



# **TECHNOLOGY PLAN AND STATUS REPORT 2023 – 2024**



## Changes made from 2022 version

- General language updates (ie. coworker=Coworker, families=family/representatives, removed significant others, etc.)
- General formatting changes (bullet points, line breaks, etc.)
- Updated that IWA may be referred to as any of the following: "IWA, Glenora Farm or Glenora Farm community"
- Removed the term volunteers when referring to Coworkers
- Changed accomplishments to include 2021 and 2022
- Edited timeline of hardware checks (not scheduled regularly, only engaged with at the time of procurement and then as needed)
- Included appropriate disposal of hardware that no longer functions.
- Specified details of monthly server backups
- Removed quarterly review of cloud-based servers
- Specified details regarding security of the online Companion database
- Removed "Ensure all Coworkers have an assigned @glenorafarm email address and that address uses approved security and privacy statements" as the task is completed
- Updated parameters of passwords for all IWA accounts
- Updated conditions for use of assistive technology- IWA will not pay for these technologies, but will ensure staff is trained and feels confident to support Companions using this technology
- Updated frequencies and timelines for virus protection, disaster recovery drills, and contracted services
- Changed timelines from ongoing/as needed to more specific timelines to reflect actual review dates

## Remaining priorities from last year

- No identified priorities.

The Ita Wegman Association leadership team develops an annual Technology Plan and Status Report to review technology needs and services on an on-going basis. The Technology Plan indicates current status, identified needs, associated estimated



costs, business and disaster recovery needs and extenuating factors / influencing factors associated with planning efforts. The plan and status report is also developed in accordance with CARF (Commission on Accreditation Rehabilitation Facilities) a non-profit organization supporting best practices and internationally recognized service standards for organizations, agency's and societies providing programming in the social service sector. CARF standards associated with the Technology Plan and Status Report are listed below

**1.J.1 – Organization identifies gaps and opportunities in the use of technology and conducts ongoing assessment of:**

**a. The organization's current use of technology and data, including:**

- (1) Hardware
- (2) Software
- (3) Communication technologies
- (4) Sensitive data
- (5) Services purchased or contracted
- (6) Assistive technology

**b. Collection of input from:**

- (1) person served
- (2) staff and
- (3) stakeholders

**1.J.2 – Organization implements a technology plan that:**

**a. Is based on:**

- (1) current use of technology and data
- (2) Identifies gaps and opportunities

**b. Includes**

- (1) goals
- (2) priorities
- (3) technology acquisition
- (4) technology maintenance
- (5) technology replacement
- (6) resources needed to meet goals and timeframes



**c.Supports:**

- (1) the business processes of the organization
- (2) protection of sensitive data
- (3) efficient operations
- (4) effective service delivery
- (5) access to services
- (6) performance improvement

**d.Aligns with the organization's strategic plan**

**e.Is reviewed for relevance**

**f.Is updated as needed**

**PRIORITY DEFINITIONS:**

Priority 1: Immediate within 3 months

Priority 2: significant within 6 months

Priority 3: Important within 9 months

Priority 4: Relevant within 12 months

## Summary of Accomplishments

- Analysis of technology (hardware and software) needs for all IWA Coworkers and office sites
- Assignment of @glenorafarm email addresses for all IWA Coworkers
- All Coworkers have an assigned @glenorafarm email address and that address uses approved security and privacy statements.
- Acquisition of a server to facilitate data security and access for the administration team
- Procured iPad technology to facilitate communication and remote work access
- Engagement of Internet Technology contractor for all technical support and safety needs



- The IWA has procured 13 laptops (configured to individual/role/position) to ensure all Coworkers have the hardware they need to accomplish their tasks and training
- Cybersecurity training from Govt of BC has been added as a Relias module mandatory for all Coworkers.
- Facilitate access to private internet and telephone
- Grillo walk-behind tractor sourced to allow more Companions to engage in day programming
- Training for adaptive communicators
- Specified that the IWA will provide Coworker training to facilitate Companion support with communication devices as requested.

