

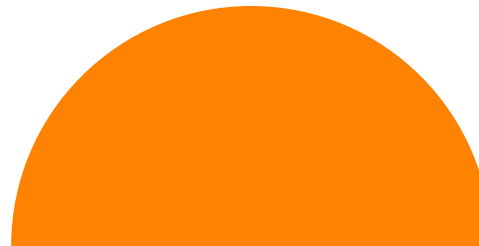


Create a Plan for Your Organization's Success:

Strategy + Data + Tech

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19 Sept 2022





Today's Agenda

- 1.** Assessment Frameworks
- 2.** Making a Plan
- 3.** Sector Findings
- 4.** Successful Tech Adoption

New Technology Adoption?

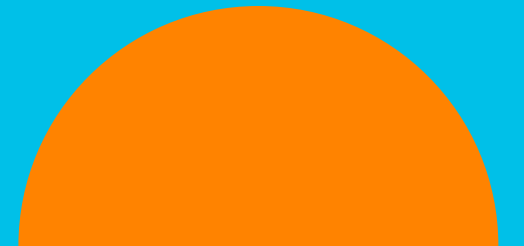
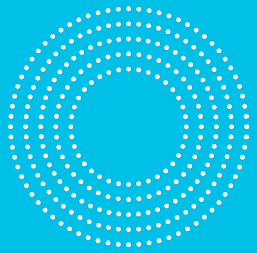
IT Strategy vs. IT Plan?

Hello!

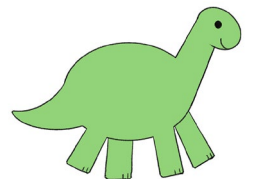
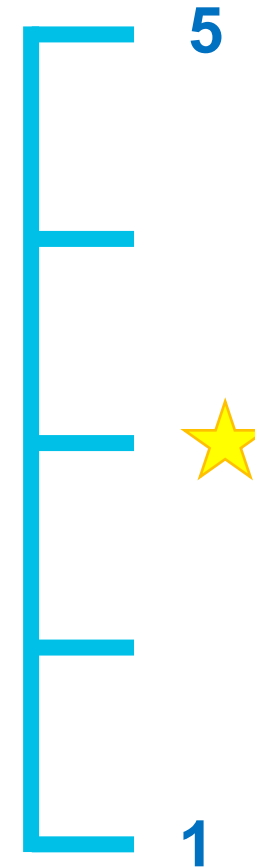
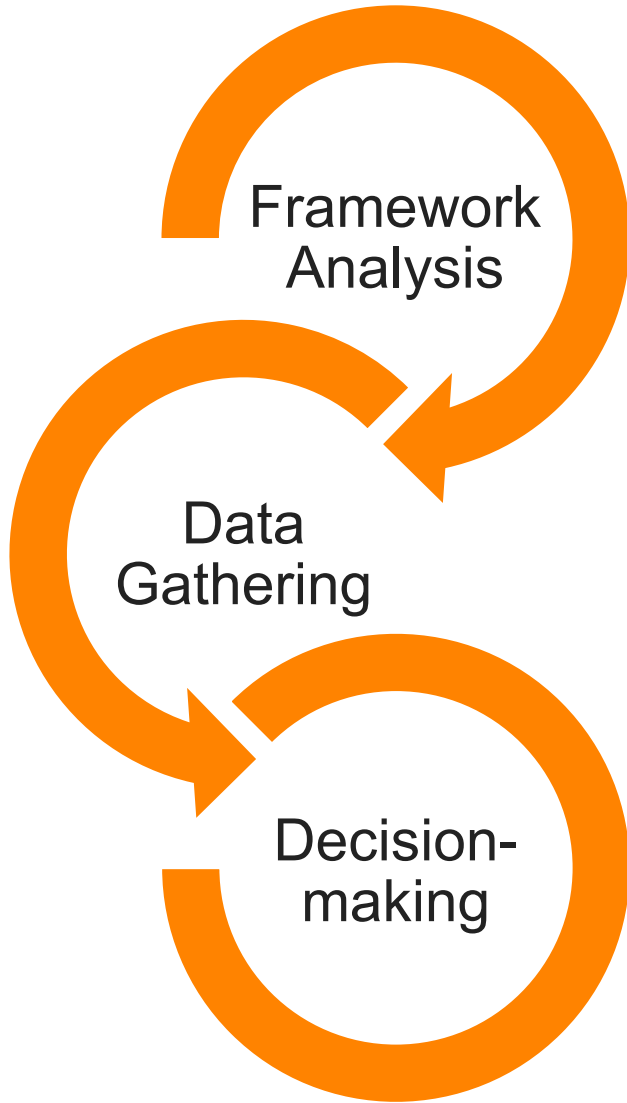




