

mission
~~IT~~ Alignment

Steve Heye – YMCA of Metro Chicago

What does IT alignment mean?

What steps would you take to
make that happen?

CEO



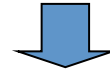
Vision

COO



Tactics

CFO



Budget

Goals



Executive
Directors

Services

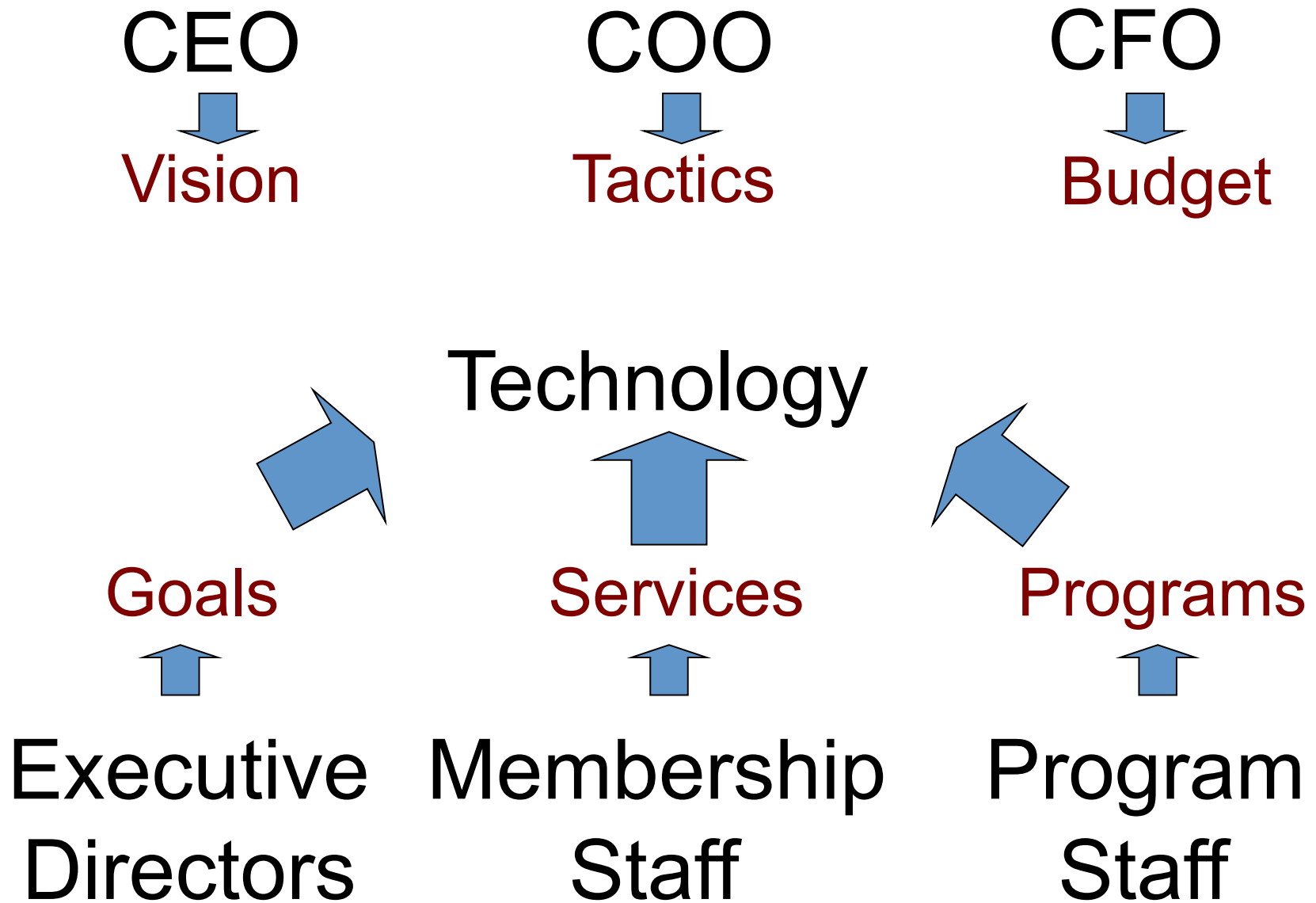


