

## Section 8: Writing the Plan

### Overview

After your organization has met with the technology planning consultant and specialist, and prior to the last workshop in October, your organization will begin putting the plan onto paper. The consultant will be available by phone or email to answer questions and provide guidance. Once you've articulated a vision statement & goals, taken a close look at your technology infrastructure, and identified priorities, the next step is to "get the plan on paper." The Technology Planning Template provides a format for you to capture your plan in writing. Simply answer the questions that should be addressed based on your planning work to date.

Obviously, it will take your organization several drafts to finish writing the plan. Most likely, the research, assessment, and meetings with the consultants and your technology team will enable you to write sections 1-4 which focus on the vision statement and goals as well as technology infrastructure. Section 5-8 address a sustainability issues which include: staffing, professional development & training, funding, policy, ergonomics, and knowledge management. And finally, the last section which focuses on the timeline, budget, and evaluation will flow from the first two sections.

We have included two examples arts organizations' technology plans in this section, however, there are many other approaches and styles.

#### Arts Tech Plan Library

[http://www.artswire.org/spiderschool/workshops/kit\\_buffalo\\_01/elements/library/index.html](http://www.artswire.org/spiderschool/workshops/kit_buffalo_01/elements/library/index.html)

#### Arts Boston Case Study

[http://www.artswire.org/spiderschool/workshops/kit\\_buffalo\\_01/artsboston/index.html](http://www.artswire.org/spiderschool/workshops/kit_buffalo_01/artsboston/index.html)

This section includes tools and information that will help you write the plan, including:

- Technology Plan Template
- Example of Technology Plan
- Training & Professional Development
- Staff Skills Assessment
- Staffing
- Funding
- Ergonomics
- Policy
- Implementation Tips
- Financial Analysis

# Technology Planning Template

## 1. The Vision

Describe how technology will benefit your organization's mission and audience. This description should be based on a synthesis of discussion by Tech Team, soliciting input from key stakeholders, and considering outcomes.

Your organization's technology vision statement:

List your organization's Technology Goals. These should be brief "To Do" statements that describe your organization's strategic goals and the use of technology. The statements should be broad, covering a time period of 3-5 years.

You may want to include bulleted points from the evaluation/strategy tool as well.

Goal #1:

Goal #2:

Goal #3:

Goal #4:

Goal #5:

Goal #6:

### Philosophy

Describe any guiding philosophies that describe your organization's approach to integrating technology into the daily life of your organization.

### Integration with strategic planning

Describe how your organization has integrated technology planning into an overall strategic planning process or content of strategic plan.

Describe board involvement in the technology planning process and how they will continue to be involved during implementation

Describe how your organization involves individuals with both technology and program expertise in the technology planning process

Describe the Tech Team's role in the planning process and during implementation

## 2. Programs and Services

Describe your programs and services. Summarize any audience research, field research, or work process analysis that you undertook to make technology integration decisions. Describe how technology will enhance the delivery of your organization's programs or services. Describe ways that the use of technology will make your programs or services more efficient. Include descriptions of any upgrades, redesigns, and improvements in any program or service communication, materials creation, or information systems/databases. Include a description what role your organization's Web site and Internet presence will play in the short-term and long-term strategies. Describe how information collected through your organization's Web site will be integrated with organizational databases.

## 3. Operations/Administration

Summarize any audience research, field research, evaluation of technology tools, and work process analysis your team undertook to make decisions about technology. Describe how technology will make administration and operations more efficient. Describe any upgrades, redesign, or improvements in information systems that support administration or operations. Include several paragraphs for each the following business systems listed below, if applicable.

Contact Databases  
Fundraising  
Financial  
Marketing and Sales  
Inventory  
Other

## 4. Infrastructure

### Connectivity

Describe any upgrades, improvements, or redesigns of your organization's LAN, WAN, and Internet connection. If moving to a LAN or redesigning a LAN, include a schematic diagram. Discuss strategy for installation of network cards, hubs, routers, and wiring. If upgrading Internet service, describe type and selection of vendor.

