

# **Developing A Technology Plan** **For My organization**

The following document may seem a bit intimidating at first but it should not be. Some of the sections below, you likely will not need. For example if you do not do accounting in-house then that worksheet is not needed at this time. Also the Internet connectivity worksheet will help give you some insight into the future, even though today AtchiCIN is handling this portion of your technology needs.

In the sections below are the most likely needed worksheets and then follow up sections on planning, putting together a Technology Plan and how to keep it vital and useful, as well as how to use your Plan as a tool for funding to make sure you can continue to provide the services your organization supplies to our community.

A Technology Plan is really just another form of Strategic Planning. A well done plan can give you insight into your organization and how to strengthen and improve the way you do your job. A well done plan may also open up new opportunities to find the resources you need to, not only acquire the technology you need, but to serve your community better, faster and in new ways you may not have thought of before.

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# **Technology Organizational Assessment**

This worksheet is designed to help you start thinking about the overall status of your organization's use of technology.

See the more detailed content area worksheets for questions that are specific to local area networks, hardware, word processing software, accounting software, connecting to the Internet, databases, website development, training and technology support staff.

1. What do you see as the most pressing needs for your organization, that technology might address?
2. Why/how do you think computers can help?
3. If all computer systems were magically working and adequate tomorrow, what would change in the organization?
4. Who at the agency has been involved in planning for technology staffing, training and purchases?
5. Who at the agency has been involved in day-to-day computer troubleshooting and maintenance tasks?
6. Who will be involved in the implementation of new technology efforts?
7. Are staff members able to use the technology that is crucial to their efficiency and to the tasks they need to accomplish?
8. What type of training have staff members completed in the past? How useful was it?
9. What type of financial resources does your organization have available for technology? Are you prepared to seek additional funding from other sources?
10. What are the obstacles to your organization's effective use of technology?
11. What is management's attitude and role in the organization with regards to technology?
12. How would you assess your use of technology compared to other agencies with similar missions?
13. Do you need better systems to streamline your operations, increase communication among staff, reach out to clients, cultivate your board, or communicate with your members?
14. What role does the implementation of new technologies play in your strategy for the next five years? Do you need new technology in order to grow? Would new technology allow you to respond to new opportunities?

## **Local Area Network (LAN) Assessment**

Use these questions to help you think through your local area network needs. Do you currently have a local area network?

If you do not have a LAN:

1. What would a LAN enable you to do that you can't do now? For example, a LAN might:
  - \* Allow staff members to access each others' files on the computer
  - \* Enable you to share Internet access across all the computers on the LAN
  - \* Allow staff members to use one central database
  - \* Allow you to set up an automated backup system for all computers on the network
2. How many computers do you want on the network?
3. Do you have computers with different operating systems, such as Macintosh, and Windows '95 or '98?
4. What is your budget for setting up a LAN? Have you explored fundraising possibilities?
5. What support staff can you dedicate or hire to maintaining and troubleshooting the LAN?
6. Do you have access to a consultant who can set up your LAN? If not, do you know of other nonprofits who might be able to recommend someone?

If you do have a LAN already:

1. What network software are you using?
2. What kind of cabling does your LAN have?
3. Are you having any problems with your LAN?
4. Is everyone who needs to be on the network, on the network?
5. Is there room to put more computers on your network with your current cabling and hub?
6. Is the network fast enough? What tasks are too slow, if any?
7. Does the network break down often? What seems to cause the breakdowns?
8. Do you have a network server? What kind of computer is it? Has it been down more than once in the past few months?
9. What kind of backup system (ZIP drive, tape backup, etc) does your network have? How frequently do you perform these backups? Do you backup all the hard drives connected to the network, or just the server?

10. Do you have a network consultant? If so, how much would you estimate that you have paid them during the last year?

11. Is your LAN connected to the Internet? If so, what kind of connection do you have?

- \* Shared modem (28.8 dial-up or dedicated line)

- \* ISDN

- \* 56Kb line

- \* T1 Connection

- \* T3 Connection

12. What do you need to be able to do using your LAN that you can't do now? What about the LAN is slowing you down?

13. What solutions or next steps do you see?

## **Hardware Assessment**

Use these questions to help you think through your hardware needs.