Assessment Frameworks



About Frameworks



Nonprofit Assessment Frameworks

- Reviewed 20 nonprofit assessment tools from around the world - and did a deep dive on 11 of them which came from the US, South America, Europe and Asia.
- Regional differences were not significant across the tools
- There was a lot of consistency in the digital transformation areas, and there were 7 common areas of assessment:
 - Internal systems
 - Communications and fundraising
 - Data
 - Risks
 - Culture, People and Skills
 - Leadership and strategy
 - Finance and sustainability



TechSoup's Assessment Framework

Organization Mission

Add your organization mission here

Beneficiaries

Who are your beneficiaries?

Strategic Goals

What are your top 3 strategic goals for the next 1-3 years?

Focus Areas

Based on your goals, pick your top 3 focus areas.

Program Delivery
& Management



Fundraising &
Development



Communications
& Marketing



Operations &
Collaboration



Digital Security



Hardware &
Infrastructure



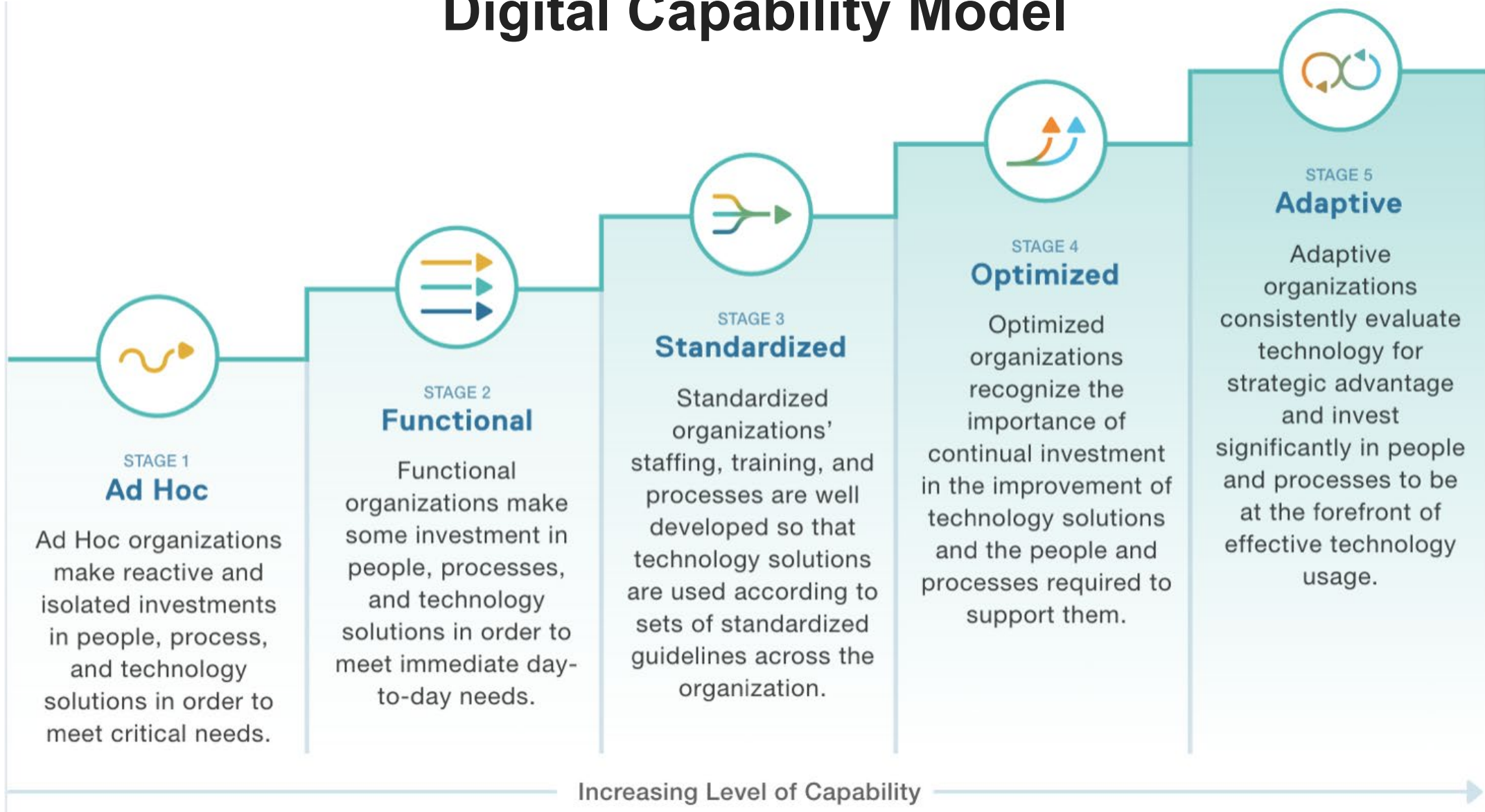
Tactics

Use the topics above to pick your tactics to meet your goals.

Framework → Assessment Tool

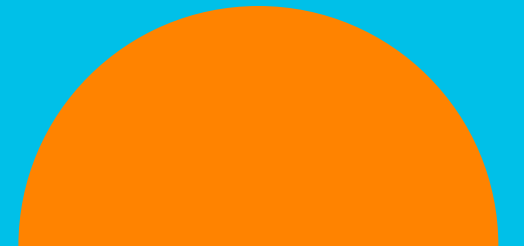
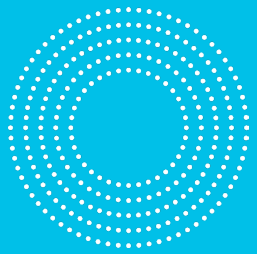