Describe how staff who require access to online resources have the software and hardware needed to connect to these resources and individual email accounts. Describe shared information resources.

### Equipment Life Cycles

Describe strategies for upgrading existing equipment and retiring obsolete equipment. Include specific information about computers (hardware), voice/mail systems, fax, copy machines, and other technology equipment. Identify strategy for future purchase of new computers. Identify maintenance schedule for existing and new equipment. Include description of maintenance contracts for any existing and newly purchased equipment. Include description of leasing details, if leased. Identify staff person responsible for overseeing equipment.

### Software Standards & Upgrades

Describe strategies for upgrading software and any software standards.

## 5. Professional Development

Summarize the results of the digital literacy self-assessment or discussions with Team regarding professional development. Describe what staff training/development is needed to support the successful implementation of your organization's technology plan. Describe minimum technology use requirements for all staff. Describe methods and strategies for providing technology training for minimum technology-use requirements and for specific areas as related to your technology plan.

## 6. Staffing

Describe who on staff and your technology team will be responsible for implementation of your technology plan. Describe any new staff positions that will be required as part of the plan. Identify technology consultants that will be contracted. Describe staff responsibility or consultant contract for administering network, regular maintenance (backup/virus protection), fixing things when something goes wrong, and incremental and major upgrades. Describe any technology-related policies such as acceptable Internet use that will be implemented. Describe strategies for implementing ergonomics and educating staff regarding safe computing habits.

## 7. Funding Strategy

Describe strategy for ongoing funding of technology plan. Describe how technology needs will be integrating into organizational fundraising.

## 8. Implementing Change/Keeping Current With Technology

Describe your strategy for moving from "paper" to implementation, Describe any pilots, phasing, or incremental changes. Describe your strategies for implementing change, particularly introduction of new or upgraded equipment and software. Describe the mechanism through which your organization plans to keep current on "best practices" use of technology in the nonprofit/for-profit sector and incorporates this knowledge into the technology plan.

## 9. Timeline/Budget

What are your strategies for implementing the technology plan on an annual basis. Describe any pilot tests. If upgrades and new equipment purchases will be phased in, describe the phases.

Use the worksheet below to identify how much plan will cost implement. Base budgets on price quotes not older than 18 months. Identify revenue sources and how technology costs will be covered by earned and unearned income or be part of general operating costs.

## 10. Evaluation

How will you evaluate the success of your technology planning? Describe your indicators for success.

## Budget Worksheet

<b>EXPENSE ITEM</b>	<b>y1</b>	<b>y2</b>	<b>y3</b>
<b>Equipment</b>			
Computer Hardware (New Systems)			
Computer Hardware (Upgrades - Drives, Memory,etc)			
Printers, Scanners, CDROM, and other add-ons			
Network cards/hubs/cables			
Modems			
Other			
<b>Software</b>			
New			
Upgrades			
<b>Setup Charges/Other</b>			
Wiring			
Furniture			
Ergonomic accessories			
Facility Modifications			
<b>Network Access Fees (ISP, Dedicated Line)</b>			
<b>Service contracts and maintenance charges</b>			
<b>Insurance</b>			
<b>Operating Expenses</b>			
Phone lines			
Utilities			
Security			
Paper/Toner/Ink/Diskettes/Labels			
<b>Personnel Costs</b>			
In-House Staff			
Consultants			
<b>Staff Development/Training</b>			
Workshops/courses			
Consultant			
Substitute Pay			
Books/Materials			
Other			
<b>TOTAL</b>	\$		

<b>INCOME</b>	<b>Y 1</b>	<b>Y 2</b>	<b>Y 3</b>	<b>Y 4</b>	<b>Y 5</b>
<b>CASH</b>					

<b>Earned Income</b>					
Increased sales due to Web site/new system					
<b>Unearned Income</b>					
Individuals					
Foundations (list specific donors and amounts)					
Corporations (list specific donors and amounts)					
<b>Amount Allocated from General Operations</b>					
<b>INKIND</b>					
Contributions of Hardware/Software/Internet (List)					
Contributions of services (consulting/training)					
Other					
<b>TOTAL</b>	\$				

