Integrating Information Technology & Strategic Planning

- Presenters:
  - Ben Blanquera, Columbus Technology Council
  - Chris Kloth, ChangeWorks
  - Tony Wells, Tony R. Wells Foundation

Session Goals

- 1. Increase understanding of the importance of integrating information technology (IT) planning into the agency strategic planning process

- 2. Increase understanding of the importance of assuring that technology planning goes beyond identification & acquisition of hardware, software and network tools by including technology training, maintenance, backup and disaster planning, upgrading, etc.

Agenda

- Introductions & Overview
- Strategic Management in an Era of Limits
- The New IT Landscape
- Taking Action
- Questions & Answers

Strategic Management in an Era of Limits

- Changing populations & needs
- Changing public policy priorities
- Focus on impact
- Focus on measurement
- Limited resources

Strategic Planning (short version)

- Take time now
- To describe the future you are committed to creating and being held accountable for
- To influence
  - Resource allocation
  - Priority setting
  - Action steps
  - Everything you do between now and then

Strategic Planning (short version)

- The core of every strategic plan is:

INFORMATION

Information

- Information = data + context
- Data is the words, punctuation, etc
- Context is the storyline
- Information drives the plan

Information Technology

- The tools we use to collect, save, organize, access, learn from and apply information that will allow us to achieve our short and long term strategic outcomes

Don't Let Terminology Be Frustrating

- Non-Profit Speak
  - Consumers – Participates
  - Donors – Funders
  - Capacity Building
  - Outcome Measurement
- Foundation Speak
  - Technical Assistance
  - Social Partnerships
  - Earned Income Strategy
  - Entrepreneurial Nonprofits
  - Sustained Business Model

- Technology Speak
  - IT Infrastructure Solutions
  - Value Management
  - Enterprise Information
  - Shared Services
  - Total Cost of Technology Ownership (TCO)

Timing of the Project is Perfect

Pressures

- Overwhelming reporting requirements by funding sources
- The slowing economy has affected income sources
- Increasing number of consumers needing information

Resources

- Nonprofit Technology Web Sites are growing
- Foundations are funding technology orientated research
- The research on how technology impacts the nonprofits is improving
- National United Way IT Partnership
- Local Role Models

NPower Consulting Toolkit - Microsoft Internet Explorer

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Consulting Toolkit

The Consulting toolkit is designed to assist in operating and managing a nonprofit technology consulting program.

Feedback and questions regarding this toolkit can be directed to National@npower.org.

Overviews
Components of a Scope of Work - (doc-79 KB)
Customer Service Philosophy - (doc-52 KB)
Data Collection for Engagements - (doc-67 KB)
Handling Consulting Inquiries - (doc-59 KB)
Managing Consulting Engagements - (doc-68 KB)
NPower's Customer Service Philosophy - (doc-52 KB)
Offering Scheduled Support - (doc-59 KB)
Staffing a Consulting Program - (pdf-135 KB)

Flowcharts and Processes
Consulting Engagements-Step by Step - (doc-68 KB)
Engagement Intake Flowchart - (pdf-18 KB)
Handling Inquiries-Step by Step - (pdf-81 KB)
Scheduled Support-Step by Step - (doc-70 KB)

Samples and Worksheets
Consulting Engagement FAQ - (doc-56 KB)
Database Functional Requirements Outline - (pdf-27 KB)
Database Start Guide - (pdf-36 KB)
Network Start Guide - (pdf-35 KB)
Planning Start Guide - (pdf-35 KB)
Sample-Change of Scope - (doc-42 KB)
Sample-Database Scope - (pdf-28 KB)
Sample-Network Scope - (doc-105 KB)

etc...

Tools developed by NPower:

TechAtlas- A tool to help nonprofits with the tech planning process.

TechSurveyor- A technology inventory tool for nonprofits.

Planning and Service Delivery Toolkits- Resources to help those who help nonprofits with technology.

TechSoup - Nonprofit Technology Articles and News - Microsoft Internet Explorer

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Articles & News

Technology Planning

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Recycled Hardware

Software

Using the Internet

Web Building

Volunteers

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Internet Connections

Databases

Funding

Nonprofit Technology Articles and News

Home > Articles & News

⊛ Featured Article

The Roma Women's Movement Takes on Technology
Read about the challenges and rewards working as an technology consultant for women's groups in Bulgaria.

