People & Processes
Preparing for a Technology Implementation

MNN Annual Conference 2017│Framingham, MA

Facilitators

David Nero
Chief Information Officer
Perkins School for the Blind

Nick Strutt
Senior Consultant
Vera Solutions

Follow Us! @PerkinsVision @VeraSolutions

Agenda

- Are you ready to implement a new technology?

- What does it mean to be tech ready?

- Case Study

- Discussion/Q&A

Vera Solutions uses cloud and mobile technology to help social impact organizations better track impact and streamline operations.

Some of Our Partners

More than 200 NGOs, foundations, social enterprises, and academic institutions

VERA SOLUTIONS

psi

JSI

✻PATH
A catalyst for global health

अवन्ती
AVANTI FELLOWS

SANERGY

GRASSROOTSOCCER

ELTON JOHN
AIDS FOUNDATION

skoll
FOUNDATION

Pratham
Every Child In School and Learning Well

Global TB Caucus

Shining Hope
for communities

PCI

UNITED NATIONS
FOUNDATION

GLOBAL
INNOVATION
FUND

JACARANDA
HEALTH

ILUMÉXICO
PRENDE LA LUZ DE MÉXICO

OXFAM
International

US
SOCCER
FOUNDATION®

pact
building
local
promise.

WPA
WOMEN'S PRISON ASSOCIATION

college for
social innovation

NOORAHEALTH

FRIDA
FRIDA | The Young Feminist Fund

JLUSA
justleadershipusa.org

AGA KHAN FOUNDATION
An agency of the Aga Khan Development Network

TECHNOSERVE

ipa
INNOVATIONS FOR
POVERTY ACTION

HAGAR
the whole journey

IDinsight
DATA. DECISIONS. DEVELOPMENT.