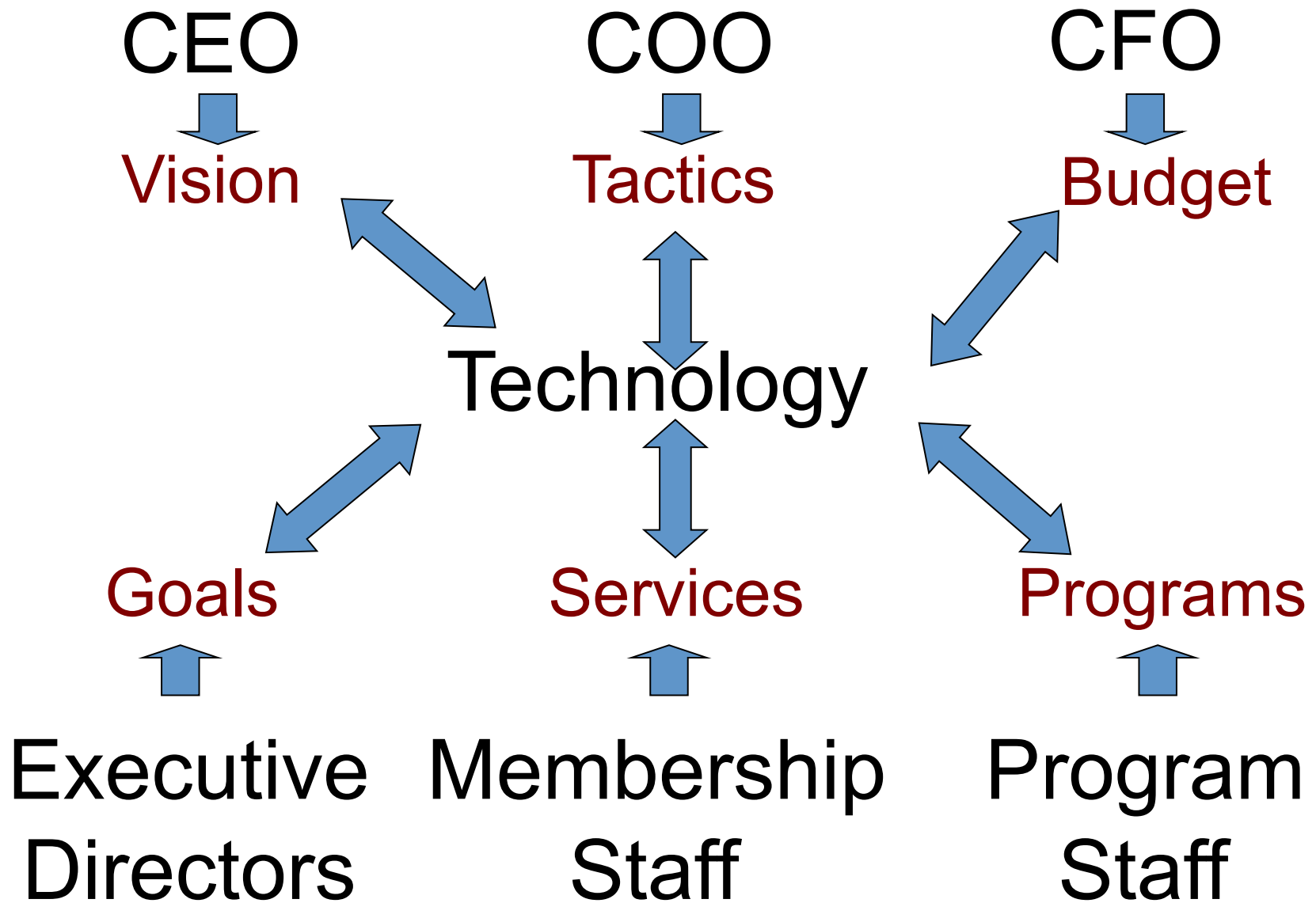
Membership
Staff

Programs



Program
Staff



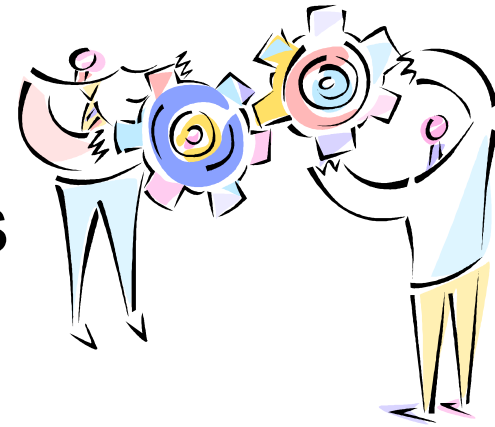




HR
CEO
COO

People

CFO
Business



Process

Tools

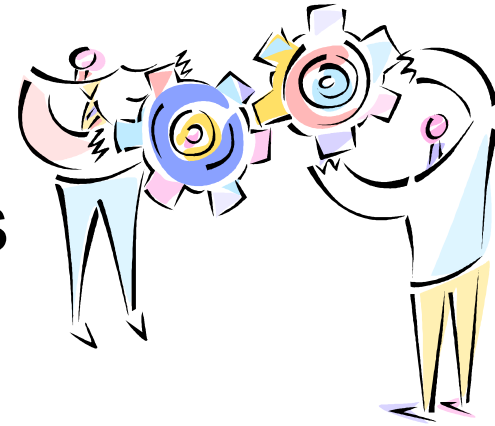
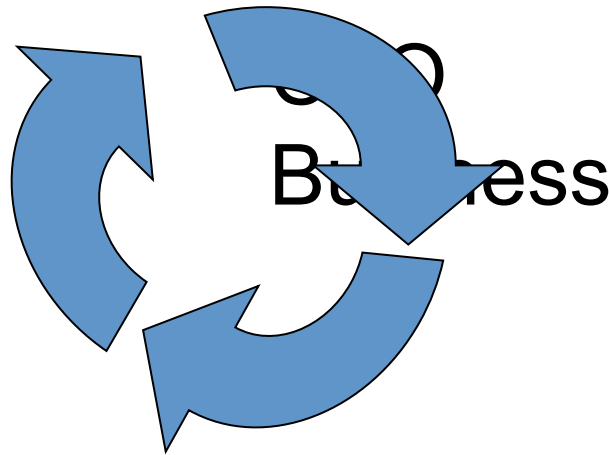
Tech Staff