>> **More Articles on Circuit Riding**

⊛ Nonprofit Technology News

Digital Radio "Shuns" the Blind
provided by BBC News
Digital broadcasters are ignoring those who make the most use of radio.

Building Digital Libraries with Open Source Software
provided by UNESCO
Greenstone Digital Library software empowers users to build their own digital libraries.

>> **Read Yesterdays News...**

⊛ Read More Articles On...

- Technology Planning
- Hardware
- Software
- Using the Internet
- Web Building
- Volunteers
- Consultants
- Training

- Computer Networks
- Internet Connections
- Databases
- Funding
- CTCs
- Adopting Technology
- Computer Recycling

Our staff of nonprofit technology experts and our content partners have written a wide range of articles that will help you use technology appropriately, effectively, and within your budget. We understand that technology is a means to an end. What really matters is helping you serve your communities.

Whether you are a techie who is researching networking options for your office or an

⊛ New at DiscounTech!

Expanded Microsoft Software Donation Program. New limits and rules apply. Learn more.

⊛ Community Spotlight

The event is over, but the discussion continues. Taking eRiding Global.

⊛ Nonprofit Technology Events

The O'Reilly Emerging Technology Conference
April 22-25, 2003

New York Regional Nonprofit Technology Conference
May 8 - 9, 2003

Alliance for Nonprofit Management's Conference
June 19-22, 2003

Technology and Disability: Research, Design, Practice, and Policy
June 19 - 23, 2003

Educational Multimedia, Hypermedia, and Telecommunications

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Welcome to DiscounTech! Learn more about this unique resource made possible by our generous technology partners.

⦿ **FEATURED DONATING PARTNER**

Cisco Systems Corporate Philanthropy is committed to providing the resources its communities need to prosper, while educating its coworkers about the challenges facing those communities. Corporate Philanth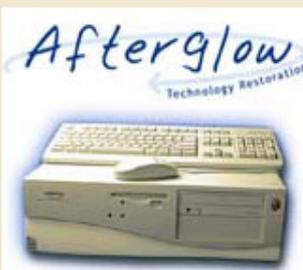ropy includes the Cisco Foundation and the Community Investment group. Cisco's partnerships with nonprofits give them access to technology solutions and leverage the power of the Internet, allowing them to focus on the individuals they serve. More.

Cisco is committed to providing comprehensive technology solutions for nonprofits at a fraction of the usual cost. Find a variety of Cisco networking products at DiscounTech.

CISCO SYSTEMS

NEW! **Microsoft** **Software Donation Program**

Microsoft has enhanced its software donation program to better serve the nonprofit community. This means more products for more nonprofits at dramatically lower administrative fees. Qualifying organizations are immediately eligible to place one order for Microsoft donated products over a 2-year period. Go to the Microsoft Program Page for full details.

⦿ **FEATURED DISCOUNTING PARTNER**

Afterglow Technology, a division of Desktop Products, Inc., provides a smart and reliable way for individuals and organizations to get great prices on used and reconditioned computers from major manufacturers like IBM, HP, Compaq, Dell, and Toshiba. Our parent company has been serving large organizations with information technology products and services since 1985, partnering with our clients to make the most of their technology investments and internal resources through solution-oriented systems, processes and programs.

Afterglow
Technology Restoration

RESOURCE CENTER

Need strategic planning support? Check out TechSoup's articles, message boards, resources and more!

Technology Planning & Strategy

Selecting Hardware & Software

Computer Networks & Connectivity

TechSoup Community Forums

Internet

N-TEN : Welcome to N-TEN! - Microsoft Internet Explorer

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Nonprofit Technology Enterprise Network

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Welcome to N-TEN!

Your connection to the nonprofit technology community.

May 8-9: Register Today!

N-TEN REGIONAL CONFERENCES NEW YORK

The Nonprofit Technology Enterprise Network (N-TEN) seeks to help nonprofits make more effective use of technology to advance their missions. N-TEN supports the people who provide technology services to the nonprofit sector by creating opportunities to identify peers and develop professional support networks, share information and resources, and work collaboratively on a range of projects.

▶ JOIN   ▶ BENEFITS   ▶ MEMBERS   ▶ SUBSCRIBE

UPCOMING EVENTS:

- **New York Regional Conference, May 8-9**. Co-hosted by NPower NY. Get the details at the New York Conference Page or **Register Now!**

- **Minneapolis/St. Paul Regional Conference, June 9-10**. Co-hosted by MAP for Nonprofits and the Minnesota Council of Nonprofits. Get the details at the Minneapolis/St.Paul Conference Page.

