An Introduction to Strategic Technology Planning

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Welcome to Strategic Technology Planning

If you are reading this article, you are about to embark (or re-embark) on a process that will help your organization harness the potential of technology to deliver your mission and best serve your community. Proactively planning for technology is about more than replacing old equipment (although that might be part of your plan). This process will help your organization fundamentally shift the way you approach technology investments toward greater mission achievement and community impact. It will identify opportunities for technology to help you control costs, reduce risks, raise funds, empower staff, and transform and enhance the way you deliver programs and services.

Strategic technology planning – much like any strategic planning process – is a comprehensive look at the current state and the desired future state for your organization. If you just need some new computers, this may not be the right process (it's a lot of work if your key objective is to purchase new devices). But, if you are ready to treat technology as a mission-critical *investment* that can *accelerate* your organization's *impact*, this is the place! Your nonprofit has much to gain from appropriately integrating technology into your operations, communications, fundraising, and service delivery. A good technology plan will be your roadmap to smart technology investment and use.

An Overview of Nonprofits and Technology

Let's be honest: You are likely not choosing to go through a strategic technology planning process at your organization just because "it's the right thing to do." Chances are if you are reading this and preparing for technology planning, you are in a stare-down with some noteworthy challenges that are making your current use of technology hard to bear. Or, perhaps you see amazing opportunities to use technology to greater effect that you know you can no longer afford to ignore. Whatever your motivation, going through this process will be well worth your time. Technology planning can help your organization mitigate a range of challenges and reap greater rewards from its technology investments.

Challenges Facing Nonprofits

As you well know, nonprofit organizations face a lot of the same challenges that many businesses face. Add in reliance on outside funding and your mandate to deliver on your mission, and you and your nonprofit peers have some unique challenges to navigate... challenges that could either be greatly helped or exacerbated by technology.

- **Funding Challenges** – These are a constant in the nonprofit sector given the ongoing volatility of the economy and government funding sources. You constantly scan for new and diverse sources of funding – ranging from grants and donations to contracts and earned revenue – to ensure you can continue operations and deliver your mission.

- **Increased Demand for Services** – When times are tough, your organization probably faces increased demand for services because more people are out of work and/or in need of some

type of assistance, or because government programs get cut, leaving a gap in services that nonprofit organizations often step up to fill.

- **Escalating expectations for accountability** – Nonprofits today face increased pressure from the community, donors, government, and funders to demonstrate accountability and transparency for how they steward funds and create measurable impact. You are being asked to be more transparent in how funds are used, and to accurately measure and report on key data about the impact of your programs and services.

- **Rising Competition** – As dollars become scarce, being able to differentiate and prove your unique value-add is critical to your organization's ability to survive and thrive. You need to be able to attract and retain clients and/or supporters to continue to be viable.

Given the sampling of key challenges above, you can see how technology can play an important part of your organization's success strategy.

How Technology Can Help

Technology can help your organization better achieve its mission by enabling you to:

- Improve engagement with supporters and raise more funds
- Streamline and/or automate operations and processes and boost productivity
- Expand your reach and serve more people
- Better manage and use mission-critical data to drive decisions and programming
- Strengthen internal and external communications
- Enhance the quality and impact of your services

Still, many nonprofits, perhaps including yours, struggle to keep up with the exponential pace of technology change, and are not able to fully capitalize on its potential. Even those organizations that *can* keep IT humming along are often focused on it as an operational or infrastructure tool, and miss opportunities for technology to truly drive business and/or service value and to help them deliver on their mission. Strategic technology planning can help.

If you are like other nonprofits, you may face technology challenges such as:

- Old and outdated hardware and software; often a mix of different makes, models and versions
- Lack of funding, particularly for large capital expenditures like new equipment
- No or too few IT staff to support your organization's needs
- Lack of IT expertise or of formal, documented technology policies and processes
- Reticence from leadership or board to fund IT, which is perceived as an "operations" or "overhead" cost versus an investment in programs and services
- Lack of confidence in leading or managing the IT function or IT staff
- Lack of awareness around the Total Cost of Ownership of technology, which leads to under-budgeting or over-running budgets

Sound familiar? Read on.

Introduction to the Strategic Technology Planning Process

Why a Technology Plan?