HR
CEO
COO

People

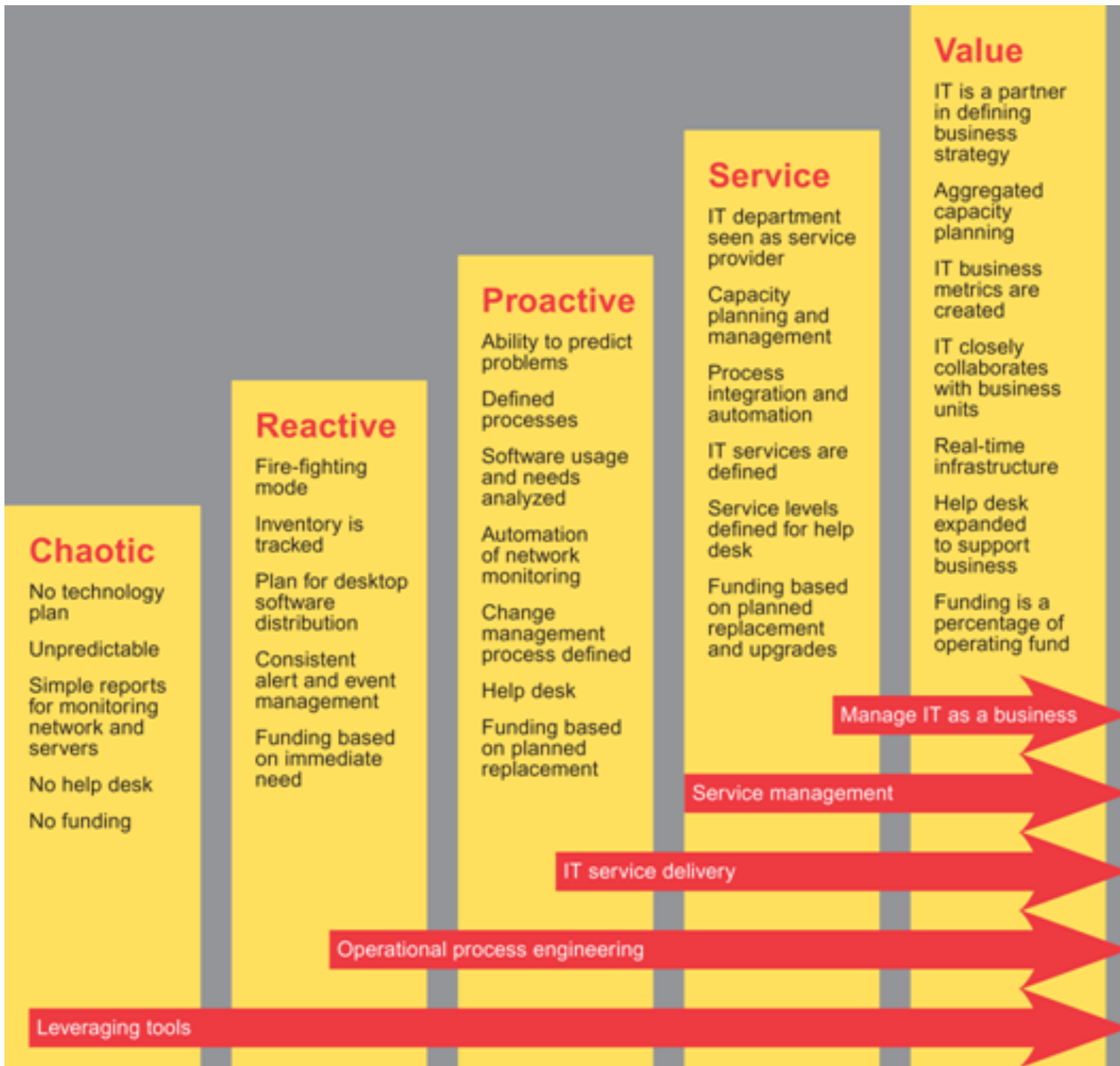


Process

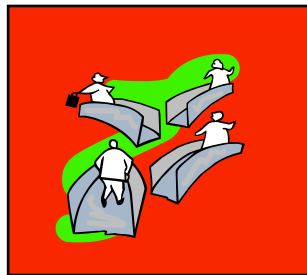
Tools

Tech Staff





Level 0: Chaos



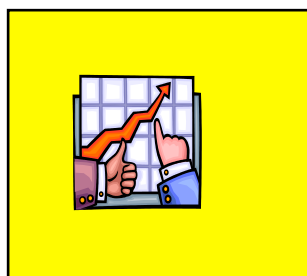
Objective	None
People / Organizations	Lack of centralized and formalized IT responsibility Multiple or no help desk
Processes	No defined processes or documentation Uncoordinated problem resolution Manual updates, no automation
Tools	Backup Ad hoc monitoring or alerting
Funding Model	None

Level 1: Reactive



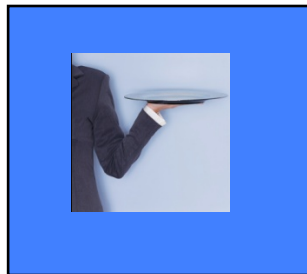
Objective	Control: Tools, speed Reduce cost
People / Organizations	Centralized operations Consolidate help desk Silo IT Infrastructure: DB, network, desktop
Processes	Backup / recovery Inventory tracking Component-oriented availability mgmt
Tools	Trouble tickets for logging & dispatch Inventory discovery / desktop SW distro. Real-time event monitoring
Funding Model	Random based on immediate need

Level 2: Proactive



Objective	Efficiency & Effectiveness Prevent problems reduce downtime Define standards
People / Organizations	IT operations command center Defined processes managers Identified support levels / tiers
Processes	Change management Tacking Control Asset management Configuration management
Tools	Server provisioning Software usage analysis Application availability
Funding Model	Budget for replacement

Level 3: Service



Objective	Business alignment: Service delivery Defined services, improve service quality
People / Organizations	Relationship managers Service delivery managers Capacity planning
Processes	IT service definition, classes, cost IT service configuration mgmt with policies Capacity management Process integration and automation
Tools	CMDB Event mgmt results automatically integrated Service availability with user impact Capacity planning including "what if" analysis
Funding Model	Budget based on planned replacement & upgrades

Level 4: Value



Objective	Business Value & Agility: IT and business partner to improve the business processes
People / Organizations	IT Director or Top IT manager on executive level steering committee IT viewed as a partner in defining business strategy Relationship managers are strategic IT liaisons
Processes	Automation of IT infrastructure business level service needs Aggregated capacity planning as part of business planning
Tools	IT operations and business metric linkage Business transaction measurement
Funding Model	% of Operating fund dedicated to technology funding