1. What is your organization's budget for computer systems? Have you explored fundraising options?
2. What is your budget for technology support and maintenance?
3. How much money would you estimate your organization has spent on your computer systems (hardware / maintenance) in the past year?
4. How many computers are in the main site of your agency? Do you have an inventory of your computers?
5. Are your systems standardized or wildly different from each other? For example, do you have a combination of Macs and PCs, or a combination of newer and older systems? If they are different, does it cause problems? How serious are the problems?
6. Do you have any satellite sites? How many computers are at each satellite site?
7. Do all staff who need computers have them? Are the computers adequate for the tasks that staff need to perform?
8. Generally, are your computers new enough to run most of the software you need to run?
9. Are your computers new enough to support the Internet access, database use and network configuration that you want? How many are not up to speed for these things?
10. How many new or upgraded computers would you estimate you need (lowest figure)? How many would be optimum?
11. Based on what you intend to use the computers for, what would be the minimum configuration acceptable for new computers (386, 486, Pentium, Mac LC, Performa, PowerMac)
12. Can your organization accept used or reconditioned computers? If yes, do you have the knowledgeable staff, time and budget to do work on donated computers?
13. What kinds of printers are you using at each site? Do they all work adequately? What do you use them for (for example, graphics, word processing or desktop publishing)? What do you need to do using your printers that you can't do now?

## **Word Processing Software Assessment**

Use these questions to help you think through your word processing software needs.

1. What kind(s) of word processing software does your organization use?
2. What are the main types of documents that your organization creates with your word processing program?
3. Does everyone on staff with a computer use word processing?
4. Is everyone on staff able to create the documents they need to make?
5. Do staff members need more training than they're getting in doing word processing?
6. Are staff members able to use advanced features of word such as document templates, macros or change tracking?
7. Do your computers run the word processing software adequately?
8. Does your organization need to upgrade to a newer version of your current program or even a different program? If so, what program do you need?
9. How many computers will not be able to run the new software?

## **Accounting Software Assessment**

Use these questions to help you think through your accounting software needs.

1. Does your organization have a person on staff doing your accounting? If so, is your accounting system computerized?
2. If the accounting system is not computerized, do you think it should be? Why?
3. What kind(s) of accounting software does your organization use?
4. Is your computerized accounting system currently working well?
5. Would your accounting system be adequate with a 25% increase in volume?
6. Is the accounting staff able to keep your organization's accounts accurately and easily?
7. Do your computers run the accounting software adequately?
8. Does your organization need to upgrade to a newer version of your current program or even a different program? If so, what program do you need?
9. How many computers will not be able to run the new software?

Before you start looking at fund accounting software, make a list of the features that you are looking for. Most of the programs on the market can produce basic fund financial statements, but each of them has strengths and weaknesses. Some questions to ask yourself include:

1. Do you need fundraising software, fund accounting software, or both. If you need both, do they need to be connected? Why?
2. How many funds do you have? How independent are they? How many accounting transactions do you have each month?
3. Do you have specific reporting requirements from your grantors?
4. Can you support the software internally, or are you going to need long-term help from the consultant who installs it?
5. What is your budget for this project?
6. Do you have fast enough Internet access that using an ASP (Application Service Provider, such as Tapestry.com, LocalVoice, etc) could be a viable solution for your organization?

## **Internet Connectivity Assessment**

Use these questions to help you think through your Internet connection needs.  
Do you currently have Internet access in your organization?

If you do not have Internet access:

1. What tasks could you do using the Web that you can't do now?
2. Do you currently have an internal office email system? If so, is it adequate, or do you need to email people outside your organization as well?
3. Who among your staff needs to do research on the Web as part of their job?
4. What is your budget for establishing a connection to the Internet? Have you explored fundraising options?
5. Do you need all your computers to connect to the Internet, or just one or two? Do you currently have a local area network that you could connect? Do you have plans to install one?
6. How important is your speed of access to the Internet?
7. How many users do you think will be sharing an Internet connection at once?
8. How many phone lines do you have in your office? Are any of these lines used for multiple purposes (e.g. for both fax and data)?
9. What services do you need from an Internet Service Provider? For example, do you need web hosting? How many email accounts do you need?
10. What types of Internet Service Providers (ISP) serve your region? What types of Internet connections are available?
11. How much are you prepared to pay your Internet Service Provider (ISP) on a monthly basis?
12. How many hours a day do you expect you and your staff to be on the Internet?
13. Will you be connecting to an ISP from multiple locations throughout the state or out of state?

If you already have Internet access:

1. Are all staff computers connected to the Internet? If not, do all staff need a connection?
2. Are individual computers connected, or a whole network?
3. What is your method of connection? For example, do you use DSL, a T-1 line, ISDN or another method?
4. If you use a modem, is it external or internal? What is its speed? (For example, 14.4, 28.8, 56K or cable.)
5. Is your speed of connection adequate for the web research you need to do?
6. What Internet Service Provider are you registered with? What is your average monthly cost?
7. Do you feel your service is adequate for the price you are paying?
8. What services do you need that your ISP does not provide?

## **Basic Database Assessment**

Use these questions to help you think through your accounting database needs.  
Does your organization have a database?

If you do not have a database:

1. How do you currently store data such as contact information or information about clients and projects?
2. Is your method of keeping data efficient? Is it easy to share data among different staff members?
3. What is your budget for a new database?
4. What type of data do you want to store in the database?
5. What tasks will you use the database for? For example, do you want to retrieve information, sort data or print reports?
6. Do you currently have database software such as Access or Filemaker?
7. Do you want several staff to be able to access the database? Do you have a network to support this?
8. Do you know of a consultant you trust who could build a database for you? Do you have someone on staff that could do it?