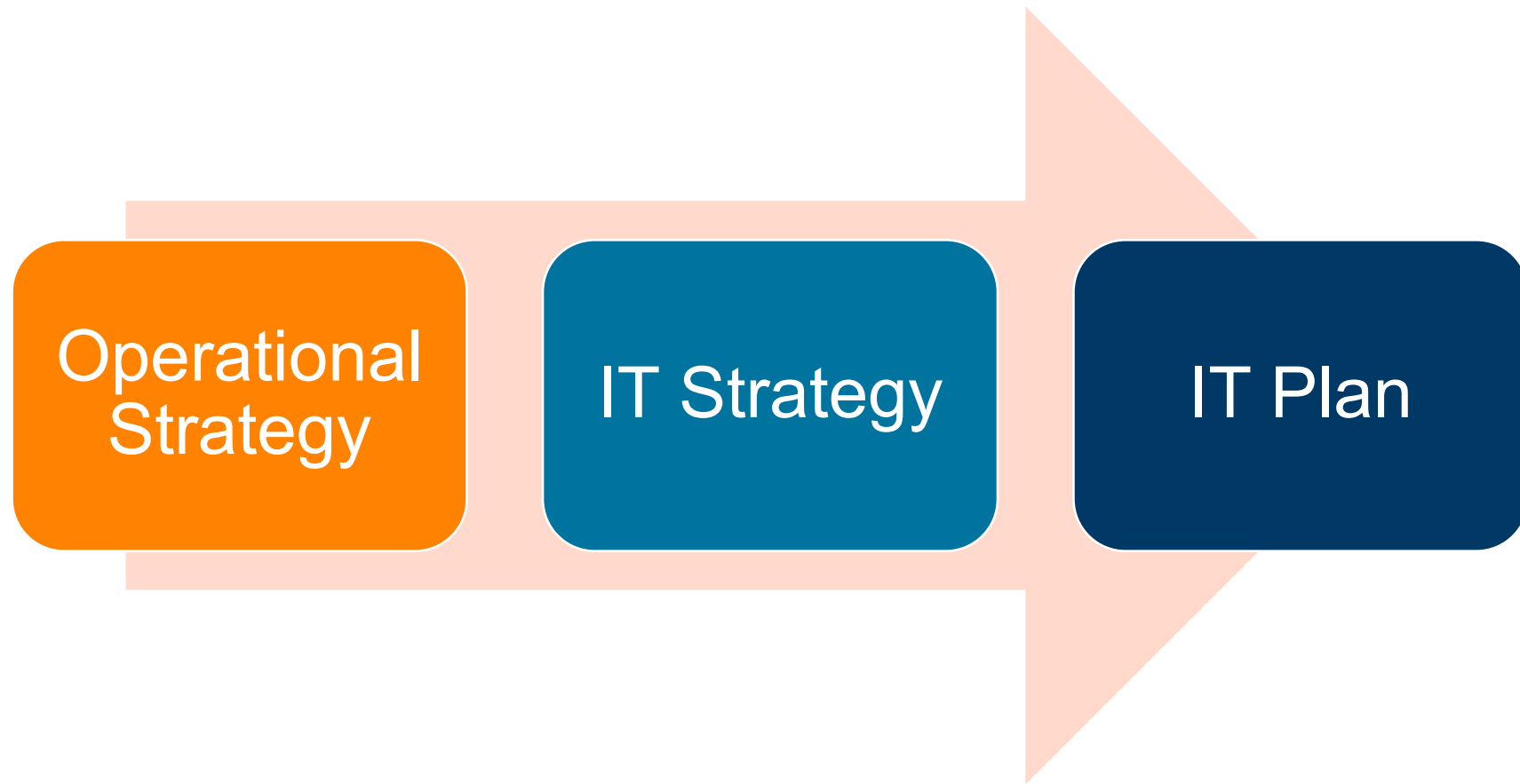
Digital Capability Model





Making an IT Strategy & Plan





Strategies & Plans



IT Strategy vs. Digital Transformation Strategy

- **IT Strategy** and **Digital Transformation Strategy** terms have become synonymous.
- **Organizational Strategy** should drive **IT Strategy**
 - Organizational strategy – directs what you need to do to meet your mission and goals; it guides the decisions you make related to resources.
 - Having a clear Organizational Strategy should ensure that everyone understands how their work supports the strategy and helps reduce conflict between teams' work.
- Your **IT Strategy** should be a business document; it is not meant to be a technical document, but rather a roadmap for where you would like to go with your organization's use of technology.
- The **IT Strategy Document** is meant to be a guide for an organization's management and board – directing how to make technology and operational investment decisions.

Building an IT Strategy – A Five Step Process

- 1. Understand your High-level Business Processes and organizational Strategy**
- 2. Assess existing and desired Applications, Infrastructure and Governance; Map current IT to “desired” IT**
- 3. Create a Narrative for your Mapping and identify areas of focus**
- 4. Bounce your areas of focus against trends in IT**
- 5. Finalize IT Priorities and Projects**

Step 1

Understand your High-level Business Processes and Organizational Strategy



Business processes support from technology forms the basis of an IT Strategy

- **What is the organization's target IT use profile? In general, organisations' use of technology falls into the following profiles:**
 - Sophisticated – Technology is an enabler of strategic advantage for the organization
 - Functional – Digital Technology/IT provides good business support to day to day operations
 - Basic – Digital Technology/IT is used where required by not a key focus of the business
- **List all your technology systems**

➤ **Next: Assessment!**

Step 2

Assess Existing and Desired Applications, Infrastructure and Governance



- Evaluate the infrastructure and applications that underpin your operational processes
- What SHOULD be in place to support the organization's operations from an Digital Technology perspective?
- What application systems and infrastructure CURRENTLY underpin business processes
- Technology governance and policies processes are in place?
- What support and training is in place?

