

# Technology Planning for Heritage Organizations: Lessons Learned & Resources from the OHS Reach Project



## Resources from the Webinar

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Sarah McCabe, Project Manager and Librarian  
The Ontario Historical Society  
(416) 226-9011  
[smccabe@ontariohistoricalsociety.ca](mailto:smccabe@ontariohistoricalsociety.ca)

## 1. Initial Planning and Information Gathering

### Best Resource:

#### TechSoup

[www.techsoup.org](http://www.techsoup.org)

[www.techsoupcanada.ca](http://www.techsoupcanada.ca)

- Software donations and discounts, many useful articles

### TechSoup Videos on YouTube

<https://www.youtube.com/user/TechSoupVideo/videos>

### On Demand Tactical Tech Planning Course

Idealware, 2016

<http://tacticaltech.idealware.org/>

Course content PDF: <http://tacticaltech.idealware.org/wp-content/uploads/2014/04/tacticaltechoverview.pdf>

Trailer Video: <https://vimeo.com/idealware/tacticaltech>

- The short trailer is worth watching, as it gives a great overview of the issues involved in IT planning.
- We did not take this course, but it might be worthwhile to your organization (for \$).

### Take Back Your Tech Workshop

TechRaiser, an Initiative of Framework, 2015

<http://www.takebackyourtech.ca/>

<http://weareframework.org/techraiser/our-work/take-back-your-tech/what-is-tbyt/>

- The next workshop is not yet scheduled, but these links give you an idea of what was covered (best \$40 we ever spent!).
- TechRaiser does website audits: <http://weareframework.org/techraiser/our-work/website-audits/>

### Idealware

<http://www.idealware.org/>

- Research and training courses.

### NTEN

<https://www.nten.org/>

- Community building, sector reports, webinars.

**“Think Like a Project Manager... Act Like a Library Leader”**

Emily Clasper, System Operations Manager, Suffolk Cooperative Library System, 2015

Webinar Recording: <https://vimeo.com/152471027>

Slides: <http://www.slideshare.net/eclasper1/ala2015-pm>

## 2. Identify Needs

### *For Membership Surveys*

#### **SurveyMonkey**

<https://www.surveymonkey.com/>

- A free (or upgrade to paid) online survey software and questionnaire tool that we used.

#### **Surveys 101**

SurveyMonkey

<https://www.surveymonkey.com/mp/survey-guidelines/>

- Best practices and guidelines.

## 3. Internal Review

### *For Strategic Plan Update*

#### **OHS Webinar: “The Secrets to Strategic Success: Strategic Planning for Small Organizations”**

Kim Pittaway, 2016

<https://www.ontariohistoricalsociety.ca/index.php/strategicplanning>

- Now available to OHS members only, open for public viewing in December 2016.

## 4. Recruit Tech Consultants

### *Finding and Working with Tech Consultants*

#### **“How to Choose and Work with Technology Consultants”**

TechSoup, Dan Rivas, 2015

<http://www.techsoup.org/support/articles-and-how-tos/how-to-choose-and-work-with-technology-consultants>

#### **“What Every Organization Needs in Its IT Consulting Contract”**

TechSoup, Jim Lynch, 2015

<http://www.techsoup.org/support/articles-and-how-tos/what-every-organization-needs-in-its-it-consulting-contract>

#### **“Choosing the Right Consultant”**

TechSoup, Becky Wiegand, 2012

<http://www.techsoup.org/support/articles-and-how-tos/choosing-the-right-consultant>

## 5. Perform IT Assessment

### **“How to Assess your IT Needs and Implement Technology at your Nonprofit”**

TechSoup Canada, Enzo Logozzo and Eric Neufeld, 365 iT solutions, 2016

Webinar Recording: <https://youtu.be/xzzbet0vc4E>

Article: <https://www.techsoupcanada.ca/en/community/blog/how-to-assess-your-it-needs-and-implement-technology-at-your-nonprofit-0>

### **“Are Your Technology Priorities in Order? Take the Tech Self-Assessment”**

TechSoup Canada, Tierney Smith, 2015

<https://www.techsoupcanada.ca/en/community/blog/are-your-technology-priorities-in-order-take-the-tech-self-assessment>

## 6. Develop IT Build Plan and Timeline

### **“What Every Nonprofit Executive Needs to Know About Information Technology”**

Tech Networks of Boston, Deborah Elizabeth Finn, 2016

<http://techboston.com/what-every-nonprofit-executive-needs-to-know-about-information-technology/>

### **“Digital Capacity in Canada’s Not-For-Profit Sector” [Report]**

Canadian Internet Registration Authority (CIRA) in collaboration with Framework, 2015

<https://cira.ca/digital-capacity-canada%E2%80%99s-not-profit-sector>

- In early 2014, CIRA provided a grant to Framework to conduct audits of the websites of more than 400 not-for-profit organizations.

