Technology Planning
Values of a Technology plan

- Strategic instead of ad-hoc
- Well integrated into programs and administration
- Active instead of reactive
- Create a robust technology infrastructure
- Can still be opportunistic: Take best advantage of opportunities.
Pump v. Sustainable water source

• How would you install a *pump* technology plan?
Pump v. Sustainable water source

- How would you install a pump technology plan?
- How would you build a sustainable water source technology plan?
Learning to budget for technology

Orgs tend to follow the path:
1. No technology
2. Gifts, scraps, make do
3. Computers are a capital expense
   - I.e. special, one-time, not regular
4. Technology is an operational expense
   - Budgeted each year
   - (With perhaps periodic capital expenditures)

They also mature on the path:
1. Technology is an administrative overhead
2. Technology is a program expense

Goal:
- Technology is an operational expense that is critical to the success of our program(s).
Budgeting - Total Cost of Ownership

• Don’t consider only initial costs, but **total cost of ownership**
• I.e. The total cost of purchasing, owning, maintaining, and updating a technology.
Include into Total Cost of Ownership

- Purchasing
- Training
- Normal operations
  - e.g. updates, backup
- Repairs and maintenance
  - Internal staff and/or consultants
- Software
  - Commercial Off-The-Shelf (COTS)
  - Custom-build
- Upgrades
- Regular replacement
Technology Planning

- Technology planning is a process
- A Technology plan is the working document supporting that process.
People, process, plan

1. Assemble a team who will be involved in planning.
2. Devise a planning process.
   • Provide a planning process framework
3. Initiate a working-document technology plan.
People

• Who should be on the team?
People - on the team

- Organization management team
  - Executive Director / CEO
  - CFO / accountant
  - Key program directors
    - Especially where technology could be of high value
  - Not necessarily the whole team, but good representation
People - on the team

- Organization technology staff
  - Accidental techie(s) or actual IT staff (leader)
- Board member(s)
  - To ensure board support
  - Bonus if board member has IT expertise
- Extra volunteer committee members
  - To bring additional technical expertise
People - keeper of the plan

- Someone should be identified as the keeper of the plan.
- They have primary responsibility for:
  - Convening the meetings
  - Planning agenda (around the plan)
  - Updating the planning document
  - Tracking status of the plan
  - Managing implementation of the plan
- Your CP is often the likely keeper
Your role - People

- So what is your role in assembling this team?
Your role - People

• So what is your role in assembling this team?
  – Prepare yourself with a good understanding of the roles on the team.
  – Communicate with your CP the roles necessary on the team
  – Work with your CP to identify team members
Build on existing processes

• Ask early on:
  • Do you have a strategic planning process already in place?
  • Has it addressed technology?
  • How can we build on that process?
Process - if none in place

• What do the team members do in the meetings?
Process

1. Assess their current state
2. Explore the possibilities
3. Build the organization’s Vision

4. Develop (mixed/incrementally) strategies to meet that vision
   • Develop budgets for each strategy
5. Implement (mixed/incrementally) strategies
What does (mixed/incrementally) mean?

- Some of vision does not have strategies defined yet
- Some strategies are only loose ideas
- Some strategies have concrete implementation steps defined
  - Some have budget fully defined
- Some strategies have begun implementation
- Some strategies have been completely implemented
Technology Plan - Working Document

- The Technology Plan is a working document
- It captures the knowledge of the planning committee
- It guides the planning committee
- It guides staff implementing the plan
Prototypical technology plan

I. Technology vision statement
II. Statement describing org’s mission and programs.
III. Statement describing org’s current use of technology and how it supports program operations.
IV. Descriptions taken from “About the Org”
   - Staff computer skills
   - Technology infrastructure
     I.e. Inventory of HW, SW, networks
   - Technology management practices
Prototypical tech plan (cont.)

V. Statement of long-and short-term technology goals.
VI. Strategy for meeting the plan’s goals.
VII. Timeline for meeting the plan’s goals.
VIII. Budget detailing the costs of implementing the plan.
IX. Evaluation criteria to determine whether the plan’s goals have been met.