If you have an existing database:

1. What kind(s) of database software does your organization use?
2. Is your current database system adequate? Does it do what your organization needs it to do easily?
3. Would your database system be adequate with a 25% increase in volume?
4. Do you have more than one database? If so, are they on different computers? Can more than one person use the same database?
5. What does your organization use the database(s) for? (Specific info on clients, donors, merging letters, labels, reports)
6. How many people on staff with a computer use the database?
7. How many people should be using it?
8. Is everyone using the database able to do all the things they need to do on it? Do they need help from a system manager?
9. Do staff members need more training than they're getting in using the database?
10. Do your computers run the database software adequately?
11. Does your organization need to upgrade to a newer version of your current program or even a different program? If so, what program do you need?
12. How many computers do you estimate will not be able to run the new software?

## **New Website Development Worksheet**

If you are in the process of creating a new website for your organization, these questions are a good place to start.

1. What is your message? In this section you should ask yourself what you want to say on your site.

2. Who are you targeting? Who is your audience? Who would use your site? Why would they come to your site?

3. What is the budget available in your organization for web development? How much for setup and how much for maintenance? What are the ways that you could get funding for your website? Do you know what type of website you can afford (large-scale database type, or online brochure type?)

4. How can you present your point of view effectively? What kind of voice is appropriate for your audience? What kind of content will be available? What are your featured categories? Should your site be consistent with other collateral materials in your organization? Do you have several other sites that you want to emulate?

5. What will your website accomplish? Will your website be a research or a development tool? What would your site's main use be? How will it improve what you do have? What will be the benefits of online exposure? What will it bring you that you don't already have?

6. Can you do it in-house? How will you reassign staff duties to provide for ongoing maintenance and updating? If not in-house, do you know whether you would like an individual consultant or a web design firm?

## **Training Assessment Worksheet**

Use these questions to help you think through your staff training needs.

### Staff /Skill Profile

1. Who is the target audience? What are their skills and motivation level?
2. What training has staff requested?
3. What is specific, observable data that indicates that training is needed?

### Agency Training Systems

1. In the past, how has training been delivered?
2. On a scale of 1-5, how successful would you say past training has been?
3. What is your budget for training? Is the budget flexible? Are you raising money for training?
4. What methods of training do you use?
5. How do your staff learn best?
6. Does training of staff typically happen off-site? (i.e. at workshops, in classes, independently)
7. What training has proven successful in the past ? (i.e. learners were able to apply what was taught immediately)? What training has NOT proven successful?

### Training Objectives

1. What areas of inefficiency do you have as an staff that training could improve?
2. What do you want to be included/covered in the training?
3. If training was successful, what would be the outcome?
4. What is the problem/need to be addressed through training?

### Training Logistics

1. Do you have time allocated for organized technology training for your staff?
2. By what date do you want staff to be able to use software, systems, etc.?
3. Do you have someone on staff who could deliver training?
4. Do you know of other nonprofits who could recommend a trainer or a class?

## **Technology Support Staff Assessment**

Use these questions to help you think through your technology support staff needs. Do you have a system administrator on staff?

If you have a system administrator:

1. How many hours does your system administrator work per week? Do they have too much to do? Do you feel like they can handle most of what needs to be done?
2. Do they answer questions easily and understandably?
3. Are they able to train staff individually, or organize group trainings?
4. Are they keeping a network log or other records on the computer system?
5. Is there a person on staff in addition to the system manager who can do essential computer tasks if necessary?

If you do not have a system administrator:

1. Are your existing systems of technology support adequate? Do you have a need for a system administrator?
2. What is your potential budget for technology support? Can you fundraise to extend this budget? Remember that approximately 70% of technology spending should go to support and training.
3. On average, how many hours does your organization dedicate to the following each month?
  - \* Computer Maintenance
  - \* Printer Maintenance
  - \* Software Troubleshooting
  - \* Network Administration
4. Who does this work? Is it a part of their assigned tasks?
5. Is anyone in charge of computer training at your organization? Is there a need for such a person?
6. Do you have a computer store or consultant that you can afford to hire to help you fix or make upgrades on your computer?

## Additional Technology Planning Worksheets available at:

<http://techsoup.org/howto/worksheets.cfm>

### Worksheets

Welcome to TechSoup's Worksheets section. The worksheets below are tools to use when assessing how well your organization's computer systems are working, and what you need to change. See the Technology Planning section for more information on the process of assessment. You can view the worksheets in your browser or print them out and write on them.

