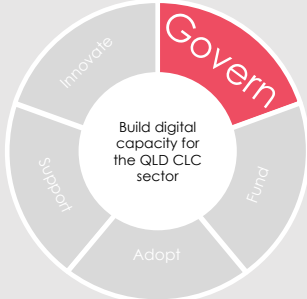


# Developing an IT plan

## 'Building Digital Capacity' resources series

Resource type:	Strategic area:	Use it to:
Guidelines		<ul style="list-style-type: none"><li>• Learn about what an IT plan is, how it can help your CLC and how to develop one.</li></ul>

*Current as of February 2020*

## 1 OVERVIEW

- ☐ What is an IT plan (and why your centre needs one)?
- ☐ When is a good time to do an IT plan?
- ☐ Who should put the plan together?

## 2 DEVELOPING AN IT PLAN

- ☐ Step 1: Establish current situation
- ☐ Step 2: Define, prioritise, and plan digital initiatives
- ☐ Step 3: Deliver the IT plan

Other relevant resources in our **Building Digital Capacity resources series**:

- *Assessing your CLC's digital capacity.*

### What is an IT plan (and why your centre needs one)?

With technology permeating every aspect of our working (and personal) lives, IT (Information Technology) is no longer an administration function stuck in the back office, but a capability that is essential to every facet of a CLC's operations. An IT plan is a way to take stock, plan and manage that capability to support and assist CLC staff, volunteers and clients.

Organisations with an IT plan have the means to proactively manage their digital capacity, and plan improvements and priorities in line with the centre's strategy. Those without a plan will tend to be reactive and limited to basic use of technology.

An IT plan is a core tool for building digital capacity for your centre, and putting a plan together will help your centre:

- get value out of its technology investment by focusing IT effort (time, resources, energy) on the priorities that align with the CLC's goals and have a clear positive impact for the organisation and its stakeholders;
- plan and deliver the right technology solutions at the right time whilst managing the pace of technical change for staff and volunteers;
- identify costs savings and efficiency improvement opportunities, and maintain better control over total cost of ownership;
- manage risks associated to technology.

*'An IT plan is still the best way to move up the technology maturity ladder – organisations without an IT plan are twice as likely to rate their technology as "basic" or "challenged" compared to those with an IT plan'.*

Source: [Digital Technology in the not-for-profit sector 2019 report](#).

### When is a good time to do an IT plan?

There is never a bad time to take stock and create your IT plan. However, if you can, you should aim to align your IT plan development with other business activities:

- the strategic planning process is a great driver for developing your plan, so if your centre is about to enter a strategic planning process, plan to do your IT plan after that so you can let business goals guide digital priorities;
- outside of the strategic planning process, your centre's calendar for developing operational plans and budgets can inform when to do your IT plan;
- you can also do your IT plan outside of those processes, but use your strategic and operational plans as input towards the IT plan's development.

IT plans are best done for a 3-year period with annual review and adjustment.

## Who should put the plan together?

Developing an IT plan requires capacity and you should consider how to involve your teams in leading and participating in this exercise:

- One person in the CLC should own the IT plan: who to select will depend on your centre's organisation and structure. The person who owns the plan will be responsible for coordinating input, engaging with the team, collating information and developing the document. They also own the overall execution of the plan and its regular review and update.
- The person who develops the plan does not need to be a 'techie', but they should have a sound understanding of technology and its relevance to CLCs. They should also have a good understanding of the centre, its goals and operating model.
- Even if you have IT resources, don't restrict participation to that team: it's essential to get input from other members of staff and volunteers, especially when trying to identify key pain points and needs, and validating priorities for the centre.
- Don't forget your management committee (MC)/board: consult with your MC/board members on their own take on technology for your centre. Engaging your MC/board upfront will also help with decisions on future technology investment, and they can assist with providing strategic guidance and governance oversight.

