

Session 1: Introduction to Operations Software Selection





Acknowledgements

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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

This session will introduce you to the following concepts:

- the operations software selection process
- technology planning
- types of technology plans



Overview of Operations Software Selection

YMCA of the USA's Operations Software Selection (OSS) process is designed to help YMCAs who want to implement operations software in selecting the most appropriate solution for their association.

OSS involves several phases, including this email-based training. Although you may be starting this training at a different point in the process, to receive full benefit from the program, your YMCA should complete *all* steps listed below.

OSS Cycle of Events

The following outlines the best practice model that YMCAs should follow once they decide to participate in the OSS process.

1. The YMCA works with the Y-USA Network Consultant for their area to complete the *Dimensions of Vitality* and Service Delivery Plan. Through this work, the YMCA assesses the health of their organization in all key areas, including operations and technology, and identifies strategies for improvement.
2. Once the Network Consultant and YMCA have determined the need to implement a new operations software system at the association, the Network Consultant contacts Y-USA's Technology Resource Group (TRG) who will engage the Y in the Operations Software Selection program.
3. The YMCA attends a neighborhood meeting with other YMCAs, lead by TRG staff and the Network Consultant to discuss technology needs and identifying the technology planning process. TRG's Software Evaluation tool is introduced.
4. The YMCA completes the OSS email-based training, which introduces the concepts and stages of selecting operations software.
5. Using the software evaluation tools identified in the OSS training, the YMCA completes their association's evaluation.
6. The YMCA attends a second group meeting with their completed assessment. This meeting will be used to answer questions, define next steps, and begin work on a software needs assessment for the group as a whole, as well as discuss how to incorporate a business case and benefit analysis.
7. The YMCA completes the TechAtlas Technology Assessment tool, which provides an overall picture of technology use in the organization.



8. The YMCA attends a third group meeting to define the technology provider scripting and scoring process, select software providers to evaluate, and determine which products they would like to view. Team will assign members to perform reference checks on selected providers.
9. Each YMCA does some research on each of the proposed providers to prepare for the demonstrations.
10. The YMCA attends a fourth group meeting with the software providers they have selected to view demonstrations of products and score them according to the Y's needs. This meeting needs to be an appropriate length to allow for complete demonstrations.
11. Use the provided questionnaires to interview provider support personnel and existing customers.
12. The YMCA begins implementation of the operations software product they have chosen.



The Technology Plan

Whether your YMCA is implementing technology for the first time, or is moving to a new system to support your business operations, your association must have a technology plan. Planning for technology is essential to ensure that the investments you make in hardware, software, and other resources result in technology that continues to *advance*—not hinder—your business goals.

Note that in this training, the term *technology* refers to information technology (IT):

IT is any form of hardware or software (such as computers, software applications, telephones, modems, or servers) that supports the management of information for an organization's functions.

What is a technology plan?

A technology plan is ...

- ▶ A detailed, written document that connects your YMCA's current and future use of technology to achieving your YMCA's business goals
- ▶ A roadmap for implementing a *process* that fundamentally changes the way information is processed at your YMCA
- ▶ A tool for budgeting and fundraising for capital projects, training, and other technology costs
- ▶ A framework for decision-making and evaluating technology projects
- ▶ A living, evolving document that changes with your association and your needs

Guiding principles of technology planning



- ▶ YMCAs and other nonprofits have developed tried and true strategies for success in meeting their mission and can apply those same strategies to technology: **budget-minded planning, mission-driven implementation and oversight, and continuous evaluation.**

- ▶ Technology solutions work best when **people at all levels and activity areas of the association contribute** to the planning and evaluation processes.

- ▶ An understanding of the technology planning process **will assist senior leaders** in integrating technology planning with association-wide strategic planning, budgeting, and implementation.

- ▶ Relationships are at the heart of the YMCA mission. **Technology does not replace relationships**, but can be a tool for establishing, building, maintaining, and expanding communication to assist YMCAs in accomplishing their missions.



Technology plan benefits

Both the process of technology planning and the technology plan document, itself, offer significant benefits.

