

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.	