### Worksheets

#### Technology Planning

Technology Organizational Assessment

Hardware Assessment

Internet Connectivity Assessment

Local Area Network (LAN) Assessment

New Website Development Worksheet

Basic Database Assessment

Training Assessment Worksheet

Word Processing Software Assessment

Accounting Software Assessment

Technology Support Staff Assessment

In-Depth Database Needs Assessment

Blank Troubleshooting Log (PDF Format)

Blank Volunteer Project Schedule (Word Format)

Computer Workstation Inventory (Word Format)

Technology Inventory Worksheet

ROMA's Information Management and Technology Plan (PDF Format)

Sample Database Plan (PDF Format)

Sample Database Plan (Word Format)

Staff Inventory Worksheet (Word Format)

Technical Volunteer Questionnaire (Word Format)

Troubleshooting Log (PDF Format)

Sample Youth Center Acceptable Use Policy (Word Format)

### Hardware

Hardware Assessment

### Software

Word Processing Software Assessment

Accounting Software Assessment

Operations Software Selection Orientation (PDF)

Trial License Agreement Covering Software (Word Format)

Operations Software Selection Session 1 (PDF)

Operations Software Selection Session 2 (PDF)

Operations Software Selection Session 3 (PDF)

Operations Software Selection Session 4 (PDF)

### Web Building

New Website Development Worksheet

Sample Nonprofit Acceptable Use Policy (Word Format)

Sample Online Disclaimer Regarding Information (Word Format)

Sample Webpage Disclaimer Regarding Information

Online Events Checklist

Accessibility Guidelines Checklist

### Volunteers

Blank Volunteer Project Schedule (Word Format)

Technical Volunteer Questionnaire (Word Format)

Volunteer Project Schedule (Word Format)  
Working with Technical Volunteers: A Manual for Nonprofit Organizations  
Consultants  
Technology Support Staff Assessment  
Training  
Training Assessment Worksheet  
Computer Networks  
Local Area Network (LAN) Assessment  
Networks 101 - An Introduction to Networking for Nonprofits (Word Format)  
Networks 101 - An Introduction to Networking for Nonprofits (PDF Format)  
Internet Connections  
Internet Connectivity Assessment  
Databases  
Basic Database Assessment  
Off-the-Shelf Database Assessment  
In-Depth Database Needs Assessment  
Database Needs Assessment Questionnaire (PDF Format)  
Database Needs Assessment Questionnaire (Word Format)  
Sample Database Plan (PDF Format)  
Sample Database Plan (Word Format)  
Database Planning Guide, Version 1 (PDF Format)  
Database Planning Guide, Version 1 (Word Format)  
Funding  
Building a Great Case Statement Funding Planner  
Building a Great Case Statement Funding Planner (Sample)  
Getting Started on Better Grant-Seeking Strategy  
Getting Started on Better Grant-Seeking Strategy (Sample)  
CTCs  
CTC Neighborhood Inventory Worksheet  
Apprenticeship Toolkit Resource Guide (PDF Format)  
Apprenticeship Toolkit Trainer's Manual (PDF Format)  
Apprenticeship Toolkit Apprentice Manual (PDF Format)

Excerpts from the TechSoup website on technology planning

## **Technology Planning**

If TechSoup had a mantra, it would be, "Do a technology plan!" A technology plan is the single most important ingredient to an effective use of technology in your organization. The technology planning process will help you minimize technology-related crises, use staff time efficiently, and avoid wasting money on equipment that makes your life miserable. It will help you think through your priorities in order to use technology in a way that directly furthers your mission. It will help you budget for technology and make cost-effective purchases. Even more spectacularly, you can use a technology plan as a key tool to advocate for technology funding.

Links to article excerpts below and more can be found at:

<http://techsoup.org/howto/articles.cfm?topicid=11&topic=Technology%20Planning>

## **Why a Technology Plan?**

By: Anna Mills

Source: TechSoup

**A technology plan can sound like another piece of bureaucracy. Don't be fooled! There is no substitute for thinking through what you need and how you will meet those needs. Technology planning is the process that will help you save money on technology, buy what you need and use technology as a tool to accomplish your organization's mission.**

Technology planning is the magic ingredient that will help you to:

- \* **Obtain funding.** Funders will be much more likely to give money for technology if you can show them a technology plan.
- \* **Use technology effectively to further your mission.** The technology planning process can expand your horizons and help you see new ways in which technology can further your mission.
- \* **Buy the right equipment.** Purchasing hardware, software and networking equipment can be overwhelming. If you don't plan, it's easy to end up with something that is way too complicated or doesn't do what you need it to. There's no substitute for thinking through your goals and researching possible solutions.
- \* **Save money.** You probably do not need the fanciest system on the market. Planning allows you to figure out how to spend less and still meet your needs.
- \* **Avoid crises.** Bad technology decisions can leave you suffering for years. A faulty system can send your stress level through the roof and make you lose crucial data and capabilities.
- \* **Use staff time more effectively.** How many hours of staff time have you lost to those niggling technical problems? A technology plan will help you streamline staff use of technology, and put systems in place that will make technology a useful tool for staff, not a stumbling block.
- \* **Protect yourself from staff turnover.** If the person who knows your technology leaves, what will you do? A technology plan can save you by providing documentation of existing systems as well as future plans.