Timeline

<b>PHASE 1</b> October-March, 2002	<b>PHASE 2</b> April-September, 2003	<b>PHASE 3</b> October-March, 2004

# Maine Coast Artists Technology Plan: 2001-2005

## The Vision

For nearly fifty years, Maine Coast Artists (MCA) has been at the heart of contemporary Maine art, providing Mainers, summer residents and tourists the opportunity to view and appreciate works by many of the best Maine artists -- often emerging artists not seen elsewhere. Maine Coast Artists holds a unique place in Maine's art world - it serves as a bridge between the public and contemporary artists working in Maine. Activities and exhibits that draw attention and support contemporary art in Maine are central to MCA. MCA's curatorial leadership and vision in discovering new artists and bodies of work that beg attention are essential to the organization. Working to further the careers of Maine artists through exhibitions, educational programs and other activities are also core.

## MCA's Technology Vision Statement

MCA will be a strong player by using technology to present and promote contemporary art created by Maine artists, including works created with new technology tools. MCA will integrate the effective use of technology to advance the careers of contemporary artists, increase public support and understanding of the importance of contemporary art in Maine, and provide professional development to Maine artists that furthers their careers.

MCA's goals are in two distinct areas. The first is a necessity, the second is a logical step, although a big one. The first will be cost effective. The second will be costly at first, yet enable the organization to better meet its mission.

- Update staff/office technology to do business in the 21<sup>st</sup> century.
- Expand "Center for Maine Contemporary Art's" mission to include technical art forms

## GOALS:

Goal #1: To improve MCA's internal capacity for staff members to share and exchange information within the main office, with board members, and the general public.

Goal #2: To strengthen the financial base of the organization through the use of technology to cultivate current and potential donors.

Goal #3: To be known throughout Maine and New England as the Center for Maine Contemporary art by establishing a strong Internet presence.

Goal #4: To provide professional development and training for contemporary artists and to incorporate the use of the Web to market their work

Goal #5: To establish the MCA web site as a premier online gallery for showcasing Maine artists work on the Internet

Goal #6: To encourage Maine artists to exhibit technology-based work in physical and virtual galleries

## Philosophy

In order to reach beyond the physical limitation of location and gallery space, MCA thinks it is important to incorporate technology into its delivery mechanism. MCA feels that technology is an enhancement, not a replacement, for face-to-face contact with artists and audiences.

MCA is known and will continued to be known as being on the "cutting edge" or promoting what's new in the Maine art world. As such, MCA will strive to be a leader in encouraging the creation and presentation of technology-infused art as well as supporting artists who experiment with technology tools for creating and promoting their work.

#### Integration with strategic planning

Over the past year, MCA has been engaged in an extensive strategic planning process with board and staff. Strategic goals were identified for financial support, communications, strengthening leadership skills, programs, and fundraising. Technology as a tool or strategy for reaching these goals was discussed and agreed upon by the MCA staff and board. The goals identified in the technology plan directly support MCA's overall strategic direction.

MCA has established a board sub-committee that focuses on technology. It consists of technology-savvy individuals who provide advice and recommendations to the staff regarding implementation issues and reports to the entire board regularly.

1. After completing a thorough technology assessment, MCA realized that it needed to begin implementation immediately on several short-term issues that would greatly strengthen the organization's technology infrastructure, provide an immediate boost to productivity, and provide a sturdy platform to realize its technology vision by 2005. Over the past year, MCA has implemented the following:

A. Phone: The existing phone system has been upgraded to handle current incoming call volume, fax, credit card line, and Internet access. Every staff member has a phone and an internal intercom is in use. A voice mail system has been set up with staff function voice mailboxes. An additional incoming phone line will be added during the summer of 2001 to handle additional seasonal call volume.

