

NYFA: Knowledge in Technology Technology Planning Template

Use the following template to write your technology plan. Answer the questions under each section.

1. The Vision

Describe how technology will benefit your organization's mission and audience.

Your organization's technology vision statement:

List your organization's Technology Goals. These should be brief "To Do" statements that describe your organization's strategic goals and the use of technology. The statements should be broad, covering a time period of 3-5 years.

Goal #1:

Goal #2:

Goal #3:

Goal #4:

Goal #5:

Goal #6:

Philosophy

Describe any guiding philosophies that describe your organization's approach to integrating technology into the daily life of your organization.

Integration with strategic planning

Describe how your organization has integrated technology planning into an overall strategic planning process or content of strategic plan.

Describe board involvement in the technology planning process and how they will continue to be involved during implementation

Describe how your organization involves individuals with both technology and program expertise in the technology planning process

Describe the Tech Team's role in the planning process and during implementation

2. Programs and Services

Describe your programs and services. Summarize any audience research, field research, or work process analysis that you undertook to make technology integration decisions. Describe how technology will enhance the delivery of your organization's programs or services. Describe ways that the use of technology will make your programs or services more efficient. Include descriptions of any upgrades, redesigns, and improvements in any program or service communication, materials creation, or information systems/databases. Include a description what role your organization's Web site and Internet presence will play in the short-term and long-term strategies. Describe how information collected through your organization's Web site will be integrated with organizational databases.

3. Operations/Administration

Summarize any audience research, field research, evaluation of technology tools, and work process analysis your team undertook to make decisions about technology. Describe how technology will make administration and operations more efficient. Describe any upgrades, redesign, or improvements in information systems that support administration or operations. Include several paragraphs for each the following business systems listed below, if applicable.

Contact Databases
Fundraising
Financial
Marketing and Sales
Inventory
Other

4. Infrastructure

Connectivity

Describe any upgrades, improvements, or redesigns of your organization's LAN, WAN, and Internet connection. If moving to a LAN or redesigning a LAN, include a schematic diagram. Discuss strategy for installation of network cards, hubs, routers, and wiring. If upgrading Internet service, describe type and selection of vendor.

Describe how staff who require access to online resources have the software and hardware needed to connect to these resources and individual email accounts. Describe shared information resources.

Equipment Life Cycles

Describe strategies for upgrading existing equipment and retiring obsolete equipment. Include specific information about computers (hardware), voice/mail

systems, fax, copy machines, and other technology equipment. Identify strategy for future purchase of new computers. Identify maintenance schedule for existing and new equipment. Include description of maintenance contracts for any existing and newly purchased equipment. Include description of leasing details, if leased. Identify staff person responsible for overseeing equipment.

Software Standards & Upgrades

Describe strategies for upgrading software and any software standards.

5. Professional Development

Summarize the results of the digital literacy self-assessment or discussions with Team regarding professional development. Describe what staff training/development is needed to support the successful implementation of your organization's technology plan. Describe minimum technology use requirements for all staff. Describe methods and strategies for providing technology training for minimum technology-use requirements and for specific areas as related to your technology plan.

6. Staffing

Describe who on staff and your technology team will be responsible for implementation of your technology plan. Describe any new staff positions that will be required as part of the plan. Identify technology consultants that will be contracted. Describe staff responsibility or consultant contract for administering network, regular maintenance (backup/virus protection), fixing things when something goes wrong, and incremental and major upgrades. Describe any technology-related policies such as acceptable Internet use that will be implemented. Describe strategies for implementing ergonomics and educating staff regarding safe computing habits.

7. Funding Strategy

Describe strategy for ongoing funding of technology plan. Describe how technology needs will be integrating into organizational fundraising.

8. Implementing Change/Keeping Current With Technology

Describe your strategy for moving from "paper" to implementation, Describe any pilots, phasing, or incremental changes. Describe your strategies for implementing change, particularly introduction of new or upgraded equipment and software. Describe the mechanism through which your organization plans to keep current on "best practices" use of technology in the nonprofit/for-profit sector and incorporates this knowledge into the technology plan.

9. Timeline/Budget

What are your strategies for implementing the technology plan on an annual basis. Describe any pilot tests. If upgrades and new equipment purchases will be phased in, describe the phases.

Use the worksheet below to identify how much plan will cost implement. Base budgets on price quotes not older than 18 months. Identify revenue sources and how technology costs will be covered by earned and unearned income or be part of general operating costs.

10. Evaluation

How will you evaluate the success of your technology planning? Describe your indicators for success.

EXPENSE ITEM	y1	y2	y3	y4	y5
Equipment					
Computer Hardware (New Systems)					
Computer Hardware (Upgrades - Drives, Memory, etc)					
Printers, Scanners, CDROM, and other add-ons					
Network cards/hubs/cables					
Modems					
Other					
Software					
New					
Upgrades					
Setup Charges/Other					
Wiring					
Furniture					
Ergonomic accessories					
Facility Modifications					
Network Access Fees (ISP, Dedicated Line)					
Service contracts and maintenance charges					
Insurance					
Operating Expenses					
Phone lines					
Utilities					
Security					
Paper/Toner/Ink/Diskettes/Labels					
Personnel Costs					
In-House Staff					
Consultants					
Staff Development/Training					
Workshops/courses					
Consultant					
Substitute Pay					
Books/Materials					
Other					
TOTAL	\$				

INCOME	Y	Y	Y	Y	Y
	1	2	3	4	5
CASH					
Earned Income					
Increased sales due to Web site/new system					
Unearned Income					
Individuals					
Foundations (list specific donors and amounts)					
Corporations (list specific donors and amounts)					
Amount Allocated from General Operations					
INKIND					
Contributions of Hardware/Software/Internet (List)					
Contributions of services (consulting/training)					
Other					
TOTAL	\$				