Plan IT
Technology Assessment Process

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Assessment Overview

The purpose of the Plan IT technology assessment is to help your consultants get an idea of where the organization is at in terms of technology. Through the process of assessment and discussion, your consultants will work with you to draft a key issues report and an action plan for addressing these key issues.

The Assessment is organized into 8 sections:

1. General Information
2. Personal Devices
3. Servers
4. Networks
5. Data Management
6. Communications
7. Collaboration
8. Tools

Each section includes a series of assessment statements expressing basic standards for technology based on generally accepted technology practices, as well as open-ended response questions. Because many technology elements are interrelated, you will find some overlapping items as well as program tasks that can be categorized under more than one of the tabs.

Who should complete the Assessment?

Members of the Technology Leadership Team (TLT) should work together to complete the Assessment. You may choose to involve additional staff with a working knowledge of the organization's technology. The assessment will be made available on Basecamp to the organization, technology consultants, and project managers at 501 Commons.

Assessment Process

Step 1: Completing the Assessment

It is the primary responsibility of the organization to fill out the assessment, with the exception of the Assessment Debrief at the end.

Completing the Assessment should take about two hours. The TLT will download the assessment from Basecamp or our website, fill it out using Microsoft Excel, and then upload the new version to Basecamp where the consultants will be able to access it. Although there are only 2 members responsible for filling in the assessment, it is important to draw upon staff members for any information as necessary. Consultants will be available to answer any questions for clarification regarding the assessment.

Evaluation

The assessment is evaluated in two ways: closed questions may require a numerical response and corresponding comments or written responses for open-ended questions.

Numerical Responses

Consider each question based on your experience with technology within your organization. For each statement, choose a score of 1 to 4.

- A score of 1 is the absence of said technology, or need for assistance in use.
- A score of 4 demonstrates sophisticated knowledge of the technology, with high level of understanding of what the technology is capable of, and how the technology works at the ground level of the organization.

Written Responses

Consider each question based on your experience with technology within your organization. For each statement, write a response that answers how your organization uses that technology in a day-to-day setting.

Don't think of the assessment as a report card. It is important to remember that the Assessment is designed to apply to all kinds and sizes of organizations. No organization will assess themselves at the "highest" level of 4 for every item. In some cases, a level 4 may not be the appropriate level for the organization's situation. All organizations have areas of strength and areas of weakness. The goal is not to score a perfect 4 for each standard, but to recognize where you currently are and identify where there are opportunities to improve. This assessment will help the consultants gather an understanding of where the organization is at, and will help them formulate some key issues that the organization may need to address regarding technology.

When completing the assessment please remember:

- Because there are so many variations in the way organizations operate, some standards and/or ratings may not exactly match the organization's experience. Please choose the statement that *best* describes your organization's current situation.
- If you are not sure of an answer, make a choice based on your best guess and note "not sure" in the comment section.
- Please make sure to use the comments section to further elaborate on your answer. This will help the consultants get a better understanding of your organization.

Individual responses will be compiled and discussed at the Assessment Debrief meeting. The TLT is NOT responsible for filling in the Assessment Debrief portion (the last tab) of the document. The TLT will upload the document upon completion of their part of the assessment document.

Viewing the Assessment Summary

Columns and rows can be expanded to display all answers in a viewable and printable format.

Step 2: Assessment Debrief Meeting

Once all individual assessments are completed, consultants will be responsible for filling out their portion of the Assessment Debrief Tab. This tab will auto-populate all responses from each of the 8 tabs that the organization has filled out.

The Consultant team will schedule a meeting with the TLT to discuss the Assessment using the Assessment Debrief tab. Expect this meeting to take about two hours. Your consultants will facilitate this meeting and take notes on the discussion so that all members of the TLT can participate fully. This should be an open-ended discussion, but the Assessment Debrief tab should be used as a guide to facilitate the meeting.

Divide up the meeting time between the 8 areas, leaving at least 30 minutes for discussion around any issues that may not have been fully expressed in the Assessment document. Go through each area and consider the questions below. If as a result of the discussion you decide an evaluation should change, note the agreed upon change in the Assessment Debrief tab.

Consider the following questions to guide the discussion of each section:

- Were there any surprises?
- Were some areas of concern confirmed?
- Were some positive areas confirmed?
- Were there differences of opinion among the assessment team? What might this mean?

The assessment process may surface existing tensions between staff. This can be a positive outcome because identifying tensions provides the opportunity to address them. It is important to welcome and facilitate open discussion and dissent. Stress that the purpose of the assessment process is to grow stronger, not to lay blame. Let the consultants help you build trust in the process.

The consultants will then be responsible for filling out their portion of the Assessment on the final tab, and will then upload the document to Basecamp to share with the TLT.

Step 3: Sharing the results (optional)

In addition to sharing the results of the Assessment Summary with the TLT, think about sharing the results with others in the organization: executive leaders, key agency personnel, lead volunteers or a report for the board. Invite their comments and suggestions. Write about what you learned from the assessment in social media or newsletters. It is important that everyone in the organization is aware of what is happening in the Plan IT program. This will help demonstrate that technology planning is something that needs to have a high priority in helping an organization to achieve its goals. Keep in mind that this is not the end of the process. Consultants will be using this information to formulate a key issues report and an action plan that the organization will be using in the future.

