SAMPLE

Plan IT Action Plan

May 2015

Prepared by 501 Commons

Plan IT Consultants

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Technology Leadership Team

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Notes for the reader:
- *This is an example plan, demonstrating the layout and content that might occur in a typical Action Plan.*
- *The reader is urged to focus on the use of Objectives and Actions, assignments to positions, timeline dates, and metrics, rather than specific details of the plan.*
- *Timeline dates here are specific dates.   Plans may also have dates expressed more generally, in terms of months and/or quarters.*

EXECUTIVE SUMMARY

After assessing its existing technology infrastructure and processes, SAMPLE has defined a plan that focuses on the following:

- Improving communication with the community by expanding use of social media.

- Creating a plan to update/replace software functions on outdated servers, while supporting organization needs.   In the future, servers can be replaced or retired once software needs are covered.

- Creating a plan for improving network availability and access, across the office, including support for off-site access into the network.

SECTION 1—ORGANIZATIONAL BACKGROUND

SAMPLE is a mid-size nonprofit in the arts community, focused on presenting contemporary theater at several locations in Seattle, and providing residence opportunities that allow emerging artists to develop new work.

SECTION 2— ASSESSMENT RESULTS AND KEY ISSUES

Summary of Assessment Results

The assessment process captured information from SAMPLE's leaders, including the Managing Director, Artistic Director, other department directors, and a member of the board.   The following are summary statements (not in priority order) of issues identified:

- Rudimentary use of social media to connect with the community.

- No single "voice" for social media.

- Scheduling for volunteer activity is time-consuming.

- Office network and wireless (Wi-Fi) provides poor connectivity.

- No remote access for staff who want to work off-site.

- Is sensitive artist/subscriber/donor data adequately protected?

- No consistent backup process for data and files.

- No disaster recovery plan.

- Website is difficult to update.

- Servers, and server software, are old / outdated.

Key Issues Identified

The Key Issues selected for further attention at this time are:

1. There is only rudimentary use of social media to connect with current and potential donors, volunteers, supporters, etc.   In addition, there are no clear guidelines for the content or "tone" of messages posted to social media.

2. There are 2 older servers, running outdated versions of Windows Server operating systems, which are used as a file server and a database server (which includes running ticket-sales software).   Files and data on these machines are not consistently backed-up.   The age of the machines and the software is a concern.

3. There is a wired office network, but not all machines connect to it.   Wi-Fi is available in the office, but it is not reliable across the entire office, and may not be secure.   People working outside the office are not able to properly login to the office network.

SECTION 3—GOALS

The following goals have been selected:

Goal 1: Social media accounts are actively used to communicate with donors, volunteers, and supporters, to promote the organization and its events.   There are editorial guidelines, with examples, for creating posts to social media accounts.

Goal 2: There is a plan for improving storage of files and data, as well as updating support of ticket sales.   Plan will also include support for any other software run on the server.   This may involve update/replacement of servers, including update of server software, to support needs of file storage, database, and ticket sales. Include plans for funding, training, maintenance, backup, processes.

Goal 3: There is a plan for putting all desktop computers on the wired network, offering secure Wi-Fi for laptops, and offering secure remote access for offsite workers.

SECTION 4—ACTION PLANS

Positions used in Action steps are:
        MD = Managing Director

AD = Artistic Director

CD = Communications Director

DD = Development Director

FD = Finance Director

BM = Box Office Manager

FM = Facility Manager

AA = Administrative Assistant

Goal 1:	Social media accounts are actively used to communicate with donors, volunteers, and supporters, to promote the organization and its events. There are editorial guidelines, with examples, for creating posts to social media accounts.		
Desired Outcome:	The organization has active accounts on major social media platforms. There is a clear communications plan for types of content that should be posted, how often, and how content should be expressed, to present a consistent message and voice. The intent is to improve communications with supporters and the community in general.		
Steps to Achieve Desired Outcome		**Who**	**Completed by**
Objective 1.1	Investigate potential for outside assistance.		
Action 1.1.1	Contrast similar efforts – talk with other nonprofits to see if any have done anything similar with regard to social media, and get input on their experience. In particular, did they use a consultant or expert assistance?	CD, MD	7/31/15
Action 1.1.2	Investigate potential consultants to assist, as well as availability.	CD	7/31/15
Action 1.1.3	Coordinate with board on funding for consultant, as needed. Investigate grants that may potentially support work.	MD, FD, DD	8/28/15
Objective 1.2	Gather information on current use of social media.		
Action 1.2.1	Catalog existing social media accounts (Platforms, accounts, passwords, etc.)	CD, AA	9/11/15
Action 1.2.2	Catalog typical use, and collect examples of post content.	CD, AA	9/11/15