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Nonprofit Resources

The Foundation works to help nonprofits find and use resources that will help assist them in becoming more effective. We have supported efforts to leverage the use of technology through programs such as Network for Good - a nonprofit collaboration to help organizations increase capacity, reach new audiences, and build Internet strategies. Those resources and others are listed below:

General Nonprofit Resources
- Network for Good's Nonprofit Resources
- CompuMentor's TechSoup and DiscounTech
- Mentors Online, the E-mentoring Tool Kit (TM)
- TechAtlas
- IT Resource Center
- N-TEN (Nonprofit Technology Enterprise Network)
- ContentBank
- Council on Foundations
- Foundation Center

Regional Nonprofit Resources
- Technology Works for Good (Washington, DC)
- NPower (New York)
- CompuMentor (San Francisco Bay Area)

Digital Opportunity Resources
- Digital Divide Network
- ConnectNet/Conectado

Internet

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W.K. Kellogg Foundation

- **The New Wireless Paradigm – 2002**

- **Using e-Philanthropy to Expand Volunteering, Giving and Community Building – 2002**

- **The eNonprofit: A Guide to ASPs, Internet Services, and Online Software – 2002**

- **After the Bubble: Investing in Internet-Based Social Enterprise in Challenging Times – 2001**

- **Wired, Willing and Ready: Nonprofit Human Service Organizations' Adoption of Information Technology – 2001**

- **More Than Bit Players: How Information Technology Will Change the Way Nonprofits and Foundations Work and Thrive in the Information Age – 2001**

- **E-Philanthropy v2.001: From Entrepreneurial Adventure to an Online Community – 2000**

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The Benton Foundation seeks to articulate a public interest vision for the digital age and to demonstrate the value of communications for solving social problems.

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Today's Headlines

FCC Plan in Media Proceeding Unlawful Says Government Agency

Powell: 'Rising Anxiety Over Radio Ownership

(read more)

What's New

Internship Opportunity at the Benton Foundation

Benton is currently seeking a graduate-level intern to work part-time at the foundation starting in June.

April 7 Phoenix Media Ownership Forum a Success

On Monday, April 7, the Benton Foundation hosted a public forum on the FCC's review of US media ownership rules. Panelists such as Arizona Attorney General Terry Goddard and journalist Hugh Downs took questions from the audience, as well as from Internet users who participated via a live audio stream.

Benton and APT Publish New Report on Broadband Applications

Benton Initiatives

Capacity Building
Communications Policy
Connect for Kids
Digital Divide Network
Digital Opportunity Channel
OneWorld US
Sound Partners

Benton Newsletters and Discussion Groups

Communications-Related Headlines
The DIGITALDIVIDE List
Sound Partners Newsletter

Recent Publications

A Broadband World: The Promise of Advanced Services (available in PDF and HTML) Twelve case studies of ground-breaking communities utilizing advanced broadband services

Resources   Internet

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University Research

- Boston College – November 2002

- University of Richmond - August 2001

- United Way of Minnesota - March 2000

- University of Michigan
    School of Social Work – November 1999

Making Progress

- 1999 Research
  - 36% of organizations have web sites
  - 48% have a network
  - Less than 50% have email and internet access

- 2002 Research
  - 70% of organizations have web sites
  - 62% have a network
  - 77% have email and internet access

Areas of Opportunity

- Only 17% of organizations have a Technology Plan
- Only 16% of organizations have IT Policies and Procedures
- Average age of computer hardware is 5.8 years old
- Only 44% of organizations back up data on a regular basis
- Non-Profits are the largest abusers of pirated software
- Majority of non-profits do not use Anti-Virus
- Only 46% of organizations have a IT Budget
- Organizations with budgets spent an average of $7,608 annually
- Average (national) IT Budget for a Non-Profit organization is less than one half of one (.5%) percent of annual revenue

vs.

3.4% of annual revenue (Information Week 500, September 2002) with for-profit companies

National United Way IT Partnership

- Teaming for Technology
  - Started in 1998
  - Joint Partnership between IBM, United Way and the Americorps Vista Program
  - IBM provides $54,000 in equipment per year to the local United Way agencies
  - Program operates 14 cities

Teaming for Technology
of Minnesota

Building Better Communities Through Technology

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Resources for Nonprofits

Looking for tech planning resources, cheap software or hardware, or other resources on issues dealing with technology and nonprofits? Check here first! See the table below for a summary of what you will find and click on a link for more details.