Step 3

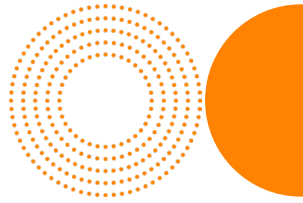
Create a Narrative for your Mapping and identify areas of focus



- Summarize your org's current status with regards to **Applications** supporting:
 - Operations – program delivery work
 - Business Systems – HR, Finance, Legal, etc.
 - Strategy, Management and the Board – Reporting, etc.
- Summarize your org's current status with regards to **IT Infrastructure** that supports the Applications
- Summarize your org's current status with regards to **IT Governance and Support**

Step 4

Bounce your areas of focus off of trends in IT



Technology continues to evolve and new tech offers opportunities for you to innovate the way you deliver on your mission.

1. Cloud Computing
2. Unified Communications and mobility
3. Data:
 - a. Business Intelligence and analytics
 - b. Data quality and governance
 - c. Evidence based social impact reporting
4. Artificial intelligence, machine and deep learning
5. Virtual Reality (VR)
6. Internet of Things
7. Cybersecurity compliance & best practices
12. Distributed Ledger Technology (Blockchain)
13. Multimedia storytelling and use of social media like TikTok, WhatsApp, Instagram, etc.
14. Online (virtual) events
15. Gamification Opportunities
16. Chatbots
17. Business Continuity and Disaster Recovery Plans
18. Systems integration to enable automation



Step 5

Finalize IT Priorities and Projects

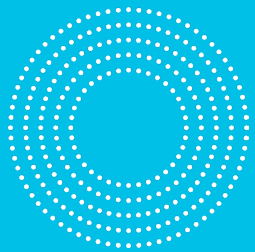
- List the projects that are already underway
- Add in the projects you've identified as the next major projects you want to undertake, and include:
 - Priority
 - Estimated cost
 - Impacted teams and systems/processes
- Create a timeline for when you want to tackle these projects over the next 3 years (don't try to go beyond 3 years)



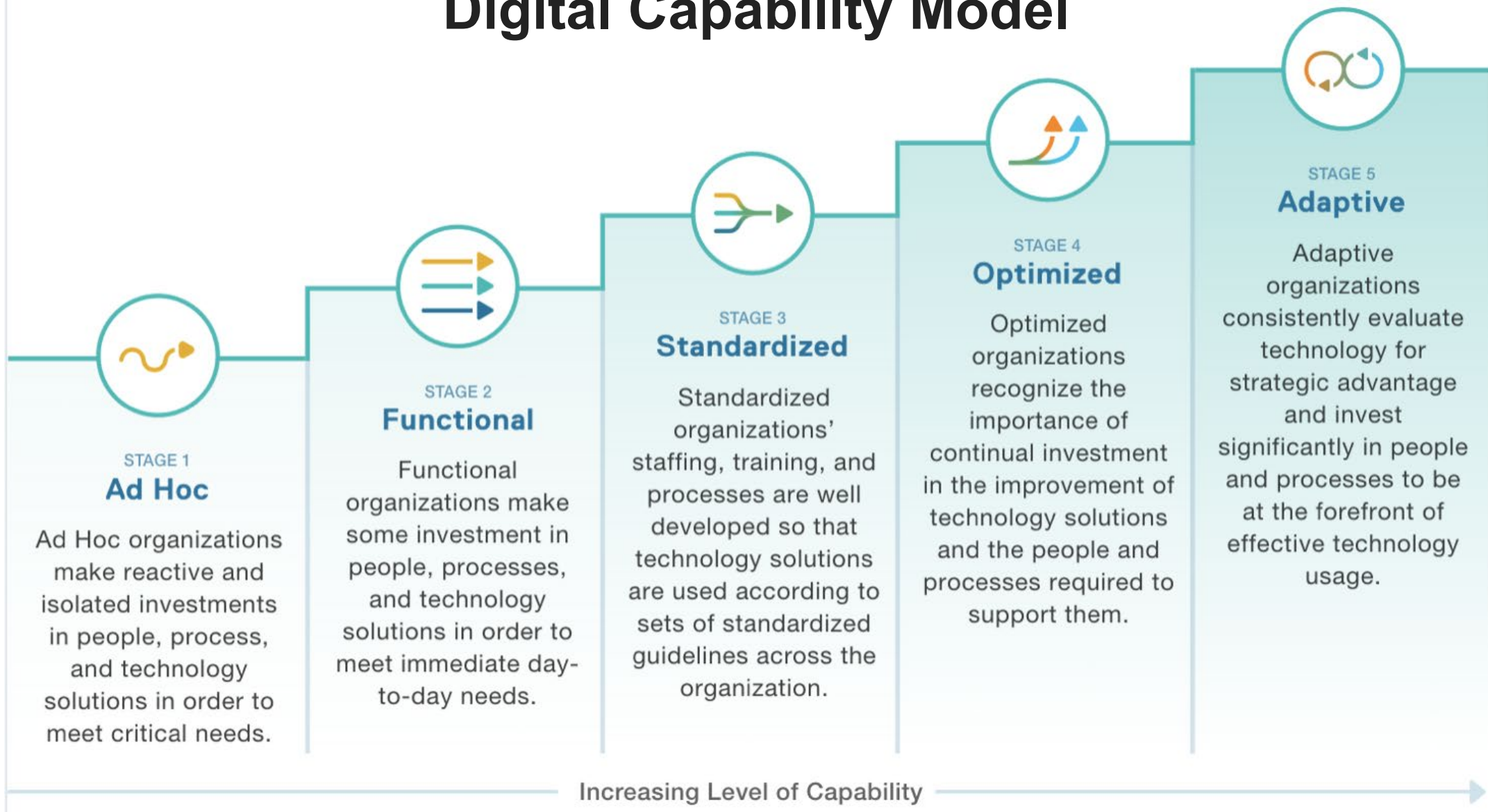
This is your IT Plan!