## Implementing Your Technology Plan

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.

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.

- \* 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.***

## Do I Need Help With My Technology Plan?

Technology planning is not quick or simple. There is no magic formula for success. In order to make informed decisions, you will need access to technology expertise.

Whether or not you can do your planning on your own depends on the technology expertise you have on staff already. Most nonprofits do not have enough know-how to complete the whole planning process, including deciding which type of network they need, or how best to connect to the Internet. In most cases, TechSoup recommends that you do draw on outside resources.

***(This is where AtchiCIN comes in)***

However, you may be able to save money by seeking help on some aspects of technology planning while doing others on your own.

- Only you can define what it is that you want your organization to gain from technology use.

- Taking your hardware and software inventory may be the most well-defined part of technology planning. As a result, you have more options for how to get it done. If someone on staff has even a minimal knowledge of hardware and software vocabulary, you may well be able to do it in-house. Is there someone who knows how to find out the processor speed of a computer? How to find out the full version number of a software application? Have your most technical person look at the hardware and software inventory worksheets to see if she or he understands all of the columns. Your other options include hiring a consultant or finding a volunteer.

- Planning technology solutions can require much more in-depth technology understanding. In some cases, if there is already an experienced IT person on staff, some nonprofits find that with web research and phone calls, a technology team can complete the plan on its own. However, if you do not have an experienced IT person on staff, it will be hard for someone to learn enough to make a reliable judgment call.

- Whether or not you seek outside help, however, educating your own technology team is crucial to a successful plan. In order to understand the options a consultant presents to you, you need vocabulary and basic concepts. The content areas of TechSoup are a good place to start. For example, if you are trying to decide on a network, familiarize yourself with network concepts and issues in the Networks section of TechSoup.

## What's Involved in Technology Planning?

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 machines that work, networks that give access to information, and applications that are appropriate for an organization's mission.

Technology planning is a process. TechSoup has broken it down into seven phases.

1. Establish leadership and support. Setting up a technology team and ensuring management and staff buy-in will allow you to get started with the whole organization behind you.
2. Assess your resources. The first step in planning is to assess your existing technology. What do you have in place? How well is it working? See the article "Assess Resources" for more information.
3. Define your needs. Why do you need technology? What will new technology help you do that you can't do already? Defining your needs will enable you to choose the most efficient solutions. See the article "Define Your Needs" for more information.
4. Explore solutions. The next step is to research existing technology options and decide on ones that meet your needs at a minimum cost. See the article "Explore Solutions" for more information.
5. Write the plan. Your written plan should document your resources, needs and solutions, as well as your budget. See the article "Write the Plan" for more information.
6. Get funding. You can now use your technology plan as key element in seeking technology funding. See the Funding section for more information.
7. Implement the plan. Setting a timeline, assigning responsibilities and evaluating your progress will make your plan a reality. See the article "Implementing Your Technology Plan" for more information.

If this seems like a lot to handle, remember that most nonprofits will want to seek help with one or more aspects of the technology planning process.

Don't despair! Help is available. Technology planning is no simple matter, but it is a rich, powerful process. In the long term, it can reduce your headaches tenfold, and lead you to use technology to further your mission in ways you never dreamed of.

## The Planning Process: Assess Resources

The first step in developing a plan is to assess where you are.

Sound philosophical? The key is to spend some time asking yourself what is working, and what needs improvement. What technology do you have in place in your organization? What technology skills does your staff have? Who does your organization rely on for technology support?

One part of assessment is taking 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. A software inventory worksheet can give you an overview of the software resources and how they are distributed on different computers.

By taking this step, you can help avoid buying redundant technologies or incompatible technologies, and you can help assess whether any of your current technology is obsolete.

In the hardware inventory worksheet, you will want to write down the following items for each computer:

- \* User
- \* Brand
- \* Model
- \* Serial Number
- \* Monitor type
- \* Processor type and speed
- \* RAM
- \* Hard disk capacity
- \* Available hard disk space
- \* Operating system
- \* Modem or network card (if any)
- \* Ports available (USB, FireWire, SCSI, etc.)
- \* Floppy, CD, or DVD drive (Be specific: indicate the type of floppy drive or whether you have a CD, CD-R, CD-RW, DVD, DVD-R, DVD+RW, DVD-RW, or DVD-RAM drive)
- \* Any additional equipment attached to the computer
- \* Other equipment such as network printers, switches, firewalls, modems, etc.