B. LAN: MCA's computers are now networked on a LAN. The building has been wired on all floors to accommodate current needs and future expansion/upgrading of hardware. A firewall, will be installed when MCA converts to cable.

C. Internet Access: MCA will switch from a single dialup Internet access account to high-speed Internet access (Cable) from every desktop. Email accounts for each staff function will be purchased from Internet provider. A cable modem will be installed that will be connected to the LAN in early 2001.

D. Hardware: MCA's has been able to upgrade several of its elderly computers with a donation of newer equipment from Colby College and K2BH (Klick to be here). The technology plan life cycles section includes a systematic plan for upgrading over the next five years.

E. Software: MCA has standardized all software and eliminated unlicensed software.

F. Integrated Database: MCA has almost completed a transition to a fully integrated database using GiftMaker Pro as the software.

G. Web Site: MCA now has its domain name (www.artsmaine.org). The web site is now kept up to date by a volunteer. MCA plans to bring the maintenance in-house and redesign its Web site as the next phases of development over the next year.

H. Maintenance/Security: A regular back-up procedure has been established. Data is backed up three times a week. A copy is stored off-site. Virus protection is installed. Users all have individual passwords. Rights and privileges are outlined in the Employee Handbook. A firewall will be installed at the time cable modem is installed.

## 2. Programs and Services

Program	Short-Term/Current	Long-Term
<p><b>Professional Development:</b> These programs are for individual artists and are focused on career-related topics. They consist of one-day or weekend face-to-face workshops.</p>	<p>Currently use email to communicate with participants. Internet is used for research for materials. Digital graphics design tools are used to create program materials.</p>	<p>To be able to extend the research by adapting into a distance learning program to reach individual artists around the state, particularly in remote areas. Would be research, piloted, and implemented in conjunction with MAC, University and Library system</p>
<p><b>Exhibitions</b></p>	<p>Limited promotion on the Web site and Email Use of Internet for research by curators Exhibit documentation in digital format on CDROM</p>	<p>Have all exhibitions available on the Web and promoted vigorously</p> <p>Document every exhibit with using technology</p> <p>Distribute an e-zine on the Web site</p>

Longer-Term:

A. MCA seek funding to commission a feasibility study to develop a concrete plan, which includes infrastructure, fundraising, organizational capacity, staffing, training, and mission, to determine the role MCA will play as a virtual gallery and in online professional development for artists. In developing proposals, initial research will address the following questions:

1. What is required in building a virtual gallery? What is needed to sustain it in terms of capacity?
2. What is the best way to promote and market electronic art?
3. How the organization might use the new high school tech facility as a training venue and venue to deliver program?

- B. Further planning with State Arts Commission - goal is to develop and test a small pilot for distance learning due to the rural nature of the state of Maine.
- C. Build the capacity of the organization to identify and incorporate new technological opportunities.

Shorter-Term:

- A. Staff and organizational efficiency and responsiveness
- B. Upgrade computers and telephones
- C. Staff training and determine the role of Technology Committee
- D. Incorporate strategies for strengthening its Internet presence as part of the next phase of its Web site development.

### 3. Web Site Development

Short-Term

MCA bring the maintenance of its Web site in-house so that it can be updated in a timely manner. In order to do so, the following needs to take place:

- A. All staff descriptions will include developing content about programs for MCA's web site.
- B. The curatorial assistant will serve as the organization's Web manager, the person who edits the HTML files on the Web site. MCA needs to research schools or training opportunities in the local or Portland areas.
- C. Several staff members, including the curatorial assistant, will be trained in using a Web/HTML editor such as Dreamweaver.
- D. Identify appropriate staff person to do online marketing activities such as sending out news releases via email to members.

Longer-term

Once the maintenance of the web site is brought in-house, MCA staff will develop a plan for a site overhaul and redesign. The following needs to take place:

- A. Identify key goals and audiences for the Web site
- B. Identify a comprehensive list of content that will be added to the site (see content inventory forms)
- C. Develop a site structure (what gets linked to what)
- D. Develop a list of written specifications for the site (for example, on the top page there should be a visual of the current exhibition, etc.)

