

Many organizations choose to pursue SHIFT's Technology First Accreditation to learn how to bridge the gap between education and practical application. Other organizations prefer to work independently toward the adoption of enabling technology. Regardless of which path you choose, you'll need to implement some best practices in moving toward a Technology First culture. The following list should get you started with the planning process.

What are your funding sources?

- Are enabling technologies covered as a waiver service in your state? If yes, describe the level of funding and outline limitations.
- Do your state or other agencies dedicated to the support of self-advocates offer grants that could be used for the purpose of funding technology? If yes, describe the parameters of the grants/programs.
- If the organization is affiliated with a foundation, does the foundation support the technology initiative? If so, to what extent?
- Do people you support contribute toward the purchase of their technology? If so, to what extent?
- Do family members or guardians contribute funds to cover the cost of technology? If so, to what extent?
- What is the process for making purchases? Who has the authority to make purchases? Does this person have all of the tools and resources needed to handle this responsibility? Are one-time purchases (for example, a device) handled differently than ongoing purchases (for example, a monthly service or subscription)?
- What is the process for billing? Who fulfills that responsibility? Does the person have all of the tools and resources needed to handle this responsibility?

Who is spearheading your initiative?

- How will candidates for technology implementation be identified?
- What is the discovery process for learning about which outcomes are important to the person?
- Who will facilitate team discussions and work to resolve conflicting priorities, preferences and concerns?
- Who will complete assessments?
- How will the selection and procurement of the technology occur?
- How will people supported, natural supporters, and paid staff be trained on the technology and on the support plan? Also consider how new staff will be trained as turnover occurs.
- Who will be responsible for setting up new technology?
- How are passwords, access codes, account credentials, and credit/gift cards handled? Who has access to that information? Where is it stored? How is confidentiality ensured?
- Who is responsible for writing the technology plan? Has that person received the education and resources necessary to successfully write the plan? Where is the plan kept? How and when is it shared with staff?

- Who is responsible for ensuring that the technology is included in the ISP? How has the person who writes the ISP been involved in, and educated about, the plan for technology implementation?
- Who is responsible for ensuring that restrictive technologies are not implemented without due process? Who looks at all of the features of a product or service to ensure that it is not utilized in a manner for which it was not intended?

How will your Technology Team support the transformation?

- How many people serve on the team? What are the names, titles and enabling technology qualifications of each team member? What skills/strengths does each team member bring to the table? Who leads the technology team? Are there other defined roles?
- How were the technology team members chosen? Be sure to define the selection criteria and process. How are openings on the team handled?
- What departments/service areas/programs have representation on the technology team?
- At what frequency does the technology team meet? For what period of time?
- What are the ongoing agenda items for the technology team meetings?
- What are the expectations of team members and requirements for membership? How are team members who are not meeting expectations or requirements held accountable?

How will you communicate your commitment to adopting a Technology First approach to services?

- How has your organization communicated their commitment to a Technology First approach? Consider how stakeholders (Boards of Directors, organizational leaders, direct support staff, people supported, guardians, families, etc.) have been approached. Think about whether you have buy-in from these stakeholders. If not, what is your strategy for getting them on board?
- Where is your organization's commitment to a Technology First approach evident (website, social media, newsletters, etc.)?
- What educational and marketing materials has your organization developed to increase awareness of this service model? How do self-advocates, support staff, families, case managers and other interested parties learn about opportunities to incorporate technology as a natural support? Consider people currently supported by your organization as well as those who apply for services in the future.
- How are concerns about the implementation of technology on an organizational level solicited and addressed? Who is responsible for ensuring that those concerns are addressed satisfactorily?
- How are all involved parties updated on organizational progress, challenges, status changes, etc.? At what frequency is this information shared?

Do you have a strategy for building out your OTP?

- The people who completed the Enabling Technology Leadership Certifications (ETLs) will have completed the first draft of an Organizational Technology Plan as part of their experiential learning.
- Make sure your organization continues to build out that plan as it will be your guidebook where all technology related systems, processes, policies, and procedures are clearly mapped out.
- It's important to note that a diverse group of people within your organization - folks from all levels and services areas - are expected to directly contribute to the development of this plan. It is highly recommended that members of the Technology Team are part of this process as well.

What are your goals?

- Develop realistic goals for your organization. From a best practices standpoint, the primary reason to pursue a Technology First service model is to benefit the people you support. So, it is reasonable to expect that you would have goals to that end.
- Clearly define what you would like to accomplish and then identify how you will track the organization's progress. What type of information is important to the organization? This might be different from what your organization is required to collect. What information are you required to collect? Think about state mandates, grant requirements, etc.
- Who is responsible for reviewing data? At what frequency? What is done with the data?

What is your plan for managing repair & maintenance?

- Describe the process for ongoing maintenance (device checks, battery changes, software updates, etc.). Who is responsible for completing this maintenance? At what frequency is maintenance required and how is completion documented?
- Who is responsible for repair? Is this handled internally, sourced out to a third party or a combination of both?
- How is the organization's IT department involved with the Technology First initiative? What aspects do they support (internet access, cabling, etc.)?
- How do you ensure HIPAA compliance and privacy as they relate to technology?

Which technology vendors will make good partners?

- What is your process for identifying potential vendors?
- Who is responsible for contacting and screening vendors?
- Where and how does the organization document conversations with vendors?
- What are your expectations of, and requirements for, vendors?
- What limitations or requirements does your funding source place on vendors?