First complete the Technology capability and maturity assessment

	Chaotic = 1	Reactive = 2	Proactive = 3	Service = 4	Value = 6	Rating (1-6)	Target (1-6)	Category
How closely is technology tied to mission?	YMCA does not use technology in support of its mission. Information systems, if any, are used only for routine business processes.	YMCA does not use technology in support of its mission. Information systems, if any, are used for routine business processes and automating tasks.	The idea of mission-based technology is not a foreign concept; however, day-to-day issues often overshadow realizing these goals.	Technology assets are seen as mix of investments and expenses. Some planning efforts have focused on technology or accounted for a technology component to support a new program.	Technology assets are seen as investments rather than expenses. Strategic planning efforts have focused on technology or accounted for a technology component to support a new program.			Planning
Is technology involved in strategic planning and plan?	Technology is not represented in association strategic planning process or included in association's strategic plan. No separate technology plan exists.	Technology is mentioned as a needed resource but is not represented in association's strategic planning process. Separate technology plan may exist, but is limited to replacement and hardware requirements.	Technology is mentioned as a needed resource and is consulted for some projects but is not represented in association's strategic planning process by YMCA technology staff. Separate technology plan exists and includes replacement, upgrades and process improvements.	YMCA technology staff is included in the strategic planning process but with limited access; staff is only present answer questions. Technology is directly mentioned as a tool throughout association's strategic plan, and a separate technology plan includes replacement, upgrades, and process improvements exists.	YMCA technology staff is included in the strategic planning process and acknowledged to be a managed resource of the YMCA. Technology staff advises on what is possible and ways to be more effective. Technology is fully integrated throughout association's strategic plan. All projects and technology plans are tied to the association's plan and			Planning
Is leadership and board supportive of operations and technology needs?	Leadership and board are unaware of technology and operations needs beyond day to day needs.	Leadership and board have limited knowledge of how technology is supporting their operations.	Leadership and board have clear picture of our technology in use and for future improvement.					
Are all areas of the YMCA actively participating in identifying technology needs?	YMCA does not allocate any regular resources or planning for technology.	YMCA begins to actively look for ways to use technology to support new service offerings or develop new programs.	Some departments programs regularly identify technology; the effort may not be integrated across p					
Is there a review of technology to measure member impact?	There are no reviews in place to measure how effective our technology is for our members.	YMCA tracks anecdotal comments from members or staff about how effective our technology is for our members.	Member satisfaction are analyzed for are technology may be enhance service.					

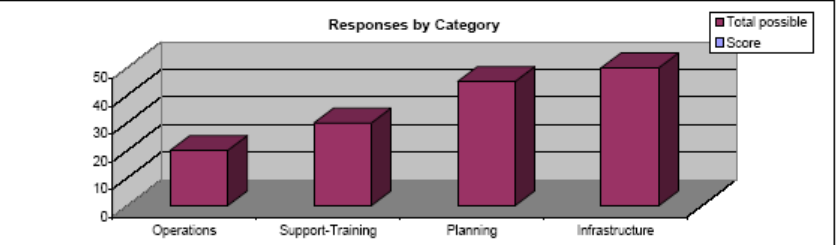
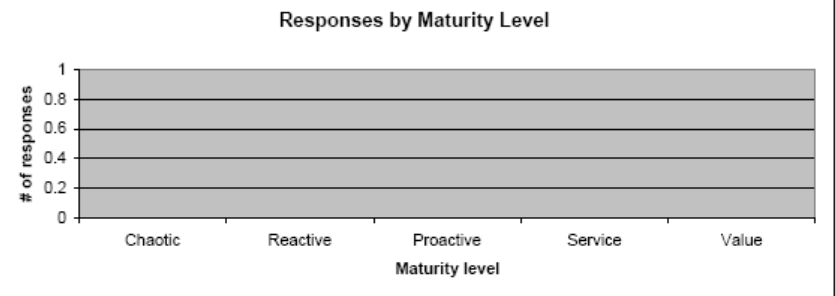
Overview of Technology Capability and Maturity Assessment

Scoring a 5 on every row is not the objective of this tool. Some areas of this assessment may not be appropriate for your YMCA at this time. Consistently working to improve how your technology is aligned is the objective, not scoring the highest. After scoring your YMCA you can use the target column in the assessment tool to define where you think your YMCA should be. Then compare yourself to those targets and see where improvement is needed.

Total Score	0
Target Score	0
Average Score	0.0
Overall Level	Chaotic

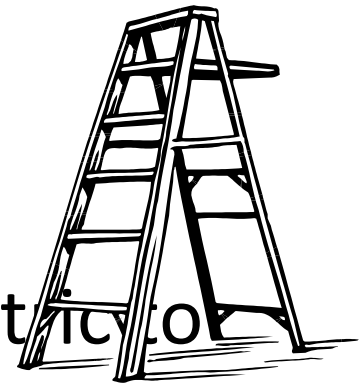
Breakdown of responses	
Chaotic	0
Reactive	0
Proactive	0
Service	0
Value	0

	Score	Total possible
Operations	0	20
Support-Training	0	30
Planning	0	45
Infrastructure	0	50



Why Climb the Ladder?

- Build org & IT Partnership | Mission Alignment
- Business Requirement
- IT Accountability
- Improve IT Service Delivery
- Lower IT Costs
- Encourage IT Culture Shift: Tech-Centric to Service-Centric



ART of Technology

A = Alignment

R = Relationship

T = Transparency

Technology Hemispheres

Org Core Business Support	
Enterprise Applications	Business Applications

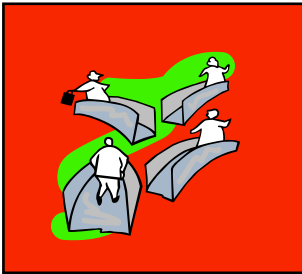
Value

Commodity

Infrastructure Management	
Desktop / Laptop <ul style="list-style-type: none">• Patch Mgmt• Anti-Virus• Upgrades• Asset Tracking	Servers / Network <ul style="list-style-type: none">• Fault Mgmt• Configuration• Performance Mgmt• Upgrades
Help Desk <ul style="list-style-type: none">• Password Reset• Equipment failures• "How to"	E-Mail <ul style="list-style-type: none">• SPAM• Upgrades

IT Direction...