The benefits of following a planning *process* are as follows:

- Planning is an opportunity to improve existing processes *without* regard for technology. Technology placed on top of flawed processes will only make the situation worse, not better. You may discover that some process improvements can be made without the addition of technology at all.
- Planning creates organizational learning. Staff engaged in the planning process are likely to make unexpected discoveries along the way, such as where processes have become inefficient or where there is duplicated effort. By working together to create the technology plan, staff become more closely aligned, sharing a new language, and will ultimately learn new and better ways of working together.
- Planning enables your organization to effectively target resources. Without planning, it is easy to purchase equipment that is not needed, that is inappropriate, or that is not robust enough. Planning helps avoid wasteful purchases and allows you to identify new equipment, support, and training that are needed.

The benefits of the technology plan *document*, are as follows:

- **The planning document is a historical record.** As such, the plan communicates critical information to current staff, new employees, the board, consultants, volunteers, and vendors. It provides a record that documents past, current, and future thinking, such as the criteria used in making key decisions. It incorporates inventories, diagrams, maintenance records, and service contracts, which are essential information for those who need to know where the organization stands. This significantly cuts down the time you need to orient new staff or others who are providing technology services to your organization.
- **The planning document is a reference tool.** By having decisions, processes, and infrastructure documented, the technology plan is a blueprint for all current and future



decisions. No new technology should ever be implemented without first referencing the technology plan and determining whether it fits into the plan.

- Finally, **the planning document is mandatory if you are applying for technology grants or other sources of funding for your technology projects.** Funders have a vested interest in making sure that the technology they fund will help your Y advance its mission, and that you have realistically planned for the resources and training to support the technology.



Your Turn: Benefits and Outcomes

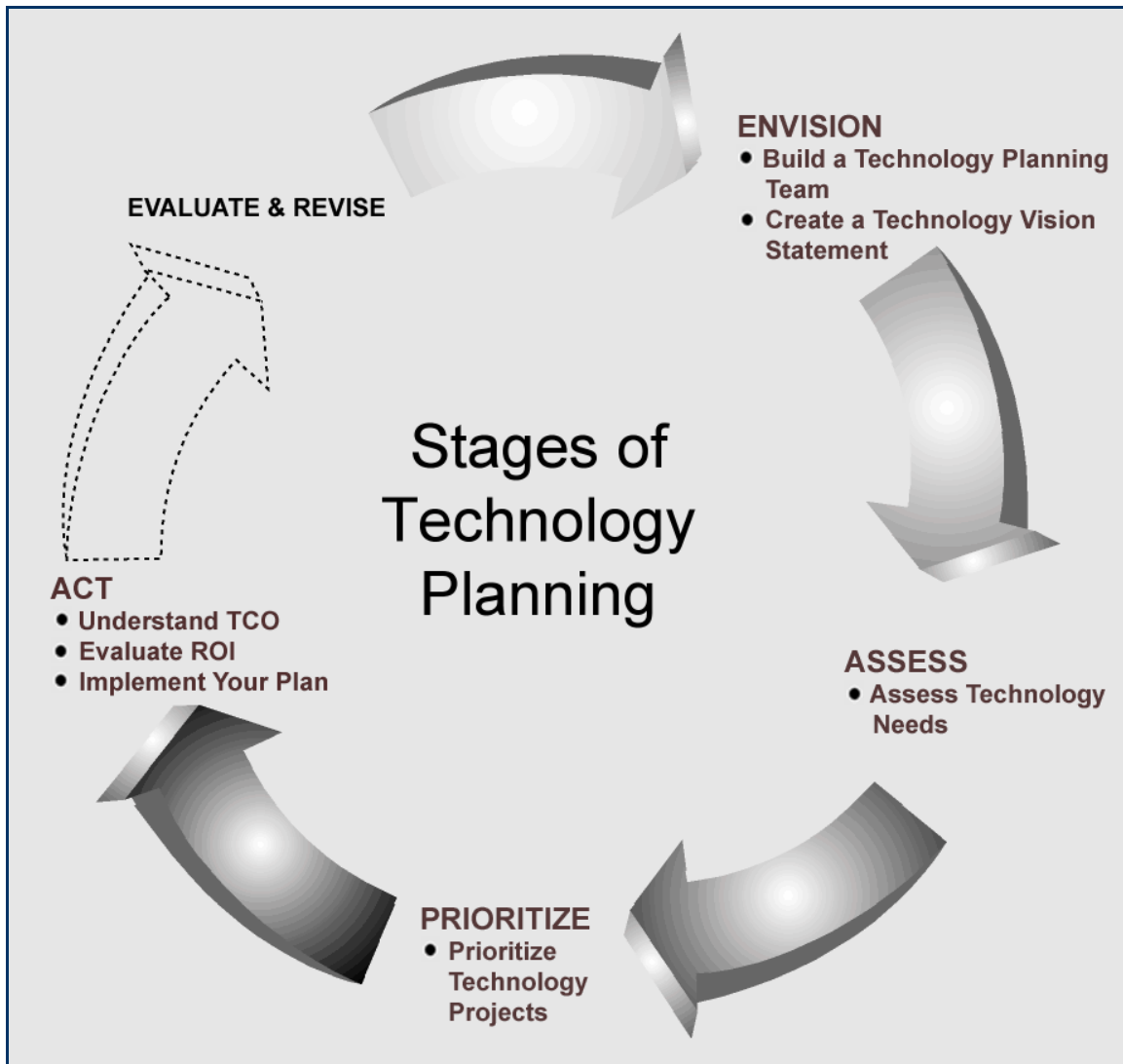
In the space below, list some of the benefits and outcomes of following a technology planning process at your YMCA.