E. Research a short-list Web designers and invite them to prepare a proposal based on the specifications, site structure, and list of content. Identify a Web designer than create a design that looks professional, but can be easily updated by staff.

F. Site will be launched in conjunction with MCA's 50th Anniversary in 2002.

#### 4. Equipment Life Cycles

MAC is committed to remaining with the Macintosh platform and treating its computers as consumables with 3-year life span. The goal will be turn retire one-third of its computers every year and replace them with new machines. Computers will be assigned to staff based on functional needs. The staff person designated to maintain the Web site and the office manager will always work on the most up-to-date and powerful machines for that purpose. A summary of current equipment and functions as well as a replacement schedule are indicated in the below tables.

#### Current Equipment

Work Station #	Assigned To	Description	Function/Uses
#1:	President	PowerMac 7200	BO, E, DB
#2:	Shared	PowerMac 6400	BO, E, DB, G
#3:	Development Assistant	PowerMac 7200 (18 RAM)	BO, E, DB
#4:	Office Mgr	PowerMac 7200 (48 RAM)	BO, E, DB
#5:	Clerical	IIsi	BO, E, DB
#6:	Ed Coordinator	PowerMac 8100	BO, E, DB, G
#7:	Assistant Curator Web Manager	Performa	BO, E, DB, G
#8:	Curator	Performa	BO, E
#9:	Development Dir	PowerBook 5300	BO, E, DB
#10:	Server	PowerMac 8100	DB
#11:	Front Desk	PowerBook 520	BO, E, DB

Functions:  
Basic Office  
Email  
Graphics  
Database



## Computer Replacement Cycle

New computer purchases are highlighted in gray.

<b>NOW</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>
#1: PM 7200	Same	Retire <b>NEW MAC</b>	Same	Same	Retire <b>NEW MAC</b>
#2: PM 6400	Same	Same	Retire #2 Switch To: #7 G4 2002 or equivalent	Same	#7 G4 2004 or equivalent
#3: PM 7200	<b>NEW I-MAC</b>	Same	Same	<b>NEW MAC</b>	Same
#4: PM 7200	<b>NEW I-MAC</b>	Same	<b>NEW MAC</b>	Same	<b>NEW MAC</b>
#5: IIsi	Retire #5 #4: PM 7200	Retire #4 #10: PM 8100	#4 -2002	#4 -2002	#4 -2003
#6: PM 8100	Same	Retire #6 #7 - G4 2001	Same	#7-G4- 2003	Same
#7: Performa	Retire #7 <b>NEW G4</b>	<b>New G4 or equivalent</b>	<b>New G4 or equivalent</b>	<b>New G4 or equivalent</b>	<b>New G4 or equivalent</b>
#8: Performa	Retire #8 #3: PowerMac 7200 Upgrade RAM, if possible	Retire #3 <b>NEW I- MAC</b>	Same	Same	<b>NEW MAC</b>
#9: PB 5300	<b>NEW I- MAC PowerBook</b>	Same	<b>NEW PowerBook</b>	Same	<b>NEW PowerBook</b>
#10: PM 8100	Same	<b>New Server</b>	Same	Same	<b>New Server</b>
#11: PB 520	Retire #11 #9: PowerBook 5300	Same	#9 2001 I-MAC PowerBook	#9 2002 PowerBook	#9 2003 PowerBook

A digital camera will be purchased in 2001 and a slide scanner in 2001. An upgrade from a hub to switch and a new fax in 2002. Printer is an elite 1200, Network printer. It will need to be replaced in 2003.

## 5. Staff Development

MCA will seek or provide training in these areas:

**Web Development/Maintenance:** MCA assistant curator who will be responsible for managing and updating the organization's web site will be trained in Dreamweaver.