T4T Toolkit

▶ Technology Planning Guide
▶ Technology Planning Worksheet
▶ Technical Volunteers
▶ RCTC Internships
▶ Local Computer Vendors and Services
▶ Technology Training

Web Links

▶ Hardware and Software Resources
▶ Nonprofit Tech. Initiatives

Tech Toolkit

Tech Planning Guide

Tech Planning Worksheet

Tech Volunteers

RCTC Internships

Local Computer Specialists

Technology Training

Web Links

Local Non-Profit "Role Models"

- Action for Children   Diane Bennett
  Executive Director

- Children's Hunger Alliance   Bill J. Dolan
  CEO

- Goodwill Columbus   James M. Puleo
  President/CEO

Committee Members

- **Jesse R. Jones, Director of Technology, City of Columbus**

- **Angelo Mazzocco, VP & CIO, Dispatch Printing Company**

- **Dr. Kay Nelson, Associate Professor – Director of CITM, Fisher College of Business, Ohio State University**

- **Thomas Ramseyer, Executive Director of House of Hope, Member UW Management Advisory Committee, Member UW Professional Advisory Council**

- **Daniel J. Rogier, VP, IT Business Development, AEP**

- **Tom McFadden, CIO, The Limited**

- **Tony Wells, Committee Chair**

Committee Members

- **Pete Anderson, VP Chief Technology Officer,   COTA**

- **Jonathan Beard, President, Columbus Compact Corporation, UW Board of Trustees**

- **Ida Copenhaver, Manager of Editorial Database Content Chemical Abstracts, Chair UW Management Advisory Committee (MAC)**

- **Joel Dinkin, Executive Director Leo Yassenoff Jewish Community Center, Member Professional Advisory Council**

- **Jonathan B. Dove, CIO, Worthington Industries**

- **Winston Faircloth, UW Processing and Information Center**

- **Roberta Garber, Executive Director, Community Research Partners**

- **Sidney Hargro, Program Officer, Columbus Foundation**

Information Technology Community Collaboration Plans

- Within first six months
  - Fisher College of Business conducts business research project with the 69 agencies – Dr. Kay Nelson
  - Involve all agencies in at least one sub-committee activity
  - Develop Education Program for Executives and Board Members
  - Research "Shared Services" model
  - Develop Internship Program with local colleges
  - Capitalize on knowledge developed by "Role Model" agencies

Information Technology Community Collaboration Plans

- Within first twelve months
    - Develop a three year delivery plan for services, support and strategies
    - Develop a three year capital investment budget
    - Identify measurable outcomes to monitor the success of the services, support and strategies
   - Develop a self-funded model to ensure sustainability

Subcommittee Opportunities

- Shared Services
  - Lead - Dan Rogier, AEP
- Sustained Business Model Effort
  - Lead - Tony Wells
- Equipment Redeployment Program
  - Lead - TBD
- Agency Board/IS Professional Matching Program
  - Lead - Angelo Mazzocco, Dispatch Printing Companies
- Agency Executive Training and Development
  - Lead - Jesse Jones, City of Columbus
- Survey Task Force
  - Lead - Kay Nelson, Fisher College of Business

Taking Action

- Strategic action starts with strategic leadership

- Strategic Leadership
  - Superior organization performance is not a matter of luck. It is determined largely by choices leaders make.
  - One of leadership's primary functions is to create a compelling vision and develop a strategy to achieve it