Technology Planning Stages

The technology plan is a critical step in establishing technology change. However, technology implementation is rarely a linear process. It is easier to think of it as a cycle as shown in the diagram below:



Note: Building a Technology Team, Assessing Needs / Prioritizing, and Act are covered sessions 2, 3, and 4 of this email training, respectively.



Strategic and Operational Planning

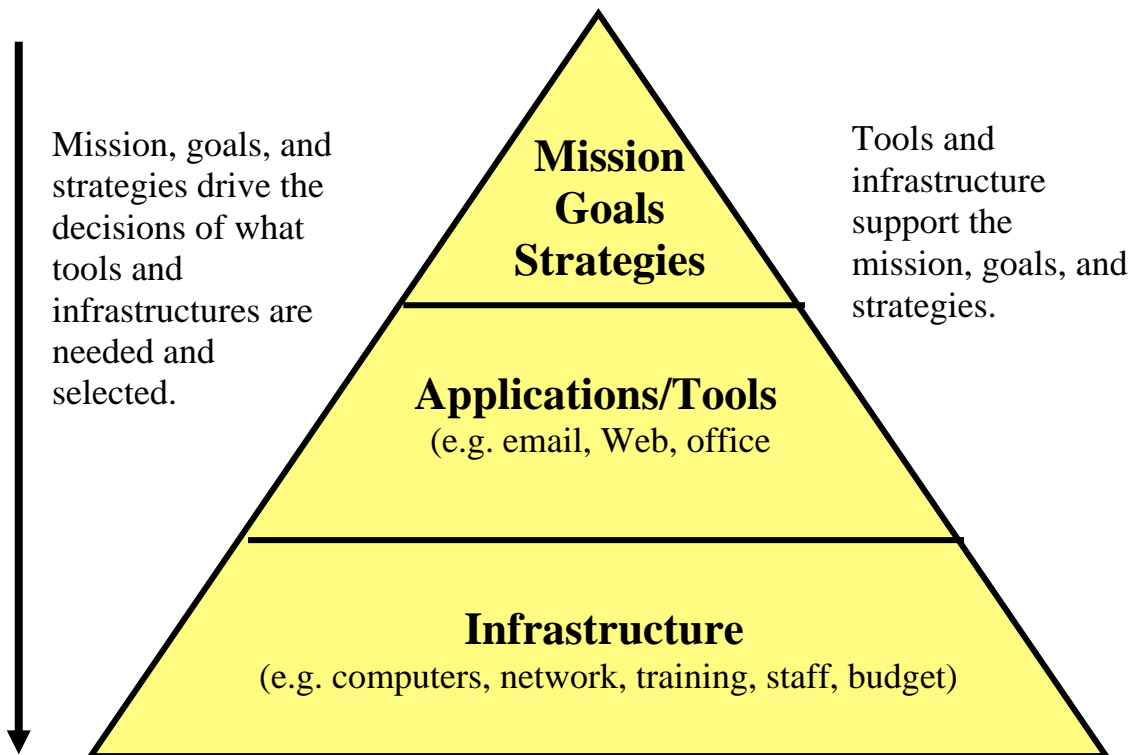
The types of technology plan fall into two main categories: strategic and operational.