ELEMENT	STATUS / IDENTIFIED GAPS & OPPORTUNITIES	ACQUISITION		GOAL / PRIORITY	RESOURCES REQUIRED / HOW TO BE ACCOMPLISHED AND BY WHOM	MAINTENANCE / REPLACEMENT / PROGRESS MADE	TIMELINE / COMPLETION DATE
		YES	NO				
HARDWARE	Hardware checks are engaged at the time of procurement and then as needed (either in-person or remotely). These services are provided by 3TEC Information Technologies. Suggested preventative maintenance is accommodated. Hardware checks include ongoing technical support for all IWA Coworkers.		X	<b>Priority 1:</b> Maintain contracted support from 3TEC <b>Priority 2:</b> Complete maintenance inspections as needed on all IWA computers.	3TEC contracted services provides ongoing technical support and maintenance for all IWA hardware and software to ensure all equipment is secure and in good working order.	Consistent onsite and remote hardware check are provided by 3-TEC as needed and in a timely manner.	Annually (January). As needed and requested. Hardware checks are completed within 48 hours.
	Replace hardware (computers/monitors etc.) for all IWA Coworkers as needed.	X		<b>Priority 1:</b> In an effort to ensure all Coworkers have access to functioning hardware, Bus. Admin. conducted	Bus. Admin. worked with the Facility Manager to identify all hardware that needed to be added, or replaced. Bus. Admin. engages with a hardware needs assessment on an annual basis (May).	Bus. Admin. worked with 3TEC to review current IWA hardware, this included assessment and budget creation to procure hardware	Initial inspection completed Oct 2022. Budget and procurement Dec 2022 and



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				a survey of all Coworkers regarding hardware performance and need.	Bus. Admin. to follow up on functionality of units procured.	that needed to be replaced.	Jan 2023. Next inspection May 2023.
	Appropriate disposal of hardware that no longer functions.		X	<b>Priority 1:</b> To ensure safety and confidentiality practices are adhered to, Bus Admin. will engage 3TEC for the disposal and destruction of nonfunctioning hardware.	Bus. Admin. Will coordinate hardware disposal and destruction with 3TEC.	Nonfunctioning hardware has been replaced by the additional units procured. 3TEC informed about appropriate disposal guidelines.	Annual review (January) For the current project - Bus. Admin. requests that the hardware be safely disposed of when the units are delivered to 3TEC.
	Ongoing server backups.		X	<b>Priority 1:</b> in accordance with the monthly contract held by 3TEC, the IWA server is backed up on a regular basis.	Bus. Admin. to maintain contract and work with 3-TEC, ensuring regular server back-ups and maintenance are completed. Monthly service invoices identifying successful backups are provided to the IWA Bus. Admin.	Contract remains established and supports delivered meet IWA, provincial and federal standards and contract agreements.	Monthly review and reports.
SOFTWARE / PROGRAMMING	Website host.		X	<b>Priority 1:</b> Continue contract with Yonder Moon for secure website hosting.	Bus. Admin. to review website hosting reports and work with contractors on any identified issues.	Contract is established and supports delivered meet standards and contract agreement.	Monthly review and reports.



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SOFTWARE / PROGRAMMING CON'T	Bus. Admin. and 3TEC as required provide updates to software needs for all Coworkers. Software needs include but are not limited to QuickBooks online, Adobe, Software4 Nonprofits, M365 suite, Zoom,	X		<b>Priority 1:</b> Software needs for all Coworkers is reviewed on an ongoing basis and any action required is undertaken.	Bus. Admin. engages 3TEC to inspect all IWA computers for software needs. Units are reviewed on an as-needed basis.	Bus. Admin. to work with all Coworkers and Facility Manager to identify software needs and procure software that needs to be replaced.	Annual review (January) Ongoing review of software needs for all IWA computers is occurring. Requests are responded to within one working week.
	Ensure the online Companion database is secure and operational. Contract held between IWA and Patrick Gavaghan to provide Companion database backup and security.		X	<b>Priority 1:</b> Ensure the Companion database is operational and secure.	Bus. Admin. engages with backup and security contracting. Facility Manager trains Coworkers in the secure use of the database.	Contract with Patrick Gavaghan in place, back ups and security services are occurring as stated in the contract. Coworker training is ongoing.	Monthly review and reports. Contract with Patrick is engaged with bi-annually. Companion database has been updated. Training for current Coworkers is complete. Training for new Coworkers occurs as part of orientation.



