

IT Planning And Budgeting Crash Course

April 11, 2018 @ 10:30 AM in 355

Session Hashtag: [#18NTCCrashcourse](#)

Session Evaluation: <https://event.crowdcompass.com/18ntc/activity/MgFLsSXBdK>

Session quiz: <http://bit.ly/CrashCourseQs>

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Session Materials

- [Session slide deck](#)
- [Sample TechBook](#)
- [Sample Technology Plan](#)
- [Sample Budget Spreadsheet](#)

Additional Resources

- [Nonprofit Strategic Technology Planning Guide - NTEN Community](#)
- [TechSoup Technology Inventory and Planning Toolkit](#)
- [Journal of Accountancy - A Strategic Approach to IT Budgeting](#)
- [Sample staff computer replacement schedule](#)
- [Simple IT Budget Template](#)
- [ROI Worksheet](#)
- [How Can Technology Help Nonprofits Run More Efficiently?](#)
- [Tech Planning 101: Getting Started and Assessing Your IT Infrastructure](#)
- [Nonprofit Quarterly - A Graphic Re-visioning of Nonprofit Overhead](#)
- [The Overhead Myth](#)

Other Presentations

- [IT Budgeting for Nonprofits](#) (12NTC)
- [Tips and Tools for Technology Planning](#) (12NTC)

- [Tech Planning Smack Down! Tactical Vs. Strategic Vs. Missional](#) (14NTC)
- [Tech Planning Smack Down slides](#)
- [The Dollars and Sense of Nonprofit Technology Budgeting](#) (17NTC)
- [Yes, We Need a Technology Plan, but Where Do We Start](#) (17NTC)

Collaborative Notes

Use this section to make your own contribution to the notes for this session.

Audience Participation

TechBook

Existing TechBook infrastructure areas	New ideas for infrastructure areas
• Network diagram • Office port map - phone & data ports • Server hardware details • Server roles and IP addresses • Server peripherals • Hubs/switches • Wireless access points • Internet connectivity • IP schema • Firewall port mappings • Data backup configuration • Account log in & email accounts • Data storage • Website hosting • Email marketing and transactional email providers	• Password repositories • VoIP • Onboarding practices • SaaS Providers • VDI (Virtual Desktop Infrastructure) • Cat6 Cables • Internet Router • Proxy • Shared Printers (Names and IP's) • VPN

• Technology support (managed service providers) • Domain registration & DNS hosting • SSL certificates • Database hosting • Telephone system • Conference calling service • Antivirus/endpoint protection • Staff technology roles and responsibilities • Staff computer equipment plan • Standard software	
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Existing TechBook supporting documentation	New ideas for supporting documentation
• Network diagram • Office port map • Equipment inventory • Software license inventory • Software license installation inventory • Staff computer replacement schedule • Equipment checkout sheet • Conference call provider moderator setup form • Phone handset specs and cost • Voicemail instructions • PCI compliance assessment (Month 201x)	• Your ideas here • Procedural Wiki for completing different IT tasks • Software and licenses that are own by other departments • Admin guides for software/subscriptions ○ Zoom ○ Office 365 ○ etc

Tech Plan

Existing Tech Plan areas	New ideas for plan areas
Run • Strategy, budgeting, and documentation • Technology support staff • Technology policies and procedures • Data storage • Data backups • Servers • Networking equipment	Run • • Grow • • Transform • •

• Staff computers • Printers • Telephone and internet • Website hosting and maintenance • Software procurement • G Suite • Accounting software • Mail machine leasing • Event audiovisual services Grow • Website development • Phone system upgrade • Staff technology training Transform • Salesforce database implementation • Organization voices project	
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Existing Tech Plan supporting documentation	New ideas for supporting documentation
• TechBook • IT Director Job Description • Staff computer equipment plan • Staff technology usage policy • Staff social media guidelines • Copier contract • CenturyLink phone & internet service agreement • Comcast internet service agreement • Comcast nonprofit rate sheet • Website vendor maintenance agreement • Salesforce implementation vendor contract • Mail machine contract • Website privacy policy	• Your ideas here