Submit Completed Assessment

Once you and your team have completed the Assessment, please upload the file to your Basecamp project. We will go over the Basecamp project management tool thoroughly during the program launch.

Logging into Basecamp

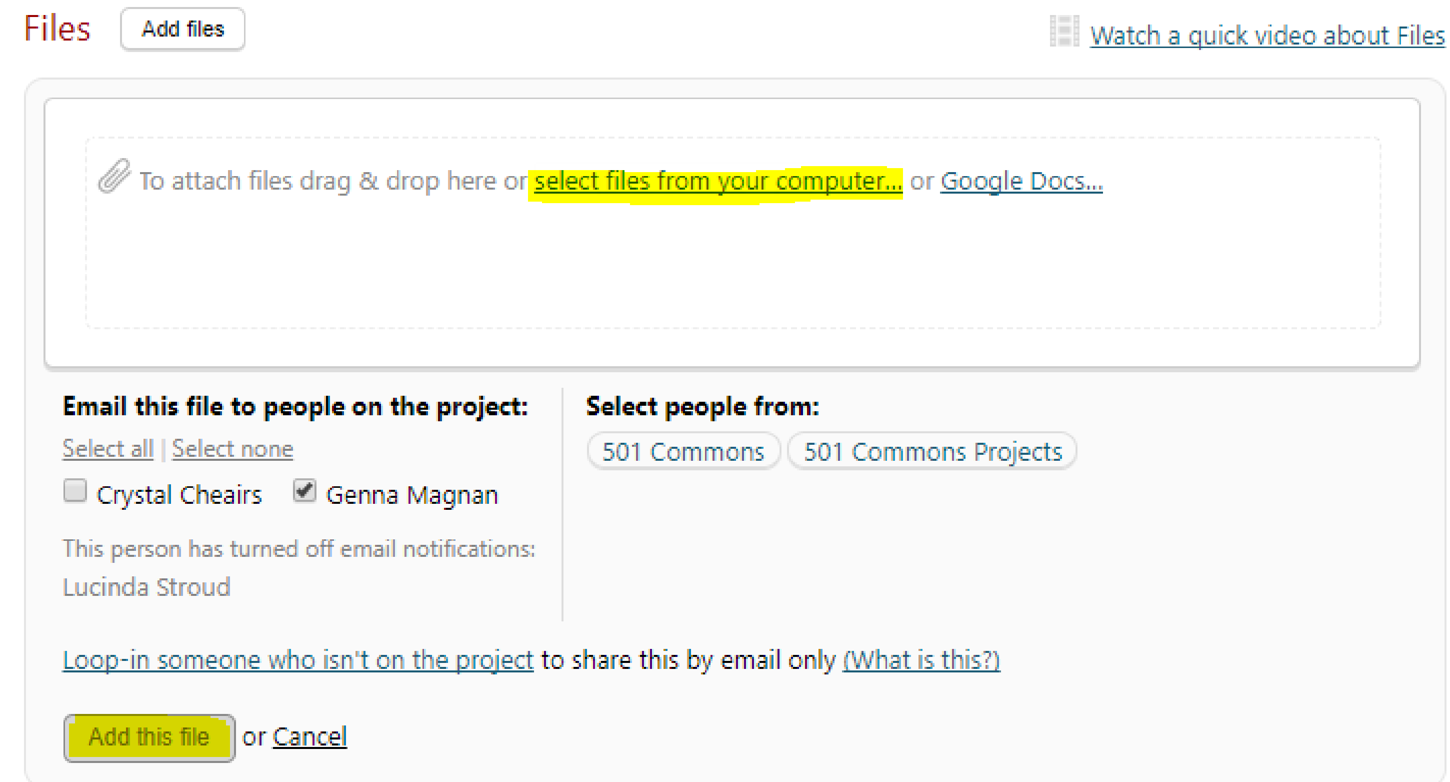
You will receive an email invitation, from notifications@basecamp.com. It will ask you to set up a new account – it's free – and you simply need to type your email and create an easy-to-remember password. Each member of the Technology Leadership Team should be on Basecamp.

The Basecamp invitation will expire after a day or two; if you find that happens, contact us and we'll send a new one.

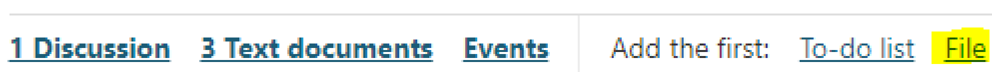
Adding a File to Basecamp

On each Basecamp project, there are different features: Discussions; To-do's; Text documents; Events; and Files. To upload your completed Assessment, you will utilize the Files feature.

Scroll down to the Files section and add your file in that window:



Once you add any files to the project, they'll all be stored in the File area.



If you have any issues with Basecamp, you can send questions to megan@501commons.org or alternatively share the Assessment file with us as an email attachment.