



STRATEGIC TECHNOLOGY PLANNING TEMPLATE FOR NONPROFITS



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About this Resource

The first half of this resource depicts a sample strategic technology plan created by a fictional nonprofit organization to provide a model for how to complete such a plan. In the second half, you'll find a blank template you can use to create your own strategic technology plan. This template is meant to be a starting point; add as many relevant sections as needed to incorporate your own plan.

About this Project

As societies work to rebuild, we see a rise in infrastructure investment. However, one type of infrastructure investment is often left behind: **digital infrastructure**.

According to a recent [TechSoup study](#), just 52 percent of nonprofits have the resources they need to act on their digital strategy. Contrast this with 83 percent of grantmakers who report having the resources they need, and it's easy to see that nonprofits are being left behind.

In the social sector, this investment is a critical part of service delivery in the digital era—and yet, it's often overlooked in favor of program investment. When technology does receive funding, it's often innovative mobile apps rather than core system stabilization, maturation, and integration. This lack of basic digital infrastructure investment widens the gap between large well-funded nonprofits and small organizations often devoted to underserved communities.

Changing this dynamic requires effort both from funders and from nonprofits. [Tech Impact](#) and the [Technology Association of Grantmakers](#) have created a series of resources—including these case studies—to guide you in this work. Investing in digital infrastructure means a commitment to building digital skills, capacity, and new platforms to unlock the knowledge, passion, and collective strength of civil society over time as the relationship between technology and society continues to evolve. As society pauses to rally public sector investment in infrastructure after the pandemic, we invite the social sector to do the same.

Learn more or download all of the free resources at offers.techimpact.org/reports/overhead.



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Overview

The Narrow River Conservation Group was established in 2005 to engage people to protect, restore, and enhance Rhode Island's Narrow River. It has grown from a volunteer-staffed organization led by a part-time executive director to five staff members with an annual budget of \$550,000.

In 2022 we are hiring a full-time Data Manager to replace an entry-level Data Coordinator position, an additional Communications Associate, an Advocacy Communications specialist, and an education and outreach assistant.

Since 2019, our web presence has grown from 500 visitors to 5,000 visitors monthly. We are turning our attention to increasing our social media presence, capturing more leads, and better use of our CRM engage more volunteers and donors.

These improvements would help us expand our base of river restoration volunteers and cultivate more individual donors, shoring up our ability to protect and restore the Narrow River and its recreational and natural presence in Rhode Island.

Introduction

Organization Mission

The Narrow River Conservation Group mobilizes and engages community resources and volunteers to act as stewards for the river and its watershed by protecting, preserving, and maintaining public access.

Organization Description

Our vision requires addressing the three-fold goals of land conservation, watershed protection, and river corridor stewardship. Our programs are structured around these interrelated goals. The Narrow River Conservation Group currently employs five people and has an annual budget of \$550,000. This year, we engaged more than 4,000 people in on our volunteer and educational events, river bank cleanups, and nature walks, spending more than 6,000 hours restoring 500 acres of river habitat for wildlife in the Narragansett and South Kingstown areas.

Technology Planning Team

Name	Title	Phone	Email	Role on Team
Greg Houde	Volunteer Coordinator	(555)555-5555	greg@nrcg.org	Recruits and oversees volunteers for riverside events. Manages volunteer management database, coordinates messaging with social media coordinator.
Susan Estabrook	Executive Director	(555)555-1212	susan@nrcg.org	Oversees staff and budgets, approves technology purchases.

Organization Analysis

Current Business Processes

Our program areas directly reflect our strategic approach to protecting and enhancing the Narrow River and its watershed in the towns of Narragansett and South Kingstown. Our vision requires addressing the three-fold goals of land conservation, watershed protection, and recreational access, and our programs are structured around these interrelated goals.

Land Conservation

The Narrow River is a local ecological resource of significance, providing habitat for fish and aquatic wildlife and waterfowl, recreational opportunities for fishing and boating, and scenic beauty. Development and climate change threaten the watershed's banks, water quality, and shorelands. Our restoration and conservation initiatives reflect the urgency of protecting the river's ecological functions. The Narrow River Conservation Group works with public and private landowners, local governments, and concerned citizens to protect and restore critical lands by providing technical assistance, planning, land management and hands-on natural resources restoration services.

Watershed Protection

Water quality continues to be a pressing concern and is linked to land use policies and practices within the region. NRCG works with citizens to clean and protect the watershed, shape the priorities of local governments and influence public policy related to local water quality and recreational access.

Recreational Access

The Narrow River is a critical habitat for migratory waterfowl, anadromous fish, and shellfish. Thousands of Rhode Islanders join others who travel from out-of-state to enjoy this river's fishing, shellfishing, and boating opportunities. As communities move to embrace the river and capitalize on its exceptional value, we risk degrading or even destroying the qualities we seek to enjoy. NRCG works to provide the leadership, technical assistance, and expertise in grassroots advocacy required to ensure that the essential values of public access and environmental quality continue in tandem.

Existing Technology Infrastructure

Hardware

NRCG's files exist on a on-premise server backed up via Barracuda Backup. The file server was purchased in 2016 and adequately supports office functions. Each employee has a laptop and cell phone, with access to the server.

Software

For databases, NRCG uses Salesforce as our core system, maintained by an external IT consultant. For communication platforms and events we use MailChimp and Eventbrite. All constituent data, event attendance, interests, advocacy actions and donations are entered into Salesforce and contact info is reconciled weekly in a partially automated process with staff oversight.

