Strategic Technology Plan
for medium and large agencies

To aid your organization in the development of your own Strategic Technology Plan, the following documents are included in this package:

- Strategic Technology Plan Outline
- Strategic Technology Plan Instructions
- Sample Strategic Technology Plan

Much of the content for the sample plan has been drawn from the technology plans of previous participants in the Strategic Technology Program of the Nonprofit Support Program (NSP).

Some of the content contained in this sample plan may be applicable to your organization and you are free to use any part of it as you develop your own plan.

Your technology plan should cover both short-term initiatives that should be completed within the first six to eighteen months, as well as longer term initiatives to be implemented within three to five years. While the Hartford Foundation intends to provide funding to aid in the implementation of the plan, you should not limit the initiatives and associated budget to the funding offered by the foundation.

This plan is intended to serve a number of purposes for your organization:

1. First and foremost, this plan is intended to be a guide to strategic use of technology in your organization. The plan should document the agency’s planning process that occurred through the NSP’s Strategic Technology Program and should be viewed as a living document which is updated on a regular basis.

2. The plan should be a guide for the annual development of your organization’s technology budget.

3. This plan may be useful for technology fundraising. The Hartford Foundation offers financial support for the technology initiatives implemented or begun in the first year of the plan. Identifying your subsequent technology needs and their costs can help you make your arguments for support from other funders.

To apply for your Strategic Technology Grant through the Hartford Foundation, you will need to complete your technology plan and request an application from the NSP staff. Application for the Strategic Technology Grant will require submission of some standard grant attachments (demographic info, annual budget, board info, etc.), detail on the grant dollars requested including two quotes for major items being purchased, and your technology plan. There is no additional grant writing required.
Strategic Technology Plan
Outline

Section Completed by:
Agency Consultant

Executive summary Lead Support

1. Introduction
   1.1 Mission Lead Support
   1.2 Organizational Overview Lead Support
   1.3 Organization’s Key Goals Lead Support
   1.4 Technology Attitudes Lead Support

2. Evaluation Process
   2.1 Involved Parties Lead Support
   2.2 Decision Making Process Lead Support

3. Technology Initiatives
   3.1 Listing of technology initiatives with justification Lead Support

4. Technology Areas – (Status, Resolution, Implementation)
   4.1 Infrastructure Support Lead
   4.2 Technical support Support Lead
   4.3 Training Support Lead
   4.4 Data management Support Lead
   4.5 Communications Support Lead

5. Implementation Plan
   5.1 Responsibilities of Staff, consultants and vendors Lead Support
   5.2 Required RFPs/RFIs Lead Support
   5.3 Timeline Lead Support

6. Budget
   6.1 Detailed budget – costs by year for three year period Lead Support

Appendix A – Attachments
   Logic Models
   Infrastructure Inventory
   Staff Skills Survey
Appendix B – Quotes for Implementation

Computer Workstation and Server
Tech Support and Systems Installation
Copier
Web Development
Strategic Technology Plan
Instructions

Executive Summary

Include a summary covering the main concepts of the technology plan. The summary should include the context and an overview of the planning process, an outline of the most important technology initiatives, and a brief overview of the budget for the initial year and all subsequent years covered by the plan.

1. Introduction

1.1 Mission

Insert the mission of the agency.

1.2 Organizational Overview

Insert a paragraph on general operations of the agency, including location, scope of services provided by the agency, identification of client base and plans for agency growth.

Provide a separate paragraph identifying each of the agency’s major specific programs.

1.3 Organization’s Key Goals

As identified in the organization’s current strategic plan (if available) or in the current annual plan, list the organization’s key goals over the next one to three years. These are not technology-specific goals (although they could be if that’s what the organization has discussed), but should be the broad, strategic goals the organization has identified it needs to achieve over the next one to three years to be successful as an organization and to continue delivering on its mission. You do not need to include detail on the tactics or activities you are undertaking to help you achieve these goals.

1.4 Technology Attitudes

Include an overview of attitudes about technology within your agency, including potential barriers to adoption of new technology as well as opportunities for capacity-building change through technology use. The surveys you may have conducted during the tech planning process will help inform this section.