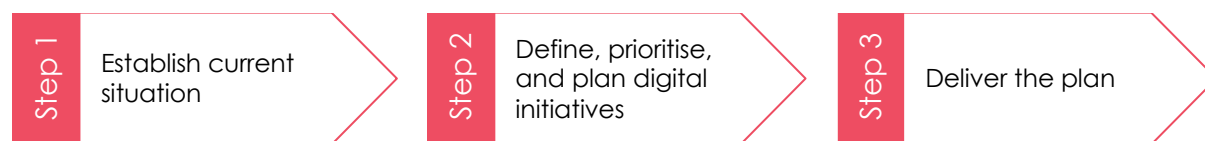
### Getting help in developing your IT plan

Your centre may not have sufficient capacity or skills to develop an IT plan. If this is the case, here are some alternatives to explore:

- Seek pro bono assistance from qualified professionals: this could be from a consulting firm or perhaps a legal firm with an IT department, but it should be from someone who has adequate experience and skills in running this type of exercise.
- Engage an external expert: you can decide how much or how little you want them to do (see part 2 below for an overview of the activities involved in developing the IT plan). For example, you could carry out the baseline assessment, and get an expert to review and help you with planning and prioritisation.
- Follow a course: ConnectingUp offers a ['Digital Transformation / IT Strategy on a Plate' course](#) for small to medium size non-profit organisations. The course is delivered via a series of 6 webinars over a couple of months and costs \$2000 (as of January 2020).

## 2 - DEVELOPING AN IT PLAN FOR YOUR CENTRE

The development of an IT plan is done in three key steps:



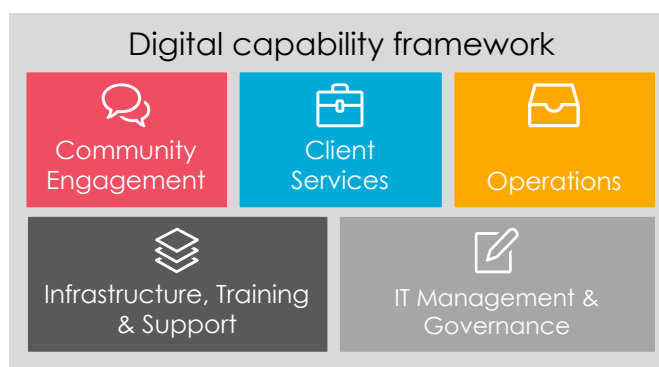
### Step 1: Establish current situation

All centres come with a technology legacy and the first step to take when developing an IT plan is to establish a clear picture of what you have. This will give you a baseline to work from and help you identify any gaps or challenges.

Establishing your current digital capacity level will take more or less effort depending on your centre's size, and whether you already have processes in place to track what technology you have in place. Your ability to answer the question "what do we currently use?" will be an early indicator of how your centre approaches technology and its governance.

To establish your current digital capacity level, take the *Assessing your CLC's digital capacity* questionnaire in our **Building Digital Capacity resources series**.

This self-assessment questionnaire takes you through a comprehensive review of your current state using the digital capability framework.



#### Gathering information on what you currently have and what you need:

- Refer to any existing IT documentation and resources for your centre.
- Your centre's strategic plan is a key input towards identifying your needs: review your CLC's strategic goals and identify where technology needs to play a part.
- Get input from staff, board and volunteers: this will strengthen engagement and allow you to get different perspectives. If you have a large team, consider running the questionnaire as a survey, or ask key departments to fill out the questionnaire for their function.
- Consider getting input from your clients, especially on questions related to their own usage of technology to access your services.

## Step 2: Define, prioritise, and plan digital initiatives

Once you have completed step 1, you will have a good idea of what currently works for your centre, and where any gaps lie. This will form a key input towards identifying core needs for your centre. Typically, you will have a number of needs and gaps identified for each of the framework's capability areas.

As an example, the digital strategy development identified the following needs – these were across the sector, so some may apply to your centre, others not, especially in terms of how important they may be to your CLC:

<b>Community engagement</b> <ul style="list-style-type: none"><li>• New websites</li><li>• CRM / supporter communications tools</li></ul>	<b>Client services</b> <ul style="list-style-type: none"><li>• CLASS improvements</li><li>• Practice management tools improvements</li><li>• Clients digital access to services</li></ul>	<b>Operations</b> <ul style="list-style-type: none"><li>• Knowledge management &amp; collaboration</li><li>• Rostering capabilities</li></ul>
<b>Infrastructure, Training &amp; Support</b> <ul style="list-style-type: none"><li>• Infrastructure and IT support improvements</li><li>• Technology/digital skills training</li></ul>	<b>IT Management &amp; Governance</b> <ul style="list-style-type: none"><li>• Digital governance</li><li>• Technology risk management</li></ul>	

Once you have identified key needs in your centre across the capability framework, you can translate those into tangible digital initiatives such as:

- Replace our website (Community Engagement)
- Improve intake process (Client Services)
- Consolidate documents and files into cloud-based solution (Operations)
- Source more cost-effective telco solution (Infrastructure, Training & Support)
- Develop technology risk management plan (IT Management & Governance).