**Database:** MCA is phasing in GiftMakerPro for integrated database. The fundraising database has been converted, although historical data still needs to be input. The board and past board databases have been converted. The business, foundation, comp, volunteer and education databases will be converted in Q1 2001. The artists and purchasers databases will continue to run parallel until the end of 2001. Three staff members (Office manager, Development Director, Development) will be sent to the Nashua, NH training center to receive intense training on the program. These staff members will then train other staff members on the basics. Depending on what they need to do their work, all staff members will learn how to view data, how to input data, and how to generate reports or output.

**Basic Computer Training:** Staff members who require it will receive basic computer training on how to navigate on the Internet and basic troubleshooting.

**Quark:** The curator will be trained on Quark.

Minimum technology skill requirements are included in every job description.

MCA has purchased ergonomic chairs (adjustable) and accessories. Staff members have been encouraged to read materials concerning safe computing and avoiding carpal tunnel syndrome.

## 6. Staffing

Technology responsibilities are a formal part of two staff members job descriptions. The assistant curator also serves as the organization's web manager. MCA's office manager is responsible for all equipment, maintaining the network/Internet connection, backups and routine maintenance, and software licenses. MCA has a technology consultant on contract that answers questions or provides on-site support when technical problems require more expertise to solve. MCA has an agreement with Sapient Systems that serves as the paid technology consultant. The consultant provides 24/7 technical support via email and only charges if an on-site visit is necessary.

MCA has a formal technology and Internet-use policy in its Employee Manual. Employees are asked to review the manual and sign a paper indicating that they have read and understand the policies.

## 7. Funding Strategy

Technology expenses are a part of the budget and operating expenses and integrated into all fundraising proposals. Technology-specific proposals, as well as program specific proposals, are currently being researched and will be prepared as part of the annual fundraising plan.

#### 8. Implementing Change/Keeping Current with Technology

The executive director keeps current on technology and Internet resources through the Technology Committee which has five individuals who work in different technology related fields and through an organization called NP Partners consisting of executive directors of 25 nonprofit organizations who meet once a month. Activities such as peer reviews of Web sites and other technology topics have regularly been on the agenda.

#### 9. Timeline/Budget

MCA will stagger the introduction of new equipment purchased annually which will cause less stress on the organization's cash flow and staff.

MCA is using a phased-in approach to switch to a fully integrated contact database created in GiftMaker Pro. MCA has been running parallel systems for a year. As of January 2001, the staff will switch to using data for fundraising on the new system and discontinue the legacy fundraising information. The volunteer data will be phased in as of March 2001. The Artists database will be migrated to the new system by end of 2001. Staff members will be trained on the new system as part of the transition for each phase.

Longer-range projects such as the distance learning project and a publication on Maine art will be implemented as small pilots and evaluated before proceeding to full implementation.

#### 10. Evaluation

MCA's Technology Team will oversee and monitor the implementation of the technology plan. They will conduct an annual evaluation of the plan. As part of each initiative implementation, MCA will prepare a "logic model" that guide evaluation.