## ***Content Management Systems***

### **“The Consumers Guide to Content Management Systems for Nonprofits”**

Idealware, 2014

<http://www.idealware.org/reports/consumers-guide-content-management-systems-nonprofits>

- As of September 20, 2016, this is being updated for 2017, so please check back.

### **“Website Tips for Nonprofits: How to Choose a CMS, Accept Donations and Set Up Email on Your Domain”**

TechSoup Canada, Jason Faber, CIRA, 2016

<https://www.techsoupcanada.ca/en/community/blog/website-tips-for-nonprofits-how-to-choose-a-cms-accept-donations-and-set-up-email-on>

### **“The Ultimate CMS Showdown” [Infographic]**

Udemy Blog, Kasia Mikoluk, 2013

<https://blog.udemy.com/drupal-vs-joomla-vs-WordPress/>

### **“CMS Wizardry: Librarians as Open-Sourcerers” [Webinar]**

Special Libraries Association, Information Technology Division, Andrea Cherney, 2016

<http://it.sla.org/2015/08/virtual-event-cms-wizardry-librarians-as-open-sourcerers/>

Webinar Recording: [https://www.dropbox.com/s/21nrp7xijqcaibj/2015-09-09%2012.02%20IT%20Webinar\\_%20CMS%20Wizardry.mp4?dl=0](https://www.dropbox.com/s/21nrp7xijqcaibj/2015-09-09%2012.02%20IT%20Webinar_%20CMS%20Wizardry.mp4?dl=0)

Slides: <http://it.sla.org/wp-content/uploads/2015/09/sla-webinar-september-2015.pdf>

### **CMS Crash Course [Webinar]**

TechSoup Canada, Net Tuesday Toronto, Andy McIlwain, 2014

Slides: <http://www.slideshare.net/techsoupcanada/net-tuesday-toronto-cms-crash-course>

### **“Five CRM Mistakes Nonprofits Should Avoid”**

Idealware, Dan Rivas, 2015

<http://www.idealware.org/blog/five-crm-mistakes-nonprofits-should-avoid>

### **“Website Builders Comparison Chart”**

Website Builder Experts, Jeremy Wong, 2016

<http://www.websitebuilderexpert.com/website-builders-comparison-chart/>

### **“Web Development & Design 101”**

Hosting Facts, 2016

<https://hostingfacts.com/web-development-101/>

## ***The Cloud***

### **“A Nonprofit's Guide to Cloud Storage for Security and Productivity”**

TechSoup Canada, Corbin Hartwick, 2016

<https://www.techsoupcanada.ca/en/community/blog/a-nonprofits-guide-to-cloud-storage-for-security-and-productivity>

## ***Accessibility***

### **Accessibility Ontario**

<https://accessontario.com/>

- Accessibility Ontario is a training and development organization that helps nonprofits and businesses in Ontario to understand and comply with the Accessibility for Ontarians with Disabilities Act (2005).

### **“Enabling Access Through Web Renewal Handbook”**

Wilfrid Laurier University, 2015

[https://wlu.ca/docs/EnablingAccessHandbook\\_online.pdf](https://wlu.ca/docs/EnablingAccessHandbook_online.pdf)

- Advice for updating organizational websites to meet accessibility standards.
- Includes best practices check-list.

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*Bonus:*

## ***Social Media***

### **OHS Webinar: “Social Media and Online Communication in Heritage” (freely available)**

Kim Pittaway, 2013

<https://www.ontariohistoricalsociety.ca/index.php/ontariohistoryweb>

Supporting resources:

<https://www.ontariohistoricalsociety.ca/images/webinarmaterials/OntarioHistory%20Resources.pdf>

### **“New Resources to Help Not-for-Profit Organizations Succeed on Facebook”**

Canadian Heritage Information Network (CHIN), 2016

<http://www.rcip-chin.gc.ca/sgc-cms/nouvelles-news/anglais-english/?p=9979>