

# Session 3: Assess Current State and Understand Possibilities





# Assess and Understand Possibilities

## 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](http://www.NPower.org), or visit their online technology planning tool, TechAtlas, at [www.techatlas.org](http://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>



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## Learning Objectives

After this session, you will understand

- ▶ What is involved in a technology assessment
- ▶ What resources are available to you to perform technology assessments
- ▶ The importance of understanding technology possibilities before committing to any new technology implementation
- ▶ What resources are available to you to learn about new technologies and what other organizations are doing



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## Assessing Your Current Technology and Business Practices

New technology can and will change the way you handle your business from day to day. Before you can select what you want for the future, you need to review what technology you already have and what business processes you already follow.

While it is tempting to jump straight into an inventory of software and hardware, remember that you have to look at the entire picture at your YMCA.

Identify the following:

- ▶ mission deliverables
  
- ▶ information-intensive processes
  
- ▶ your internal and external constituencies
  
- ▶ your staff and what skills they have and skills they need
  
- ▶ what procedures and business practices you follow for Membership, Financial Development, Program, Accounting and all other operations
  
- ▶ opportunities for technology to improve operations, efficiency, or service delivery – where can value be added?
  
- ▶ And, finally, what technology you have including software, hardware, peripherals, etc.

## Process Mapping

Depending on the complexity of your organization and business processes, you may want to complete some *process maps*. Process mapping is a method of breaking down a workflow or set of procedures into all of the individual steps required to complete it. These individual steps are typically put into a diagram which graphically depicts everything that is needed to achieve the desired results.



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Process mapping is very helpful for assessing intangibles when you are considering introducing technology into an area that has never been automated before. Depending on the depth of your plan, process mapping may require time and effort from many people to adequately complete. You may need to create small teams that focus on each area that you want to map. Process mapping forces you to evaluate the way you conduct your business and to examine why you do it that way.



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## Assessment Resources

There are a number of resources available to help you through the assessment stage of the OSS process. These resources help you evaluate your current business procedures, staff skills, and operations software. This part of the email training simply introduces you to these materials so you can familiarize yourself with how they are used. It is not necessary to work with them now.

- **Nonprofit tech benchmarks, created by NPower**
  - Executive overview of technology planning and strategic thinking
  - Includes current standards for sustainable technology use in nonprofit organizations.
  - Great starter point that introduces many of the topics highlighted in this training.
  - Available at <http://trg.ymca.net/technology/tools.htm>
- **Software Evaluation tool, provided by Y-USA TRG**
  - Rank and score what operations software functionality your YMCA requires.
  - Compare your needs against software products available in the marketplace.
  - Available at <http://trg.ymca.net/technology/tools.htm>. **Note:** You should complete this tool after this email training or as part of a neighborhood meeting.
- **TechAtlas, created by NPower**
  - Developed for nonprofits to help you with the technology planning process.
  - Online questionnaire that assesses your organization's current level of technology.
  - Provides recommendations based on your responses
  - A customized questionnaire for YMCAs is available on the TRG web site at <http://trg.ymca.net/technology/tools.htm>. Information you enter will be shared with a TRG Operations Consultant.

## Other Resources

*Wired For Good: Strategic Technology Planning for Nonprofits* by Joni Podolosky – This book is a thorough guide to strategic technology planning. Its concepts are the foundation for the YMCA technology planning process that you are learning here.

**TechSurveyor** – a technology inventory tool for nonprofits from NPower.



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## **Technology Provider Certification**

TRG has certified four leading technology providers who offer operations software solutions that manage the core YMCA business areas. The purpose of certification is to aid Ys in assessing operations software by providing information on providers who meet a base level of criteria. Using evaluation tools and conducting an on-site review at each company's headquarters, TRG staff verified information provided by each company in two key areas:

- Company (business viability, client references, support/training, software cost, and future development plans)
- Software functionality

Information on the certified providers will be available in a *Certification Summary* document, published on Y-USA's extranet.



