STRATEGIC TECHNOLOGY PLANNING

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Session 1

Course website with materials: tinyurl.com/STPFall21

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"RENAME" YOURSELF BEFORE WE BEGIN

Hover over your name, click "More." Then "Rename" yourself with FIRST & Org name.

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WHO'S HERE TODAY? (WAVE TO US WHEN I SAY YOUR ORG NAME!)

CWEALF
ConnectKids
Creative Living Community
hartford performs
Hartford Youth Scholars Foundation
JUDY DWORIN PERFORMANCE PROJECT
Moving for Change Since 1989
LATINO COMMUNITY SERVICES
MACC CHARITIES
reSET Where Great Companies Grow.

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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

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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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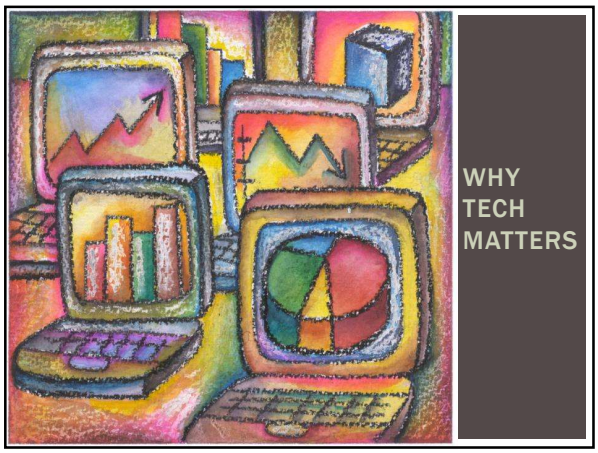
WHY
TECH
MATTERS

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TECH MAKES US EFFICIENT & PRODUCTIVE
(OR AT LEAST IT *SHOULD*)
But it can do so much more than that!
Flickr credit: Sumo!

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TECHNOLOGY CAN HELP US…
Engage our stakeholders /community
Transform products or services
i·e· Transform our beneficiaries/ mission/cause
Optimize our operations
Empower our people
i·e· Transform our organizations

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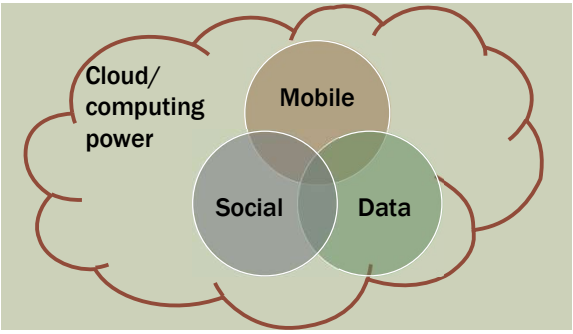
CONTINUED CONVERGENCE OF TECHNOLOGIES DRIVING POSSIBILITIES



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SOCIAL TOOLS EVOLVE BUT USE CONTINUES. STORYTELLING (VIDEO) IS KEY

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EVERYONE'S ON MOBILE. ALL THE TIME.

More than 50% of web traffic comes from mobile devices (not including tablets!)

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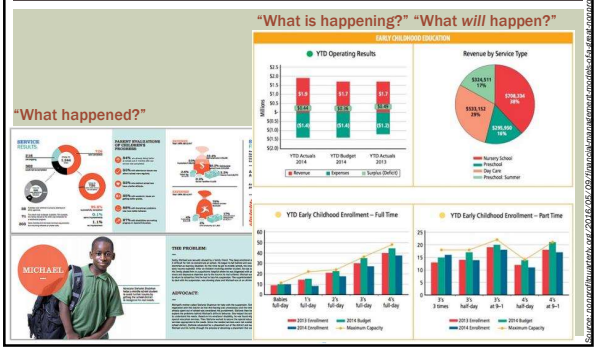
THE WAYS WE CAN AND ARE EXPECTED TO USE DATA ARE EVOLVING



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PANDEMIC ACCELERATED ALREADY RAPID PACE OF TECHNOLOGY CHANGE

"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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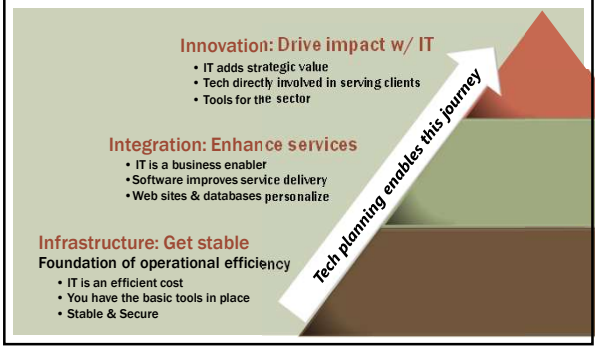
TECH PLANNING HELPS REALIZE IT VALUE & DRIVE IMPACT



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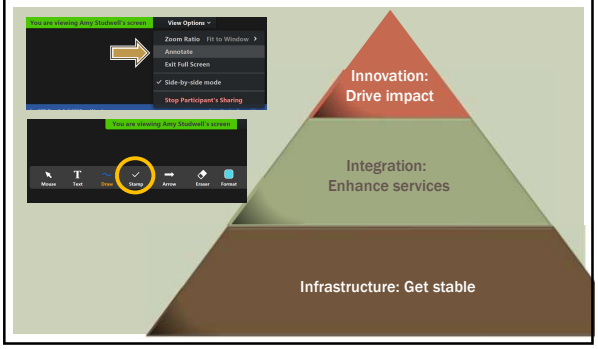
WHERE ARE YOU IN THE PYRAMID? ADD A "STAMP" RIGHT ON THE SLIDE



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OVERVIEW OF TECH PLANNING

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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/STPFall21

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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. 1st 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

1. 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:	
Key goals in the next 1-3 years to help you achieve that mission *(likely from strategic plan)*:	
How can technology help you achieve the goals above? What are the opportunities?	

