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Preface

THE INTEGRATION of information technology (IT) into many of our daily activities has dramatically changed the way we live. It has altered the way we communicate, conduct business, and access resources. The computer has made it possible for us to increase our efficiencies and productivity, and the Internet has collapsed time and distance on a global scale. Information technology has done for the economy and the world's social infrastructure what no other new technology has done since the industrial revolution. Knowledge and information have arguably become the most valuable commodities in this new information-based economy.

For nonprofits, having access to appropriate IT tools is critical to their success in this new environment. Faced with a volatile economy, changing demographics, shifts in governmental and private funding priorities, swings in the political climate, and influential—sometimes explosive—world events, nonprofits are being called upon more and more to adapt to change—and to do so quickly. The community services that nonprofits offer are as critical as ever, but limited resources are available to deliver them. Thus, although other sectors have been relatively quick to incorporate tools that enable them to adapt to the shifting landscapes, the nonprofit sector has not had the resources to adapt as quickly.

Clearly, one of the most important tools in this necessary adaptation is technology. The purpose of this book is to provide nonprofits with a framework for planning the strategic use of technology to support the organization's mission. The following chapters are intended to supply enough information so that a nonprofit can embark on a process that will

- Align its technology use with its mission, goals, and strategies.
- Determine what technology will be implemented and how it will be implemented.

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- Define how the technology will be supported over time.

At the same time, this book is not meant to be all inclusive. You will likely also need to consult with technology experts who can guide your nonprofit in its technology decisions and assist with portions of the design work, but this book will prepare you to work effectively and efficiently with these experts.

Intended Audience

Wired for Good: Strategic Technology Planning for Nonprofits has been written to assist any nonprofit interested in strategically implementing technology in order to substantially improve the way it provides services to its community. The contents of this book will be of use to executive directors, operations managers, IT managers, board members, technology committee members, and any other key individuals looking to better implement and manage technology in their organization. (I would note, however, that even though individuals from educational institutions—K–12 or universities—and governmental agencies may well find the material in this book useful, they will also find they have specific technology planning issues that are not addressed here and that will have to be researched separately.)

This book will help organizations that intend to implement new technology to do so in a way that supports their mission and carefully targets their resources. Organizations that already have technology in place but are facing challenges managing it and finding it too costly to support will also find this book useful. This guide will help them take a step back from their technology woes and focus on what they want to accomplish. With this understanding, they can select the appropriate technological tools and infrastructure to accomplish their goals.

In addition, this guide is ideal for organizations that have an excellent and well-running technological infrastructure but want to document it so that internal and external stakeholders can gain both a current and a historical understanding of it. These organizations will find that going through the technology planning process documented here will help them communicate about technology issues with current and new staff, consultants, vendors, board members, funders, and others.

Finally, the strategic technology planning process outlined in this book is designed for organizations that are seeking to engage in in-depth organizational improvement. It is not intended for nonprofits that want a quick and easy technological solution. The concepts discussed here apply to nonprofits of any size. However, small nonprofits may find their needs less

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complicated than those of medium-sized and large nonprofits. (For the purposes of this book, a small nonprofit is defined as having a fiscal year [FY] budget of $500 thousand or less and fewer than ten full-time equivalent [FTE] staff. A medium-sized nonprofit has a FY budget of $500 thousand to $3 million and ten to thirty FTE employees. A large nonprofit has a FY budget of more than $3 million and more than thirty FTE staff.)

Let me explain. Organizations may choose to use technology in one or both of two ways. First, organizations may use technology to make their existing operational processes more efficient. For example, paper files may be replaced with electronic data that are more easily stored and updated, or accounting processes may be streamlined. Many nonprofits may feel comfortable implementing this aspect of technology by going directly to an operational plan, such as a needs assessment or technology audit, because their basic organizational strategy is not being changed. Often small nonprofits will opt to create this kind of a plan rather than a strategic technology plan because refining existing processes is all they need at the time, and the effort can more easily be led by an IT consultant, thereby putting less strain on staff time and resources.

Many organizations, however, may decide to use technology as a tool to change their processes, fundamentally altering the way their organizations operate and meet their missions, and thus changing the way they provide services to clients. In this case, a strategic technology plan is essential, no matter what the size of the organization.