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## Understanding Possibilities

It is hard to think about the future and start to make decisions without knowing what is possible. This is especially true with the ever-changing world of technology. This section introduces you to sources for finding what is possible with technology.

### **Where to start?**

Before we talk about who to ask and where to look, you need to know what you are looking for and what you are going to ask. If you just ask people for technology suggestions you never know what you will get. After all, they do now make email screens for refrigerators.

So let's focus on your questions and approach. For this you will need to go back to the vision and goals that you wrote. Refer to the goals you wrote in session 2.

### **Who to ask?**

The best sources are those who are closest to your organization. Start with those who already know your YMCA, such as

- ▶ Staff
- ▶ Board members
- ▶ Volunteers
- ▶ Technology consultants.
- ▶ Technology providers you already use

Also consider

- ▶ Other YMCAs in your neighborhood and beyond
- ▶ Other nonprofit organizations either in your area or with a similar mission

Don't limit your list. Remember, there are no bad ideas in this step.

## Nonprofit Technology Communities

The YMCA is not alone when it comes to technology challenges. There are many other nonprofits that struggle with these same challenges, and there are also several nonprofit organizations that assist nonprofits with technology issues.

Organizations like [www.techsoup.org](http://www.techsoup.org) provide:

- ▶ Articles and documents on a wide range of topics from what is a LAN to Technology Planning



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- ▶ Community forums where you can read and participate in discussions with other nonprofits about technology
- ▶ TechSoup Stock, offers hardware, software, training and other technology at greatly reduced rates.

Organizations like [www.npower.org](http://www.npower.org) provide:

- ▶ Technical consulting, they have certified staff that can help you maintain, install or upgrade your technology. They can also be contracted with to do regular network maintenance.
- ▶ Training, this can either just be materials or attending training sessions at a local office or conference.
- ▶ Tools that help you plan, assess or select technology. One helpful tool is at [www.techatlas.org](http://www.techatlas.org).
- ▶ Resources about all different areas of technology, including Disaster recovery, planning, wireless security, budgeting, grants, networks and much more.

Organizations like [www.nten.org](http://www.nten.org) provide:

- ▶ Regional conferences around technology and nonprofits
- ▶ A community of nonprofit technical assistance providers (NTAPs), Nonprofit Management, Development, and Program Staff and Nonprofit technology staff.
- ▶ 501 Tech Clubs are informal groups of nonprofit techies that meet monthly in a number of cities.

Resources from TRG

## Case Studies

The Technology Resource Group has been working with local YMCAs on their technology challenges, including assisting them in moving to new technology solutions. This work has been documented in Case Studies available on the TRG web site at [http://trg.ymca.net/technology/case\\_studies.htm](http://trg.ymca.net/technology/case_studies.htm). Referring to these case studies is a good way to discover what other YMCAs are doing and become exposed to new methods of using technology. This will be a growing library as we continue to work with more YMCAs.

## Webcasts

TRG hosts periodic webcasts on a range of technology topics of interest to local YMCAs. These webcasts are usually held in conjunction with leading technology providers and other subject



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matter experts and may also include speakers from local YMCAs. Webcasts are announced in *HotFax*, in TRG's newsletter (*Y-Lines*), and on the TRG web site at <http://trg.ymca.net>.



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## Your Turn: Field Trip to a Technology Tool or Resource (Homework for Sharepoint)

A number of tools and other resources were mentioned in the Assessment and Evaluation sections of this session. Most are available on the web. Pick at least one to visit and review. You will post this part of the exercise to your group's Sharepoint site. Create a discussion item, call it "Technology Resource," identify which resource or tool you visited, and type in your thoughts about it.

**Note:** If you choose a tool (for example, a survey or evaluation), you do not need to complete it at this time. This exercise is to acquaint you with how to access these resources and to understand how they are used.