Information Technology Planning Policy

**Purpose:** The intent of this policy is to describe the process by which CDS sets strategy, defines policy, and makes decisions related to information technology (IT) investments.

**Policy:** CDS will ensure that IT resources are managed as a strategic resource, which will help CDS serve its participants better. IT resources will be governed responsibly, managed ethically, standardized sensibly, procured appropriately, used wisely, and refreshed timely.

**Procedure and/or Process:**

The Information Technology Team (ITT), comprised of the COO, DSM, supports the agency’s strategic priorities by looking to the future to see how technology can improve service delivery, and managing IT resources to make that vision a reality. The ITT is responsible for:

1. Establishing the IT Plan
2. Reviewing and approving the allocation of major IT resources to provide the best return on investment and best use of resources to support strategic goals
3. Reviewing and approving policy, procedures, and standards for agency information resource management that support the agency mission and strategic plan
4. Constituting and overseeing ad-hoc workgroups that develop more detailed information resource standards and operations
5. Adopting IT performance measures that create accountability to management and customers
6. Reviewing IT performance
7. Reviewing technology policies at least annually and updating them as needed

The ITT will operate under the following guiding principles:

1. Development and/or acquisition of information resources is linked to CDS’s mission and strategic plan
2. The goal of any and all use of technology is to improve the quality of service, both in terms of effectiveness and efficiency of CDS
3. Technology planning is sensitive to the needs and wishes of participants, staff, and stakeholders
4. Technology planning seeks to reduce barriers and improve communication within the boundaries of confidentiality and security
5. Confidentiality and security is absolute and in compliance will all laws, regulations, and contractual requirements
6. Technology standards (office automation, infrastructure, systems development, etc.) are set to ensure compatibility with funding agencies and to make optimal use of resources for innovation, supportability, and excellent customer service
7. CDS builds its technology strengths as cost effectively as possible and accesses external experts and partners when appropriate

These guiding principles will be implemented in the following manner:

1. The ITT will meet at least semi-annually or more often if needed.
2. Meetings will focus on decision-making, and may include updates and briefings
3. Relevant research papers will be prepared and circulated in advance of the meetings
4. Input from key staff and stakeholders will be obtained prior to the meeting

The goals of the IT Plan are to:

1. Ensure all aspects of the organization have a clear picture of our technology goals
2. Give timelines for implementation
3. Assign responsibility and accountability
4. Ensure necessary training is conducted
5. Facilitate the annual review of policies and procedures required for the safe and secure use of technology

The Information Technology Plan will address the evaluation, maintenance, policy review, and training needs (as appropriate) in the following areas:

* Hardware: *Critical servers, microcomputers, laptops, networking equipment, printers, phone systems and cell phones, UPS’s, projectors, video surveillance equipment, copiers, and fax machines.*
* Software: *Participant Information Systems, Accounting System, Human Resources System, Donor Management System, office productivity software.*
* Assistive Technology
* Networks Infrastructure: *WANs, VPNs, and LANs.*
* Internet & E-Mail
* Websites: *CDS web-site and intranet*
* Security: *Network security, equipment security, data security, and physical security.*
* Virus Protection
* Confidentiality
* Data back-ups
* Disaster Recovery