

What is a professional practice statement?

This Professional Practice Statement, developed by the Association Forum, is provided as a management tool for associations and individual association professionals, developed by experts in the industry, and recommended as a means to achieve excellence in managing associations and other not-for-profit organizations.

BACKGROUND

At their core, associations exist to serve their members and the industries or professions which they represent. This, in turn, drives the need for an association to build a culture that is member-centric and demonstrates a commitment to analysis and feedback. To meet this goal, technology must be viewed as an extension of an association’s overall strategic plan. The plan should provide the framework for improving the organization’s effectiveness through the selection and use of the right tools.

POLICY STATEMENT

All associations should develop and maintain a strategic business plan that aligns business functions with enabling technologies. With the growing use of enterprise systems, the web, business intelligence, mobile and social media, associations’ dependence on technology will only increase in the future. The purpose of this document is to identify the essential elements that should exist within an effective technology plan and provide guidelines on needs assessment, budgeting, project management and implementation and evaluation.

I. ELEMENTS OF AN ASSOCIATION TECHNOLOGY PLAN

A. Business Case

When developing or updating a technology plan, an association should first determine which of its strategic goals and priorities will be furthered through the use of technology. The association should investigate the specific needs of its audiences and available alternatives for meeting those needs.

Components include the following:

1. Technology vision statement
2. Assessment of current infrastructure: Network, hardware and software (How it meets business needs)
3. Assessment of core systems and related applications
4. Assessment of Electronic Communications
5. Human Resource Management
6. Assessment of existing and projected needs and the available technology to address them.
7. Determination of how members and customers use technology for practical business, communication and educational purposes
8. Potential for integration and on-demand access through a shared pool of configurable resources

B. Budgeting

Any planned investments in new or updated technology must match with the organization’s overall planning calendar and budget. Thus, the plan should include realistic budget estimates, along with the resources required and the time frame within which the technology should be implemented.

The seven key components of the budget include:

1. Hardware
2. Network and Operating System
3. Internet Connection and mobility
4. Software
5. Data Conversion

6. Software Maintenance and Support
7. Research, Development and Training Requirements

C. Goals and Measurements for Evaluation

To determine and learn from a plan's successes and failures, an association should determine how it will judge the success of the plan and any projects within it. The association should include in its plan the benchmarks and milestones it seeks to reach at given times during the implementation of the plan, as well as how specifically it plans to measure success.

Components include the following:

1. A determination of what stakeholders will evaluate technology projects.
2. Ongoing evaluation mechanisms to be used throughout the implementation of the plan.
3. Plans for regularly reassessing the plan for currency and applicability to the association's business needs.

II. MODEL PROCESS CONSIDERATIONS FOR STRATEGIC TECHNOLOGY PLANNING

A. Needs Assessment

1. **Internal Needs:** What do current users of the association's technology tools identify as the most important business and technology needs? Create a technology advisory committee, comprised of constituents and both management and administrative staff, to determine its full range of technology needs.
2. **External Solutions:** What are other related associations doing to address their technology needs, and what technology solutions are available on the market?
3. **Consulting Assistance:** Does your association have sufficient in-house staff expertise to conduct the needs assessment? Associations can make effective use of technology planning consultants who have technology expertise, planning experience, and experience in working with associations.
4. **Systems to Be Addressed:** Are all association technology systems included in the plan?

The plan should address the following association-wide systems, if they exist or are needed: the association management system (AMS); the customer relationship management (CRM) system; the financial management systems, including general ledger and financial reporting/analysis systems; the human resources management system (HRMS); and the content management system (CMS).

In addition, the plan should address its effects on the following: desktop hardware and applications; the association website and communications or services delivered through it; and data backup and recovery.

