

**Data Management:  
Where We're Going**

Presented by  
**Brian M. Worrall**

**November 20, 2008**

CHICAGO WALLACE AUDIENCE ENGAGEMENT NETWORK  
LEARNING CIRCLE: DATA MANAGEMENT

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**Session Recap**

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**Overview: Session 3**

- **Planning Technology**
  - Why a Technology Plan?
  - The Planning Process
  - Implementation
- **Funding Technology**
- **Protecting Technology**
  - Disaster Recovery and Security

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## Planning Technology

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## Planning Technology

- A technology plan is the single most important ingredient to effectively use technology in your organization.
- The technology planning process will help minimize technology-related crises, use staff time efficiently, and avoid wasting money on equipment and resources.

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## Planning Technology

- Create a plan to help you think through your priorities in order to use technology in a way that directly furthers your mission.

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## Why a Technology Plan?

- **Obtain Funding**
  - Funders will be much more likely to give money for technology if you can show them a technology plan.
- **Further Your Mission**
  - The technology planning process can expand your horizons and help you see new ways in which technology can further your mission.

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## Why a Technology Plan?

- **Buy the Right Equipment**
  - If you don't plan, it's easy to end up with something that is way too complicated or doesn't do what you need it to.
- **Save Money**
  - You probably do not need the fanciest system on the market. Planning allows you to figure out how to spend less and still meet your needs.

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## Why a Technology Plan?

- **Avoid Crises**
  - Bad technology decisions can leave you suffering for years and make you lose crucial data and capabilities.
- **Use Staff Time More Effectively**
  - A technology plan will help you streamline staff use of technology, and put systems in place that will make technology a useful tool for staff, not a stumbling block.

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## Why a Technology Plan?

- **Protect Yourself From Staff Turnover**
  - A technology plan can save you by providing documentation of existing systems as well as future plans.

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## The Planning Process

1. **Establish Leadership and Support**
  - Technology Team
  - Technology Lead
  - Management Support

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## The Planning Process

2. **Assess Your Resources**
  - What technology do you have in place?
  - How well is it working?
  - What technology skills does your staff have?
  - Who does your organization rely on for technology support?

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## The Planning Process

**3. Define Your Needs**

- Why do you need technology?
- What will new technology help you do that you can't do already?
- How will technology support your larger mission as an organization?
- What are your mission-critical priorities and what are your long term needs?

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## The Planning Process

**4. Explore Solutions**

- What are your technology options?
- Which meet your needs at a minimum cost?
- Who can help you? Do we need a consultant?

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## The Planning Process

**5. Write The Plan**

- Organizational Profile
- Technology Vision
- Projects
  - *Description, Benefits, Tasks and Costs*
- Budget
- Timeline

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## The Planning Process

**6. Get Funding**

**7. Implement The Plan**

- Designate a Point Person
- Break Projects into Tasks
- Assign Responsibilities
- Establish a Timeline
- Evaluate Your Success
- *Update Your Technology Plan*

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## Examples

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## Implementation

- How can a nonprofit executive better anticipate the hurdles that an organization will encounter when introducing a new technology – be it hardware or software?
- What can be done to increase the likelihood of success and the chances that the investment will pay off?

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### Implementation

Most organizations move in and out of these zones

Layer Three  
**Clear Skies**  
Rarely Achieved

Layer Two  
**Cloudy**  
Sometimes Achieved

Layer One  
**Terra Firma**  
Often Achieved

**What capabilities are valued?**

- Value delivered from IT investment
- Collaboration & Communication
- Information
- IT Strategy & Planning
- Effective Executor

**Who values this?**

- Funders
- Broad Members
- Executive Directors
- Senior Managers

**What capabilities are valued?**

- IT Management & Leadership
- Innovator
- Understand the organization
- Cost Controls

**Who values this?**

- Executive Directors
- Senior Managers

**What capabilities are valued?**

- User Support / Helpdesk
- Application Uptime or availability
- Stable/Secure Network & Desktop

**Who values this?**

- All Staff

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### Implementation

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**Funding Technology**

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**Funding Technology**

- **Build strong relationships with funders**
- **Incorporate technology into your annual strategic plan**
- **Focus on your mission and your program, not technology for technology's sake**
- **Budget technology expenses as shared costs, not overhead**

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**Funding Technology**

- **Maximize existing resources**
- **Generate unrestricted revenue where possible**
- **Use local community technology resources**
- **Partner with others for joint grant proposals**
- **Target likely technology funders**
  - **Arts Work Fund For Organizational Development ([www.artsworkfund.org](http://www.artsworkfund.org))**
  - The Donors Forum
  - The Foundation Center
  - iWave

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## Funding Technology

- Spend less on technology purchases
  - Donated Products
  - Recycled Hardware
  - Free Downloads
  - Other Software and Hardware Resources

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## Funding Technology

- Key Messages
  - Sustainability
  - Measurable Outcomes
  - "Can We Do It?"

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## Developing Strategies

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## Developing Strategies

1) **What is the opportunity or challenge?**

- **Why is it important to respond or take action on this?**
- **Do you have the skills or time to adequately respond?**
- **If not, what can you do to access the skills or make time?**

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## Developing Strategies

2) **Who needs to discuss it?**

- **What will this person provide that is essential?**
- **At what point do they need to be involved?**

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## Developing Strategies

2) **Getting everyone on the same page**

- **What is your goal for this meeting?**
- **What will success look like?**
- **What is the best time for the meeting?**
- **How will you share the details to prepare people?**

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Protecting Technology

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Disaster Recovery and Security

- How Critical is Technology to Your Organization?
  - Business *and* Technology Issues
- Document Systems in Place
- Backing Up Your System
- Where is Support Available?
- Policies and Practices for Security

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Conclusion

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**Conclusion**

*Vision without action is a daydream.  
Action without vision is a nightmare.*

- Japanese Proverb

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**Questions?**

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**Thank You!**

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