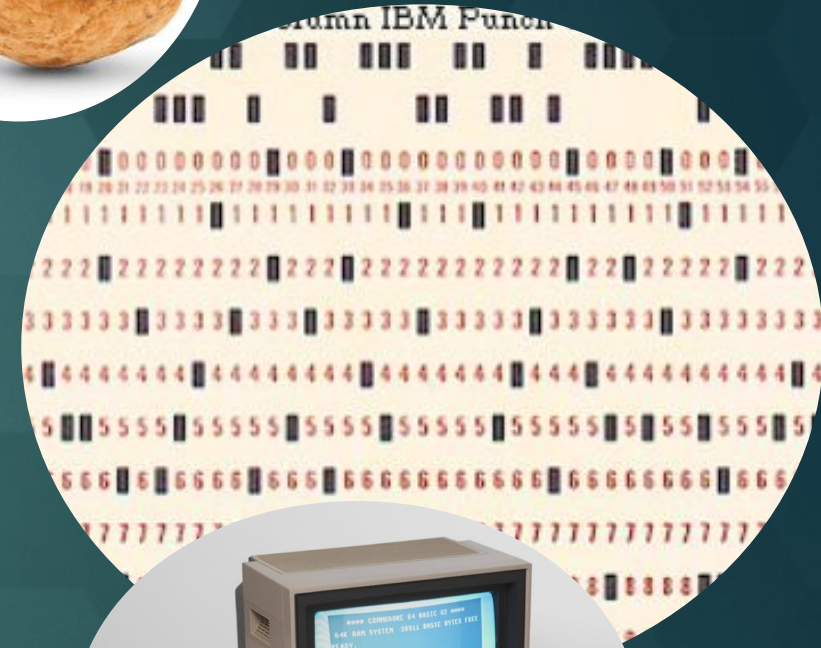


Digitization in the Nonprofit Sector

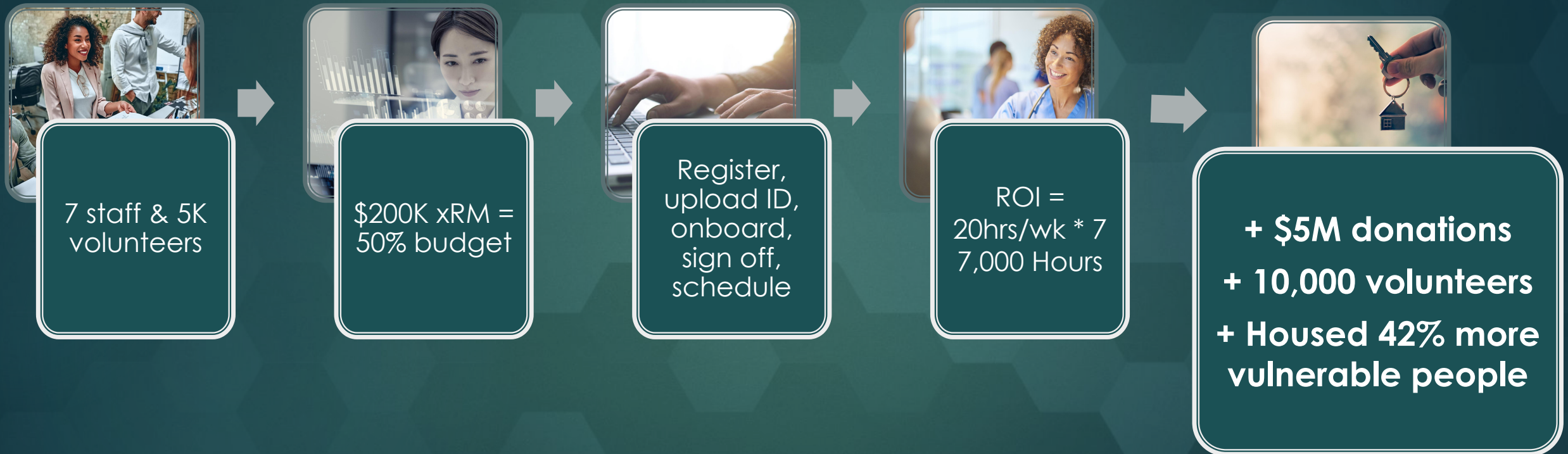
Helen Knight in a nutshell



- ▶ 14 years corporate IT
 - ▶ Help Desk □ Training □ ECM □ SAP □ BRM □ Leadership
- ▶ MBA IT Strategy, PMP, ITIL4, MIT Digital Strategy, Blockchain, Palo ACE, ECM, SAP, PROSCI, MCSE, MDCBA, MCSD, A+, ICD Board Fundamentals, Covey, Carnegie, Facilitation, Indigenous Canada, Stanford University Advanced Project Management
 - ▶ Why? You can't put books on your resume
- ▶ Consulting since 2008: Energy, IT Security, Insurance, Aviation, & Start ups
- ▶ Exclusively social service nonprofits since 2016



Case Study – Emergency Shelter



So... why don't we do this everywhere?

