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?
Assessment Frameworks
About Frameworks

Framework Analysis

Data Gathering

Decision-making
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.

<table>
<thead>
<tr>
<th>Program Delivery &amp; Management</th>
<th>Fundraising &amp; Development</th>
<th>Communications &amp; Marketing</th>
<th>Operations &amp; Collaboration</th>
<th>Digital Security</th>
<th>Hardware &amp; Infrastructure</th>
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<tr>
<td>![Program Delivery Icon]</td>
<td>![Fundraising Icon]</td>
<td>![Communications Icon]</td>
<td>![Operations Icon]</td>
<td>![Digital Security Icon]</td>
<td>![Hardware Icon]</td>
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## Tactics
Use the topics above to pick your tactics to meet your goals.
Framework → Assessment Tool

Assessment Categories
- Programs
- Fundraising
- Communications
- Operations
- Security
- Infrastructure

Rating Stages of Capability
- Ad Hoc
- Functional
- Standardized
- Optimized
- Adaptive

STEP 1
Nonprofit

STEP 2

STEP 3

Recommendation
Resource Types
- Software
- Hardware
- Courses
- Services
- Webinars
- Blogs
- Consultants
- Policies
Digital Capability Model

**Stage 1: Ad Hoc**
Ad Hoc organizations make reactive and isolated investments in people, process, and technology solutions in order to meet critical needs.

**Stage 2: Functional**
Functional organizations make some investment in people, processes, and technology solutions in order to meet immediate day-to-day needs.

**Stage 3: Standardized**
Standardized organizations' staffing, training, and processes are well developed so that technology solutions are used according to sets of standardized guidelines across the organization.

**Stage 4: Optimized**
Optimized organizations recognize the importance of continual investment in the improvement of technology solutions and the people and processes required to support them.

**Stage 5: Adaptive**
Adaptive organizations consistently evaluate technology for strategic advantage and invest significantly in people and processes to be at the forefront of effective technology usage.

Increasing Level of Capability
Making an IT Strategy & Plan
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 a 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
8. Distributed Ledger Technology (Blockchain)
9. Multimedia storytelling and use of social media like TikTok, WhatsApp, Instagram, etc.
10. Online (virtual) events
11. Gamification Opportunities
12. Chatbots
13. Business Continuity and Disaster Recovery Plans
14. 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

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Increasing Level of Capability
## Digital Assessment Framework

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

### Programs
- Monitoring & Evaluation
- Service Delivery
- Beneficiary Management
- Program Insights

### Fundraising
- Donation Processing
- Donor Stewardship
- Grants Management
- Event Management

### Communications
- Organization Presence
- Content Creation
- Digital Marketing
- Marketing Insights

### Operations
- Finance Management
- HR Management
- Workplace Collaboration
- Information Management
- Business Insights

### Infrastructure
- Asset Management
- Asset Maintenance
- Server Infrastructure
- Network Infrastructure
- Identity Management

### Security
- Data Privacy
- Business Resiliency
- Device Management
- Threat Detection
- Threat Protection
- Authentication & Authorization
DAT Results – What we’re learning

**PROGRAMS & DELIVERY MANAGEMENT**
- Digital Capability of Orgs based on Programs Delivery & Management Assessments Completed (Total = 40)
  - 21 Ad-hoc
  - 10 Functional
  - 7 Standardized
  - 1 Optimized
  - 1 Adaptive

78% Orgs are Below Standardized Digital Capabilities

**COMMUNICATIONS & MARKETING**
- Digital Capability of Orgs based on Communications & Marketing Assessments Completed (Total = 47)
  - 12 Ad-hoc
  - 20 Functional
  - 14 Standardized
  - 1 Optimized
  - 1 Adaptive

68% Orgs are Below Standardized Digital Capabilities

**FUNDRAISING & DEVELOPMENT**
- Digital Capability of Orgs based on Fundraising & Development Assessments Completed (Total = 42)
  - 23 Ad-hoc
  - 13 Functional
  - 6 Standardized
  - 0 Optimized
  - 0 Adaptive

86% Orgs are Below Standardized Digital Capabilities
DAT Results – What we’re learning

**OPERATIONS & COLLABORATION**

Digital Capability of Orgs based on Operations & Collaboration Assessments Completed (Total = 57)

- Ad-hoc: 19
- Functional: 26
- Standardized: 10
- Optimized: 2
- Adaptive: 0

79% Orgs are Below Standardized Digital Capabilities

**DIGITAL SECURITY**

Digital Capability of Orgs based on Digital Security Assessments Completed (Total = 51)

- Ad-hoc: 29
- Functional: 14
- Standardized: 6
- Optimized: 2
- Adaptive: 0

84% Orgs are Below Standardized Digital Capabilities

**HARDWARE & INFRASTRUCTURE**

Digital Capability of Orgs based on Hardware and Infrastructure Assessments Completed (Total = 51)

- Ad-hoc: 15
- Functional: 17
- Standardized: 16
- Optimized: 3
- Adaptive: 0

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