Strategic Leadership Domain

Vision

Mission

Strategy

Architecture for alignment and implementation
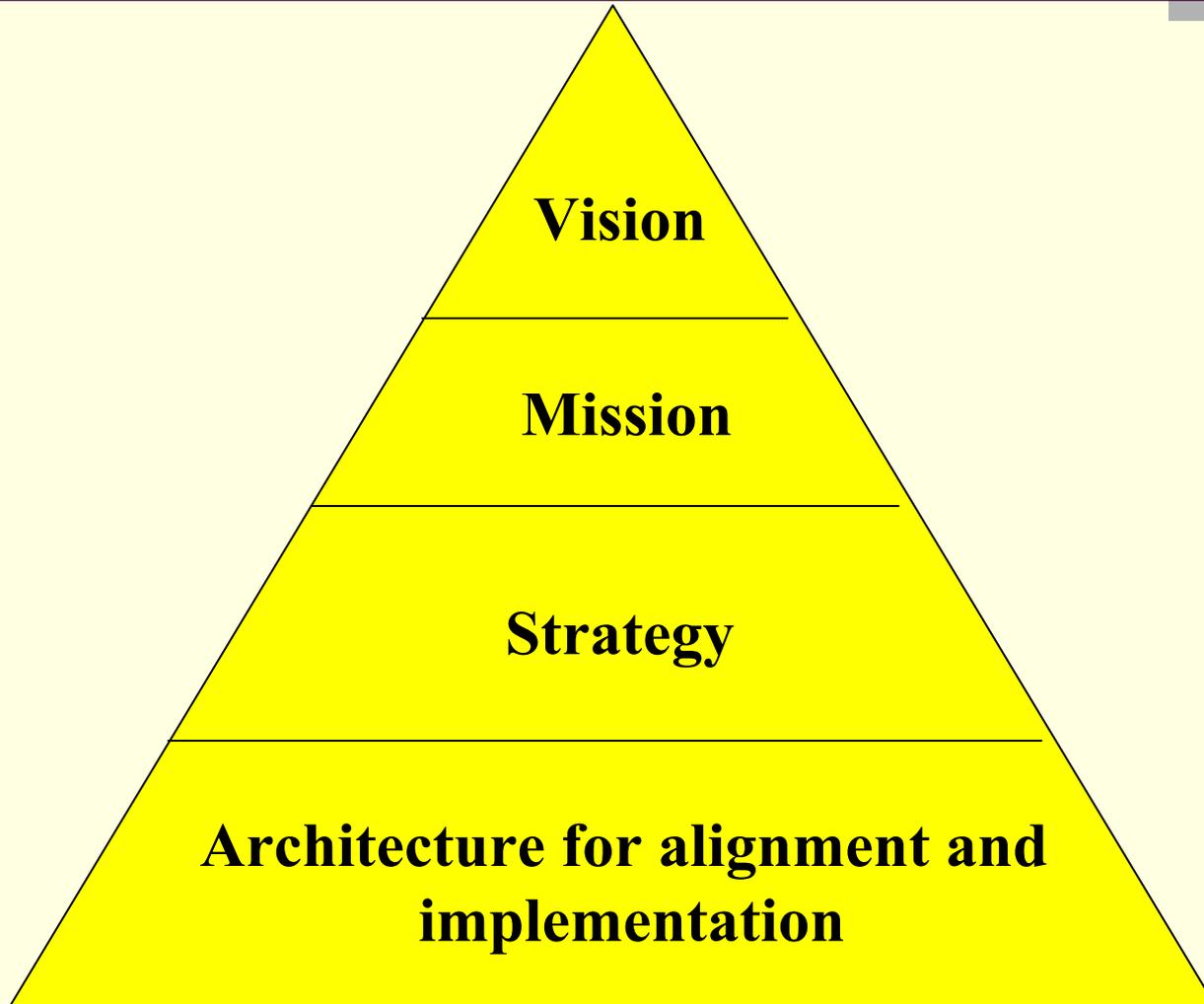
Strategic Leadership

- Vision – An attractive ideal future that is credible yet not readily available

- Mission – Organization's core purpose and reason for existence

- Strategy – A general plan of action that describes resource allocation and other activities for dealing with the environment and helping the organization attain its goals

Strategic Leadership

- Strategy implementation – involves using several tools or parts of the organization that can be adjusted to put strategy into action

