

STRATEGIC TECHNOLOGY PLANNING

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Toolkit Consulting
Session 2

Course website with materials: tinyurl.com/STPFall21

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ZOOM MEETING REFRESHER

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

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SINCE DAY 1 OF TRAINING...

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

Task & Sub-tasks	Progress Notes/Next Steps
<input checked="" type="checkbox"/> 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"> <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) <input type="checkbox"/> Conduct business process analysis (i.e. "process mapping") for any processes that are key business drivers and critical to your organization <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 <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/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 <ul style="list-style-type: none"> <input type="checkbox"/> Section 1: Introduction <input type="checkbox"/> 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: <ul style="list-style-type: none"> <input type="checkbox"/> Logic Model Process <input type="checkbox"/> 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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OUR GOALS/AGENDA FOR DAY 2



At the end of this session, you will:

- Have a framework for prioritizing projects & a head start on doing so
- Understand the why & how of creating logic models for tech projects
- Have tips & tools to help you select IT vendors & solutions
- Have strategies and a template for budgeting for technology
- Have tips to help you complete and implement your tech plan

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STAGE 3: PRIORITIZE

Define projects
Prioritize them
Define success

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PRIORITIZE TECHNOLOGY PROJECTS





“Too many projects, too little _____.”

Questions to Help You Prioritize Quickly

- Housekeeping: Are there key infrastructure projects that should be taken care of first?
- Are there other “low-hanging fruit” projects that will help you get traction?
- Are there projects that will solve multiple problems or be big wins with your staff?
- Projects that lack compelling outcomes?
- Are there projects that require certain sequencing and/or fundraising?

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PRIORITIZE TECHNOLOGY PROJECTS, CONT.

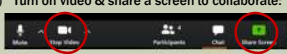
Implementation Complexity • Degree of specialization • # of processes, dependencies • Cost & timeline	Leave for now 	BIG Hits 
	 Nice to have	 Quick Wins

Potential Benefit
 • Strategic value/ program impact
 • Dollars saved/ earned
 • Increased services offered / clients served
 • Risk decreased / problems solved

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HEADSTART: PRIORITIZE PROJECTS (P. 49 OR THE PRIORITIZATION HANDOUT)

- 1) Join the breakout room
- 2) Turn on video & share a screen to collaborate:


- 3) Discuss → → →
4. Ask for help if you want me to pop-in:

1. Click Ask for Help in the meeting controls.

2. Confirm that you would like assistance by clicking Invite Host.

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

Invite Host
5. At end, click “Leave breakout room,” **NOT** “Leave meeting”

NOTE! Chat is still visible to full meeting during breakout

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DETERMINING SUCCESS CRITERIA & OUTCOMES

Using the Logic Model for your Technology Initiatives

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POLL TIME!

How comfortable are you working with logic models?

- Very comfortable
- Somewhat comfortable
- Neutral
- Somewhat UNcomfortable
- Very UNcomfortable



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USE THE LOGIC MODEL TO IDENTIFY OUTCOMES

Objective	Activities	Resources	Outcomes	Indicators
State what you are doing and why (1 sentence)	The tactics/ steps staff will use/ take to implement the project	What inputs or resources are needed for the project to go well?	<i>i.e. "Impact"</i> Changes in individual, community or org conditions; answer the question, "So what?"	How will you know you've arrived? "How many, how often, over what period of time?" (evidence, outputs)

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LOGIC MODEL QUIZ: OBJECTIVE, ACTIVITY, RESOURCE, OUTCOME OR INDICATOR?

- New Foundation Funding
 - **RESOURCE**
- Research potential vendors
 - **ACTIVITY**
- 6,000 unique visitors to the web site
 - **INDICATOR**
- Greater engagement with our members
 - **OUTCOME**
- 1.5K video views of Facebook video
 - **INDICATOR**
- Improved client satisfaction
 - **OUTCOME**
- Consolidate existing contact lists/data sources
 - **ACTIVITY**

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3 SAMPLES IN THE WORKBOOK (PP 54-56)

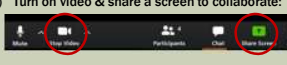
Logic Model Sample: Web Site Upgrade/Mobile-Friendly Web Site