Although nonprofits of any size will need to consider all the issues covered in this book when developing a strategic technology plan, size does make a difference in how some of these issues are addressed. For example, because a small nonprofit has fewer staff, the processes it examines may have fewer steps—one person hands something to another person and the other person does something with it and the process is complete—whereas a large nonprofit may pass something through many hands before the process is finished. Therefore a small nonprofit may be able to chart a process on only one page, whereas a medium-sized or large nonprofit may need several pages. Likewise, when developing the computer network's logical diagrams, a small nonprofit may be able to combine diagrams (putting the LAN and WAN diagrams on the same page), whereas a larger nonprofit will need to keep each diagram separate. Thus a smaller nonprofit's strategic technology plan may be less complex and have fewer pages than a larger nonprofit's plan. Throughout this book there are indications where these differences between small and large nonprofits may occur. Further, the technology plan examples presented here are representative of nonprofits of all sizes.

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Overview of the Contents

The materials and approach in this book are based on the content of the successful Wired for Good™ program (www.wiredforgood.org) conducted for Silicon Valley nonprofits by the Center for Excellence in Nonprofits (CEN™) (www.cen.org) from 1998 through 2002. They draw on the knowledge and experience provided by volunteer experts participating in the Wired for Good program's workshops and technology planning process. They incorporate the best practices and lessons learned from the corporate, educational, and governmental sectors, and most important, from nonprofits who have been through the technology planning process themselves. Sprinkled throughout the book are mini-case studies called Planning in Practice, and examples from technology plans drawn up by real nonprofits that have gone through the strategic planning process.

The book is divided into five parts. Part One sets the stage for understanding strategic technology planning and for determining whether or not your organization is ready for such a process. Chapter One defines what technology planning is and discusses the benefits that creating a technology plan will have for your organization. It also dispels many of the myths surrounding technology planning. Chapter Two describes in greater detail how technology planning fits with technology implementation. It explains the continuous improvement cycle and introduces the concept of total cost of ownership. Chapter Three provides guidance in determining whether your organization is ready to embark on the technology planning process. Chapter Four outlines some of the reasons people resist adapting technology, and therefore technology planning, and presents some useful advice on ways to address this resistance.

Part Two focuses on managing the technology planning process. Chapter Five discusses the costs, amount of time, and tools and resources associated with creating the plan. Chapter Six describes the technology planning team, who should be on it, and what roles and responsibilities team members must undertake. Chapter Seven takes a closer look at the roles of the executive director and the board. Chapter Eight discusses how to make the best use of consultants and volunteers, what their roles can be, and what to look for when hiring them.

Part Three (Chapters Nine through Twenty-Six) zeros in on writing the technology plan. The chapters here follow closely the Comprehensive Technology Plan Outline presented in Resource A, providing detailed guidance

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about each section of that outline. These chapters are rich with tips and with examples from actual technology plans created by nonprofits that have been through the process themselves. Worksheets are provided to assist you in preparing some of the more detailed elements of your own plan. Certain chapters in this section are fairly technology specific. Explanations are provided for many of the technology concepts addressed; however, this book is not intended to provide in-depth discussions of the technology itself. Other resources are readily available for that information. Additionally, technology is continually changing and to address specific applications in detail would have made this book only a snapshot in time. Instead, this book provides an infrastructure for planning that can be applied anytime, even as hardware and software change. Part Three, in short, presents a framework for asking the right questions, the answers to which will be your technology plan.

Part Four discusses the steps to take after the technology plan is written. Chapter Twenty-Eight addresses the change management associated with implementing new technology, providing tips to ease the organization's transition. Chapter Twenty-Nine considers finding funding and in-kind support for technology implementation and the ways that the technology plan can help you get this support. Chapter Thirty discusses revisiting the technology plan in order to maintain it as a living, useful document.

Part Five contains five resources. Resource A is a comprehensive and consolidated technology plan outline that is described in great detail in Part Three. Resource B illustrates flowchart symbols, and Resource C offers a technology plan checklist. A robust glossary is to be found in Resource D, and Resource E lists Web sites and publications that offer further information.

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Wired for Good: Strategic Technology Planning for Nonprofits is the culmination of three years of work with the nonprofit sector on technology planning and implementation. Neither the Wired for Good program, the content of which is documented in this book, nor the book itself would have been successful without the help of many people and organizations.

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Belmont, California Joni Podolsky
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