<b>EXPENSE ITEM</b>	<b>y1</b>	<b>y2</b>	<b>y3</b>	<b>y4</b>	<b>y5</b>
<b>Equipment</b>					
Computer Hardware (New Systems)	7. 0	7. 5	5. 0	4. 5	10 0
Computer Hardware (Upgrades - Drives, Memory, etc)	1. 0	1. 0	1. 0	1. 0	1. 0
Printers, Scanners, CDROM, and other add-ons	3. 0	-	2. 0	1. 5	4. 0
Network cards/hubs/cables	.5	.5	-	-	-
Modems	.5	.5	-	-	-
Other	-	-	-	-	-
<b>Software</b>					
New	1. 0	1. 0	-	-	-
Upgrades	.5	.5	1. 0	1. 0	1. 0
<b>Setup Charges/Other</b>					
Wiring	1. 0	2. 0	1. 0	1. 0	1. 0
Furniture	-	2. 0	-	-	-
Ergonomic accessories	-	1. 0	-	-	-
Facility Modifications	-	10 .	-	-	-
<b>Network Access Fees (ISP, Dedicated Line)</b>	1. 5	1. 5	1. 5	2. 0	2. 0
<b>Service contracts and maintenance charges</b>	1. 5	1. 5	2. 0	2. 0	2. 0
<b>Insurance</b>	.5	.5	.5	.5	.5
<b>Operating Expenses</b>					
Phone lines	1. 2	2. 4	2. 4	2. 4	2. 4
Utilities	1. 2	1. 2	1. 2	1. 2	1. 2
Security	.1	.1	.1	.1	.1
Paper/Toner/Ink/Diskettes/Labels	1. 5	1. 5	2. 0	2. 0	2. 0
<b>Personnel Costs</b>					
In-House Staff	8. 0	10 .0	12 .0	15 .0	15 .0
Consultants	1. 5	5. 0	2. 5	2. 5	2. 5
<b>Staff Development/Training</b>					

Workshops/courses	5. 0	2. 0	2. 0	2. 0	2. 0
Consultant	-	-	-	-	-
Substitute Pay	-	-	-	-	-
Books/Materials	.5	-	.5	-	.5
Other	-	-	-	-	-
<b>TOTAL</b>	<b>37</b> .0	<b>51</b> .7	<b>36</b> .7	<b>38</b> .7	<b>47</b> .2

<b>INCOME</b>	<b>Y 1</b>	<b>Y 2</b>	<b>Y 3</b>	<b>Y 4</b>	<b>Y 5</b>
<b>CASH</b>					
<b>Earned Income</b>					
Increased sales due to Web site/new system	2. 0	4. 0	6. 0	8. 0	10 .0
<b>Unearned Income</b>					
Individuals	2. 5	2. 5	2. 5	2. 5	2. 5
Foundations (list specific donors and amounts)	7. 5	-	-	-	-
Corporations (list specific donors and amounts)					
<b>Amount Allocated from General Operations</b>	25 .0	45 .2	28 .2	28 .2	34 .7
<b>INKIND</b>					
Contributions of Hardware/Software/Internet (List)					
Contributions of services (consulting/training)					
Other					
<b>TOTAL</b>	<b>37</b> .0	<b>51</b> .7	<b>36</b> .7	<b>38</b> .7	<b>47</b> .2

Foundations

Y1

NLT Foundation - \$3,500

Libra Foundation - \$4,000

# Implementation

The shift from planning into implementation is not always an easy one. After investing the time to research, strategize, and map out a course for your organization's technological future, the last thing you want is to have your plan end up on a shelf and gather dust. Now is the time to begin specifically discussing how your organization will carry out the various goals and strategies identified in the plan.

Overall, expect change to happen. As soon as the ink dries on the most recent version of your plan, something will change – whether it be software, hardware, turn over in staff or whatever. Remember, your plan is written in electricity, not cement. The key is to be flexible and make ongoing adjustments. Also remember that implementation of technology projects always take longer than projected. Try to build this into your timeline. Don't panic if something is not going precisely the way you thought it would. Reevaluate and accept the fact that the technology planning and implementation process requires constant monitoring and adjusting.

Some advice:

**Create a supportive environment.** This is particularly important as you implement professional development and staff training or if introducing new software or hardware into your organization. You need to create a culture where people are encouraged to take risks to learn technology skills and integrate its use into their daily work life. That isn't an easy thing to do. Think about what incentives you can offer to motivate all staff to implement the plan.

**The Technology Team's Work Is Never Done.** Remember, the Technology Team's primary responsible was to help develop the plan, but there is also a large role for the Technology Team in monitoring the ongoing implementation and evaluation of the technology plan. The Technology Team should manage the implementation process, ideally with one point-person who is the link between the Technology Team, Technical Consultants, Board, and Staff. Be sure to clearly assign responsibilities to people. As new needs and priorities come up, you'll need to modify your plan. Technology Team's should continue to meet after the plan is on paper to discuss changes and to evaluate the plan's success. Think of the process of planning, implementation, and evaluation not as distinct threads, but closely interwoven.

