Nonprofit Technology Plan Template

STEP	KEY TASKS	NOTES
ESTABLISH YOUR TEAM	❑ **Identify key stakeholders to involve in your planning process.** ❑ **Assign roles and responsibilities for each team member.**	

OUTLINE A BUDGET	❑ **Determine how much funding you can allocate to technological improvements.**
	❑ **Account for:**
	    ❑ **Consulting Fees**
	    ❑ **Software Purchases**
	    ❑ **Team Training**
	    ❑ **Custom Software Development**	

ASSESS YOUR CURRENT TECHNOLOGY	❑ **Partner with a nonprofit technology consultant to conduct a nonprofit technology assessment.**	

DETERMINE YOUR PRIORITIES	❑ **What are the gaps or issues in your current technology infrastructure?**
	❑ **How would you rank these gaps as far as which are most important to alleviate?**
	    ❑ **Consider in light of your operations and processes.**
	    ❑ **Consider in light of your ongoing strategic plans.**	

IDENTIFY YOUR NEEDS	❑ **Identify the types of hardware, software, and digital platforms you'll need to invest in, in order to alleviate your highest-priority technological challenges.**	

RESEARCH TECHNOLOGY VENDORS	❑ **Research specific vendors for the solutions you identified in the previous section.**
	  ❑ **Use resources such as:**
	    ❑ **Third-party sites**
	    ❑ **Review aggregators**
	    ❑ **Software guides**
	  ❑ **Consider details such as:**
	    ❑ **Integrations with other platforms**
	    ❑ **Training needs**
	    ❑ **Implementation and configuration**
	    ❑ **Specific features**
	    ❑ **Budget**	

CONSIDER ADDITIONAL TRAINING	❑ **Understand which types of training your team will need with regards to new technologies.**
	  ❑ **Consider:**
	    ❑ **General training services from vendors**
	    ❑ **Free online resources**
	    ❑ **Customized training and documentation from a consultant**	

DEVELOP A TECHNOLOGY IMPLEMENTATION TIMELINE	❑ **Determine a hard deadline by which your plan must be executed.** ❑ **Use that deadline to set smaller deadlines and benchmarks for your plan overall.** ❑ **Develop metrics for evaluating whether benchmarks are hit.**	
FINALIZE YOUR PLAN	❑ **Thoroughly review your technology implementation plan.** ❑ **Present your plan to your nonprofit's board for approval.** ❑ **Make revisions as necessary.**	
IMPLEMENT YOUR PLAN	❑ **Implement your plan.** ❑ **Measure success.**	