**Strategic Technology Plan Template**

To aid your organization in the development of your Strategic Technology Plan, the following documents are being provided:

* Strategic Technology Plan Outline & Instructions (this document)
* Sample Strategic Technology Plan (provided separately)

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

Some of the content contained in the sample plan may be applicable to your organization and you are free to use any part of it as you develop and write your own plan. Keep in mind that while your consultant can help answer questions and serve in an advisory capacity, writing the technology plan is the responsibility of your technology planning team.

Your technology plan should cover both short-term or time-limited projects that should be completed within the first six to eighteen months, as well as longer-term projects to be implemented within three years. While the Hartford Foundation intends to offer funding to aid in the implementation of the plan, **you should NOT limit the projects and associated budget to any potential Foundation funding**.

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

1. First and foremost, this plan is intended to guide 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 be viewed as a living document which is updated on a regular basis.
2. The plan should guide annual development of your organization’s technology budget.

3. This plan may be useful in helping you fundraise to cover the costs to implement it. The Hartford Foundation will not be able to fund the entire, 3-year, strategic technology plan you create through this program. Identifying your subsequent technology needs and their costs can help you make the case for support from other funders.

*NOTE: Throughout this plan template, you will see guidelines on “expected length”. These are meant to serve as* guidelines*, not as strict rules or limitations. They are intended to simplify the writing of the plan by clarifying expectations so you can manage your time accordingly.*

To apply for your Strategic Technology Grant through the Hartford Foundation, you will need to complete your technology plan and budget 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.), and your technology plan (which will include a comprehensive, detailed three-year budget and quotes for major items being purchased). There is no additional grant writing required.

**Strategic Technology Plan Outline**

Executive summary

1. Introduction

1.1 Mission

1.2 Organizational Overview

1.3 Organization’s Key Goals

2. Evaluation Process

2.1 Involved Parties

2.2 Decision Making Process

3. Technology Areas – (Status, Resolution, Implementation)

3.1 Infrastructure

3.2 Data management

3.3 Digital Communications

3.4 Training

3.5 Technical support

3.6 Cybersecurity

4. Summary List of Technology Projects

4.1 Bulleted list of technology projects with justification

5. Implementation Plan & timeline

5.1 Responsibilities of Staff, consultants and vendors

5.2 Timeline

6. Budget

6.1 Detailed budget – costs by year for three-year period

Appendices

Appendix A – Inventory of your current technology infrastructure

Appendix B – Logic models for two (2) of your most significant projects

Appendix C – RFPs/RFIs and/or Quotes for Implementation of large projects, such as:

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| --- |
| * Computer Workstations and Servers * Photocopier purchase * Tech Support and Systems Installation * Cloud solution provider/cloud migration * Web Development * Database customization, development, migration |

**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 projects, and a brief overview of the budget for the initial year and all subsequent years covered by the plan. (Expected length: 1 page)*

1. **Introduction**
   1. **Mission**

*Insert the mission of the agency. (Expected length: 1 sentence to 1 paragraph)*

* 1. **Organizational Overview**

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

*Provide a separate paragraph identifying each of the agency’s major, specific programs. (Expected length: 2+ paragraphs, depending on the number of major programs)*

* 1. **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 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; a bulleted list is sufficient.*

*(Expected length: Bulleted list)*

1. **The Planning Process**
   1. **Involved Parties**

*Include a list of primary individuals (positions) who are/have been involved in the technology planning process, giving the role that each person has played. The list should include the Tech Team, the Executive Director, technologist or accidental techie, board representatives and other involved parties. (Expected length: Bulleted list or table)*

* 1. **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. (Expected length: 1-2 paragraphs)*

**3. Review of 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 maintenance and implementation*** *(the steps you will take to either achieve the suggested resolution or to continue to maintain the current status (if stable)). (Expected length: Will vary greatly, but this is the most substantive section of your plan.)*

*TIPS:*

* *Within each of these technology areas, make sure you think through how technologies and technology projects/investments can help you best serve your mission and improve or enhance client/constituent programs and services.*
* *Your plan (and budget) should include both the resources needed to* **maintain and sustainexisting technologies** *as well as any new project investments. Consider what it takes to run or maintain necessary technology, and also additional investments or projects to grow your capacity to use technology as a strategic tool for mission. Make sure both are reflected in your budget.*
* *The implementation and maintenance costs associated with the resolution and implementation sections below must be accounted for in your budget!*

**3.1 Infrastructure**

*Provide detailed information on the status of the agency’s technology infrastructure (networks, workstations, Internet access, peripherals, operating systems, routers, productivity software, phones/phone systems etc.). Attach a copy of your current technology infrastructure 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 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.*

Current Status:

Proposed Resolution:

Implementation Plan:

**3.2 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.*

Current Status:

Proposed Resolution:

Implementation Plan:

**3.3 Digital Communications**

*Identify the current status of digital communication programs being used by the agency. This should include agency web site, email/e-newsletters, social media, text messaging or broadcast text software, 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.*

Current Status:

Proposed Resolution:

Implementation Plan:

**3.4 Training**

*Indicate the technology skills gaps or training needs among agency staff, informed by your Staff IT Training Needs & Perceptions Surveys distributed.*

*Using the staff survey results and the list of planned technology projects, 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 use of current or new technologies. 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.*

Current Status:

Proposed Resolution:

Implementation Plan:

**3.5 Technical Support**

*Indicate the current status of technical support provided by staff or outside vendors. Is it sufficient to meet agency needs? Is access to additional or different support critical to successful implementation of your technology plan?*

*Provide detail on any changes required to improve the maintenance and support of both existing 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.*

Current Status:

Proposed Resolution:

Implementation Plan:

**3.6 Cybersecurity**

*Indicate the status of your current cybersecurity practices as an organization. This should include security software (antivirus, anti-malware, etc.), firewalls, backup and recovery processes, appropriate use policies for staff, cybersecurity training for staff, any cyber insurance held by the organization, and other cybersecurity practices and protocols, such as Multi-Factor Authentication. It may also include physical security if technology is used to manage that (or needs to be implemented). Is your agency following best practices to mitigate potential security risks?*

*Provide detail on any changes required to improve your cybersecurity. Provide an implementation plan outlining the steps to be taken. Include success metrics or what success will look like if you take the steps outlined here.*

Current Status:

Proposed Resolution:

Implementation Plan:

**4. Technology Projects**

**4.1 List of Technology Projects Being Addressed**

*Summarize the major technology projects the agency plans to implement, in order of importance, including a high-level, 1-2-line justification for each (i.e. how will this project help you achieve your organization’s key, strategic goals or enable you to further your mission? This should be the “So what?” for this project). You do not necessarily need to list every area of “resolution” from above, but you should include all of the significant project investments you are taking on and their relative priority. Keep in mind that a project may not be net-new; it could be an upgrade of existing technology. You will attach logic models for two of the agency’s most important or more complicated projects in Appendix B. Indicate which technology area (infrastructure, technical support, training, data management or digital communications) relates to each initiative.*

*Make sure your technology projects are specific and achievable. This should not be a list of equipment to be purchased. Add extra lines to this table if needed.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Priority  (A, B, C) | What’s the project?  (1-line summary) | Justification (1-2-line summary of the “So what?” for this project. How will it help you achieve your strategic agency goals and/or enable you to advance your mission? ) | Tech Area addressed (from section 3) | Which tab is this on in your tech plan budget (separate excel spreadsheet)? |
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*IMPORTANT: Make sure each of the projects above is accounted for in your budget!*

**5. High-Level Implementation Plan**

* 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 once agreement is reached with the outside party. (Expected length: 2-3 paragraphs or bulleted lists)*

1. Responsibilities of Staff

*Outline staff responsibilities to implement the plan/projects as outlined.*

1. Responsibilities of Consultants and Vendors

*Outline the responsibilities of consultants and/or vendors to implement the technology plan/projects as outlined.*

**5.2 Timeline**

*Develop a list of necessary activities to be completed by the project team and others to ensure that the projects will meet their time commitments. The timeline should be divided into items needed in each quarter during the term of the strategic technology plan. The list should show what needs to be accomplished and the responsible party.*

*You may also want to include any recurring activities in a separate section, including the frequency at which they should occur in order for your technology plan implementation to be successful. (Expected length: Varies depending on format used)*

**6. Budget**

**6.1 Detailed Budget**

*Using the provided budget template, include costs for each project you listed in Section 4. In addition to costs related to each new project, you must also include operating costs associated with maintaining and supporting* existing *technology already in place (ex: web sites, hardware) or otherwise not directly tied to a new project. Consider costs over a 3-year planning horizon so you account for not just one-time costs, but ongoing costs too.*

*Include in your budget the staff time required to implement new projects, as well as staff time required to maintain current technology. This may include the time of the executive director or other program staff, as well as any staff assigned to specific ongoing tech support functions (i.e., database management, web updates).*

**Appendix A**

*Attach the infrastructure inventory*

**Appendix B**

*Attach logic models (2) for significant projects*

**Appendix C**

*Attach two quotes for each major purchase or contract. (If you developed an RFP/RFI to help you obtain the quote, please attach that as well). One quote will be sufficient in situations where the agency has an already established relationship with a particular vendor. Ensure the quotes you have selected are clearly identified and reflected in your budget.*