Preparing for technological change
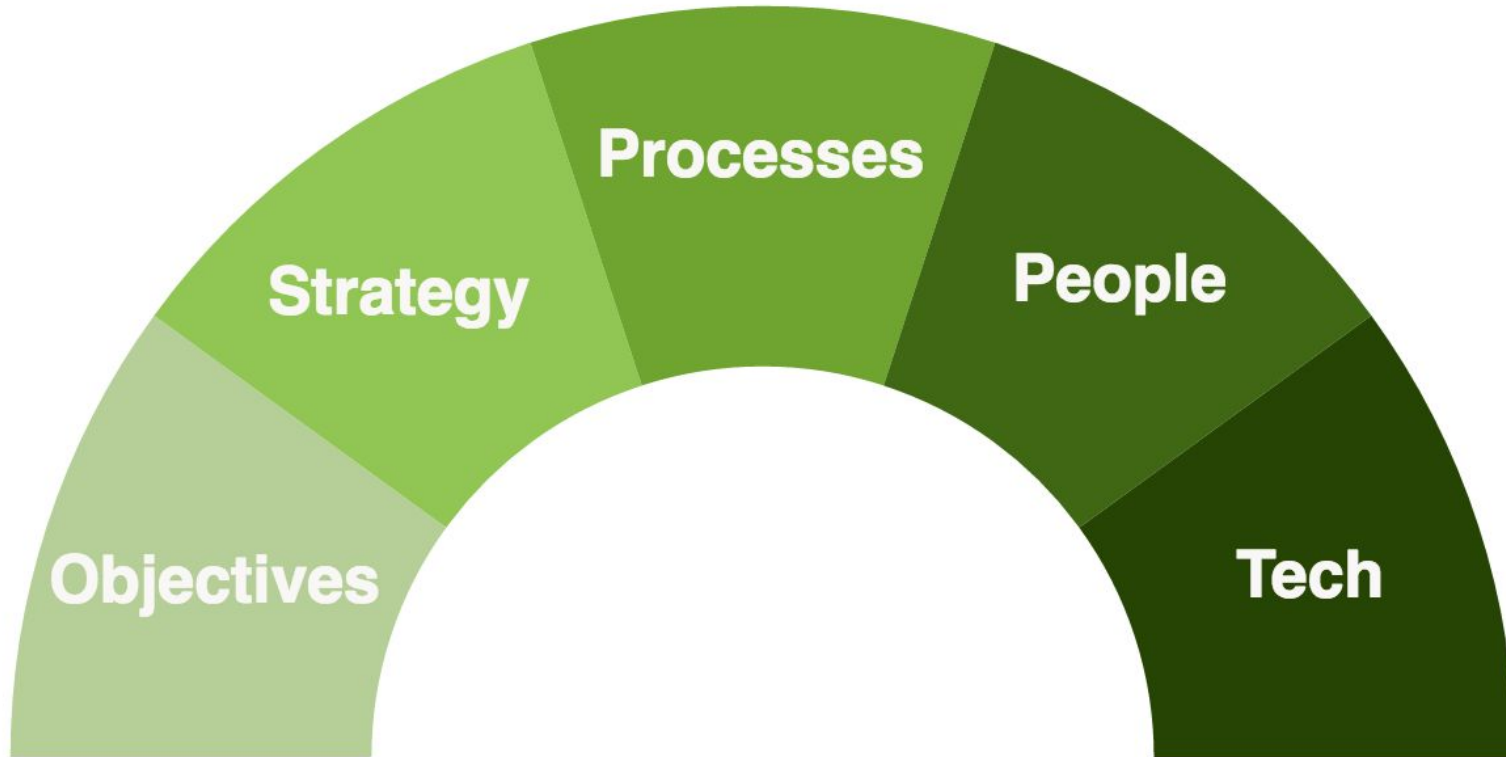
