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Creating and Integrating Your Technology Plan

In partnership with **idealware**

Presenter

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Introductions

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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

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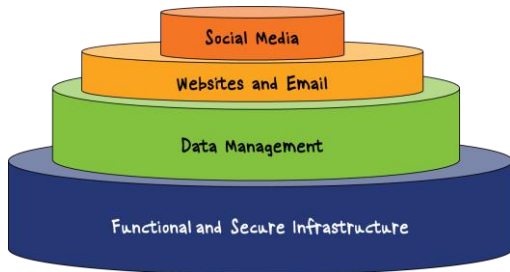NETWORK

Prioritizing Projects

Use the Pyramid

Social Media

Websites and Email

Data Management

Functional and Secure Infrastructure
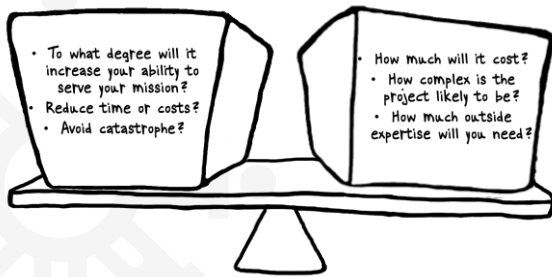
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Is Your Basement Underwater?

- 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?

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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?

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Score Your (Non-Critical) Projects

Project	How much does it increase effectiveness?	How much does it reduce time or costs?	Is it straight forward to implement?	Is it inexpensive?	Can you do it in-house?	Total score
	Rate from **0-10**. **0**= Not at all; **10**= Would transform org	Rate from **0-10**. **0**= Not at all; **10**= Enormous savings	Rate from **0-5**. **0**= No, very difficult; **5**= Can virtually drop it in	Rate from **0-5**. **0**= No, very expensive; **5**= It's free	Rate from **0-5**. **0**= No, never **5**= Sure, no problem	Total the scores from the other columns
i.e. Combine events data with main database	6	4	2	1	3	**16**
i.e. Purchase a new printer	2	4	4	5	5	**20**

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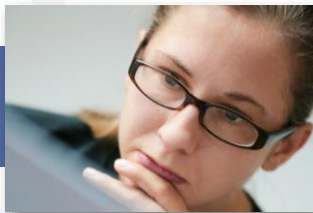
Choose a Project

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

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![Immigration Advocates Network]

Creating an Action Plan

Complete Your Template

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

Technology Project Action Plan

Project Description
What project are you planning to take on? Why is it a top priority project? How does it enhance your ability to meet your mission?

What specific impacts will it have for your organization? Will it save time? Decrease costs? Increase people served? Make it cheaper per person served?

Project Team
Who will be the key participants in this project? What qualifications do they bring to the project?

[i.e. We plan to convene a steering committee for this project that includes our Executive Director, Marketing Director, two board members and a consultant. The project will be overseen by:
• **Leslie Julian, Marketing Director**. Leslie has served with Our Organization for ten years, in which time she has modernized and dramatically improved marketing and outreach. She has in depth experience in [this area that we're talking about], through her [related work]. She will serve as the project manager on this project.
• **John Smith, Impact Consulting**. As a consultant to Our Organization, John will bring key knowledge of [things that the project is about] and help us to understand [really important stuff]. He will work with Leslie to ensure the project proceeds on track, and according to nonprofit best practices.

Core Projects Milestones

Core Milestone	Description of Milestone	Target Start Date	Target End Date
Define Needs	Working with core staff members and a consultant, we will identify the core processes that	11/1/2011	12/1/2011

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?

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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.
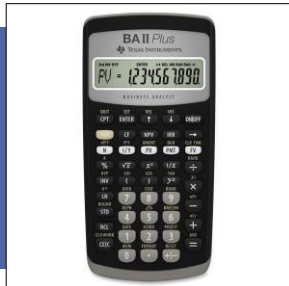
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Time and Budget Requirements

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?

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Measuring Success

How will you know that you accomplished your goals?

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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.
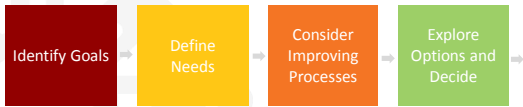
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Understanding Technology Projects

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 |

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Define Project Goals

When do you need to complete the project?

How much staff time will you allocate?

What is your projected budget?

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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.

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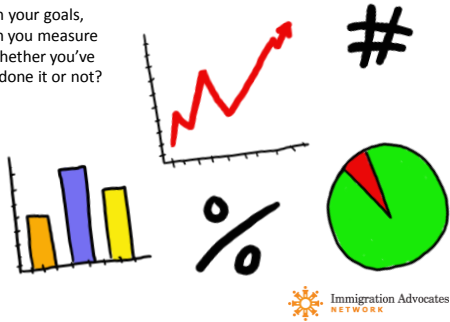NETWORK

Think About Metrics for Success

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

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Define Your Needs

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

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Don't Get Stuck with Outdated Processes

Make sure you're not "building a cathedral" to the way you've always done things.

