Building a Strategic Technology Planning Team

Why do you need a technology planning team?

Technology is key to your organization's ability to fulfill its mission and serve its constituents. It helps you manage critical data, steward supporters and grant dollars, and expand your reach, among other things. Technology should align with and support your mission and key goals as an organization. Therefore, decisions about adopting and using technology should involve a cross-section of key stakeholders that – together – have optimal insight into your organization's current operations and service-delivery, as well as where it is headed.

A team approach to tech planning helps ensure you consider how technology can serve the mission and goals across *all* aspects of your organization's work, from end clients to board leadership, from finance to case workers. The people on the team can become champions for the technology planning process and the technology and organizational changes that will inevitably result from it.

What will the team do?

A strategic technology planning team will meet regularly to lead the technology planning process at your organization and to write your technology strategy and plan. Your team may meet weekly or twice a month until your plan is written. The team will do research, writing and other tasks between meetings.

The tech team members will help drive technology planning at the organization, including:

- Reflecting on the organization's current use of technology
- Interviewing stakeholders about their perceptions of and needs for technology
- Researching technology tools and vendors, including estimating costs for the budget
- Writing pieces of the technology plan

Getting through the tech planning process and writing the plan is an initiative unto itself, but you may find that your team also has a role to play (and wants to stay involved!) once the plan is *completed* and it is time to start implementing the technology projects identified.

At that time, the team may oversee implementation of the defined projects and ensure they stay on track, and/or become part of an ongoing IT strategy committee that meets regularly to ensure that technology is up to date and supporting the organization's mission and goals.

Who do I want on my team?

The technology planning team should be made up of key staff members who will work together to create a strategic plan for technology investments at the organization over the next three years. Key among them will be the Executive Director or CEO of the organization (since the

tech plan will be based on the goals of the organization, tied to the success of the organization, and most likely require additional investment and resourcing).

Besides the Executive Director, the team should be large enough to represent different programs and stakeholders at the organization, but small enough to **meet regularly, make timely decisions, and sustain progress**. It is generally a good idea to keep the team between three and six people, depending on the size and complexity of your organization. If additional perspectives and insights are needed to ensure the technology plan is comprehensive, you can use interviews, focus groups, surveys, or occasional "open" meetings to gather further stakeholder input.

Select people for your team that will bring various perspectives on your services, technology, and experience. For example, you may want someone who works on the "front lines" of your organization and knows your clients and service delivery well, and you may also want the database administrator who uniquely understands the current processes and challenges of data management and reporting at your organization. **One need not be technical to be a valuable member of the tech team**. While someone technical will be helpful, it's just as important–if not more so–to have team members who are familiar with your stakeholders, goals, and operations.

Build a team with this mix of skills, experience and perspective in mind.

Your team may include the following:

- A senior leader and decision maker (i.e. the Executive Director/CEO)
- The IT lead/key IT staff person (if you don't have IT staff, this could be an IT-savvy board member or volunteer, perhaps)
- A program manager familiar with departments, programs, or key stakeholders
- A field or case worker who may (now or in the future) use IT in the field and/or with clients
- A representative from a satellite office (if there is more than one location)

What are the key characteristics of a good team participant?

1. Perspective/Representative: They must know the organization both from the perspective of their contribution and their department's/program's contribution to the mission, but also from the perspective of how their work fits into the larger 'whole' of the organization. They should be recognized by peers as the representative of their unit and role within the organization and should be trusted to speak on behalf of their colleagues.

2. Attitude: Think "team player." A good participant is one who is sincerely interested in the well-being of the organization and is excited about improving it. They should be willing to contribute their input toward the work of the planning team. They need not be technical.

3. Effort: A good participant will plan on making all meetings, doing the required research or reading between meetings, and participating openly in discussions.

4. Stakeholder awareness: A good participant will be able to think about how key stakeholders use or interact with your organization's technology, whether it is clients, donors, volunteers, or the community. Keeping these stakeholders or "users" in mind is critical to the success of any technology solution.

Other things to consider when planning your tech planning team:

- **Stay focused.** There can be focus groups and surveys as part of the planning process to help you solicit input. Don't feel like you need to include *everyone* on the tech team.

- **Be inclusive.** To help others on your staff feel included and ready for change, create opportunities for those NOT on the team to hear about the tech planning process, to offer input and ideas, and to get periodic updates from the tech team. Consider periodic updates at staff and board meetings. If appropriate, publicly post minutes from the tech planning meetings so those that are most interested can seek them out.

- **Make room on plates.** Make sure you help staff (particularly those on the tech team) prioritize tech planning. They already have full plates; how can you frame this as an opportunity and help them make room on their plates to participate fully?

Once you have your team:

- Distribute info about the tech planning process; give time for them to review and ask questions.

- Set up consistent, recurring meeting times so that you don't get stalled on progress because the team can't find mutual meeting times.

- Assign roles (facilitator, timekeeper, notetaker, etc.) to keep the team on task, maintain accountability, and allow action items to be captured and delivered on after each meeting.

Who will you recruit to be on your planning team?

Not all of these people will be able to attend the workshops as part of the Strategic Technology Program, but up to 3 of them will (make sure you include those 3 people in the appropriate place on your official program application). Those 3 can then bring the workshop information back to the rest of the team to help facilitate the technology planning process at the agency.

Who	Part(s) of Agency They Represent	Perspective They Bring
	Executive Director	