Sector Findings from the TechSoup Digital Assessment Tool



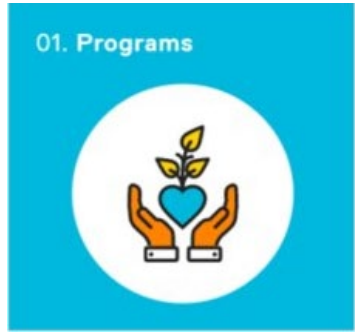
Digital Capability Model





Digital Assessment Framework

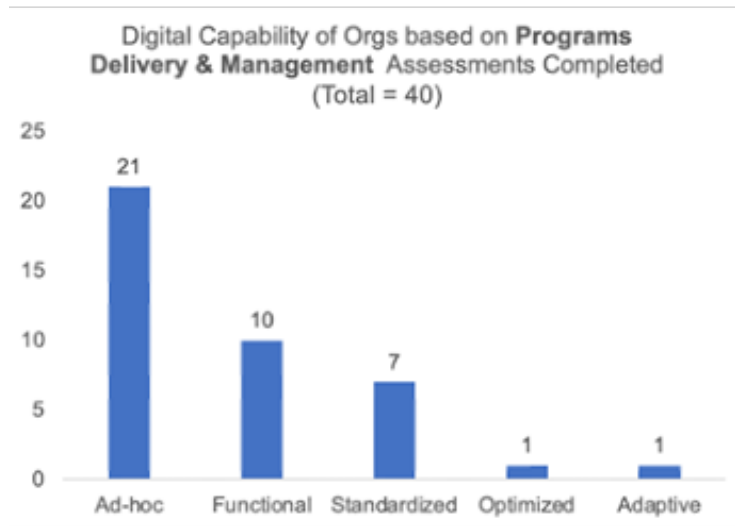
- A framework to assess the organizations' current digital capability.



Programs	Fundraising	Communications	Operations	Infrastructure	Security
Monitoring & Evaluation	Donation Processing	Organization Presence	Finance Management	Asset Management	Data Privacy
Service Delivery	Donor Stewardship	Content Creation	HR Management	Asset Maintenance	Business Resiliency
Beneficiary Management	Grants Management	Digital Marketing	Workplace Collaboration	Server Infrastructure	Device Management
Program Insights	Event Management	Marketing Insights	Information Management	Network Infrastructure	Threat Detection
			Business Insights	Identity Management	Threat Protection
					Authentication & Authorization