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Explore Your Options: Research

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

idealware

NTEN Nonprofit Technology Network

techsoup

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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.

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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.

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Compare Options Against Your Needs

And choose the right one for you!

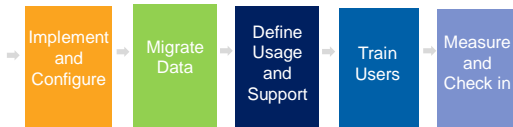Immigration Advocates
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Implementing and Rolling Out

| Implement and Configure | → | Migrate Data | → | Define Usage and Support | → | Train Users | → | Measure and Check in |

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

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Set Up Your System

The goal: Get it up, running, and working in its final location.

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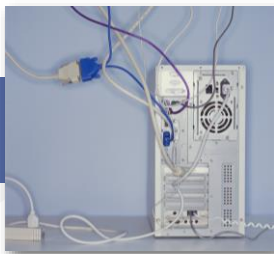
Configure, Customize, or Personalize?

What's the difference?

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Data Migration
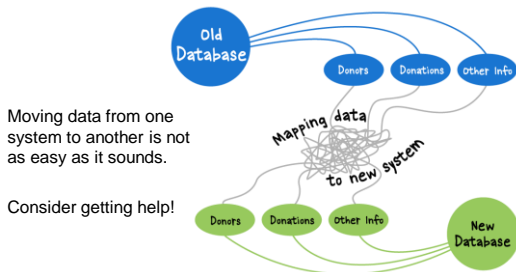
Moving data from one
system to another is not
as easy as it sounds.

Consider getting help!

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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?

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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.
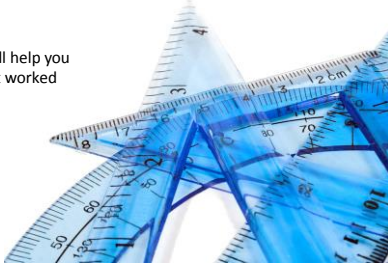
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Measure and Check In

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.

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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
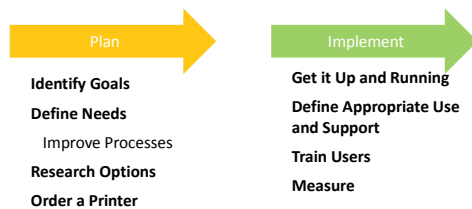
The whole process would typically take 2-4 weeks

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Example: Software Selection

Plan	Implement
Identify Goals	Customize and Configure
Define Needs	**Migrate Data**
Improve Processes	**Define Usage and Support**
Research Options	**Train Users**
Vendor Demos	**Measure**
Select Software	
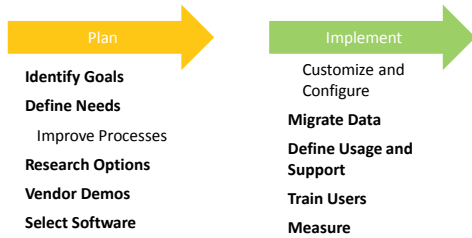
The whole process would typically take 1-6 months

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Example: Website Redesign

Plan	Implement
Identify Goals	**Create the Website**
Define Needs	**Migrate Content**
Improve Processes	**Define Content Processes and Support**
Research Software Options	**Train Users**
Design Content and Navigation	**Measure**
Design Look and Feel	
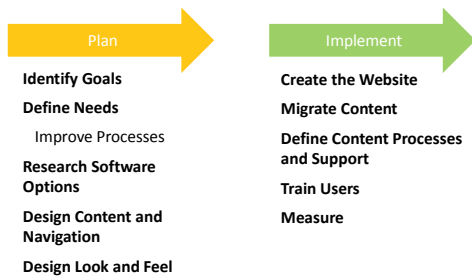
The whole process would typically take 2-6 months

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What Will it Cost?
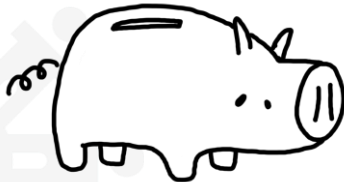
Think through all the different aspects of the project and estimate what it will cost.

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

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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

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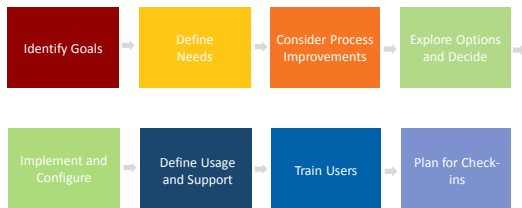NETWORK

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

There Are No Magic Tech Funders

Wouldn't that be nice?

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Can You Lower the Price?

Check TechSoup for discounts.

Ask hardware vendors about nonprofit pricing.

See if consultants offer a discount or compressed project.

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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?

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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.

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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?

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It's a Big Job

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

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You Can Do it!

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

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Questions?

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Your Homework

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

Fill in your Action Plan in the Technology Plan document.

Finish off your Technology Plan—if you've been following along, just the Executive Summary

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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
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