Action 1.2.3	Collect social media statistics/analytics (Number of posts, followers, etc.).	AA	9/11/15
Objective 1.3	Define detailed goals, editorial guidelines, and pilot project.		
Action 1.3.1	Investigate social media platforms and tools.	CD, AA	9/25/15
Action 1.3.2	Set up social media accounts.	AA	9/25/15
Action 1.3.3	Specify detailed goals for types of content to post, frequency, who will post, etc.	MD, CD	9/25/15
Action 1.3.4	Outline editorial guidelines for content, focusing on message and voice representing the organization. While focused on social media, confirm that guidelines can also be appropriate for email campaigns and website.	MD, CD, DD	10/2/15
Action 1.3.5	Define 1-month "pilot" to test goals/approach and guidelines. Include survey(s) to assess impact of new approach.	CD	10/9/15
Action 1.3.6	Review goals/approach, guidelines, and pilot plan with staff and board, for feedback. Make adjustments as needed.	MD, CD	10/30/15
Objective 1.4	Run pilot, gather results, and evaluate.		
Action 1.4.1	Setup survey and collect results, for donor/supporter/community awareness of existing social media.	CD, AA	11/7/15
Action 1.4.2	Execute pilot project, publishing on social media sites with new guidelines/schedule. Collect statistics regarding followers, comments, etc. Run second survey, gathering results for new approach.	CD, AA	12/4/15
Action 1.4.3	Review results of pilot with staff and board. Get feedback on approach & guidelines. Make adjustments as needed. Prepare for January 2016 implementation.	MD, CD	12/18/15

Goal 2:	There is a plan for improving storage of files and data, as well as updating support of ticket sales. Plan will also include support for any other software run on the server. This may involve update/replacement of servers, including update of server software, to support needs of file storage, database, and ticket sales. Include plans for funding, training, maintenance, backup, processes.		
Desired Outcome:	Needs related to files, data, ticket sales are understood. Plans are defined & approved for servers and software. Relevant plans have been defined and approved for funding, etc. Implementation schedule has been set up and approved.		
Steps to Achieve Desired Outcome		**Who**	**Completed by**
Objective 2.1	Investigate potential for outside assistance.		
Action 2.1.1	Contrast similar efforts – talk with other nonprofits to see if any have done anything similar with regard to servers, software, files, data, tickets, and get input on their experience. In particular, did they use a consultant or expert assistance?	FM, MD	7/31/15
Action 2.1.2	Investigate potential consultants to assist, as well as availability.	FM	7/31/15
Action 2.1.3	Coordinate with board on funding for consultant, as needed. Investigate grants that may potentially support work.	MD, FD, DD	8/28/15
Objective 2.2	Catalog current servers, and software, including software used for files, data, and ticket sales.		
Action 2.2.1	Catalog server hardware.	FM	9/25/15
Action 2.2.2	Catalog server software, include operating system, file storage, databases, ticket-sales, and any other server-based software.	FM	9/25/15
Objective 2.3	Determine options for file storage.		
Action 2.3.1	Catalog current status regarding file storage.	FM, AA	10/16/15
Action 2.3.2	Estimate future file storage needs.	FM, MD	10/16/15
Action 2.3.3	Investigate options and costs for updated file storage (including server-based, external drive-	FM	10/30/15

	based, cloud-based), with cost estimates, including maintenance and training.		
Objective 2.4	Determine options for data		
Action 2.4.1	Catalog current status regarding data needs, including all databases in use. Include data in Excel files or other storage.	FM, DD, AA	11/13/15
Action 2.4.2	Estimate future data needs.	FM, DD, MD	11/13/15
Action 2.4.3	Investigate options and costs for updated data needs, with cost estimates, including maintenance, training.	FM, DD	12/11/15
Objective 2.5	Determine options for ticket sales software.		
Action 2.5.1	Catalog status and features of current ticket sales software.	BM, AA, FM	1/15/16
Action 2.5.2	Determine requirements for ticket sales, which must be supported by any new option.	BM, AA, FM	1/15/16
Action 2.5.3	Investigate new options, including costs, maintenance and training.	BM, FM	1/29/16
Objective 2.6	Determine options for existing server software.		
Action 2.6.1	Catalog status and features of current applications on the server.	FM, AA	2/10/16
Action 2.6.2	Determine requirements for any updated versions of application software.	FM, AA	2/10/16
Action 2.6.3	Investigate new options for application software, with costs, including maintenance and training.	FM	2/24/16
Objective 2.7	Determine options for remaining server needs.		
Action 2.7.1	Catalog status and requirements for any remaining server-based needs which have not already been covered.	FM, AA	3/16/16
Action 2.7.2	Investigate new options for covering remaining server needs.	FM	3/30/16
Objective 2.8	Budget planning and leadership review.		
Action 2.8.1	Discuss server/software update options, and cost estimates.	FM, MD, FD	4/15/16