In the software inventory worksheet, you will want to mark down major software packages that you use, along with their version numbers. TechSoup offers a word-processing software assessment worksheet and an accounting software assessment worksheet that can help you assess your resources and can help you as you begin thinking about your needs. TechSurveyor, a free online tool, can also help you assess your technology.

There's more to an assessment than listing your hardware and software. For example, you need to document your network set-up, access policies, and protocols; document your services, including centralized databases, e-mail, and groupware; and document your management practices, from staffing to written policies.

The most important part of assessment is to ask yourself some questions about how well your systems are currently working. The worksheet below will give you an idea of the issues to look at in different areas of technology assessment.

## The Planning Process: Define Your Needs

*The trick to defining your needs is to describe what you want to do with technology, not what you think you need to buy.*

Consider the problems you might run into in your organization -- new policies to institute, procedures you need to follow to find new funding, new staff members to work into your organization's structure. Then consider all the potential tools, including technology tools, that you might use to solve these problems.

Learning to think this way is a little like learning a different language. Start by thinking more abstractly, then begin to discuss how technology might help you solve your problems and help your organization better fulfill its mission. What might your staff members be able to accomplish with a new intranet? What new capability will make a critical difference to productivity?

Put together a good technology team, one that represents all the major program and administrative areas of the organization -- including a decision maker who is involved in strategic planning -- and technical staff. Remember that a team full of people who have technical skills is not necessarily the best equipped to think of technology in terms of your organization's mission. It also helps if the technology team gathers input from staff about their needs. You can get staff input through a survey, or through individual interviews.

As you define your needs, do not start out by saying, "We need a Windows XP Professional network with 10 Pentium IIIs." Windows XP Professional may or may not be cost-effective or feasible. More importantly, if you don't know why you are getting it, there is no way to know if it will accomplish what you need it to. Instead, a nonprofit might say, "We need staff to be able to communicate effectively and efficiently, and conduct research on the issues that are important to our organization." Once you have identified your needs in this way, you can start thinking about how technology might help you reach your goals. You may conclude, for example, that your staff needs e-mail access, but consider which e-mail programs are appropriate, whether your staff needs centralized address lists, and how much of a concern privacy is. Then you can start evaluating specific technologies that are available.

The more you can connect your technology needs to your larger mission as an organization, the better your plan will be. Its recommendations will be more useful and meaningful, as well as more convincing to potential funders. The following are two examples of the kind of language you might use:

\* "We are a disability advocacy organization that does media campaigns and workplace training sessions to raise awareness of the needs of people with disabilities. We need to connect to the Internet in order to coordinate the planning of regional conferences and training sessions with our partners in other states who use e-mail. We also need to communicate by e-mail with corporations who are considering bringing us in to do training sessions."

\* "We are a social service agency that provides training and referral services to local Spanish-speaking citizens. Our referral staff need to share information about clients with our job counseling staff."

As you define your needs, develop a sense of what your priorities are. What is mission-critical for the next month, and what can wait half a year? For instance, a nonprofit might decide that backing up all data takes first priority, while developing a Web site for funders can wait a few months.

TechSoup's Technology Organizational Assessment worksheet is a list of questions to start you thinking about your priorities and vision for technology use.

## The Planning Process: Explore Solutions

***Once you have assessed your resources and defined your needs, the next step is to make a concrete plan for how to meet those needs.***

This phase of technology planning requires the most technical knowledge. Web research and information from the other areas of TechSoup can help you get started.

Most nonprofits, however, will need some type of expert advice to develop a full plan.

Deciding on concrete solutions that fit within your budget can be the most difficult part of technology planning. It's important to make sure that all the solutions you pick are compatible. For instance, if you want a new database, a new back-up system, and a new network, you will have to make sure that the database can be shared across the type of network you are getting, and the back-up system can copy the database when it is open,

**The important thing is to go back to your original vision of how technology can help you accomplish your mission. What are the key new functions you want technology to fill?**

Consider price, of course, but don't get locked into an inexpensive technology that won't grow with you and won't work with future technologies.

Before you decide on a solution or defer to a consultant, make sure you have a solid understanding of the different options. TechSoup's content areas are a good place to start for background information and further resources to answer overarching technology questions:

What type of network do you need?

What hardware purchases or upgrades should you make?

What software should you choose?

What is the best way to connect to the Internet?

How should you go about getting your organization a presence on the Web?

How can you take care of your database needs?

What is the best way to train your staff?

How can you take care of regular system administration needs?

## The Planning Process: Write the Plan

CAUTION: It may be tempting, but TechSoup recommends that you NOT cut and paste from a sample technology plan to create your own. The most important thing about your technology plan is that it be specifically tailored to your organization. What works for one organization may seem applicable to another, but there are often differences that are not obvious. A copied technology plan may be worse than useless -- it may lead your organization to waste your money on inappropriate purchases.