B. Integration with Budget and Other Strategic Planning

1. **Technology Budget:** Associations should view technology as an investment in operational success, and not simply as an expense. Association management and leadership should provide guidance on the sources of funding for technology investments.
2. **Strategic Planning Calendar:** How does the proposed technology match the organization's strategic priorities over time? Will it support the progress toward time-sensitive organizational goals?
3. **Ongoing Maintenance and Support Costs:** Does the technology budget account for ongoing maintenance, support, and training costs? In many organizations, following an initial investment in a new technology project, ongoing support and maintenance account for more than

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half of technology expenses.

C. Project Management/Implementation

1. **Written project plans:** Most new technology implementations are complex enough to require written project plans and dedicated project managers, particularly if a team larger than one department will be charged with implementing the plan. A written project plan is an effective method for keeping all team members and management informed during the implementation.
2. **Human Resource Management:** What existing or additional staff will be needed to implement the plan? Will outside consulting help be required? Who will manage the overall implementation?
3. **Training and Support:** If new technology is to be introduced, who will support it on an ongoing basis (vendor; in-house support)? Does the plan include sufficient time, funding, and resources for initial and ongoing user training?

D. Post-Implementation and Ongoing Evaluation

1. **Goals and Measurement:** What constitutes success at various stages of the implementation? Are there specific and measurable metrics the association can use to evaluate and report on progress? Are there benchmarks or milestones that will equal success at different phases of the implementation of the plan?
2. **Progress reports:** How will all stakeholders be kept apprised of progress in implementing the technology plan? An effective plan includes an articulation of when progress reports will be made to stakeholders, management, and leadership.
3. **Reevaluation and Adjustment of Plans:** How often will the association reevaluate the plan and how it addresses current needs? The ongoing technology planning process should include regular review and revision to reflect ongoing changes in technology and organizational needs.

E. Governance

Information Technology (IT) needs to be an integral part of an association's overall leadership, project management, financial, communications and strategic planning processes.

What can be done to ensure that IT performs and contributes at the highest level possible? Association planners may consider implementing "The Rule of Four of IT Governance," as described by Erik Guldentops, CISA, CISM, executive professor at the University of Antwerp Management School (Belgium).

1. **Effectiveness.** Is the IT function in alignment with the association's overall strategic goals? Business operations and IT need to be in alignment. That means sharing decisions in steering committees, sharing understanding and skills through cooperation and multi-disciplinary teams, and sharing responsibility, risks and rewards. This process creates efficiency.
2. **Accept uncertainty.** This typically goes against the grain of chief operating officers and other top association executives looking to achieve hard number objectives. But there are so many variables involved in planning and implementing IT projects including costs, delivery time, number of decision-makers involved, member/customer behaviors and market assumptions. That means an association must establish mechanisms that will put them in a position to take timely and corrective action when needed. Only then will organizations embark on initiatives that are uncertain, but have the potential to result in huge returns and to halt those that are unlikely to deliver expected benefits.
3. **The business case for IT projects** needs to be complete in order to be successful. That means a project plan needs to cover all of the activities necessary to obtain the promised benefits from inception of the idea to final completion of the program, service or project. It means

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determining whether the association has established the proper technology architecture to support the business and whether it delivers against established quality standards.

4. If promises are made about the benefits and outcomes that will result from an IT-enabled business initiative, someone needs to be accountable for those benefits. Accountability goes beyond providing the IT services or technical projects, it also means delivering change. Make certain that someone is fully in charge of outcomes in terms of strong organizational and people impact. It is also important that success is recognized. Accountability not only applies when things go wrong; it also means providing rewards when success is achieved.

These four rules can help an association change its thinking about IT and enable it to place its technology operation on an equal footing with its other association management functions.

SUMMARY

The alignment of technology to an association's business operations is high on the agenda of executive management. To be successful over the long-term, the organization must develop strategic technology goals that support an organization's business goals in every other functional area. It is important that an organization start with a clear view of its corporate mission and a thorough definition of its supporting strategy and business goals. These need to be translated into goals for the IT department, which then form the basis for the IT strategy. Finally, the supporting IT processes must be carefully planned to translate the IT strategy into action. Understanding the centrality of IT to an association's strategic initiatives is more important now than ever before.

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