What does it mean to be tech ready?
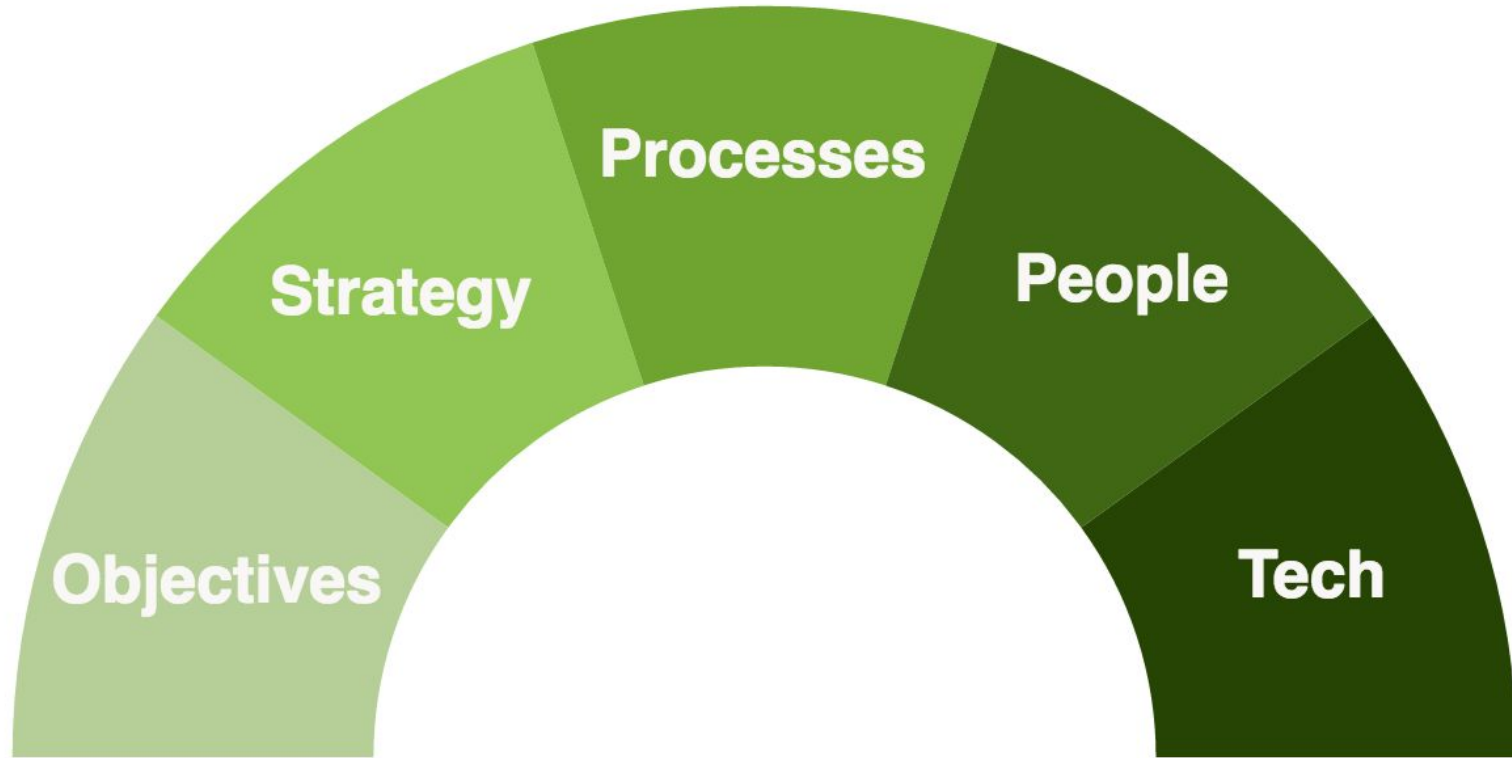
Perkins Overview

