

The following is a sample Technology Case Statement that exemplifies the kind of basic IT planning and strategy language that funders and development departments require.

Present Situation

The IT system at Johnson Cell Research is in vast need of updating. The outdated IT infrastructure is impacting the basic needs of the staff to perform and communicate at an appropriate rate. Presently, staff all works from separated workstations without connectivity across various software platforms, blocking true electronic communication or collaboration. Technology upgrades are required to facilitate continued growth at Johnson Cell Research.

The high expectations of the recent capital campaign have raised the quality of services and physical infrastructure at Johnson Cell Research. However, the operating expenses continue to increase and a lack of IT infrastructure is creating a continued decline in the ability of the Johnson Cell Research staff to adequately serve their constituency. Johnson Cell Research staff is using IT that dates back over a decade – or more. As little as five years ago, the physical and financial strains on the agency would have prohibited a technological upgrade. Today there is a new, modern facility that can handle the electrical and physical requisites of a conversion of this type, and the technology cost is up to 700% lower than in previous years, and is not expected to decline much further.

Of greatest concern, however, is the impact the outdated IT has on data integrity at the agency. The core of Johnson Cell Research's operations is the processing and delivery of accurate data at multiple levels of the agency. However, there is a fundamental loss of data integrity that is being caused by outmoded manual data collection and data communication that is causing a surmounting infrastructure dilemma that must be addressed.

The Evaluation: ISD Group

An in-depth IT evaluation was recently completed at Johnson Cell Research by the President of Integrated Solution Design Group. This organization was referred to us by Belinda Teitel at the Draper Group as an IT consulting company with “people-centered” and comprehensive approach to assist Johnson Cell Research in establishing a customized plan to create a new IT infrastructure that would be in line with the type of growth that the recent capital campaign is realizing. This service usually costs up to \$6,000 to complete, and was done on a pro bono basis for the agency. The evaluation took place over a two week period and included a review of our current IT base, schematics of the operation, as well as detailed interviews with each department at Johnson Cell Research. An overwhelming finding is an agency-wide concern that staff does not have the tools necessary to adequately succeed to serve their constituency. Most feel that they are wasting inordinate amounts of time on a daily basis simply completing the most basic of tasks.

Based on the results of the initial evaluation, there are several identifies areas of concern in our present IT set up and several solutions that will work together to formulate a concrete, integrated IT infrastructure for Johnson Cell Research.

Results of the Upgrade

Increased IT resources would significantly impact Johnson Cell Research's ability to succinctly meet the needs of its constituency by greatly increasing speed, accuracy, and efficiency levels. State of the art and task appropriate hardware and peripherals will allow for longevity of use, increased productivity, and real time collaboration and coordination of workload by the staff.

The results of an integrated, concrete IT infrastructure for JCR:

- Increased productivity and workload consistency
- Communication system with a considerable impact on the efficiency and infrastructure capabilities for the entire staff at every organizational level
- Improved quality and consistency of work standards
- Alignment of IT and business growth goals
- Offsite access to the network and document library
- Fully trained administrative and executive staff
- Further development of in-house graphics and desktop publishing capabilities
- Secure and trackable backup of work

Solution: Hardware

A primary concern is the lack of networking capabilities. For an office of Johnson Cell Research's size, all the computers should be routed through a cluster of servers that will allow for:

- Secure and trackable backup system
- Document and data sharing between individuals and departments
- Centralized digital form processing and tracking
- IT and development growth capabilities
- Offsite access to the network and document library

Solution: Software

It is essential that the office come to a consensus regarding a common software application set for Johnson Cell Research to function properly. Although Microsoft Office products allow for the greatest level of collaboration and functionality, other applications are also very useful. Coordinated software platforms allow for real time document sharing, consistency of work quality and conversion capabilities from existing software components. Current industry-specific software platforms are minimally being utilized as manual systems facilitation and need upgrading to keep pace with production and IT integration standards.

Solutions: Communications Hub

Using Microsoft Outlook as a communication hub for Johnson Cell Research would have considerable impact on the efficiency and infrastructure abilities for the entire staff at every level of their efficiency needs:

- Contact Management
- Calendar & Office Scheduling
 - Individual Schedules
 - Meeting Arrangements
 - Facilities Planning
- Share information across public folders on the Exchange server
- Blast e-mail Communications

Solutions: Document Management

Presently everyone at Johnson Cell Research saves their documents in their own folders at their desks with no central document management library system. With this type of organization, often we see a doubling of efforts and recreations of documents for similar uses by different teams. Organizing file management would greatly improve productivity levels and consistency of work product across the entire company.

Solution: Document Automation

Automated and programmed document templates would be of immense assistance in the effort to control the production of consistent and reliable work across all teams. Document automation would also substantially increase productivity by cutting down on repetitive and time-consuming document formatting as well as manual forms completion and re-typing. Automation of familiar tasks and administrative tools also is found in significantly increase the rate of acceptance and utilization of new technology, sharply elevating the learning curve across all levels of the agency.