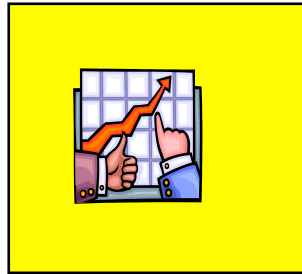
Chaos



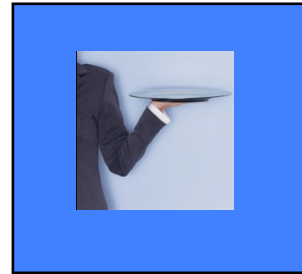
Reactive



Proactive



Service



Value



Infrastructure

- Inventory
- Replacement plan
- Support

Align Operations

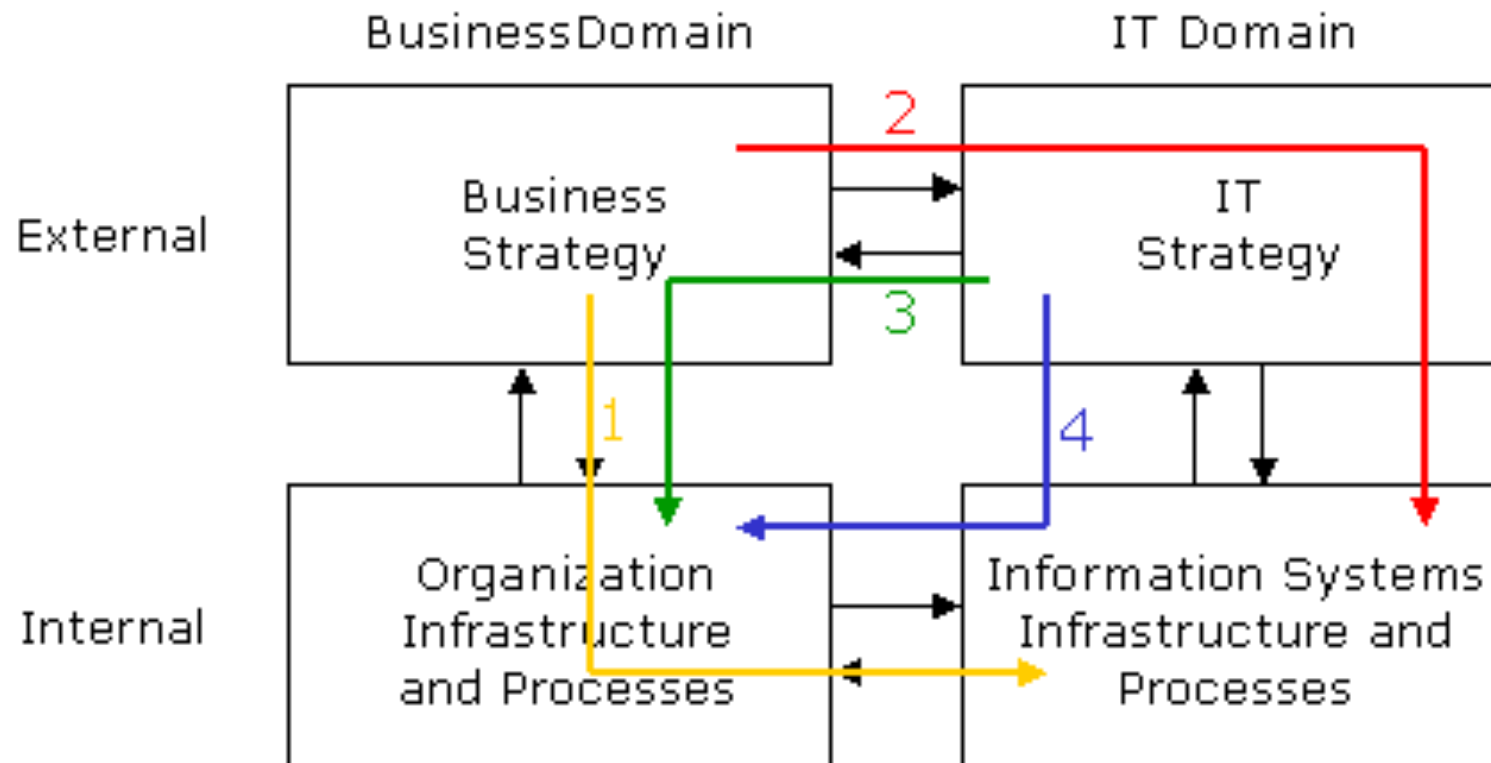
- Operations Assessment
- IT staffing
- IT budget