Perkins Overview

- Oldest school for the blind in the United States
- 700 employees
- 5 lines of business
  - School--services for 1,000 children
  - International--services in 65 countries
  - Access--products and consulting
  - Library--50,000 patrons
  - Professional Development--train 2,000 teachers

# Case Study-Community Programs

Project Case Study

- Perkins Community Programs
  - Services provided to 500 children ages 0-18 across state
  - 40 itinerant teachers, central administration staff
- Challenges
  - No system of record for program activity
  - Visit information collected after the fact/on paper
  - Complex relationships with parents, teachers, other service providers tracked inconsistently
  - Labor intensive to collect hours for monthly billing to state and school districts
- Identified as a critical need in Digital Strategy

Preparing for the Project

- Understand the business
- Build trust with management
- Find a partner
- Seed the project with funding to complete a proper assessment (scope, timeline, & budget)
- Secure funding
- Time implementation to align with business cycle

Applying the Framework
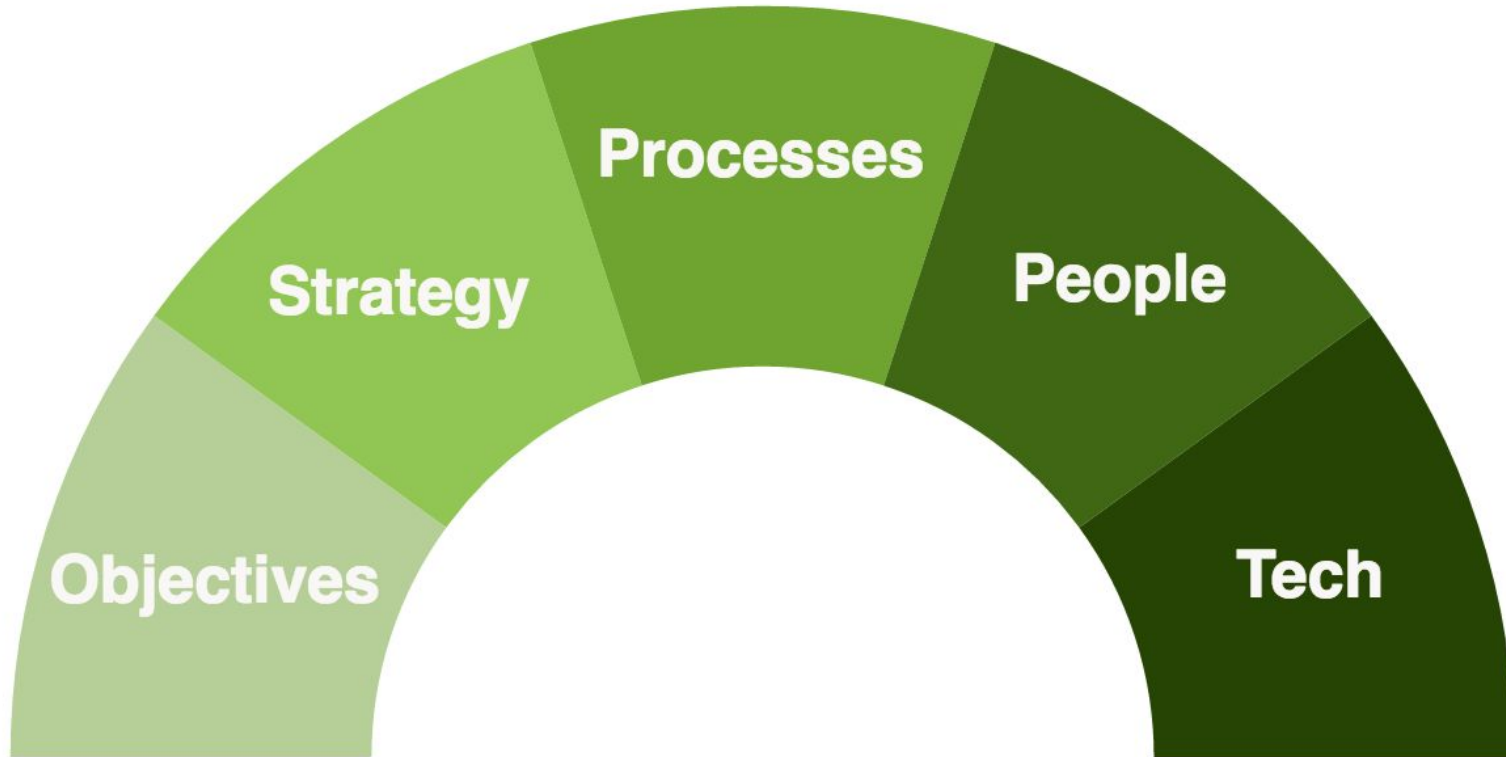
Key Considerations

- Objectives
  - Implement a system of record, establish efficiencies
  - Collect data in the field once, use for multiple purposes (analysis, finance)

- Strategy
  - Leverage a flexible platform
  - Use the budget cycle to secure funding

- Processes
  - Consider backoffice and field work
  - Use mobile to collect data

Key Considerations

- People
  - Assess capabilities of management, back office staff, field staff
  - Assess readiness of IT staff

- Tech
  - Build vs. Buy
  - Flexibility, ease of reporting, accessibility, mobility

Results

- 180 degree shift in data collection and management
- Data being captured daily vs. monthly
- Data captured via mobile devices
- Managers focus on services
  - Quality, quantity, gaps
- Staff focus on entering data once
- Streamline invoice process to generate monthly invoices

What happens after launch?