Infrastructure C

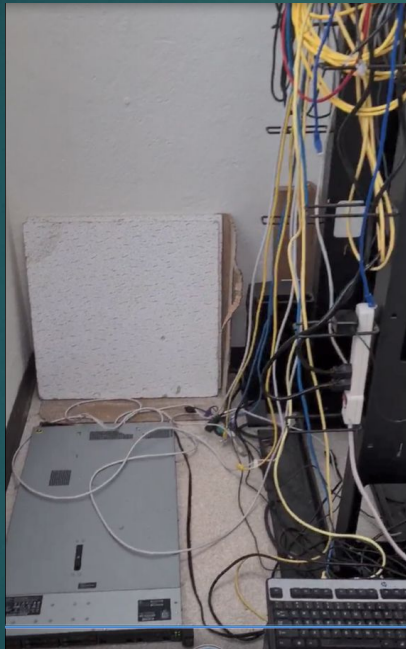


Privacy & Security Remediation Program



Remit: Good, Not Great

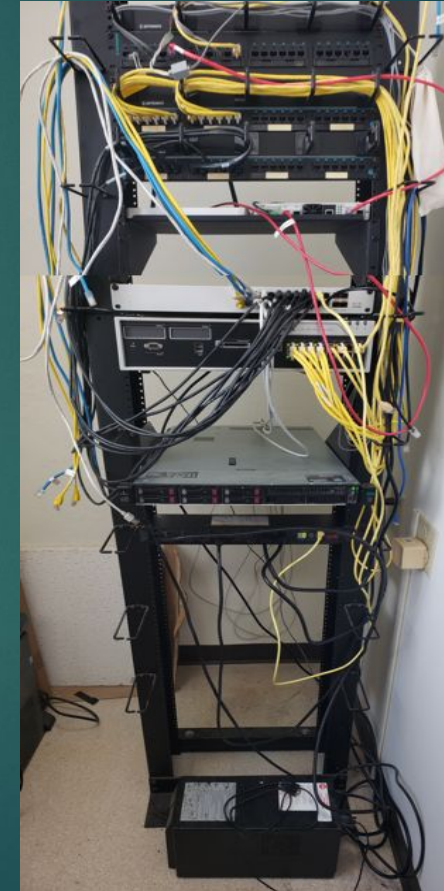
Before

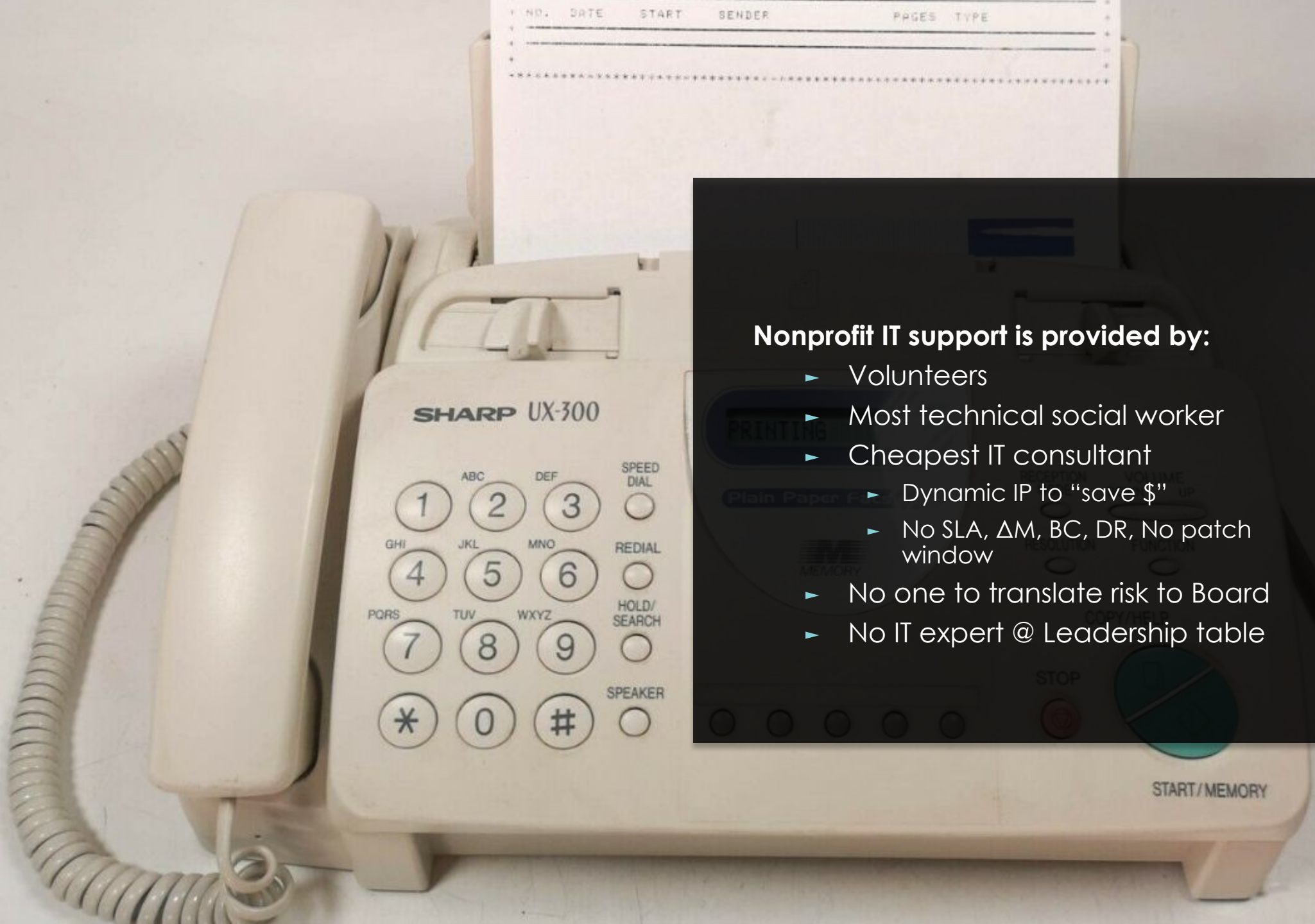


Temporary Mitigation



After





Nonprofit IT support is provided by:

- ▶ Volunteers
- ▶ Most technical social worker
- ▶ Cheapest IT consultant
- ▶ Dynamic IP to "save \$"
- ▶ No SLA, ΔM, BC, DR, No patch window
- ▶ No one to translate risk to Board
- ▶ No IT expert @ Leadership table



National Nonprofit

Vulnerable People Advocacy

Scope of Engagement

- ▶ Identify, investigate, & define what is preventing IT from being an effective organizational partner
- ▶ Deliver a prioritized plan to:
 - ▶ Achieve significant, measurable improvement
 - ▶ Optimize IT organizational structure & *reduce* team size
 - ▶ Reduce use of IT contractors



National Nonprofit IT organizational structure



Key

- Current Roles
- Does Not Exist
- Currently in X Dept.
- Currently in Y Dept.



