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Project Planning

What is Technology?

- Everything from paper and pencil to servers
- A process
- Necessary to every business, for profit and nonprofit

- **A tool, not a solution.**

What is a technology plan?

A document describing how your organization will use technology to further your mission. It describes:

- Your **current** technology practices and resources,
- How to upgrade those systems over time to meet your needs
- **Assessment** of existing resources, needs, and solutions

A successful planning process will draw on the leadership of a **technology team** made up of staff members to provide input.

Helps you **budget** for technology & make cost-effective purchases.

A technology plan is key to securing technology funding.

Are you ready for a plan?

- Is your mission statement well-defined?
- Do you have a long term organizational strategy with goals and objectives?
- Do you have support and involvement from the Executive Director?
- Do you have support and commitment from the board?

Are you ready for a plan?

- Are you able to make planning and organizational priority?
  - BUT, times of transition can be positive!
- Can you allocate staff time for planning and implementation?
- Do you have enough money for planning and implementation?

Are you ready for a plan?

- Is there someone who can serve as an organized project manager and leader?
- Do you have access to reliable and objective technology knowledge?

Planning Myths Debunked

- *Tech Projects/Plans aren't valuable*
  - Ensures that technology is helping org reach strategic goals
  - Opportunity to improve existing processes
  - Opportunity to expand services
  - Creates org. learning and discoveries along the way

Planning Myths Debunked

- *Only a techie can tech plan*
  - Technology is part of the organization, not a separate entity
  - Should encompass org goals and mission
  - May need to consult with IT folks

Planning Myths Debunked

- *We don't have time/money to plan*
  - *True, the process takes time/money, but in the long run, saves time/money*
  - *It DOES take a lot of time, depending on scope*
  - *Planning makes a stable foundation for all of organization's technology*

Tech Planning Committee

- Guides the strategic tech planning process
- Oversees plan's implementation
- Defines a vision, establishes goals
- Develops blueprint for sustainability
- Also responsible for overseeing evaluation, revision, and refinement of the plan.

Importance of Tech Team

- Helps institutionalize technology knowledge within your organization.
  - Collaborative effort
  - Impacts everyone's job

Who Should Be on Tech Team?

- Board members
- -Start with the board. If you don't already have a board Technology Committee, form one. Convincing your board that technology is important may not be so easy. Later we'll discuss ways to convince them. In the meantime, find the supporters on your board and put them on your Tech Plan committee.

Who Should Be on Tech Team?

- Technophobes
- Geeks
- ED – role model
- Cross-section of staff (skills, ages, rank)
- IT staff. Your own and/or IT staff from local businesses.
- Volunteers. Ones familiar with your work and your mission.
- Community members/Clients. If you have or plan to have public access to computers, include clients in the planning process.
- Vendors. Their role is not to sell you their products, but rather to help you choose vendors and products that are right for your agency.

Tech Team Tips

- Point person/lead and a Secretary
- Communicate with all staff and board.
- Let your mission drive the process
- Keep the size manageable.
- Meet regularly, form clear agendas, assignments, and timelines.

Questions to Consider

- How will a consensus be reached?
- How will you celebrate milestones?
- How often will you rotate membership on tech committee?
- How often will you review your tech plan?
- How often will you update your tech plan?

Traps to Avoid

- Not recognizing that board members need to have considerable knowledge about emerging technologies.
- Underestimating technophobia
- Underestimating time for the committee forming process

Components of a Tech Plan

- Needs Assessment
- Timeline
- Budget
- Inventory
- Goals/outcomes
- Policies & procedures

Needs Assessment

An effective assessment goes far beyond an ‘inventory’ of your technology stuff in which hardware, software and connectivity are counted and analyzed.

Needs Assessment

- Interviews
- Long Form
- Short Form
- Task/Process Analysis
- Process Mapping

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Inventory

Hardware - Everything with a plug

Make, model name, model number, year, specs, condition, warranty

Software

Do you have disk? Is it legal?

Belarc

Tech Atlas

Other items to assess

- Training/Skills assessment
- Infrastructure assessment (enough space, proper type of space, secure, etc, can we have wired/wireless)
- Compliance assessment

Tools of the Trade

Now that you have a committee, a rough plan and a tech workforce, you're probably going to need lots of boxes with wires sticking out of them.

Hardware

New hardware is almost always best. The only con is that it costs money.

-Comes with warranty

-Newest technology

-Better security for your data

-In the long run, old/used equipment may end up costing more in time, repairs and inefficiency.

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Hardware

Refurbished hardware

-Cheap or free

-Wide range of specs

-May or may not have warranty

-May or may not be legal

-Could crash or break at any time

Hardware

New

www.dell.com

www.tigerdirect.com

www.computergiants.com

Software

Compatibility

Legality

www.techsoup.org

Protect Your Organization, Protect Your Data

- Disaster Preparedness is crucial for any business system
- It's not technology…it's business policy (better yet, a *written* policy)
- Effective policy requires sound business judgment, which means…

Risk Assessment

- What is the Risk?
- Determined by…
  - Likelihood of disaster
  - Impact of disaster
- Identify your biggest threats (Likelihood)
- Identify mission critical IT (Impact)

Create a Disaster Preparedness policy that meets your needs…

- What is a Disaster?
  - Technology Problems
  - Personnel Problems
  - Facility Problems
  - Catastrophic Problems

Managing The Process

- Consists of
  - Developing a team
  - Conducting necessary meetings
  - Listing planning tasks
  - Developing timeline for completing the plan
  - Setting priorities
  - Determining roles and responsibilities
  - Budgeting for the creation of the plan
  - Tracking and charting progress
  - Communicating frequently and effectively

Conducting the meetings

- Acknowledge diversity of the team – many of these people may have never worked together before
- Never let the discussion steer too far toward “gee whiz!” or “I know what’s best.”
- Create “parking lot” space for ideas
- Follow each meeting with “to do” lists for members, tasks and deadlines
- Keep a “decision log” to track decisions, dates they are made, participants and reasons

Tasks & Lists

- Constantly make lists!
- Examples: interview, research, hire consultants
- Be aware of task dependencies
- Set deadlines – be aware of how adding and changing tasks will effect final deadline
- Allow flexibility

Tasks & Lists

- Task lists should match up to sections in your plan
- Use tools such as Gantt charts, trees, or affinity diagrams
- Delete tasks and milestones that become irrelevant

Setting Priorities

- What has to happen first, second, third?
- Are there some tasks than only certain people can do?
- Are those people available?
- What else is that person doing that may conflict with this project?

Tracking Progress

- Make the project plan, tasks, etc. poster size and hang in the room where you meet
- Use butcher paper or post it notes to document flow charts, etc.
- Use multiple methods of communication:
  - Emails
  - Memos
  - Meetings
  - Etc.

Specifying the System

- Check around and see what other groups are using
- Check references on software/companies
- Brainstorm and assign priorities for each idea (Must have, would be helpful, cool but not helpful)
- Write an RFP (request for proposal)

Buying/Developing tools

- Get demos
- Talk to support, not just sales
- Ask
  - Do we need add on modules?
  - How long is warranty and what does it cover?
  - How much are upgrades?
  - What kind of license comes with it?

Training

- Manuals
- Cheat sheets
- Power User
- Policies
- One on one

Maintaining

- Create internal “user groups”
- If applicable, go to external groups or create list serves
- Log training needs and bugs