Solution: Training

No IT upgrade of this nature should be attempted without appropriate training and support. Full training would consist of:

- Customized training and “cheat sheet” templates to effectively help the staff to transition through this conversion process.
- Training “boot camp” allows everyone to get on the same page and launch the new Johnson Cell Research IT system.
- Department-specific modules would be helpful in focusing task-specific training needs across various teams, such as graphics and desktop publishing.

Cost Estimates: Time

Total hours are more than 24 weeks and over 1,500 hours of billable time will be required to complete the IT conversion at Johnson Cell Research. A conversion of this scope will require the efforts of:

- Administrator
- Trainer
- Documentation/Technical Writer
- Two IT Senior Techs
- Supervising Tech
- Graphic Artist
- Macro Programmer

If done privately, the cost would be \$110,000 to \$160,000. ISD Group’s non-profit discount flat rate estimate for these services is \$95,000, representing a savings of up to \$65,000.

Cost Estimates: Expenses

Final Hardware, Software and Equipment inventory and expenses will be available at the end of the discovery process in Phase IA of the conversion. Estimates based on previous conversions of similar size indicate the need for:

- All network hardware and software, including servers
- 35 computer workstations with task-appropriate monitors
- 5 laptops with wireless network connections for field representatives
- Office conference system and LCD projector
- Task-appropriate networked peripherals, including all printers and scanners
- 15 wireless Personal Digital Assistants (PDAs) for production (Vertex)
- All O/S and workstation software licenses including the Macola upgrade and server

<i>Server Computers</i>	<i>\$10,800.00</i>
<i>Workstation Computers</i>	<i>\$18,000.00</i>
<i>Portable / Laptop Computers</i>	<i>\$8,250.00</i>
<i>Network Hardware</i>	<i>\$7,293.00</i>
<i>Printers, Scanners & Misc. Peripherals</i>	<i>\$8,059.00</i>
<i>Software</i>	
<i>Server OS and Utilities</i>	<i>\$6,778.00</i>
<i>Workstation OS and Utilities</i>	<i>\$1,725.00</i>
<i>Productivity Applications</i>	<i>\$1,400.00</i>
<i>Subtotal Software/Hardware Cost</i>	<i>\$62,305.00</i>
<i>Shipping Estimate</i>	<i><u>\$7,000.00</u></i>
<i>TOTAL</i>	<i>\$69,305.00</i>

If done privately, the cost would be \$110,000 to \$146,000. ISD Group's discounted non-profit estimate for expenditures is approximately \$69,000 to \$78,000. All fees are payable directly to the suppliers and vendors with no markup to Johnson Cell Research. All old machines and components not salvaged will be donated by ISD Group to a local non-profit computer re-calibration center. This represents a savings of up to \$68,000.

Required Maintenance

Maintenance is a cost that cannot be overlooked in this process. IT is not a static investment; it is a functional asset that requires qualified and dedicated upkeep. It is a mandatory factor in not only the conversion and installation process, but is required in the continued success of a network and IT system of this scope. Maintenance efforts include:

- Systems Administration
- Helpdesk and Tech Support
- Server and Telephony support
- Ongoing training and staff development

The first two quarters following the launch of the new network will involve a nearly fulltime effort on site by a dedicated staff or consultant. After that time, a monthly service contract can continue to provide adequate support with a combination of on and off site support at a reduced fee. Typical monthly fees for the level of maintenance required range from \$5,000 to \$10,000 a month, depending on timing and client needs.

Other Recommendations: Basic Web Site

There is a need for a basic Johnson Cell Research Web site that will reflect all of the facility and operational changes and upgrades that the organization has undergone. This will serve as an online informational brochure that will give Johnson Cell Research a Web presence for communication with corporate contacts, other partner agencies, and funding organizations. A basic Web presence could be established for Johnson Cell Research in as little as 3-5 weeks for as little as \$3,500 - \$6,000, depending on the features incorporated in the design and programming of the site, and can be completed either prior to or in conjunction with the conversion.

Other Recommendations: Make Web Site Interactive

As a next generational consideration, it would be recommended to move Johnson Cell Research's Web site toward interactivity. This makes it accountable to the agency as a flexible, updateable collateral medium. To develop a vital, functional component of the infrastructure and constituency support base, a more interactive Web site could:

- Track and process online orders for Punch sales
- Create an online job posting / searching area for clients and corporate partners
- Create Web-based streaming coursework
- Use extranet technologies to expand our data tracking and infrastructure capabilities

Other Web Recommendations

Other development /outreach Web features to consider:

- Design & development of an HTML electronic newsletter, complete with electronic communications plan and launch
- Video gallery
- Passcoded Media area
- Data gathering source via Guest Registration
- Passive Donation area where people of all income levels can shop online and have a percentage go back to Johnson Cell Research

Other Recommendations: Development Database

There is a need for a more complete and effective data tracking system for the continuing outreach and development efforts at Johnson Cell Research. The present system is not capable of expanding to meet the needs of the organization, nor is there a consistent integrity of the data utilized. A customized and user-friendly application that tracks donors, fundraising efforts, projects, events, mailings, etc. would be the best solution for the Development department at Johnson Cell Research. Basic development applications that are appropriate can cost anywhere from \$5,000 to \$8,500, depending on the modules and features required and take up to 4 months to implement.