

**2002 Roundup, April 11-14, Orlando, FL**  
**Technology Planning Models:**  
**Universal Standards, Tested Models, and Selecting a Model**

**Panelists' Objective:** to talk about various approaches to applying planning models appropriately in the field.

**Overarching Objective:** talk about planning as a group

Low touch vs. High touch: what type of approach you use

Low= not much interaction with the agency "don't grab the mouse"

High= a lot of engagement / guiding "grab the mouse"

**ONLINE CENTERED:**

**Jamie Greene, NPower Seattle: TechAtlas:**

See notes for other sessions about what this is. A tool that helps nonprofits think strategically about technology. Also, a way to present the boilerplate stuff that we use in each plan. Tech Atlas allows partners to customize the tool to use language that's meaningful to the nonprofit instead of using general terms. How it's used: agencies can use it on their own. Usually, consultant will go through the Atlas with the client to guide them through the process

Medium touch solution

Next version will allow nonprofits to adding their stuff to the pool of resources. Right now it's a one-way street consultant to client.

**ORGANIZATIONAL CENTERED:**

**Beth Kanter, Independent Consultant (mostly arts):**

Planning is like a scaffold. Pull and push with tension between to keep it upright, you triangulate around it. At the top is the leadership (E.D.); at the bottom is the Organization. 90% of time is spent setting up the org to have the planning conversation—doing assessments, thinking about where they want to go. The remaining 10% is the actual conversation that they have with us.

**HUMAN CENTERED:**

**Michael Gilbert, Social Ecology:**

Tech. planning shouldn't be about getting a car for a person who could be served by a bike. You should focus first on an orgs. operations and understand how they do their work, THEN you can build a plan. Use Michael's mapping process: discover who you're trying to empower, scope it out, cluster their communication needs (small nonprofits, each staff would be a cluster), in order to succeed, what do you need from who and by what media do you currently get it? In order to succeed, what information do you need to put out, to whom, and how do you

distribute it. Grid it out so you can see the entire scope of how the org. does their work. Stage 2: requirements building: what can we do to scale this up—how can you reduce barriers to communication? Requirement building is really important!!

### **RELATIONSHIP CENTERED:**

**Jon Stahl, OneNorthwest:**

Leverage existing relationships with the client to move through the process in an efficient way. Take a lot of small bites from the apple instead of one huge bite. Focus on immediate priorities so you can focus on the bigger ones later. Timing is really important—hanging in there for the long term allows them to be there when they're ready, take them as far as they're ready for at a given time and come back around to it later to move it along later. High touch because there's an existing relationship with them or another organization that is very similar to them. Individual instance of help is much more low touch—again because they know the orgs really well, they can give simple quick answers without spending time on it.

*Time to chat with 1 other person about struggles with the issue of applying appropriately models, tools, and constructs with the people you're working with. Throw questions that arise out and the panelists will respond.*

**Question:** Legal services community: statewide planning is motivated by a funder instead of internally motivated. Lots of politics are involved because of merging/collaborating with other orgs with somewhat divergent issues/knowledge levels. How do you deal with who is at the table and how politics affect the planning process?

**Answer:** When working with partners who have trust issues, work with each group individually. Treat each org. as their own, where they're at. Use the same tools with each org so that there are ways to make the result hang together. There are levels of agreement that people get into—focus on the ones that they all have in common. Figure out who the “levers” are at the table and build relationships with people so that you can push the levers.



**Question:** Low-high touch: is there really a way to do a purely low touch planning process?

**Answer:** NO. All of the processes require a mix of low and high touch methodology.



**Question:** Managing expectations: How can you use the various tools to manage expectations?

**Answer:** Explain your role up front clearly. Explain your approach clearly. Listening with their unrealistic expectations and dispel them immediately. Jon: Set the bar as low as possible. 😊 The tools are just tools; the expectations have to be managed up front. If there is stuff you can't do, tell them but then offer to get them the help that they need to do whatever it is.



**Question:** Sneaker/bicycle: are we justified in pushing tech planning on agencies that don't "need" it? Do we do them a disservice by forcing a computer on a person who wants a typewriter?

**Answer:** There is no disservice in planning for technology. You're diagnosing where they're at; you aren't curing them. You're setting them up to take the baby steps. Planning can take different levels: printer's broke, fix it; gotta get new computers for staff in the next 6 months, where will we be 3 years from now.



**Question:** Consultant helped them establish a tech team, it was good for about a year but it's starting to stagnate. How do you get around this issue?

**Answer:** Get closure on things you've done well. Celebrate. Break things up into manageable chunks so there are regular successes. Regularly check in to see what you've accomplished so people are motivated to continue on.



**Question:** Annual plan is done but then it gets off track 6 months in: how do you ensure that you have a sustainable plan?

**Answer:** At the beginning, set up the value and cost of ownership of systems planning, and reinforce at every step along the way. Make technology a part of your strategic planning process. If you tie the plan into how people do or want to do their jobs, the plan shouldn't get off track.



**Question:** How would internal IT staff, whose role that's been seen as supporting tech get involved in the planning process?

**Answer:** Couldn't hear answer because people were leaving for the next session. Have requirements driven conversation with management. Ask yourself always, who needs to be at the table for this part of the conversation?"



**Question:** If an agency is ready to do tech planning, what is the best way to get them going on it?

**Answer:** Build the team; don't have the E.D. lead the team. Figure out who needs to be at the table. Make sure all the key stakes are represented. Remember, some people can represent more than one interest. Figure out who's really running the show and are they respected? Get them on the team. Team development is at the center always. Giving them leverage on how they manage themselves is important.