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COMMUNICATION TECHNOLOGY	Ensure communication technology needs are being met and all communication technology is operational. ie: Printers/ fax, landline phones, cell phones	X		<b>Priority 1:</b> Review communication technology needs across the organization on an ongoing basis. All communication technology contracts are in place and renewed as needed.	Purchase communication technology as needed.	Cell phones have been acquired for all IWA vehicles.	Annual review (January) Ongoing review of communication technology. Cell phones procured and set up September 2022. Contracts for communication technology are in place and renewed as needed.
SECURITY	Passwords for all IWA accounts need to be reviewed and confirmed		X	<b>Priority 1:</b> All IWA account passwords are created and held in line with IWA technology, data and security policies ( <b>OP6- Electronic Records Management, ECP6- Internet and Technology</b> ).	Admin assistant maintains an up-to-date password list that is stored in a secure location.	All IWA account passwords are created and held in line with IWA technology, data and security policies	Review annually (January). Existing IWA policies ( <b>OP6- Electronic Records Management, ECP6- Internet and Technology</b> ) to ensure secure and safe





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							information management (Feb 2023). Update password list annually, or as needed (March 2023)
	Perimeter firewall(s) required	X		<b>Priority 2:</b> Perimeter firewall(s) to be established and secured.	All buildings and residences have a firewall in the router whether bought by IWA or supplied by Shaw.  Business Administrator to request contractor (3TEC) to inspect firewalls and ensure they are active and in standing order.	All locations and service providers will be identified. Firewalls will be checked. New hardware to be distributed will have firewalls confirmed.	Annual review (January) Inspection completed by March 2023

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CONFIDENTIALITY / SENSITIVE DATA	All information collected and documented will be held secure with back up and also in accordance with confidentiality and records management policies. <b>(ECP1-Confidentiality of Information, ECP2-Confidentiality Agreement, ECP48-Electronic Records</b>		X	<b>Priority 1:</b> All operational, program, and Coworker information is collected in accordance with Association policies and provincial / federal regulations.	The IWA will provide training in line with organizational policies to all IWA Coworkers with regards to confidentiality and records management.  The database administrator has the ability to access and review all accounts.  The Bus. Admin. monitors the server via contract with 3TEC to ensure all information and documents are held secure and in accordance with	Reviews in progress. No issues or needs identified.	Annual reviews (January) Training ongoing, Coworker training upon hire and annually.



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	<b>Management, OP22- Electronic Privacy)</b>				confidentiality and records management policies.		
BACKUP POLICY AND PROCEDURES	Review and test policies and procedures.		X	<b>Priority 2:</b> Review and test backup policies and procedures to determine effectiveness and accuracy.	Accreditation Group reviews all technology p&p on an annual basis (February) and ensures all protocols are followed and any concerns are addressed.	Review of policies/procedures (February 2023). Testing occurs during Disaster Recovery Drills ( <b>OP6-Electronic Records Management, ECP6-Internet and Technology, OP32 - Technology Emergency Drill</b> )	Annual review (January). Testing to be completed including identifying and addressing corrective action ongoing via <b>OP32-Technology Emergency Drill</b> and external contractors (February 2023)

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		YES	NO				
ASSISTIVE TECHNOLOGY	Identification and training for assistive technology and adaptive communicators		X	<b>Priority 3:</b> Ensure any assistive technology required to support Companion needs is identified.	Facility Manager to complete assistive technology review needs annually (ISP's), or as-needed.	Reviews being completed - no current needs have been identified.	Annual review (January) Annually at Companion ISP's, or ongoing as-needed.
SERVICES CONTRACTED	IT support contracts are reviewed to ensure all IT oversight is being provided.		X	<b>Priority 4:</b> Review IT support contracts to	Bus. Admin. to review IT support contracts and completeness of contracted	IT support contracts to be reviewed annually.	October 2023 Then annually based on



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				ensure all IT needs are met.	services.		contract renewal dates.
DISASTER RECOVERY PREPAREDNESS	Review and test disaster recovery planning efforts – Adhere to Association and Provincial regulations		X	<b>Priority 1:</b> Ensure disaster recovery protocols are in place and practiced annually	Bus. Admin. conducts review of disaster recovery at least annually. This includes evaluating whether all info is secure, accessible and in compliance with provincial regulations.	Reviews being completed - no needs or recommendations indicated.	Annual review (January) Drills completed Nov 2022, and January 2023 Ongoing drills.
VIRUS PROTECTION	Review and inspect virus protection status on all administration computers.		X	<b>Priority 1:</b> All computers / communication devices reviewed and inspected to ensure they have an operational virus protection programming working.	All IWA Coworkers receive information and training with regards to virus protection <b>(ECP6- Internet and Technology)</b>	Ongoing no issues identified.	Annual review (January) Ongoing, training upon hire <b>(ECP4 Employee Orientation Spreadsheet)</b> and annually (Relias training database)