- Getting to launch is a step in the process, not the end of the process
- Marathon, not a sprint
- Prepare for what happens after go-live (first day, week, month, quarter)
- Organize issues, communicate with management & users
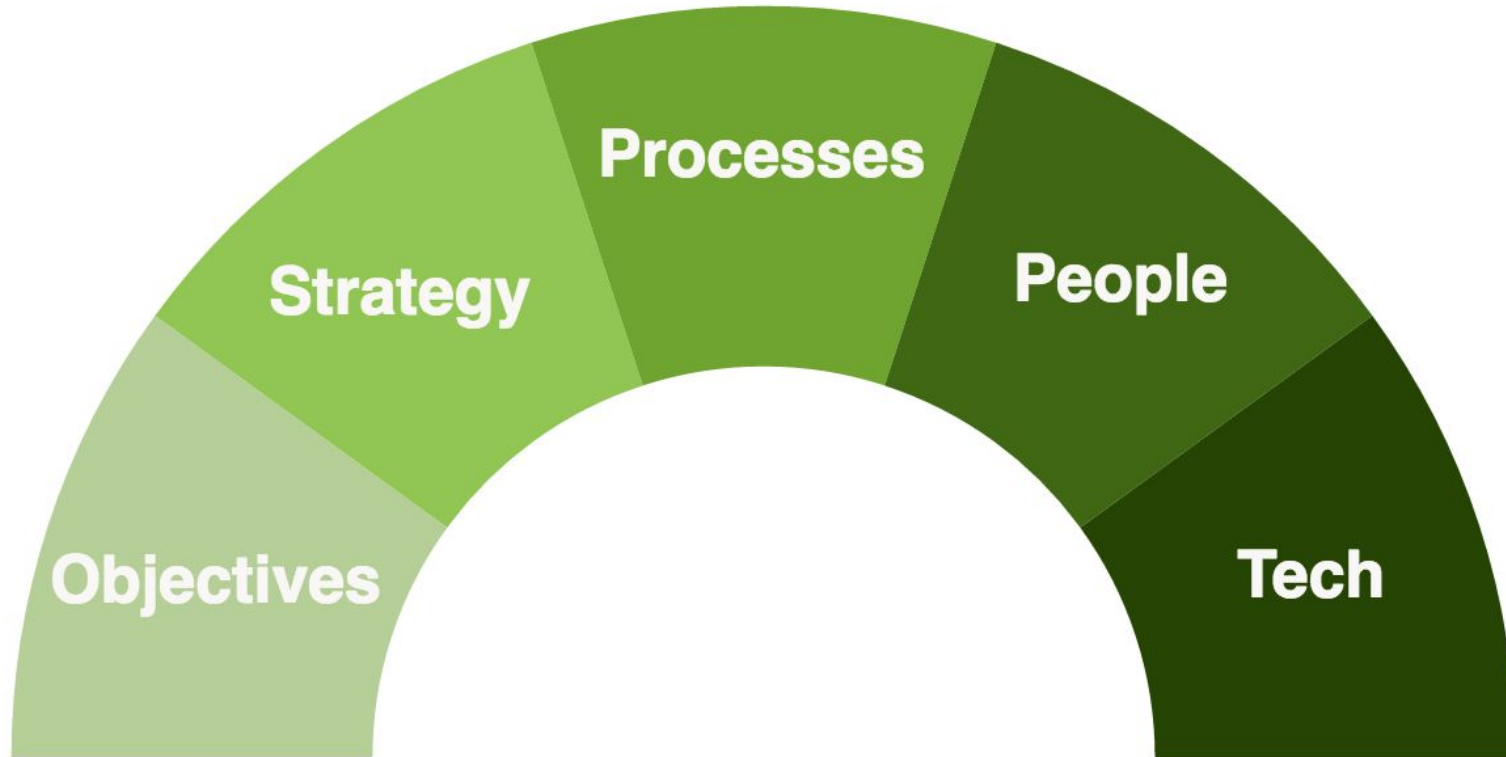- Stay organized, prioritize the work

Lessons Learned

- Communicate clearly to impacted staff in lay terms
  - Provide context
  - Discuss roles, goals
- Push through the requirements to get to the design
  - Process can feel slow, lack of results
  - Details lead to dividends
- Stay positive, remain calm

Discussion | Q&A

Revisiting the Framework

Key Learnings

Common Pitfalls │ Success Factors

Contact Us

Perkins School for the Blind

David Nero

http://david.nero@perkins.org

http://www.perkins.org/

Vera Solutions

Nick Strutt

nick@verasolutions.org

www.verasolutions.org