**Use the Salami Method.** One would never stuff a whole salami in their mouth. To digest it easily, it needs to be cut into smaller pieces. You need to do the same for the implementation tasks of your technology team. Your organization is unlikely to raise all the money required to implement everything in your plan. It is wise to think in terms of logical, incremental steps that build capacity. Be sure to include a period of reflection after completing step. This is the time to ask, "What have learned so far that can help us move forward?"

**Learn from Pilots and Experiments:** Informed experiments can help you break implementation tasks down into phases and provide a good reality check in terms of time. If part of your technology plan includes a major redesign of your organization's database or Web site or piloting a new education program that integrates advanced technology, thinking in terms of "pilots" is an essential strategy for success. Much can learned about what's needed for a full implementation process as well as provide an opportunity to work out the glitches. Pilots can also help you determine if a particularly technology is not the right fit for your organization before making an expensive commitment. Pilots can help you create a

working prototype that can have the added value of serving a fundraising tool to demonstrate “proof of concept.”

**Celebrate Your Successes:** The process of creating, implementing, and evaluating a technology plan can be, at times, very frustrating. You may feel that you’re not moving fast enough or aren’t being successful. Don’t get so caught up in what hasn’t been implemented, that you ignore what has. Celebrate all your successes and progress towards your goals.

### **Resources**

TechSoup: Implementing Your Technology Plan  
[http://www.techsoup.org/pop\\_printer\\_article.cfm?articleid=96](http://www.techsoup.org/pop_printer_article.cfm?articleid=96)

TechSoup: Keep on Keepin' on: Following Through on Your Plan  
[http://www.techsoup.org/pop\\_printer\\_article.cfm?articleid=125](http://www.techsoup.org/pop_printer_article.cfm?articleid=125)

# Financial Analysis Tips

## 1. Does your technology budget pass the 70/30 rule?

<b>70%</b>	<b>30%</b>
<b>HUMANWARE</b>	<b>HARDWARE/SOFTWARE</b>
Technical Staffing Other staff involved in planning/monitoring Consultants Training Training Materials Tech Support for Software Web Design Work Cost of Downtime	Computers (New/Upgrades) Printers, Scanners, etc Hardware installation Software ASP/Other Vendors Extended warranty/Service Contracts Network cards/hubs/cables Wiring Costs Modems Internet Access Furniture, Paper, Printer Supplies Insurance

## 2. Have you treated hardware/software costs as consumables that need to be replaced every 3 years?

Plan to replace the office computers on a staggered basis, so that roughly one-third of workstations are being replaced every year. This strategy will keep costs incremental and avoids weakening infrastructure. According to research by the Gartner Group, the total cost for a PC/user is approximately \$3,000 a year. This includes hardware, software, tech support, and training. To analyze the costs, you need to know the "vintage" (what year they were purchased) of all workstations and chart out the replacement cycle.

Computer	Age	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Staff person 1	5	\$3,000			\$3,000	
Staff person 2	1			\$3,000		
Staff person 3	3	\$3,000			\$3,000	
Staff person 4	2		\$3,000			\$3,000

## 3. Have you identified all hidden costs?

Many budgets underestimate the amount of staff time needed to master the learning curve for new software. This is not the direct cost of the training workshops, but the time needed to "practice" or become comfortable. Another hidden cost includes the cost of downtime for a network. Another hidden cost is the electricity bill and cost of printer cartridges. If you're adding new computers, it has an impact on the monthly electricity bill.

### Resources

Consortium for School Networking: Total Cost of Technology Ownership  
<http://www.cosn.org/tco/>

So What is the Total Value of Technology? by Marc Osten, published in Nonprofit Quarterly  
[http://www.summitcollaborative.com/npq\\_tvo\\_.html](http://www.summitcollaborative.com/npq_tvo_.html)