Note: This training will focus on the operational technology plan. However, because most Ys will need a strategic technology plan at some point, it is important to introduce the concept here.

Creating a strategic plan is covered in more depth in a separate technology planning training.

- **Strategic** – The strategic technology plan is created around the organization’s mission, the foundation upon which all decisions in the plan are made. As you can see in the illustration below, a technology plan is a set of building blocks. All tiers are required to complete the pyramid.

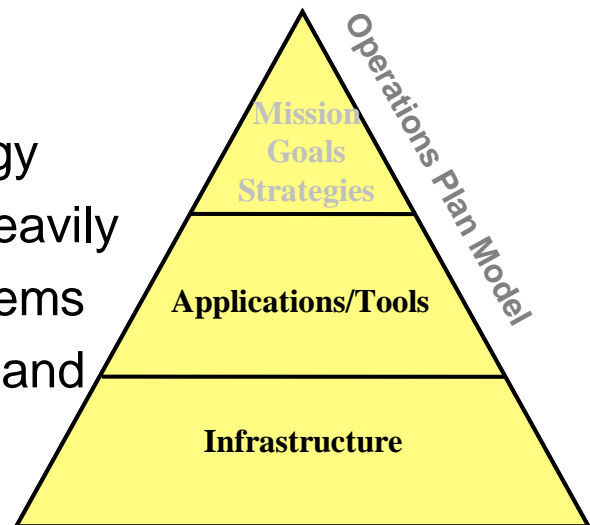
The strategic plan is most appropriate if your organization is looking to use technology as a fundamental tool to do business and provide services throughout the organization or is considering new ways of conducting business using technology.





- **Operational** – An operational plan is more like a technology audit or needs assessment. It is a process that includes determining the Y's technology needs, evaluating the organization's current technology, and deciding on the changes the organization should implement. Documentation consists only of the two bottom tiers of the technology planning triangle – applications/tools and infrastructure.

◆ An operational plan focuses mostly on the operation of technology systems and not as heavily on relating those systems to the mission, goals, and strategies of the organization.



The operational plan is the more appropriate choice for Ys who need to address an immediate, critical need, such as replacing their current operations software system, and who do not currently have the time or resources to create a longer-term strategic technology plan. However, all YMCAs are strongly encouraged to consider creating a strategic technology plan at some point.



The Fine Print

So, developing a technology plan sounds great, but what's the fine print? How much will it cost? How long will it take?

How much money?

In terms of direct expenses, the costs of developing a technology plan are few. Direct costs may include such items as hiring people with the necessary expertise to assist in the technical areas of the plan or facilitators to help with the planning meetings. These costs will vary depending on your organization's resources.

However, by far the highest cost associated with the development of the technology plan is staff time. Planning can take as much as 25% of the staff's time per week—sometimes less, sometimes more. Allowances must be made to make sure that this time is available, perhaps taking staff off another assignment so that they can work on this one.

How much time?

The less resources available and the larger the scope of the plan, the more time you will need. You can reduce this time by applying more resources, such as delegating more staff time to the project, or narrowing the scope of the plan to address only a few technology strategies.

Depending on many factors, including the scope of your plan and the resources available to you, a typical nonprofit should expect to spend six months to a year developing the plan.



Your Turn: Planning barriers and strategies (Homework for Sharepoint)

Do you think the idea of technology planning will be easily embraced by staff at your YMCA, or do you feel it may meet with resistance? Think about your own personal reservations, or those you feel may be held by other staff at your Y, to technology planning and how you might address them. You can print this page and jot your ideas down on paper first.

Next, go to your group's Sharepoint site and create a new discussion item in the Homework Session 1 section. (Refer to the Orientation session if you don't remember how to do this.) In the Subject field, type in "Planning Barriers." In the Text field, explain two of the barriers you feel you face to a planning process and your ideas for overcoming them. Save your entry.

Barriers/Frustrations/Doubts In the space below, brainstorm and list: What may get in your way?	Strategies In the space below, brainstorm and list: What may help you overcome these barriers?