OBJECTIVES <small>What basic goal(s) have you set for this technology project?</small>	ACTIVITIES <small>What do you do to implement this project?</small>	RESOURCES <small>What will you need to implement the project?</small>	OUTCOMES <small>What will success look like? What will things be a result of your effort?</small>	INDICATORS <small>What are some concrete (measurable) results of the project?</small>
Web Site Upgrade To develop an updated and enhanced web site with a mobile-friendly version that keeps us connected with current and potential supporters.	<ul style="list-style-type: none"> • Determine key goals and audience for re-design • Meet with program heads to discuss their web site needs • Research web vendors with mobile-friendly templates/features • Determine what content "gets mobile" • Determine hardware, software, and security needs • Create RFP for project; create bids • Train staff how to use the new content management system to keep content fresh • Create plan/calendar for fresh content • Launch new site 	Time <ul style="list-style-type: none"> • For staff input on web content for mobile • For staff (re-) writing • To consult w/ designers & developers Money <ul style="list-style-type: none"> • For re-design/customization • For monthly subscription fees Hardware/software <ul style="list-style-type: none"> • Subscription w/ CMS • E-commerce system tool if not integrated in CMS) Staff Training <ul style="list-style-type: none"> • To use CMS • To use newsletter tool Service Contracts <ul style="list-style-type: none"> • Web site hosting 	Immediate: <ul style="list-style-type: none"> • Improved communication with stakeholders who can now read our site on their phones • More current and useful web site content with more engagement opportunities Intermediate: <ul style="list-style-type: none"> • Ease of donation for donors • More consistent engagement for supporters & event attendees Longer-term: <ul style="list-style-type: none"> • Engage younger audience, diversify support base • Ensure those w/o home computers can learn about our services • More community awareness about our programs & services • Improved long-term sustainability • Organization seen as a thought leader for issue area 	<ul style="list-style-type: none"> • Mobile-friendly version of web site & newsletter exist; # of visitors via mobile • # of new articles and updated posts written for the site; social integration exist • Decrease drop-off of mobile visitors to web site by 20% • Higher placement in search results by X factor • # of donations received; event registrations, etc. via mobile • # of social shares/engagements driven from new site • % increase in subscribers/members under age XX • % increase in service recipient via mobile • # of new members or clients in our programs/services • # of Conference speaker requests

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HEADSTART: LOGIC MODEL (P. 57 OR LOGIC MODEL HANDOUT)

- 1) Join the breakout room
- 2) Turn on video & share a screen to collaborate:



For 1 of your big projects:

 - Try to come up with at least 2-3 outcomes, & an indicator for **most**.
 - Try to answer the question: **SO WHAT?**
 - Push beyond "efficient"
- 3) Discuss → → →
4. Ask for help if you want me to pop-in:

1. Click Ask for Help in the meeting controls.

2. Confirm that you would like assistance by clicking Invite Host.


You can bother the host by this Breakout Room for assistance.

Invite Host
5. At end, click "Leave breakout room," **NOT** "Leave meeting"

NOTE! Chat is visible to full meeting during breakout

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THINK ABOUT IT



- What value is there in the logic model beyond just as an exercise for funders or as a requirement for grant reporting?
- How can the logic model help you convince stakeholders about the role and importance of technology?

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STAGE 4: ACT

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RESOURCING IT

Getting help
Budgeting


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IDENTIFYING VENDORS (& SOLUTIONS)

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THE PROCESS OF SELECTING A TECHNOLOGY VENDOR

1. Assess Feasibility
2. Gather requirements
3. Research/refine options
4. Evaluate vendors
5. Select & engage vendor
6. Manage implementation
7. Support & maintenance




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KNOW WHAT YOU NEED: GATHER REQUIREMENTS

Do your homework: No one knows your needs better than you. Don't leave definition to an outsider.

- Determine functional requirements
 - What does it need to "DO"?
- Determine informational/data requirements
 - "Start w/ the ending" - What data or reports are needed?
 - Backwards engineer from there
- Consider Process Mapping



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 **Sample functional requirements for a photocopier**

What technology solution are you defining requirements for? What are your desired goals/outcomes from it?	
A networked photocopier to help us work more efficiently and effectively, reduce staff frustration, save costs on outside printing, and provide more professional materials to our clients and donors.	
What are the functional requirements? What do you need it to do?	Priority Need-to-Have, Nice-to-Have, Fluff?
Network to all of our computers so we can all print directly to it (all on same floor of building – existing networking infrastructure is in place)	Need to have
Accommodate print jobs from up to 50 different users (though not all simultaneously)	Need to have
Print & copy double-sided, B&W	Need to have
Print/copy 5000 pages a month with no compromised performance	Need to have
Finishing options: Staple	Nice to have
Print over Wi-Fi connection	Nice to have
Scan & Fax	Nice to have
Color printing	Nice to have
Print 11x17 foldable books	Fluff

Refer to your logic model to review your outcomes for a solution. They will help inform your requirements. If you are doing the requirements for a database or more information-based process, you may want to use your process map as a starting point to capture your information requirements – write down what info the solution would need to collect/track at each step in the process map.

Page 70 in your workbook


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HEAD START: DETERMINE REQUIREMENTS & RESEARCH VENDORS



- 1. For a key solution you are considering (ex: database, web site, phone system, etc.)
 - Start drafting the functional requirements you'll need (pp. 68-69)
 - What do you need it to DO?
 - How many users need access? Where?
 - Security requirements?
 - Information requirements:
 - What reports will you need?
 - What data does that mean you need?
- 2. THEN: Use requirements list to narrow down vendor options & start researching (p. 71)

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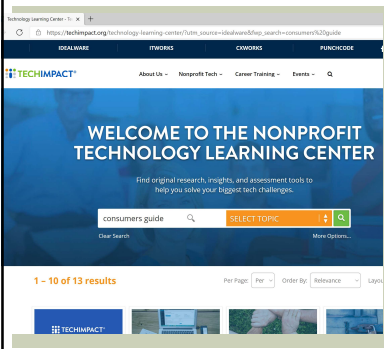
 **YOUR TURN: Define your functional requirements**