There are many different forms that nonprofits use to write their technology plans. No matter which form you choose, there are several key elements:

### \* Organizational profile

Who are you as an organization? How are you organized and what kind of services do you provide? Your technology plan should open with a short description of your organization that will set the context for your technology needs. A good organizational profile should include your mission and vision as well as practical details on your current work. This overview will ground the technology plan in your mission and will remind everyone, from your staff and board to potential funders, that this isn't just about technology. It's about equipping your organization to better serve its mission.

The following are two sample organizational profiles:

#### The Immigrant Alliance

The Immigrant Alliance's mission is to empower the individual and community to improve the quality of life while enriching our cultural heritage. For more than 15 years, IA has provided a variety of opportunities and social services to more than 3,000 people annually. IA provides general employment counseling, staffs a general information and referral service, and provides individual counseling on citizenship and immigration issues. It provides several after-school and summer programs for youth. IA also houses satellite offices for other agencies that provide Social Security, housing rights, and medical services.

#### Women's Health Action

The Women's Health Action is an education and advocacy group, founded and led by women who have survived women's health conditions. WHA's mission is to lobby for increased research and treatment resources devoted to women's health. WHA publishes a newsletter with a circulation of more than 5,000, responds publicly to misinformation in the media, pressures public policy makers to "do the right thing," and conducts public education campaigns through mainstream media.

### \* Technology vision

Your organization's technology vision (together with a brief section about the current state of technology in your organization) can take the form of an executive summary. How will technology 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.

If you include this section, it should draw heavily on the work you did early in the technology planning process to define your needs. The TechSoup article "Define Your Needs" describes how to link your organization's goals to technology priorities.

For example, a technology vision might include statements like the following:

"Our three departments serve the same client base, but currently have no mechanism to share client contact information, client history, and client needs. Sharing information is crucial to

making accurate referrals and giving advice to clients. Sharing contact information will also dramatically increase efficiency. In order to allow staff from all departments to view all information about a client, we will develop a shared database that tracks information about each client. We will invest initial energy and staff time in data entry, so that the database is fully functional. We will also train all staff in the use of the database, so that all staff can document and research interactions with clients in one location."

"Our organization depends on Americorps volunteers who serve for one year to deliver food to our homeless clients. Recruiting qualified volunteers is often a challenge, especially since it is difficult to publicize the opportunity to young people around the country who might consider moving to the area to work with us. In order to reach out to potential volunteers who use the Internet regularly in their colleges and universities, we will design and publicize a Web site which describes the program we offer and the application process."

#### \* Projects

The body of your technology plan is 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. For example, if your project is "Establish a Local Area Network," the beginning of your description might read:

"Nonprofit A currently has 10 independent workstations, with no network connecting them. This project will set up a peer-to-peer, local area network for these 10 computers, using Windows 98 as a network operating system."

**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. See the Funding section for more information on writing a Technology Funding Proposal.

Two sample benefits of setting up a Local Area Network might include:

- o A local area network will allow Nonprofit A to set up cost-effective shared access to the Internet and e-mail. Nonprofit A's current usage of e-mail and the Web is limited to one-at-a-time use. The possibility of simultaneous, continuous access would allow staff members to use the Internet frequently for research and to use e-mail as an efficient communication tool with colleagues in other organizations and with clients, members, and participating organizations.

- o Nonprofit A has several departments that all keep data about the same clients. Currently, these departments have no way to access each other's records. A local area network would allow all staff to input and access data in one database which is shared across the network. Having one database will save time that is now wasted in multiple entries of the same data and will create one accurate source for all client information.

**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.

Three sample tasks associated with setting up a local area network might be:

- o Lay down wiring
- o Configure workstations
- o Train staff to access shared files over the network

Cost: At the end of your description of a project, list the costs associated with each step. For instance, one cost associated with setting up a local area network might be:

Purchase five 10 Base T Ethernet Cards, at \$45 each .....\$225

\* 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.

The budget should include estimated costs for all aspects of the projects you have listed. A common mistake is to include only hardware and software purchases in the budget. Actually, a good rule of thumb is that approximately 70% of your technology spending should go to technical support and training, and only 30% to technology purchases.

If you plan to hire a system administrator, factor in the system administrator's salary. If you plan to use a consultant for regular troubleshooting and maintenance, you should estimate the frequency and cost of the consultant's services. If you have budgeted for a new network, database, or office application, our article titled "Types of Training" will help you think through what kind of training you will use, and what it will cost.

Be sure to include staff assignments and time budgets. Although this may be harder to estimate than your other costs, it can help you determine when it makes more sense to hire outside help.

If your technology plan is divided into different phases, you may want to divide your budget into phases as well. This will allow you to distinguish immediate investments from more long-term projects.

\* Timeline or critical path

A timeline would include the phases of work and the deadlines for implementation of your plan.