IT lives here
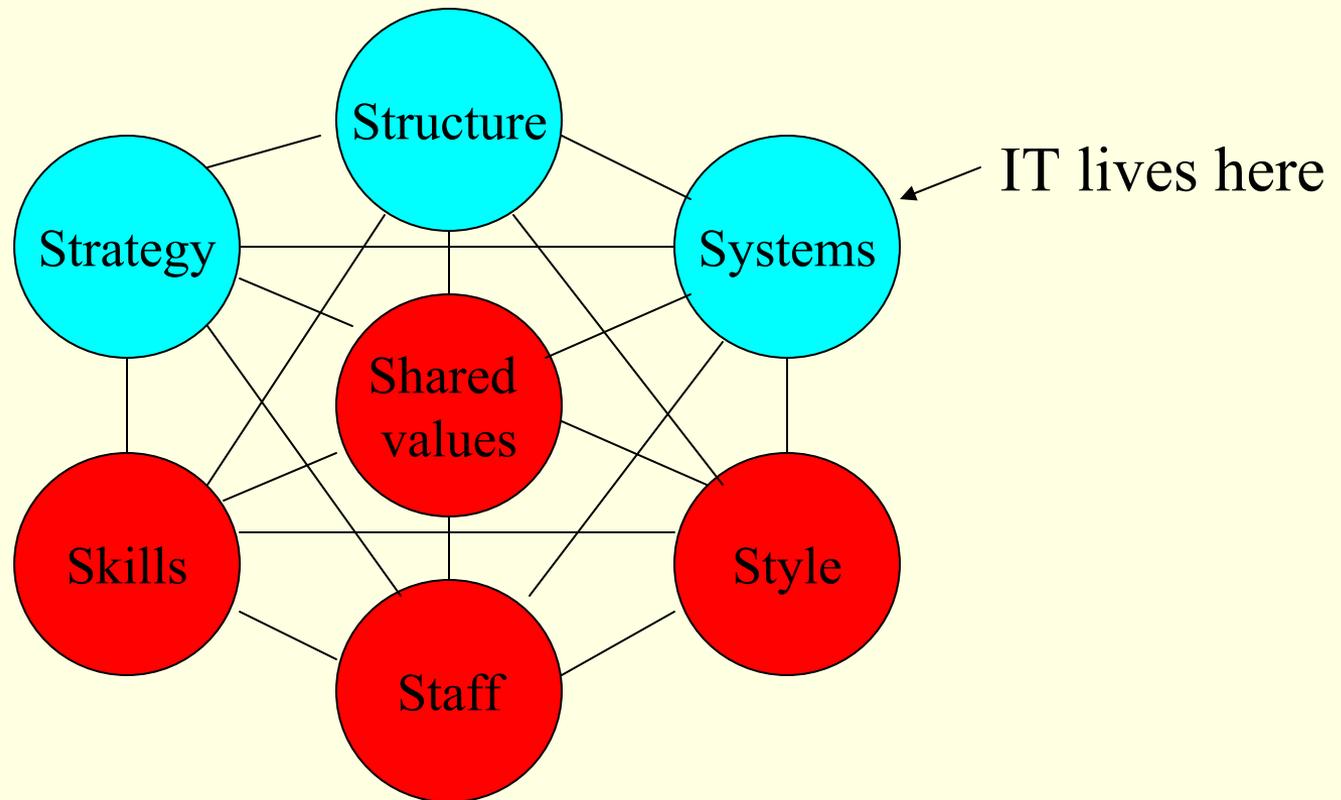
Elements where a fit must be achieved Hard Elements

- Strategy – Actions a company plans in response to or anticipation of changes in its external environment

- Structure – Basis for specialization and coordination

- Systems – Formal and informal procedures that support strategy and structure

Elements where a fit must be achieved Soft Elements

- Style/Culture – Two components
  - Organizational structure – dominant beliefs, values, norms
  - Management Style – Where do managers spend their time?
- Staff – people/human resource management
- Skills – distinctive competencies
- Shared values/ Superordinate goals – Guiding concepts, fundamental ideas around which organization is built

Strategic change equation

Change = (D)(V)(F) > cost of change

D = Dissatisfaction with status quo
V = Vision of the change
F = Process for making change occur

The realities
 D but no V or F = frustration
 D and F but no V = flavor on month
 V and F but no D = wishful thinking that eventually turns into passivity

Strategic decision making

Ease of implementation

Hard

Easy

	Hard	Easy
High Strategic Impact	**High Impact, Hard to Implement** Major changes, but With potential for high payoff Quad 1	**High Impact, Easy to Implement** Simple changes that have High strategic impact – take action here first Quad 2
Low	**Low Impact, Hard to Implement** Difficult changes with little Or no potential for payoff Avoid this category Quad 3	**Low Impact, Easy to Implement** Incremental improvements, "small wins", pursue for Symbolic value of success Quad 4

Strategic leadership takeaways

- Align domain elements of leadership
- Inventory stakeholders and resources
- Consciously manage all elements of strategic implementation
- Check your change equation
- Sequence your actions

THANK YOU

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- Tony Wells – Tonyrwellsfoundation@insight.rr.com 740-548-0781