Handout is available at tinyurl.com/STPFall21

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STAGE 2: ASSESS

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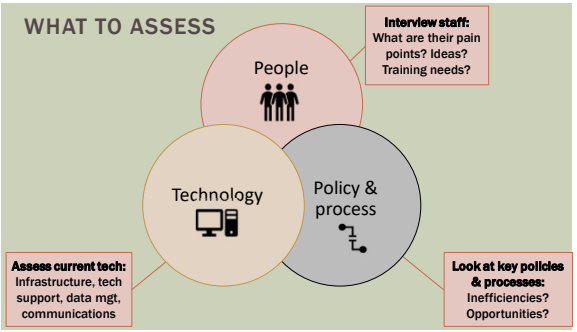
ASSESS CURRENT STATE OF IT USE



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ASSESS TECH: INFRASTRUCTURE QUESTIONS TO ANSWER (& DOCUMENT)

- 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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ASSESS HOW WELL YOU USE TECH: NTEN TECH ACCELERATE ASSESSMENT

www.nten.org/accelerate

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ASSESS HOW WELL YOU USE TECH: STABLE & SECURE BENCHMARKS

Check yourselves against the Stable & Secure Benchmarks…

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

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STABLE & SECURE: SPOTLIGHT ON CYBERSECURITY

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- 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

Two great cybersecurity resources:
tinyurl.com/CyberPlaybook
tinyurl.com/NPTechCheck

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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 re: 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

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2. Turn on video (if you can)
3. Discuss → → →
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TO DISCUSS:

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

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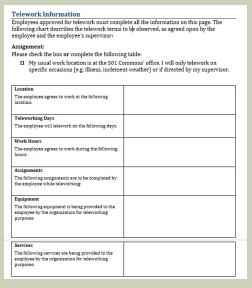
ASSESS: POLICIES & PROCESS

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

Employees approved for telework must complete all the information on this page. The following chart 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 501 Commons' office. I will only telework on specific occasions (e.g. illness, inclement weather) or if directed by my supervisor.

Location The employee agrees to work at the following location:	
Teleworking Days: The employee will telework on the following days:	
Work Hours: The employee agrees to work during the following hours:	
Assignments: The following assignments are to be completed by the employee while teleworking:	
Equipment The following equipment is being provided to the employee by the organization for teleworking purposes:	
Services: The following services are being provided to the employee by the organization for teleworking purposes:	

Sample telework agreement from www.preparerespondserve.org/resources

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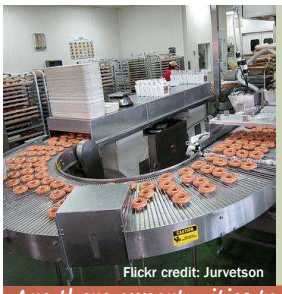
ASSESS: ORGANIZATIONAL PROCESSES



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?

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

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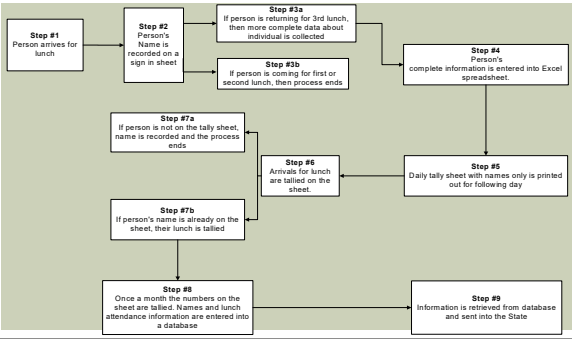
SAMPLE PROCESS MAP



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- Map the process (How does identity and info walk through the org?)
- Find inefficiencies
- Fix inefficiencies
- THEN look at tech

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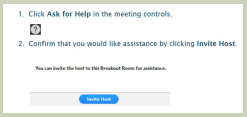
ORGANIZATION "HEADSTART" TIME

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:



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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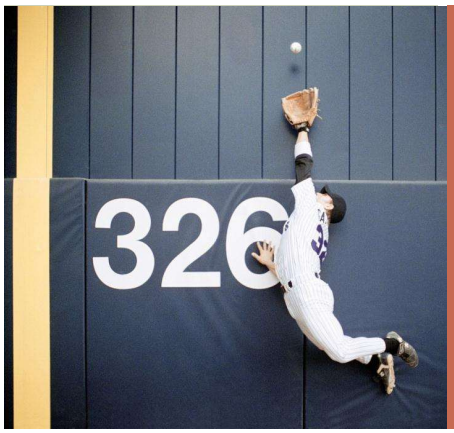

HOME STRETCH!

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): ❒ 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) ❒ 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.	

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QUESTIONS?

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