2. Evaluation Process

2.1 Involved Parties
Include a listing of primary individuals (positions) involved in the project, giving the responsibility for each. The list should include the Tech Team, the Executive director, technologist or accidental techie, board representatives and other involved parties.

2.2 Decision Making Process

Document the protocol for decision making with relation to technology planning. This outline should document the planning process and serve as a guide to future planning and decision making.

3. Technology Initiatives

3.1 Listing of Technology Initiatives

Define and list the major technology initiatives the agency hopes to implement in order of importance, including the high-level justification for each (i.e. why it is needed, how it helps meet goals or solves a problem). Attach logic models for two of the agency’s most important or more complicated technology initiatives in Appendix A. Indicate which technology area (infrastructure, technical support, training, data management or communications) relates to each initiative.

Make sure your technology initiatives are specific and achievable. They should be processes or systems, not a listing of equipment to be purchased.

4. Technology Areas

For each of the technology areas below, provide a statement of the current status of that area, the proposed resolution, and a high-level plan for implementation (the steps you will take to achieve the suggested resolution).

4.1 Infrastructure

Provide detailed information on the status of the agency’s technology infrastructure (networks, workstations, peripherals, operating systems, routers, firewalls, productivity and security software, etc.). Attach a copy of your current technology inventory in Appendix A to support this section.

Provide detail on the proposed resolution, including the items to be upgraded, new items to be purchased, and modifications to the existing systems. Provide an implementation plan outlining the steps to be taken to ensure completion. Include success metrics or what success will look like if you take the steps outlined here.

4.2 Technical Support

Indicate the current status of technical support provided by staff or outside vendors.
Provide detail on any changes required to improve the maintenance and support of both current and upgraded technology. Provide an implementation plan outlining the steps to be taken to ensure completion. Include success metrics or what success will look like if you take the steps outlined here.

4.3 Training

Indicate the current level of technology skills among agency staff. Attach a copy of the staff skills survey conducted as part of your planning process in Appendix A.

Using the staff skills survey results and the list of planned technology initiatives, include in this section information about how your organization will prepare its staff to make the best use of new and updated technology, and deliver any training necessary to improve staff skills. Provide an implementation plan outlining the steps to be taken to ensure completion. Include success metrics or what success will look like if you take the steps outlined here.

4.4 Data Management

Indicate the programs or procedures currently being used by the agency to manage its data and the current status on data management practices.

Provide detail on any necessary changes or new programs to be added to more effectively collect and manage data. Provide an implementation plan outlining the steps to be taken to ensure completion. Include success metrics or what success will look like if you take the steps outlined here.

4.5 Communications

Identify the current status of communication programs being used by the agency. This should include agency web site, email, social media, telephone system, fax, etc.

Provide detail of any changes required to improve the various communication vehicles. Provide an implementation plan outlining the steps to be taken to ensure completion. Include success metrics or what success will look like if you take the steps outlined here.

5. Implementation Plan

5.1 Responsibilities of staff, consultants, and vendors

Indicate the specific responsibilities for completion of the plan assigned to the executive director as well as other involved staff members. If specific responsibilities have been assigned to technology consultants or to vendors these should be listed, after agreement is reached with the outside party.

5.2 Required RFPs/RFIs
Include any required RFPs (request for proposal) or RFIs (request for information) that will need to be developed in order to ensure implementation of the plan.

5.3 Timeline

Develop a listing of necessary activities to be completed by the project team and others to ensure that the project will meet its time commitment. The items should be divided into items needed in each of the subsequent quarters, for the term of the strategic technology plan. The list should show what needs to be accomplished and the responsible party.

6. Budget

6.1 Detailed Budget

Break down costs by year, indicating the portion that is “one time” and that which will continue each year through the term of the plan, generally three years.

Include in your budget the staff time required to maintain current technology and manage the implementation of the selected technology initiatives. This may include the time of the executive director or other program staff, as well as any staff assigned to specific ongoing technology support functions (i.e., database management, web updates).

Appendix A

Attach the following documents: Logic models
Infrastructure inventory
Staff skills survey

Appendix B

Attach two quotes for each major purchase or contract. One quote will be sufficient in situations where the agency has an already established relationship with a particular vendor.