Nonprofit Project Management



2019 - Don't know IT project scope, schedule or costs,

- Director of Project Management hired

2020 Tension between rigor of PM processes & scope/schedule expectations

- Director of PMO departs, Remaining PMs moved under non-IT leader

2021 New BI department outside of IT, Dissolution of PMO

- All remaining PM depart & PMO documents & tools deleted

2023 – How come we don't know IT project scope, schedule or cost?



3 Similar 3rd Party Assessments



Capability Overview	2019	2021	2023 HK	Capability Overview	2019	2021	2023 HK
IT Strategy	X	X		Release Management	Not assessed	Not assessed	
Innovation				Asset Management			
Stakeholder Relations				Availability and Enterprise	Not assessed	Not assessed	
IT Governance				Application Portfolio			
IT Management & Performance	Vague			Application			
Enterprise	Not assessed			Application	Not assessed	Not assessed	
Service Management				Application	Not assessed		
Manage Service	Not assessed			Data Architecture			
Quality Management	Not assessed			Data Quality			
IT Organizational				Business Intelligence Portfolio			
IT Human Resources				Project Management			
IT Leadership Culture				Requirements			
IT Knowledge	Not assessed	Not assessed		Organizational Business Value			
Service Desk				Cost and Budget			
Incident and Problem		Not assessed		Cost Optimization			
Technical Change				Vendor Management	Not assessed		
Operations							



Positioning the value of IT for the Executive & Governance Board



<Redacted> is Working in Winchester House



- x Because we do not have an integrated plan
- x Because we just keep building individual rooms
- x Because Executive priorities can change rapidly
- x Because the squeakiest wheel gets the tech
- x Because multiple solutions are already in place, with more on the way
 - x Do we really need more dining rooms, or should we be making sure our office building enables mission delivery?

<Redacted> is Ready For Positive Change



Prioritized Plan



1

Hire a skilled Chief Information Officer (CIO) to provide a technical voice at the Executive decision-making table

2

Unite the Executive to on our priorities
Reassess development & enhancement work, stop Winchester projects
Cascade positive messaging to organization

3

Support the CIO to architect a multi-year integrated plan to realize LAA priority outcomes

4

Support the CIO to modernize IT roles, structure, processes, & technology

5

Implement Demand Management to enable future requirements for change

IT should never be positioned to approve or deny mission critical work



Helen's Nonprofit Transformation Tips

1. Never position IT to be the person or team who has to say no OR fund off-cycle requests
2. IT must be a voice at the Executive decision-making table
3. Consider using metaphor rather than directly addressing historical leadership gaps
4. Facilitate the Executive to develop effective IT demand management
5. Don't name your project fun nerd names, align to the Nonprofit Strategic Plan & Mission Priorities
 - ▶ Strategic goals of Access, Accountability & Quality: Project AQA



Question
Time



T.Hanks
You



Appendix

Helen's-Super-Secret-Transformation-Process™

1

Assess current
state systems,
processes & tools

2

Identify barriers to
transformation

3

Craft the ~~business~~
case for support:
*# hours effort * year*

4

Transform
mission delivery

5

Measure social
return on
investment

Removing technical barriers & optimizing mission
impact



Calculate the Cost of Current Effort

Capability

Systems & Year Last
Tools Used Updated

Licensing
Cost

Meets
Needs
#/10

Mission
Importance
#/10

Risk
#/10

Manual Intervention
= Hrs * FTE * \$ * Year

Direct & Govern the Organization

Planning, Budgeting & Performance
Communication & Collaboration
Standards, Security, Compliance & Audit

Deliver Mission Operations

Client Relationships, Programs & Services
Donor, Donation, Grant & Sponsor Management
Manage Marketing Campaigns & Advertisement
Employee, Volunteer & Stakeholder Engagement

Enable the Organization

Employee Lifecycle, Training & Change
Payroll & Talent Management
Finance Administration Management
Administration incl. Legal, Facilities
Analytics & Information Management
Manage Systems & Solutions
Manage IT Projects



How can you help today?



If you want to help spread the word, please post about what you learned today on LinkedIn & tag Helen-Knight-MBA-PMP