For nonprofits that need to raise the funds before they can implement a technology plan, a critical path may be more appropriate; similar to a timeline, it would indicate the order in which the different aspects of the project need to be completed.

# Technology Budgeting Basics

## *How much should you be spending?*

By: John Kenyon

Source: The Management Center

John Kenyon is a computer whiz who wears many hats. Besides being the Information Technology Director for The Management Center and managing their team of technical consultants, he conducts seminars on technology and does computer consulting for a variety of Bay Area nonprofits, including Meals on Wheels of San Francisco, Huckleberry Youth Programs, and Theatre Bay Area.

Today more than ever, nonprofit organizations depend on successful uses of technology. One of the challenges is to develop a budget that accurately reflects not only the initial cost of a computer system, but all related expenses. To make certain that your computer systems remain an efficient tool for your agency, a basic understanding of the technical and economic realities is necessary.

### **Check Your Expectations**

When it comes to computer systems and information technology (IT), the issue for many nonprofits is one of understanding and expectations. Too often, we treat computer purchases as a one-time expense. That is to say, you buy it, and you forget about it. This is not a cost-effective measure for the purchase of a computer system. Computer systems require maintenance and support.

An appropriate analogy might be the purchase and maintenance of a car. Regular maintenance and minor repairs are necessary -- and expected -- to keep a vehicle operating smoothly. In addition to the gas needed to run the car (not to mention the yearly expenses of licensing and registration), repairs and tune-ups are needed to avoid a serious breakdown. In the long run, changing the oil every 3,000 miles will cost less than a complete engine overhaul.

### **Budget for Computers Every Year**

Computer hardware should be classified as a yearly budgeted expense. A computer needs to be replaced at least every three years, however not all of them need to be replaced at the same time. Some will merely need maintenance. Therefore, if you annually allocate money (ex. \$1000.00) for each workstation, you will be able to purchase new computers for about a third of the office each year. You will also be able to maintain systems that are not being replaced.

### **other ways to keep costs down:**

**Train yourself and your staff.**

**Get a Systems Administrator.**

**Have a disaster plan.**

**Keep a back-up copy of your most valuable data off-site. Make a backup, take it home, and get a fresh backup at least once a month.**

**Use available resources (such as AtchiCIN, CRN, TechSoup & CompuMentor training)**

### **The Bottom Line**

Take care of your computers. If you neglect them, they will end up costing you more money over time. A strategy that includes preventive budgeting and maintenance will help to ensure the success of your computer systems and your organization.

## Following Through On Your Plan

### *Avoiding the 'black hole stage'*

W. Aniseh Khan      Technology Planning Guide

Favorite Soup: Miso

Ok, so you've gone through the trials and tribulations of creating your tech plan. You've outlined the organization's tech priorities, and you know how much money you need to reach your goal... **now what?**

You have just entered into an extremely crucial stage of technology planning. I like to call it the 'Black Hole Stage'...**any a tech plan has been filed away, never to see the light of day again.**

One group I worked with actually presented me with the last tech plan they had created, dated about 3 years earlier. Not surprisingly, the tech plan that I had created for them listed several of the same items as the old one.

My advice is that you move forward! Yes, I know what you're probably thinking...

"Duh! But what if I don't have the staffing resources?"

or "I don't have the money in my budget yet to implement these steps,"

or, "These tech improvements are at the bottom of my priority list right now."

**But the bottom line is, as you upgrade and make the improvements needed, doing your everyday work will be that much easier.** You will have the database to keep thorough records and create reports at the push of a button; you'll be able to check for that important email whenever you want; and you'll also have a much easier time getting funding for these improvements.

**Funders want to see that you have a plan, but they also like to see that you are working hard internally to make the necessary upgrades.**

One group I worked with comes to mind as a good illustration of how this can work. These folks were doing a lot of hard everyday work. They had been using some of the same computers for 10 years. Each computer was a stand-alone workstation, because they hadn't installed a network. One workstation had Internet access and another had the database installed on it, so they would swap workstations depending on what kind of work they needed to do. This system worked fine, and they used it for some time.

When they created their tech plan, it looked quite hefty. There was a lot of money to be raised, they didn't have a system administrator to help manage the changes, and the list of training needs was pretty long. They weren't daunted. Instead, they started implementing the plan and made changes as resources were made available. Within 9 months, they had a shared database and a new network of upgraded machines, each with Internet access.

This may be a success story, but it is not an unusual case. The organization was able to accomplish their goals through a few important steps. They assigned the role of manager to one person; they gave the manager the authority to delegate; they involved everyone in the planning and implementation processes; and they integrated technology work into staff's 'everyday' work. They also assigned a portion of their operating budget to technology and included that cost in their grant proposal. As a result, they got funding.

Just don't lose your momentum! Implement your technology plan one item at a time. If you keep moving, the result will be a positive change in your technology systems.