What technology solution are you defining requirements for? What are your desired goals/outcomes from it?	
What are the functional requirements? What do you need it to do?	Then prioritize them (Need-to-Have, Nice-to-Have, "Fluff")

See page 69 in your workbook OR functional requirements worksheet

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THEN: RESEARCH & REFINE OPTIONS



- Use your requirements to narrow list of possible vendors/ solutions that could meet your needs
- Narrow the list to only those who seem to have the functionality you need
- Establish Criteria (Possibly: consider RFP)
- Set-up vendor demos & calls

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TIPS & PITFALLS



- Make sure staff have skills & time to practice (demos, "sandboxes", training)
- Use phasing ('Must-have', 'Nice to have', 'Fluff')
- Don't base on cost alone
- Leverage product demos/ tours/evaluation period

For further learning: See pages 64-77 in your workbook!


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BUDGET FOR TECH: CONSIDER TCO

What is TCO?

Amount it **ACTUALLY** costs to:

- Purchase
- Install
- Operate
- Maintain
- & Train users on ...a piece of technology.



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BUDGET FOR TECH

- **Full costs**, not just amount covered by grant
- Consider 3 layers of needed budget/funds:
 1. **Operating costs/ "Run"** – What does it take to keep your tech "lights on"?
 2. **Project Investment costs/ "Grow"** – What will it take to complete new projects identified to build your current org capacity?
 3. **Funding R&D / "Transform"** – What really big ideas do you want to pursue or at least explore?

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Strategic Technology Budget Template - SUMMARY VIEW (do not edit)

Instructions: Do not edit this sheet. It pulls from the subsequent worksheets to provide a summary view of your technology budget. You can use the 1, 2 & 3 buttons to the left of Column A to collapse rows and see a more condensed view of your budget, or use individual minus signs to the left side of certain rows.

	Year 1	Year 2	Year 3	Total
Operating Costs				
<i>Costs to sustain and maintain existing/current technology:</i>				
Hardware costs	0	0	0	\$ -
Software	0	0	0	\$ -
Service Fees/Contracts	0	0	0	\$ -
Consulting Fees	0	0	0	\$ -
In-House Staff Costs	0	0	0	\$ -
Staff IT Skills Training	0	0	0	\$ -
Supplies	0	0	0	\$ -
Other	0	0	0	\$ -
Sub-total, Operating costs	\$ -	\$ -	\$ -	\$ -
Project Investment Costs				
Project 1: Project Name Here				
Hardware	0	0	0	\$ -
Software (including cloud/SAAS)	0	0	0	\$ -
Staff IT Skills Training	0	0	0	\$ -
Consulting	0	0	0	\$ -
Service Fees/Contracts (not including software)	0	0	0	\$ -
In-house staff costs	0	0	0	\$ -
Supplies	0	0	0	\$ -
Other	0	0	0	\$ -
Sub-total, Project 1	\$ -	\$ -	\$ -	\$ -
Project 2: Project Name Here				
Hardware	0	0	0	\$ -
Software (including cloud/SAAS)	0	0	0	\$ -
Staff IT Skills Training	0	0	0	\$ -
Consulting	0	0	0	\$ -
Service Fees/Contracts (not including software)	0	0	0	\$ -
Instructions Summary View (do not edit) Operating Costs Project 1 Project 2 Pr ...				

TECH
BUDGET
TEMPLATE

Available on the
course web site

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BUDGET FOR TECH, CONT.



Scenario planning -- Ask yourself:

- What's most likely scenario?
- What will we scale back in worst-case scenario?
- Expand/accelerate in best-case scenario?

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IMPLEMENTING YOUR PLAN

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KEYS TO SUCCESSFUL PLANNING

- Consider board adoption of plan
- Present completed plan at all-staff meeting to prepare folks for change
- Develop a clear implementation plan with detailed action plans for each project
- Communicate early, often, & in different ways

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NEXT STEPS

- Continue meeting w/ your consultant
- Finish prioritizing projects, research options, select vendors/solutions
- Create/complete logic models for big projects & action plans for all projects
- Write your tech plan & budget, review with your consultant
- Request/submit grant application
- Implement, implement, implement!

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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](http://tinyurl.com/STPFall21)

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PERSPECTIVE FROM A RECENT CRM MIGRATION...


Throughout migration and implementation, I reminded my colleagues of the 3 stages of a database migration: **Oh yes! Oh no! Ok.** Here are some variations of my messages to staff:

- Preparation will include time-consuming grunt work, such as you reviewing & updating spreadsheets.
- The migration will take longer than we think. And then longer than that.
- We will enjoy improved systems, not perfect systems.
- It will take time, practice, & some false starts to effectively integrate the new process into workflow.

Source: nten.org/article/how-can-you-ensure-a-quick-and-easy-culture-change-hint-you-cant

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GOOD LUCK & THANK YOU!

 Please complete the evaluation before you go!
 Link in the chat or type into your browser:
www.surveymonkey.com/r/D3CK25B

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