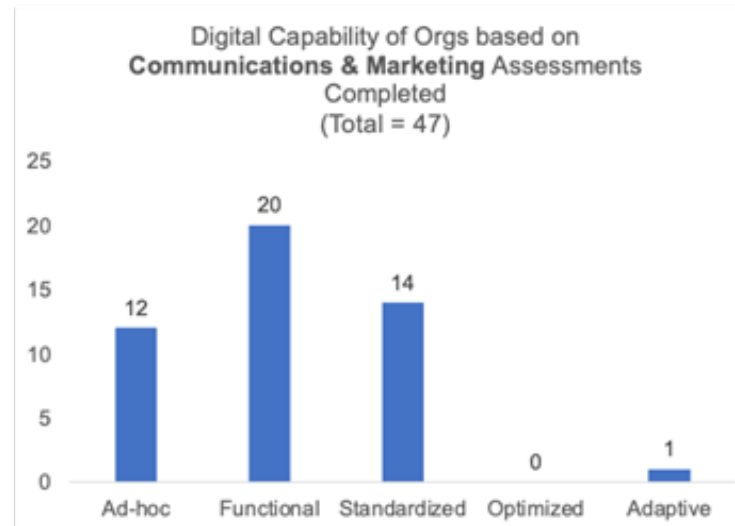
DAT Results – What we're learning

PROGRAMS & DELIVERY MANAGEMENT



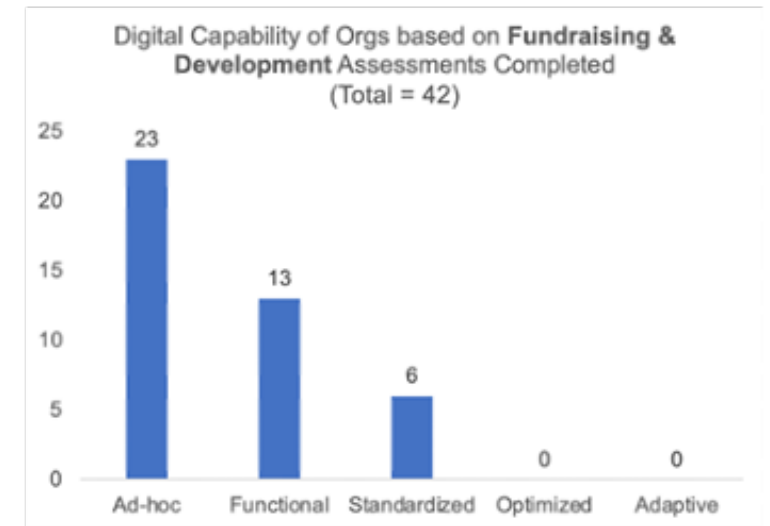
78% Orgs are Below Standardized Digital Capabilities