	Create recommendation with proposed budget. Include any needs for maintenance, documentation, and staff training.		
Action 2.8.2	Review options, recommendation, budget proposal with leadership, board. Decide on plan and timeframe.	FM, MD	4/29/16

Goal 3:	There is a plan for putting all desktop computers on the wired network, for offering secure Wi-Fi for laptops, and offering secure remote access for offsite workers.		
Desired Outcome:	Plans defined, including funding, training, maintenance. After execution, all machines, including printers, to be on network. Laptops have secure Wi-Fi throughout the office. Staff are able to login and access network resources remotely. All machines on the network have internet access. There is a written process for accessing the network, either in-office or remote, and all staff have been trained.		
Steps to Achieve Desired Outcome		**Who**	**Completed by**
Objective 3.1	Investigate potential for outside assistance		
Action 3.1.1	Check similar efforts – talk with other nonprofits to see if any have done anything similar with regard to networks and remote access, and get input on their experience. In particular, did they use a consultant or expert assistance?	FM, MD	11/13/15
Action 3.1.2	Investigate potential consultants to assist, as well as availability.	FM	11/13/15
Action 3.1.3	Coordinate with board on funding for consultant, as needed. Investigate grants that may potentially support work.	MD, FM, FD	11/20/15
Objective 3.2	Plan wired network update		
Action 3.2.1	Assess current wired network and machine connections (including printers, scanners)	FM, AA	1/15/16
Action 3.2.2	Assess Internet connection	FM, AA	1/15/16

Action 3.2.3	Identify any hardware, software needed for network, with cost estimates, including maintenance and any training needed	FM	1/29/16
Objective 3.3	Plan Wi-Fi update		
Action 3.3.1	Assess current Wi-Fi coverage (for coverage holes), and security (passwords, protocol, etc.)	FM, AA	2/12/16
Action 3.3.2	Identify hardware, software needed to improve Wi-Fi coverage and/or security, with cost estimates, including maintenance and any training needed	FM	2/26/16
Objective 3.4	Plan remote access update		
Action 3.4.1	Assess existing remote access	FM, AA	3/11/16
Action 3.4.2	Investigate alternatives for providing remote access	FM	3/11/16
Action 3.4.3	Identify hardware, software needed to provide remote access, with cost estimates, including maintenance and any training needs	FM	3/25/16
Objective 3.5	Budget planning, and leadership review		
Action 3.5.1	Discuss all network-update options, and cost estimates. Create recommendation with proposed budget. Include any needs for maintenance, documentation, staff training.	FM, MD, FD	4/15/16
Action 3.5.2	Review options, recommendation, budget proposal with leadership, board. Decide on plan and timeframe.	FM, MD	4/29/16

SECTION 5—IMPLEMENTING THE PLAN AND MEASURING IMPACT

There are several methods in place to ensure that the plan is implemented and has a positive impact on the organization's ability to accomplish its mission. The plan is intended to accomplish the following outcomes:

1. Overall systems for the three key issues addressed will be improved as evidenced by the indicators identified below.

2. The organization has an actionable plan for improvement which is designed to increase performance of its mission.

Position accountable for monitoring and updating the plan

[Technology Leadership Team Member] is responsible for keeping the action plan up to date, making changes, and marking off action items as they are completed.

Monitoring plan implementation

In addition to updating the action plans as conditions change, and marking off action items as they are completed, [Technology Leadership Team Member] will establish the internal systems to track and report on the three indicators of plan implementation listed below.

Monitoring Report		
Indicators (What will be measured)	**How Measured** What shows the outcome is achieved?	**Completion Target** (Number, Dates etc.)
1. Regular posts to social media platforms.	Number of posts per month, per goals related to each social media platform.	16+ posts/month **Date achieved: 6/30/16**
2. Expanded social media audience among donors, supporters, and general community.	Number of "followers" and/or "comments", per quarter, for each social media platform.	25+ new followers / quarter **Date achieved: 6/30/16**
3. Backups of files and data, weekly basis	Recovery of random file from backup.	Successful monthly test of backup **Date: approx. Q4 2016**
4. Wi-Fi coverage across the office.	% of office area receiving clear Wi-Fi signals.	90% of office area **Date: approx. Q4 2016**