The bookkeeper uses Quickbooks.

Additional communications software includes the full Adobe Creative Cloud Suite for design and video, Canva for light design, WordPress for the website, and TweetDeck for social media. We also use Zoom for video conferencing and Outlook for email, calendars and collaboration.

Network

Employees have internet use while at the office but connect through a VPN when working remotely.

Website

Our website is the latest version of WordPress using a purchased theme.

Process Improvements and Technology Acquisitions

NRCG has a number of goals related to increasing its information tools and technology, including:

- Increasing participation in riverbank cleanup events, advocacy events, and fundraisers
- Boosting communications capacity
- Expand diversity and inclusion
- Increasing income through members and donors
- Improving staff efficiency

Stewardship and Education

Goal: NRCG annually engages 4,000 people in river cleanup and recreational events and outings to learn about the river and meaningfully contribute to protecting and enhancing river resources.

Technology-Related Strategy: Provide background information on each site/project before, during and after events via our website and social media.

Technology Task 1: Disseminate information via email, website and social media to recruit volunteers and conduct effective communication; increase use of lead capture forms.

- **Cost:** Staff time working with additional consultants and volunteers.
- **Goal:** Cultivate the next, more diverse generation of environmental leaders.
- **Technology-related strategies:** Expand and enhance communications capacity to attract and engage more volunteers and donors while also creating content to inspire more involvement.

Communications and Outreach

Goal: NRCG strategically communicates with key audiences about the river's importance and the organization's work, inspiring the actions needed to protect it.

Technology-Related Strategy: Enhance synergy across NRCG programs and communications to raise the profile of individual programs and NRCG as a whole

Technology Task 2: Purchase new laptops for staff and tablets for event volunteers.

- **Cost:** \$10,000+
- **Goal:** Facilitate on-site volunteer recruitment and management; accept donations.
- **Technology-Related Strategies:**
 - Expand and enhance the NRCG constituent database in order to maximize relationships with event participants, volunteers, and partners.

Development

Goal: Donations grow by \$15,000 annually.

Technology-Related Strategy: Improve tools and systems to facilitate efficiency and accurate data management.

Technology Task 3: Improve data hygiene in Salesforce and communications tools.

- **Cost:** Staff and consultant time; \$10,000.
- **Goal:** NRCG doubles its membership in three years, growing its base of reliable, annual support.
- **Technology-Related Strategies:**
 - Test strategies to incentivize membership and renewals (i.e. premiums, segmented messaging, A/B testing in acquisition and renewal letters, recognition opportunities, etc.)
 - Improve tools and systems to ensure efficiency and accurate data management

Measures of Technology Plan Success

The Narrow River Conversation Group will measure the success of its technology-supported process improvements using the following parameters.

1. Our number of volunteers increases.
2. Constituent activity increase.
3. More volunteers engage with the organization, and more volunteers become donors.
4. People who participate in river cleanup events also participate in recreational and fundraising activities.
5. Our mailing list and number of social media followers increase.
6. The number of partners and partner organizations led by people of color increases.
7. Donations grow by \$10,000 annually.
8. All NRCG staff have the necessary technology needed to do their work.

Strategic Technology Plan Template

Overview

Introduction

Organization Mission

Organization Description

Technology Planning Team

Name	Title	Phone	Email	Role on Team

Organization Analysis

Current Business Processes

Existing Technology Infrastructure

Hardware

Software

Network

Website

Process Improvements and Technology Acquisitions

Focus Area One

Goal:

Technology-Related Strategy:

Technology Task 1:

- **Cost:**
- **Goal:**
- **Technology-Related Strategies:**

Focus Area Two

Goal:

Technology-Related Strategy:

Technology Task 1:

- **Cost:**
- **Goal:**
- **Technology-Related Strategies:**

Focus Area Three

Goal:

Technology-Related Strategy:

Technology Task 1:

- **Cost:**
- **Goal:**
- **Technology-Related Strategies:**

Measures of Technology Plan Success

This organization will measure the success of its technology-supported process improvements using the following parameters.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Acknowledgments

We're grateful to [Friends of the Mississippi River](#) for sharing their knowledge and expertise. This resource would not be possible without their generosity.



About the Technology Association of Grantmakers

The Technology Association of Grantmakers (TAG) is a 501(c)(3) nonprofit membership organization that promotes the strategic, innovative, and equitable use of technology in philanthropy to solve problems and improve lives. With over 1,900 members in 300 foundations throughout North America and beyond, TAG provides technology professionals and "accidental techies" in philanthropy with knowledge, networks, mentoring, and educational opportunities. Learn more at www.tagtech.org.



About Tech Impact

Tech Impact is a nonprofit on a mission to empower communities and nonprofits to use technology to better serve the world. The organization is a leading provider of technology education and solutions for nonprofits and operates award-winning IT and customer experience training programs designed to help young adults launch their careers. Tech Impact offers a comprehensive suite of technology services that includes managed IT support, data and strategy services, telecommunications, and cloud computing integration and support.

In 2018, it expanded its education and outreach capabilities by merging with Idealware, an authoritative source for independent, thoroughly researched technology resources for the social sector.

Tech Impact's ITWorks and CXWorks training programs have graduated hundreds of young adults with the knowledge, skills and confidence they need to start their careers in the technology and customer experience industries. The organization also operates Punchcode, a coding bootcamp based in Las Vegas, NV. Learn more at www.techimpact.org.