Creating and Integrating Your Technology Plan

In partnership with idealware

Presenter

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Introductions
You Have a List of Potential Projects

Every Journey Begins with a First Step

What We’ll Cover Today

- Prioritizing Your Projects
- Creating an Action Plan
- A Typical Technology Project
- How to Fund Your Project
Prioritizing Projects

Use the Pyramid

Functional and Secure Infrastructure

Data Management

Websites and Email

Social Media

Is Your Basement Underwater?

- Can each staff member use a computer and the internet whenever they need it?
- Are you backing up your data?
- Do you have a software system to track constituents?
- Do you have a solid website?
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?

Score Your (Non-Critical) Projects

<table>
<thead>
<tr>
<th>Project</th>
<th>How much does it increase effectiveness?</th>
<th>How much does it reduce time or costs?</th>
<th>Is it straightforward to implement?</th>
<th>Is it inexpensive?</th>
<th>Can you do it in-house?</th>
<th>Total score</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Rate from 0-10: 0-Not at all; 10-Should consider</td>
<td>Rate from 0-10: 0-Not at all; 10-Everything wins</td>
<td>Rate from 0-1: 0-No, very difficult; 5-Can actually pull it off</td>
<td>Rate from 0-5: 0-No, very expensive; 5-it’s free</td>
<td>Rate from 0-5: 0-No, never; 5-turn, no problem</td>
<td></td>
</tr>
<tr>
<td>J.e. Combine events with mission</td>
<td>6</td>
<td>6</td>
<td>2</td>
<td>3</td>
<td>5</td>
<td>16</td>
</tr>
<tr>
<td>J.e. Purchase a new printer</td>
<td>2</td>
<td>2</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>20</td>
</tr>
</tbody>
</table>

Choose a Project

Do a gut-check of your ratings—do the top one or two projects make sense?
Creating an Action Plan

Complete Your Template

This session will help you complete the Technology Project Action Plan in your template.

Your Action Plan

How do you take the project and make it approachable and feasible?
Define Your Project Team

- Who should be involved with the project?
- Who's the lead?
- Stakeholders?
- The executive champion?

What Are Your Milestones?

It’s helpful to map out the different stages of the project and to identify what needs to be completed before others start.

Time and Budget Requirements

What are the internal and external costs—in both time and money—of completing this project? What ongoing costs will you need to budget for?
Measuring Success

How will you know that you accomplished your goals?

Do You Need a Consultant?

Consultants can be useful to provide:
• Expertise
• Knowledge
• Project management
• An outside perspective
• An extra pair of hands

If none of these sounds compelling, you may not need a consultant.

Understanding Technology Projects
The Planning Process
In the first half of the project, define precisely what you're doing.

Identify Goals
- Define Needs
- Consider Improving Processes
- Explore Options and Decide

Define Project Goals
When do you need to complete the project?
How much staff time will you allocate?
What is your projected budget?

Identify Your Software Goals
What do you hope to achieve?
How will you define success?
What is included in this software update and what isn’t?

This could require a single meeting, or a month-long process.
Think About Metrics for Success

Based on your goals, what can you measure to see whether you’ve actually done it or not?

Define Your Needs

• What features are essential?
• What would be nice to have?
• What is unnecessary?

Don’t Get Stuck with Outdated Processes

Make sure you’re not “building a cathedral” to the way you’ve always done things.
Explore Your Options: Research

Idealware, NTEN, TechSoup, and membership associations frequently publish articles and reports on technology. Also, talk to other organizations like yours.

Explore Your Options: Demo

If you're selecting a system, choose 3-5 systems and schedule vendor demos. Ask them to walk through scenarios to see how each system will meet your needs.

Explore Your Options: Design

If you're planning a new communications strategy, design what it will look like, what content you'll need, and how it will work.
Compare Options Against Your Needs

And choose the right one for you!

Implementing and Rolling Out

Choosing a system is an important step… but not the end of the journey.

Set Up Your System

The goal: Get it up, running, and working in its final location.
Configure, Customize, or Personalize?

What's the difference?

Data Migration

Moving data from one system to another is not as easy as it sounds. Consider getting help!

Define Usage and Support

- What rules should people follow when using the new system?
- Who will answer user’s questions?
- Who's responsible for continuing success and reliability of the project?
Don’t Skimp on Training

Training is a critical step. It doesn’t matter how much of a step forward your project is for the organization if no one knows how to use it.

Measure and Check In

You’ve defined what success would mean…are you achieving it?

What measures will help you know if the project worked as you hoped?

Schedule an ongoing process to understand what’s working and how to fix what isn’t.

Example: Buying a 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?

Think through all the different aspects of the project and estimate what it will cost.

Make sure you factor in costs for the whole project, not just a new piece of hardware or software.
Investigating Cost

How do you determine how much a project will cost?

- Interview consultants
- Talk to organizations who have implemented similar projects
- Call possible vendors

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.

Funding Your Project
There Are No Magic Tech Funders

Wouldn’t that be nice?

Can You Lower the Price?

Check TechSoup for discounts.

Ask hardware vendors about nonprofit pricing.

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.

What About 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?

It’s a Big Job

The key is to have a clear plan and take it one step at a time.
You Can Do it!

- Think through your needs.
- Define your goals.
- Do your research.
- Plan ahead before you implement.

Questions?

Your Homework

Use the “Define Your Priority Project” Worksheet to decide on your first project.


Finish off your Technology Plan—If you’ve been following along, just the Executive Summary.
Join Us!

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