Prioritisation of needs and careful planning of technology improvements is critical and can be difficult to do. It's tempting to try to get everything done at once, and planning things to happen in one or two years from now can feel disheartening. However, it is essential to manage the pace of change and make your IT plan realistic and achievable. The following tables provide criteria to use when establishing priorities for your digital needs and initiatives.

Key criteria		Guiding questions*
<input type="checkbox"/> <b>Value</b>	Qualify the benefits of the initiative (tangible and intangible) together with its value for internal and external stakeholders.	<ul style="list-style-type: none"> <li>• Will this create significant, tangible impact for our CLC, our clients and the sector?</li> <li>• Is this aligned with our strategy?</li> <li>• Are we putting ourselves at risk if we don't do this?</li> </ul>
<input type="checkbox"/> <b>Time</b>	Qualify the urgency of the initiative, the implementation readiness and the risks associated with delays	<ul style="list-style-type: none"> <li>• Do we need to have this in place within the next 6 to 12 months?</li> <li>• Are there issues (internal or external) we need to consider that mean this could become an urgent priority (for example, is there a mandate by the funder to deliver certain performance metrics by a given date?)?</li> <li>• Could this initiative take a long time, and if so, should we get started ASAP?</li> <li>• Are we putting ourselves at risk if we wait any longer?</li> </ul>
<input type="checkbox"/> <b>Investment</b>	Qualify at the required investment, both in terms of external costs (e.g. engagement of specialist services, purchase of software licenses, etc.), and internal (e.g. staff capacity requirements), and the likelihood of successfully funding the initiative.	<ul style="list-style-type: none"> <li>• Do we have funding available for this, or are we confident we can get funding?</li> <li>• Do we have internal capacity we can dedicate to this?</li> </ul>

\* Initiatives that have the most 'yes' answers to these questions will be higher priorities for the centre, and should be planned accordingly.

Every project carries risks; therefore, a risk assessment should be performed for each digital initiative.

Run the prioritisation process with key representatives from your CLC so you have different teams and perspectives represented and engaged in the process.

### Step 3: Deliver the plan

Once you have completed step 2, you are ready to put your IT plan together. The IT plan is a document that will help you communicate and share with your team (including your MC/board) what your centre intends to undertake in terms of key technology changes and improvements. Below is a simple structure for the document:

Section	Content
Executive summary	<ul style="list-style-type: none"><li>• 1-2 page snapshot summarising the IT plan.</li></ul>
Context and objectives	<ul style="list-style-type: none"><li>• Summary of key reasons to undertaking the development of the plan, together with any broader context relevant to the exercise (e.g. CLC's strategic plan).</li><li>• Process: summary of process undertaken to develop the plan, including consultation activities undertaken.</li></ul>
Current state, needs & priorities	<ul style="list-style-type: none"><li>• Summary of key findings from the digital capacity assessment questionnaire (details can be added to the plan as an appendix, or kept separate as reference documentation).</li><li>• List of key gaps and needs identified across digital capability areas (ref. digital capability framework) and resulting digital initiatives for the centre.</li><li>• Digital initiatives prioritisation process and outcomes.</li></ul>
Technology roadmap	<ul style="list-style-type: none"><li>• Proposed schedule of digital initiatives (informed by the prioritisation process).</li><li>• Proposed approach for delivery of the various digital initiatives including considerations for:<ul style="list-style-type: none"><li>- funding / resource needs;</li><li>- possible technology solutions;</li><li>- dependencies on other internal or external activities/events;</li><li>- change management and staff/CLC teams readiness;</li><li>- possible barriers and risks.</li></ul></li></ul>
Appendices	<p>Any additional details that support the plan. This could include:</p> <ul style="list-style-type: none"><li>- detailed results from a survey;</li><li>- technical information such as diagrams, systems maps, etc.;</li><li>- preliminary quotes or assessment for specific digital initiatives,</li><li>- etc.</li></ul>