With all the technology needs and challenges of nonprofits, you may be asking yourself, "Can we afford to spend the time to do this?" The reality is that – without a plan – you are likely to end up with piecemeal or temporary solutions, or worse – the wrong solutions. This will end up costing you more in the long run. Through simple yet thoughtful planning, your organization can position itself to focus precious funds to the areas of greatest risk, need, or potential for impact.

Strategic technology planning will help your organization:
- Identify and prioritize the technology investments that will directly support the organization's mission, goals and business requirements
- Gain a better understanding of the ongoing costs to manage and maintain technology, including replacement and upgrade costs, and to budget for the Total Cost of Ownership
- Have a clearer understanding of the expected outcomes of technology investments and therefore better justify your spending and communicate its impact
- Write more informed grant requests for technology
- Weave technology into regular strategic or annual planning cycles, including budgeting

What is involved?

Technology planning includes a comprehensive review of an organization's underlying mission, key goals, and current opportunities and challenges, much like strategic planning. Together with a technology planning team, you will review your organization's programs and business requirements to explore and understand how technology can help you deliver on your mission.

Technology planning should include a thorough assessment of the organization's current technology state, including an inventory of hardware and software assets, as well as the collection of stakeholder perceptions on how technology is working. You will create a plan for both the maintenance and growth of technology going forward.

The technology planning process itself is just as important (if not more so!) as the actual written plan that results from it, so plan to focus on the discussion and the process as much as the actual writing of the plan. You will learn a lot about your organization in this process, not just about its technology use.

Like all major strategic planning efforts, organizational development and change management issues will surface during technology planning, and they should be addressed early and often to ensure that staff and stakeholders are ready to embrace the change that will result from this process. Change is hard, and – for many – technology change is particularly daunting. Whether it's because people feel their job will be made obsolete by technology, or because they are simply comfortable with the current way of doing things, communicating and managing change will be key to the success of the tech planning process.

Who does the work?

Strategic technology planning is a significant undertaking, but nonprofit organizations *can* complete this process. To be successful, a technology planning process needs a designated champion or *Chief "Keep-Things-Moving" Officer*. This champion does not need to be technical and may not be the IT staff person at the organization (if you have one), but he or she *will* be passionate about the importance of technology to the organization. The champion need not be a senior leader or the Executive Director, but should plan to involve senior leaders in the process. The champion will need to become familiar enough with the process that he or she can help facilitate it as needed, and – at times – act as a project manager to help the organization complete many tasks along the way to a finished plan.

Many organizations recruit consulting assistance to lead strategic planning efforts. Outside consulting can be very helpful in technology planning as well. Seek help from an experienced strategic technology consultant to guide your organization through this process. That consultant should not just be tech-savvy, but a strong listener who can understand the operations of your organization and help you consider appropriate solutions. He or she should be equal parts facilitator, management consultant, trusted guide, and technology advisor. His or her role is not to write nor implement the plan, but to help you explore what's possible and uncover options to inform your plan.

In Summary

No doubt that technology planning will take an investment of time, energy and resources from your organization. But the technology planning process and the resulting plan will be a great asset to guide the strategic use of technology at your organization. Much like a strategic plan, tech planning outcomes can guide your organization and help it achieve its goals for several years.

[Lindsay Bealko](#) is the Founder and Principal of Toolkit Consulting, which she started in 2007 to help foundations, nonprofits, and corporate social responsibility programs design engaging learning and events, creative communications, and powerful programs. She has helped clients like Idealist, TechSoup Global, the Bill & Melinda Gates Foundation, Microsoft Philanthropies, Fairfield County's Community Foundation, and the Hartford Foundation for Public Giving to expand programs, plan impactful events, and produce effective cause campaigns. Prior to starting Toolkit Consulting, Lindsay managed national programs for NPower, where she earned her wings in #nptech by delivering hundreds of workshops to help nonprofit staff use technology for good. Lindsay is a summa cum laude graduate of the University of Vermont and a Leadership Tomorrow alumnus. She currently serves on the board of Idealware, a nonprofit organization that helps other nonprofits make smart technology decisions. She suffers from a mild addiction to cooking magazines and the great outdoors.