COMMUNICATIONS & MARKETING



68% Orgs are Below Standardized Digital Capabilities

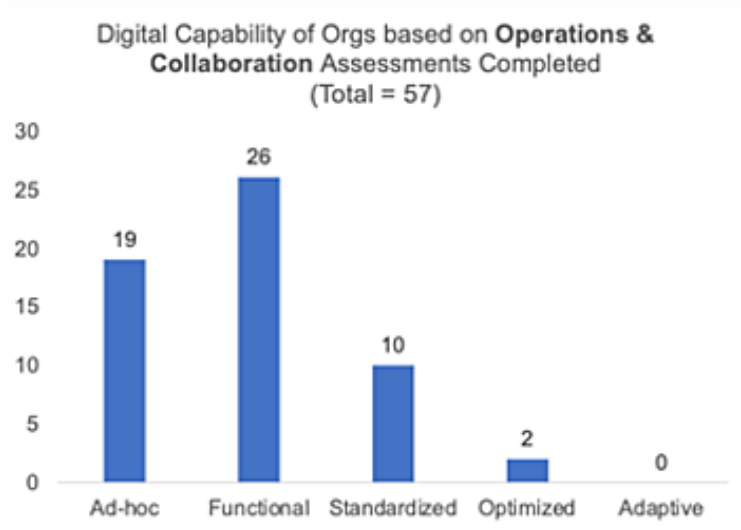
FUNDRAISING & DEVELOPMENT



86% Orgs are Below Standardized Digital Capabilities

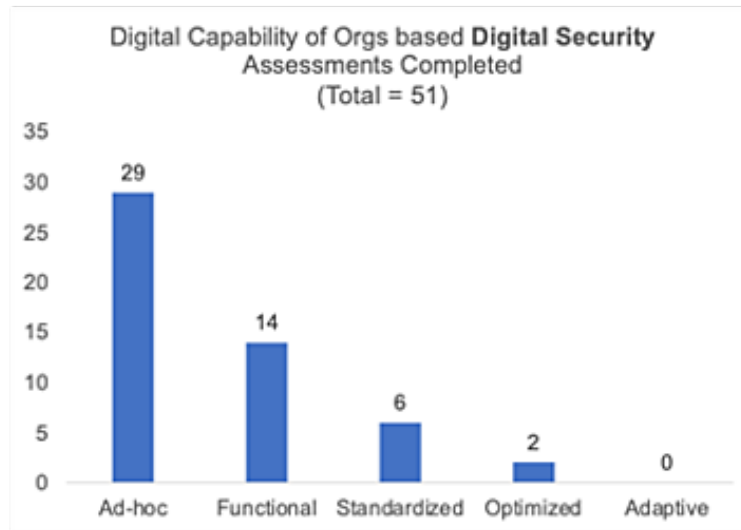
DAT Results – What we're learning

OPERATIONS & COLLABORATION



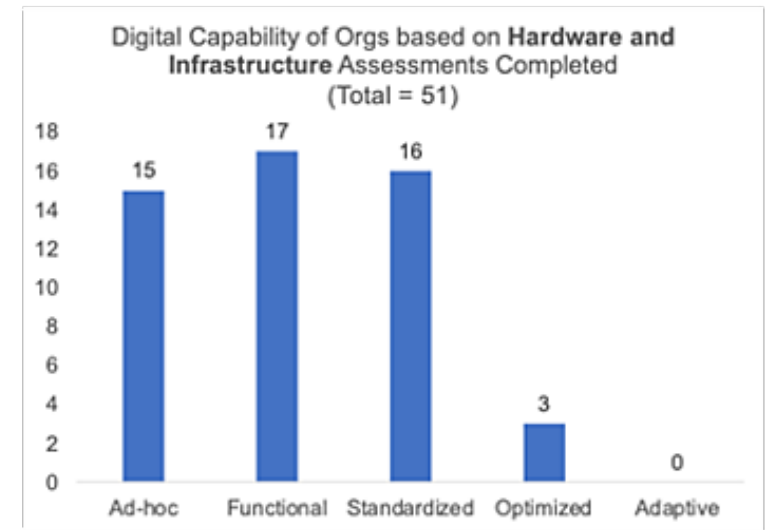
79% Orgs are Below Standardized Digital Capabilities

DIGITAL SECURITY



84% Orgs are Below Standardized Digital Capabilities

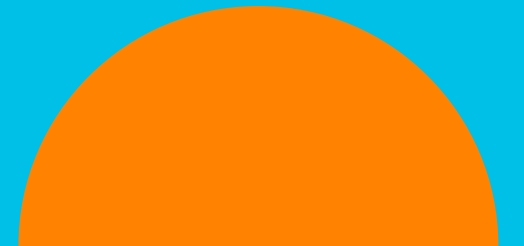
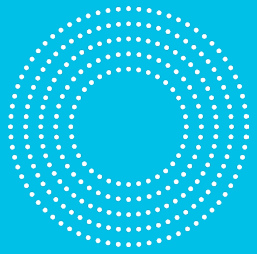
HARDWARE & INFRASTRUCTURE



63% Orgs are Below Standardized Digital Capabilities



Successful Tech Adoption



Digital Resilience Program - Findings

- Not a lot of digital strategies in place – but a lot of interest!
- ED and Board *enthusiastic* buy-in
- Need a tech champion and project leader
 - Add it to their job description
 - Measure performance against delivery
- Document how the tool will be used, best practices, security policies, etc.
- Training, training, training... (and did I say training?)
 - How to use the new technologies
 - Why they are being adopted
 - Policies and best practices
- Change is hard and sometimes it's 2 steps forward, 1 step back



Questions & Discussion

