

Session 2: Forming a Technology Team



Acknowledgements

Much of the content in this training was provided by NPower and adapted from their signature course, *Technology Strategies for Nonprofit Leaders*. Learn more about NPower at www.NPower.org, or visit their online technology planning tool, TechAtlas, at www.techatlas.org.

Additional content and other elements were adapted from *Wired for Good* by Joni Podolsky (March 2003, \$35, Paper) by permission of Jossey-Bass /A Wiley Imprint. More information on *Wired for Good* is available at the following web site:

<http://www.josseybass.com/WileyCDA/WileyTitle/productCd-0787962791.html>

Learning Objectives

After this session, you will understand

- ▶ The purpose of a technology team
- ▶ Why forming a technology team is essential to meeting your technology goals
- ▶ Who should be included on the technology team
- ▶ The skills of the technology team members

What is a technology team?

Some of you may be thinking, *I don't have any technology staff, how can I have a whole team?* While others are thinking, *I don't need a technology team when I have an IT department.* But before you skip this session, please read on.

The key concept of creating the technology plan is identifying your business needs and then selecting the technology to achieve them. This requires a variety of knowledge, experience and expertise from all levels of your YMCA.

The technology team oversees the implementation, evaluation, revision, and refinement of the technology plan.

In addition, technology needs to be integrated into your mission and culture in order to be successful. Technology can advance your YMCA and its mission but not until it is understood and accepted.

The technology team works to break down any barriers to technology within your Y and create a sense that technology is integral to the future of your association.

Therefore, the team should include a range of those who openly embrace technology to those who voice concern, so that you can address issues that may become obstacles to technology before they appear.

Who's on the team?

A successful technology plan should reflect the entire YMCA because all areas will be affected by technology decisions. Representatives should include a mix of your YMCA's key leadership, administrative/program staff, and those with specific technology-savvy or experience. Some people to consider include:

- ▶ Leadership (Executive Director/CEO) and other partners
- ▶ Board members
- ▶ Finance staff (CFO)
- ▶ Program staff from major services areas (camping, child care, etc.)
- ▶ Membership staff
- ▶ IT (Information Technology) Staff from the YMCA or local corporations
- ▶ Financial Development staff
- ▶ Sales and service staff
- ▶ Volunteers with special expertise
- ▶ Consultants

Leading the Team

Because not all team members will be involved in every aspect of the technology planning, you should appoint a sponsor and a project manager/team leader. Remember that it is critical to encourage involvement while also using people's time wisely.

- The **Sponsor** is often the Executive Director or Board. The sponsor
 - Makes the team's mission of developing the technology plan a priority
 - Allocates appropriate staff time
 - Is both an internal and external advocate for the process
 - Commits to allocating and securing the appropriate funding and in-kind resources

- The **Project Manager/Team Leader** is the person is responsible for making sure the plan gets done. The Team Leader should have, and should communicate to other members of the team, the endorsement of the CEO and Board, so that the technology team feels empowered to make decisions.

Important! Experience shows that the IT Director is NOT the best person to lead this effort. The plan's project manager must have a big-picture view of the organization.

How big should the team be?

For ease of working together, a good guideline is to include no more than twelve members. The scope of the work involved is too much for just one individual, and most importantly, a plan that does not have the involvement of multiple stakeholders is unlikely to get the wide-spread support needed to implement it.

One thing to remember when building a team that bridges across functions is that you may be bringing together people who have never worked with each other before. For example, you may very well have a receptionist working together with a board member. This will naturally create the need to establish group norms and decision making criteria so that the group is more easily able to work together productively.

Skills needed

The following are skills and qualifications you should look for when forming your technology team:

- ▶ Team Skills — communication, facilitation, and decision-making
- ▶ Project Planning — ability to develop timelines, budgets, evaluation, etc.
- ▶ Process Planning — information mapping, process management
- ▶ Decision-making and budgetary authority Facilities or operations expertise
- ▶ Expertise in network architecture, network installation, and network support

Note: One person may have multiple skills.



Your Turn: Who should be on my technology team?

In the space below, list your ideas for who should be on your technology team.





Your Turn: Team building barriers and strategies

Think about the potential difficulties you may encounter when trying to form a technology team at your YMCA. What can you do to overcome them? Take a moment to brainstorm and jot your ideas in the spaces below.

