Introduction to the Technology Pyramid: Building a Technology Plan

In partnership with idealware

Presenters

Joshua Peskay
Idealware Expert Trainer
Vice President, RoundTable Technology

Ken Montenegro
Director of Information Technology, Asian Americans Advancing Justice - LA

Introductions
Survey Data

Look for this icon to find out what technology issues other immigrant rights organizations are facing based on our recent survey.

What We’ll Cover

• What Is Technology Planning?
• Thinking About Technology at Your Organization
• Auditing Your Current Technology
• Creating an Action Plan
• Funding Your Project

What Is Technology Planning?
A Plan Lets You Know Where You’re Going

Like a Strategic Plan or a Marketing Plan, a Technology Plan helps you plot out your direction and priorities.

43% have not strategically defined how tech can help the organization.

…and What ISN'T Worth Your Time

You can’t do everything at once. A plan builds confidence about what you don’t need to think about right now.

The Journey Is Half the Value

The conversations with your team to define your issues, objectives and priorities is as valuable as the actual written plan.
## Strategic vs. Tactical

<table>
<thead>
<tr>
<th>Strategic</th>
<th>Tactical</th>
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<tbody>
<tr>
<td>How can technology best serve our mission?</td>
<td>What technology projects could make the biggest difference in our efficiency or effectiveness?</td>
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<tr>
<td>How can technology help us do our work better?</td>
<td>What’s my technology action plan for this year?</td>
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<tr>
<td>What’s our three- to five-year plan for technology?</td>
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### Strategically Assessing Your House

- [Diagram of a kitchen]

- [Diagram of a basement]

### Tactically Assessing Your House

- [Diagram of a kitchen]

- [Diagram of a basement]
Thinking About Technology at Your Organization

Technology Comes in Different Flavors

Technology Is Core to Your Mission

What does she need in order to do her job?

21% feel that their technology infrastructure is unreliable.
Start With a Technology Committee

Pull an executive, representatives of each function, whoever is responsible for technology, and a support staff member.

A Consultant Can Help

You'll need experience with technology best practices, a willingness to learn on the fly, or a consultant to help you audit your current technology situation.

Auditing Your Current Technology
Compare and Define Issues

We’re going to talk about a few areas. Working with your technology committee (and perhaps a consultant), compare what you’re doing to general best practices, and document issues that would be useful to address.

Consider Your Hardware

<table>
<thead>
<tr>
<th>Computers</th>
<th>Phones</th>
<th>Printers</th>
<th>Networking</th>
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What Are Your Replacement Cycles?

- 2 to 3 years
- 2 to 4 years
- 4 to 5 years
- Until you tire of it

44% have not defined when computers should be replaced.
Think About Software Infrastructure

What core software packages—for word processing, email, calendaring—make sense?

Are You Backing Up Your Data?

Back up core files, emails, and data and store it offsite—perhaps via a remote backup service.

Does Your Constituent Management Work?

CRM System or Integrated System

<table>
<thead>
<tr>
<th>Clients</th>
<th>Members</th>
<th>Volunteers</th>
<th>Major Donors</th>
<th>Individual Donors</th>
</tr>
</thead>
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Case MGT. System | Member MGT. System | Donor Management System
Finance
You should have a finance system.

Sage 50

Microsoft Dynamics

Do You Have Other Data to Manage?

Do you need to manage data other than constituent data?

What about inventory or collections?

What do other organizations like you use?

Does Your Website Represent You Well?

Is it polished, professional, and easy to update?

www.heifer.org
Are You Taking Full Advantage of Email?

Reach out to your constituents to let them know what you're doing. Or ask them to take action.

Should You Integrate Social Media?

Creating an Action Plan
You’ve Got a List of Potential Projects

Prioritize Based on the Pyramid
Identify one or two projects closest to the bottom to start on.

What’s the Benefit vs. Cost?

- To what degree will it increase your ability to serve your mission?
- Reduce time or costs?
- Avoid catastrophe?
- How much will it cost?
- How complex is the project likely to be?
- How much outside expertise will you need?
Create an Action Plan

How do you take the project and make it into an approachable, feasible project?

Who Should Be Involved in Decision Making?

Your technology team.

Make sure you have executive buy-in and oversight.

Include those that will be affected by the change.

Do You Need a Consultant?

Consultants can be useful to provide:

- **Expertise**, if you’re not familiar with your options.
- **Knowledge** of what’s worked for others.
- **Project management**, to keep you moving forward.
- **An outside perspective**, if you’re likely to get weighed down in politics.
- **An extra pair of hands**, if you already have too much to do.

If none of these sound compelling, you may not need a consultant.
Developing a Timeline (Part 1)

Most projects have similar stages. Think through how long they’re likely to take for you.

Identify Goals  Define Needs  Consider Process Improvements  Explore Options and Decide

Developing a Timeline (Part 2)

Most projects have similar stages:

Implement and Configure  Define Usage and Support  Train Users  Plan for Check-ins

Example: Buying a New Printer

Plan
Identify Goals  Define Needs  Improve Processes  Research Options  Order a Printer

Implement
Get it Up and Running  Define Appropriate Use and Support  Train Users  Measure

The whole process would typically take 2-4 weeks.
Example: Software Selection

Plan
- Identify Goals
- Define Needs
- Improve Processes
- Research Options
- Vendor Demos
- Select Software

Implement
- Customize and Configure
- Migrate Data
- Define Usage and Support
- Train Users
- Measure

The whole process would typically take 1-6 months.

Example: Website Redesign

Plan
- Identify Goals
- Define Needs
- Improve Processes
- Research Software Options
- Design Content and Navigation
- Design Look and Feel

Implement
- Create the Website
- Migrate Content
- Define Content Processes and Support
- Train Users
- Measure

The whole process would typically take 2-6 months.

What Will It Cost?

How do you determine how much a project will cost?
- Interview consultants.
- Talk to organizations who have implemented similar things.
- Call possible vendors.

Make sure you factor in costs for the whole project, not just a new piece of hardware or software.
How Much Staff Time Will it Take?

- Identify Goals
- Define Needs
- Consider Process Improvements
- Explore Options and Decide
- Implement and Configure
- Define Usage and Support
- Train Users
- Plan for Check-ins

Big technology projects often take way longer than expected.

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Funding Your Project

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There Are No Magical Tech Funders

Unfortunately.
Can You Lower the Price?

- Check TechSoup for discount software.
- Ask hardware vendors about nonprofit discounts.
- See if consultants offer a discount or compressed project.

Will Local Businesses Help?

- Check with local banks or partners.
- Might they donate (good quality) hardware or software?
- Are there volunteers who could help you design and implement the project?

Can You Interest Major Donors?

- Do you have donors who might fund part or all of the project?
- It’s a nice, tangible investment for the right donor.
Approach Your Current Funders

• Would they be interested in supporting their mission through tech?
• Consider including it in a larger project.
• Do they offer any capacity services or funding programs?

But the Plan Is Valuable in Itself

Remember the value of the journey.
If planning is difficult, think of all the organizational issues you’re clarifying along the way!

Questions?
Homework

Recruit your technology team.
Fill out the Hardware Safari worksheet.

Join Us!

Join a community of over 8,000 advocates dedicated to protecting and promoting the rights of immigrants in the United States.

To learn more, visit www.immigrationadvocates.org
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facebook.com/immigrationadvocates