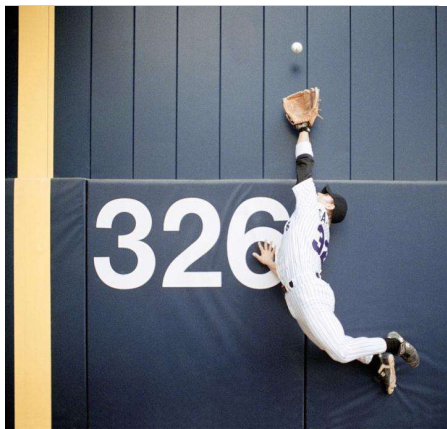
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**HOME STRETCH!**

Next Steps  
Preview Day 2

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### HOMEWORK FOR DAY 2 OF TRAINING



- Finish building tech team
- Complete assessment steps
- Compile list of IT projects (aligned with your goals)
- Start writing sections 1 & 2 of your plan
- Read about logic models
- Read Selecting & Working with IT Vendors

*Your consultant will help you talk through some of these items!*

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## USE THE STATUS TRACKER TO HELP YOU

*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): <ul style="list-style-type: none"> <li><input type="checkbox"/> Gather a technology perceptions and IT training needs survey from each of your staff (required) and perceptions surveys from other key stakeholder groups like board members, clients, etc. (encouraged)</li> <li><input type="checkbox"/> Conduct business process analysis (i.e. "process mapping") for any processes that are key business drivers and critical to your organization</li> <li><input type="checkbox"/> 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</li> <li><input type="checkbox"/> 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/measurements tools, email marketing/newsletter tools); share with your consultant</li> </ul>	
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 <ul style="list-style-type: none"> <li><input type="checkbox"/> Section 1: Introduction</li> <li><input type="checkbox"/> Section 2: Evaluation Process</li> </ul>	
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: <ul style="list-style-type: none"> <li><input type="checkbox"/> Logic Model Process</li> <li><input type="checkbox"/> Selecting &amp; Working Effectively with Technology Vendors</li> </ul>	

™ Attend 2<sup>nd</sup> 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.

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QUESTIONS?

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## GOOD LUCK!

SESSION 2: TUESDAY, JUN 8<sup>TH</sup>

Please complete the evaluation before you go!  
Link is in the chat or type into your browser:  
[surveymonkeys.com/r/WZB9Q3Z](https://surveymonkeys.com/r/WZB9Q3Z)

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