Potential Barriers/Pitfalls	Suggested Strategies
The process gets stalled because of busy schedules. It's hard to keep everyone informed about where we are.	
We get distracted by other priorities and lose track of where we are in the process.	
With staff turnover, we lose institutional memory about our accomplishments to date.	
We keep bumping into the same problems and get frustrated when we know we've resolved them before.	
We try to keep our team meetings brief, but they tend to stretch out way too long because there's so much to cover.	
We never seem to be able to finalize a project, or move past key decision-making points.	
<i>List any other barriers here.</i>	

Technology Vision and Commitment to Success

Rally the Troops

Once you've created your technology team, you need to make sure you have full commitment to the cause and a clear understanding of what you are trying to accomplish. In order to achieve that, here are a couple things you can do.

Hold a meeting with your technology team and create the following two documents:

- a Technology Vision Statement
- a Letter of Commitment or Statement of Commitment to Success

Purpose of the Technology Vision Statement

Before you begin to evaluate specific operations software packages, it is important to know what you want to do with it. As explained in Session 1, technology planning must support your YMCA's business goals. The Technology Vision Statement helps you articulate how technology will help you achieve those goals.

A vision statement

- ▶ becomes a reference point for making decisions
- ▶ keeps the focus on using technology to support your Y's business operations

When developing a technology vision statement, begin with the business strategic goals that you defined in the *Dimensions of Vitality* document and state how technology can assist in accomplishing that goal. You may want to break your business goals down by function or department with a vision statement for each.

Sample Technology Vision Statements

Membership. Membership dues play an important role in most YMCAs. Also most YMCAs want to raise their retention rates. So one of your organization's strategic goals might be:

The YMCA needs to increase its membership retention rate by 5% over the next year and 15% over the next three years.

Now to incorporate technology:

The YMCA needs to increase its membership retention rate by 5% over the next year and 15% over the next three years. This will be accomplished through better tracking of memberships in our database. Also we will create an automated process that will remind staff to contact and follow up with new members or members that haven't visited in X period of time.

Childcare. *The Child Care Directors need better access to rosters, emergency information and schedules in order to better manage remote sites.*

Now to incorporate technology:

The Child Care Directors need better access to rosters, emergency information and schedules in order to better manage remote sites. This will be accomplished by getting the directors access to the information they need by remote access to the database or reports.

Association-level. *Need to better communicate YMCA's mission and services to the members, volunteers and the community.*

Now to incorporate technology:

Need to better communicate YMCA's mission and services to the members, volunteers and the community. This can be done through enhancing the content on our web site, setting up email communications, tracking information better to be shared and allowing more access to view present information.

Purpose of the Commitment to Success

The Commitment to Success document allows you to formally declare your YMCA's commitment to the technology planning process and secure staff support. This is a great way to involve and motivate all members of your technology team. With a signed document, members know they have committed themselves to a certain level of responsibility and that they have agreed to work towards successful completion of the project. The next page shows a sample Commitment to Success document from the YMCA of Broward County.

Commitment to Success

The YMCA of Broward County has made the decision to use YMCA Technology Resource Group services, and is dedicated to reviewing its business processes to obtain better management and to leverage information for higher value.

Being aware that the successful implementation of such an initiative requires the:

- commitment of top management;
- participation and dedication of the system's future users (i.e. staff at all levels);
- backing and support of subject matter experts, key leaders and volunteers;
- acceptance of the product's natural limitations;
- development of interfaces with current operational systems and with those under development;
- effort of consultants, with due respect for the know-how and culture of the company;
and
- spirit of collaboration on the part of all;

we, the undersigned, reaffirm our commitment to the success of this project.

We shall seek to implement processes efficiently, make resources available, make decisions necessary to lend continuity to the work, and collaborate among ourselves to transform this challenge into a benefit for **The YMCA of Broward County** and to the professional satisfaction of all involved.

Signed,



Your Turn: The Vision and Commitment to Success Statements

Write a brief Technology Vision statement and Commitment to Success statement for your YMCA.

Technology Vision Statement (Homework for Sharepoint)

You will post this part of the exercise to your group's Sharepoint site. Create a discussion item, call it "Vision Statement," type in your vision statement, and save your post.

Commitment to Success Statement

Resources

[Summit Collaborative](#) Summit Collaborative helps foundations, nonprofit networks and support providers build nonprofit power. We provide a range of services including strategic advising, facilitation, program development, technology and Internet strategy and production of nonprofit focused content. We specialize in the building collaboratives and learning communities that strive to improve their effectiveness and increase their impact

[“Strategic Technology Toolkit”](#)

[TechSoup](#) offers several excellent articles and tip sheets about pulling together your technology team, including:

["Establishing Leadership and Support Your Tech Plan \(staff\)"](#)

["Establish Leadership and Support \(Management\)"](#)