Added Value

- IT standards
- Model Practices
- Integrated Communications



Strategic Alignment Model (Venkatraman ea)



1 = Strategy Execution

2 = Technology Potential

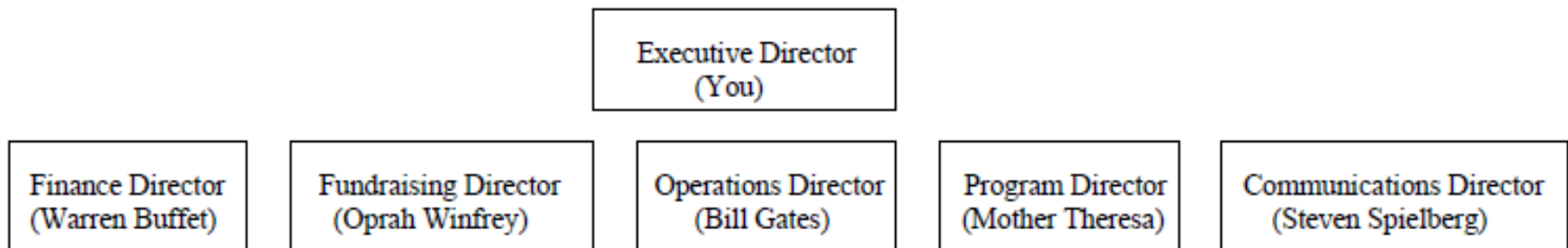
3 = Competitive Potential

4 = Service Level

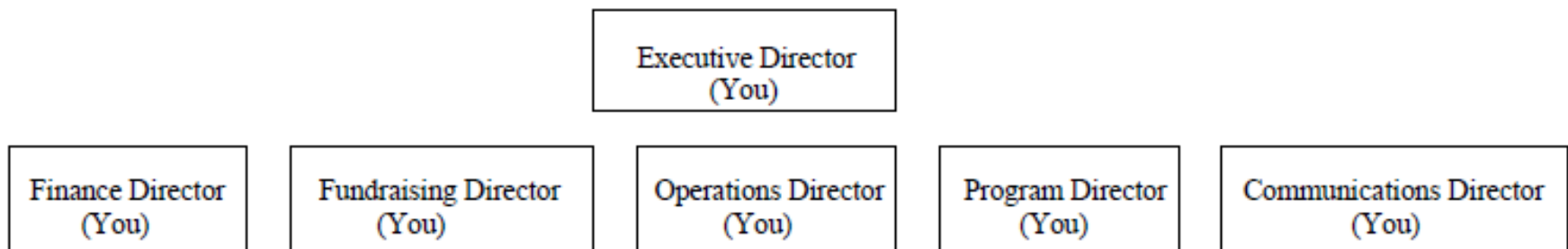
Recommendations

- Use IT process maturity model not as an end, but as a means
- Automate only after good documentation
- Be “State of the Shelf” Cost \neq Value
- Leverage YMCA staff, they can be your best advocate for change
- Make technology a part of the strategic process
- Build a Technology Fund
- Your CEO is your Partner

What Your Non-Profit Management Organization Chart Should Look Like:



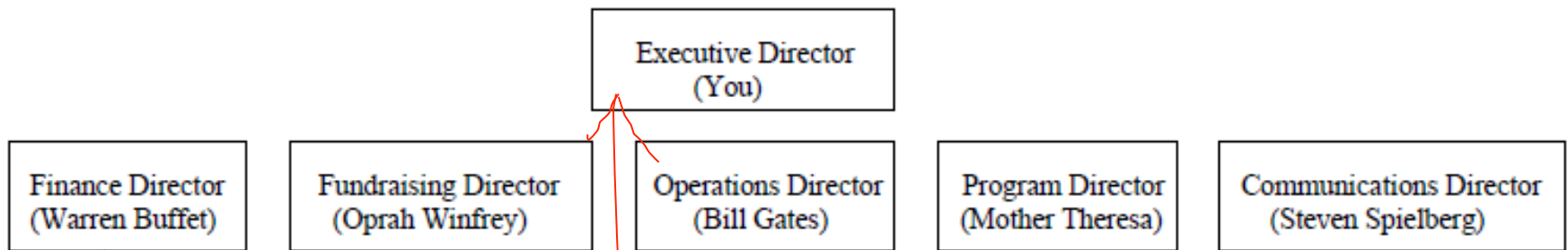
What It Probably Does Look Like:



But where is technology?

