Business/Organization _____   Date _____

Participants _____   _____

_____   _____

_____   _____

TECHNOLOGY ASSESSMENT INSTRUMENT

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Purpose and use

- Understand what's urgent for you,
- Understand what's important to you, and
- Envision how technology can enhance what you do
- Make plans and have confidence in our plans

What is mission-centered technology planning?

Mission-centered technology planning is a value-conscious approach to IT and IT management that places the organization's needs at the center of the process. **Technology assessment**, **solution development**, and **project management** are the three stages of mission-centered technology planning:

1. **Technology assessment is about values and ideas.** It includes mission, vision, values, strategy, internal and external factors, and idea generation. This step stimulates needs articulation and goal clarification, and dissolves uncertainty so that you can visualize, benchmark, and problem-solve.

2. **Solution development is about figuring out how to implement ideas.** It includes tools, people, management plan, implementation plan, budget, and risk factors. This step finds you the tools best aligned with your situation, mashed up and pieced together, so that you can grasp the problem, understand the risks, and prepare for change.

3. **Project management is about implementation.** It includes system-building, coaching, training, rolling out, and documenting. This step mobilizes this understanding with change that energizes your operations, transforms your communications, and inspires long-term learning.

Contents

1. Hooks and open loops

    What brings you in? What are your pressing issues?

2. Values

    What's important about technology to you?

3. Mission, vision, strategic plan

    What do you do? Where are you going? How do you want to get there?

4. Technology SWOT

    What are the internal and external factors that bear on your goals?

5. Idea generation

    How might technology help?

6. Next steps

Are there any decisions you want to make before ending this process?

7. Feedback and evaluation

   What worked well? What could have been better?

Hooks and open loops

*What's on your mind?! What are your pressing issues? What have you been hearing about, talking about, and thinking about? Why are you interested in having this conversation now? What brings **you** in, as an organization, as an individual, and in your role or multiple roles?*

Use a mindmap to collect these items.

What's important about technology to you?

When it comes to technology, what are your values? What is your tolerance for learning new things? What is your tolerance for complexity? Who do you rely on for help with day-to-day computing issues – yourself/Google, a peer, a staff member, a family member, a volunteer? Do you need someone else's approval or support to make a change? Do you prefer to adopt technology with of the average peer, behind the average peer, or are you comfortable adopting new ideas ahead of your peers? Is it important to use the tools customary for your sector, or stay within your sector's prevailing practices? What is your tolerance for novel or innovative approaches? Is high reliability crucial, or can you tolerate occasional glitches and hiccups? When it comes to technology, are any of these turn-ons (or turn-offs?): aesthetics, coolness factor, mainstream media buzz (e.g. New York Times, Wall Street Journal), keeping money local, free/libre/open source software, ecological sensitivity, supporting small enterprises, movement-building? How happy are you to spend your technology dollars on: physical stuff, highly scaled services from big companies, knowledge work/custom development that benefits you, and knowledge work/custom development that builds your movement in the process? Are you prone to worrying about technology? Do you need systems that take care of themselves instead of depending on you? How patient are you with your technology? Whom do you trust with your data and your operations? How do your people work and communicate, and what's important to them? How about your customers/constituents? How has your experience with past technology projects affected you? How do the other core values/operating principles of your business apply to technology?

Mission, vision, strategic plan

What do you do? What is your special purpose for existing? Who are your constituents and supporters? Do you have a target market? Do you conceive of segments in your market or constituencies?

Where are you going? What do you want to see? How would you paint a vivid picture of that?

What are your goals? How do you measure your success at reaching those goals? Where do you want your organization to be in one year? two years? Further out?

Technology SWOT

*Regarding technology, in a broad sense of the word, what are your **strengths**? What factors inside your organization favor your goals?*

*Regarding technology, in a broad sense of the word, what are your **weaknesses**? What factors inside your organization disfavor your goals?*

*Regarding technology, in a broad sense of the word, what are the **opportunities**? What factors from the external environment favor your goals?*

*Regarding technology, in a broad sense of the word, what are the **threats**? What factors from the external environment disfavor your goals? What are your worries?*

Checklist: website, personnel, communities of practice, good operations and communication practices that are easily translatable to technology systems, knowledge management, training, budget, graphics or technology help, existing infrastructure and investments, IT management skills and experience

Idea generation

What ideas from the outside environment bear on what we've heard? What altogether new ideas may be called for?

Next steps

Are there any decisions you want to make before ending this process?

Feedback and evaluation

What worked well? What could have been better?

PRESSING
TECHNOLOGY
ISSUES

WHAT'S IMPORTANT ABOUT TECHNOLOGY TO YOU?

What do you do?

Where are you going? What do you want to see?

Where will you be in one year? What are your goals? How will you measure your success?

Two years?

Three years?

Further out?

TECHNOLOGY SWOT

Strengths	Weaknesses
Opportunities	Threats

Strengths	Weaknesses
Opportunities	**Threats**

NEXT STEPS

FEEDBACK & EVALUATION

What did you like?

What could have been better?

Other feedback?