E-TECHNOLOGY PLANNING GUIDE
A reference tool for LFCCs and PCFOs

I. Product(s)

1. Is the product: (a) commercial off-the shelf software (COTS), (b) a customized product, or (c) an in-house product that is currently in use by the PCFO or LFCC? (Explain).
2. Has the product been used in the CFC by another PCFO or in another workplace campaign? If so, list the specific campaigns/organizations.
3. Describe the distribution, return, submission and any data-related transmission processes that the product(s) will achieve. Specify file formats, the user's menu of choices (screenshots preferred, if available), and other essential product features including reporting capabilities, if applicable.
4. Be certain that roles, responsibilities, and ownership of data, software, domain names, and other related components are clearly understood among all parties.

II. Training and Marketing

Discuss how the e-technology will be integrated into the current campaign structure and solicitation processes. Outline the training plan and describe the roles of campaign personnel and volunteers in learning, using, and marketing the e-technology to donors.

III. Security

1. How is the privacy and security of donor information achieved?
2. What virus protection/ filtering capabilities will be used?
3. What is the frequency of product security updates and security audits?
4. Where, when, by whom and with what accessibility will data be accessed and stored?
5. What methods of data backup and restoration will be used?
6. Who maintains the site and/or data?

IV. Costs and Benefits

Expenses associated with e-technologies can be included in the campaign budget when approved by the LFCC. Are there expectations of new revenues or cost offsets and if so, what are they? Please describe. (*Campaigns with e-technologies currently in use are invited to describe their return on investment (ROI) experience.)*

V. Evaluation

Describe measures of success (outcomes) that assess the value of the e-technologies. In addition to dollars raised and average on-line gift, (if applicable) describe how donor and volunteer satisfaction and other elements of success with respect to this e-technology project will be measured. *Campaigns with e-technologies in use are invited to describe their experience to-date and indicate if there are plans to expand the scope of their initiatives or to add additional technologies in the near future.*