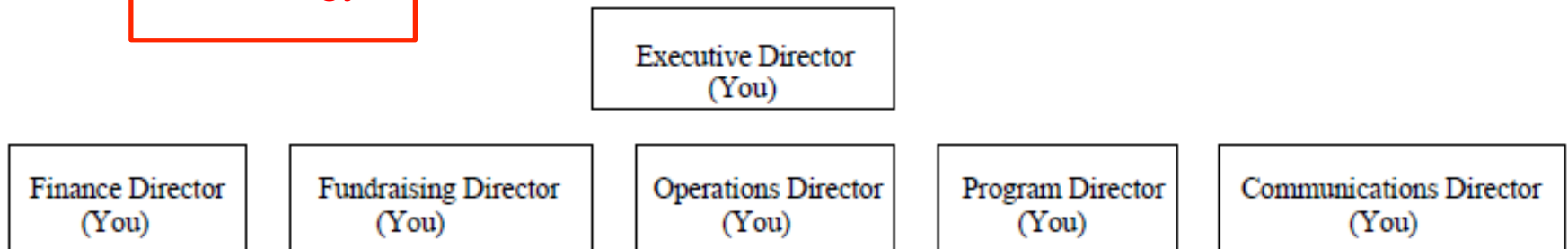
Source:<http://uncw.edu>

What Your Non-Profit Management Organization Chart Should Look Like:



Technology?

What It Probably Does Look Like:



```
graph TD; Executive[Executive] --- Finance[Finance]; Executive --- Fundraising[Fundraising]; Executive --- Operations[Operations]; Executive --- Program[Program]; Executive --- Communication[Communication];
```

Executive

Finance

Fundraising

Operations

Program

Communication

Technology should not be the focus, so let's go back to a simple org chart without technology in it and review each of the areas. But we will look at them as topic areas, not positions.

What does alignment look like at the Executive level?

Executive

Early alignment stages

- Strategic plan created to meet mission
- Leadership staff enabled to create operational plans to meet strategic plans
- Individual departments pass needs to IT

Late alignment stages

- IT included earlier in the process
- IT allowed to participate in understanding the operational goals
- IT offers solutions to meet goals not individual needs

What does alignment look like in the Finances?

Finance

Early alignment stages

- IT purchases approved individually
- Technology purchases reviewed as expenses
- Financial data used to measure progress against budget

Late alignment stages

- IT strategies approved with a budget
- Technology purchases weighed against benefit
- Financial data not sole reports to determine success

What does alignment look like in Fundraising?

Fundraising

Early alignment stages

- Fin Dev software used as financial record keeping
- Fundraising campaigns developed by Fin Dev team that uses email and web to deliver
- Individual Fin Dev staff create own process to work around the systems to get results

Late alignment stages

- Data analyzed to maximize donor experience (then tied to software)
- Fundraising campaigns are developed as a part of full org communication plan
- Fin Dev staff collaborate with IT to understand business needs and work together to improve process

What does alignment look like across the Operations?

Operations

Early alignment stages

- Individual Depts develop processes to complete tasks
- Data stored and reported as needed by each staff
- Tools and technology selected as parts of projects

Late alignment stages

- Cross functional teams work to increase effectiveness in processes
- Data stored and reported on is tied to measuring objectives in strategic plan
- Tools and technology selected planned for during full org operational plan

What does alignment look like in Program delivery?

Program

Early alignment stages

- Work hindered by ineffective technology
- Views IT as team to “fix” all the technology problems
- Makes decisions, then asks IT to implement

Late alignment stages

- Technology works well enough to be transparent
- Views IT as partner in meeting the mission
- Includes IT in planning to allow for better outcomes

What does alignment look like in Communications?

Communication

Early alignment stages

- Unclear who owns website, email strategy or solely owned by IT or Marketing
- Starts with technology, then looks to leverage it
- Makes decisions, then asks IT to implement

Late alignment stages

- Cross functional partnership on communication strategy with roles to implement it
- Define goals first, then collaborate to pick technology
- Includes IT in planning to allow for better outcomes

Review

1. Determine where you are
 - Use the IT Alignment model and a technology inventory
2. Get consensus on where you should be
 - Create the picture of where you want to be and start to share that
3. Create a plan to fill the gap
 - Build the strategy for changes across the alignment, relationship and transparency of technology