

# Hewlett, Irvine and Packard Foundations

## Community Leadership Project

The Multicultural Institute  
(TMI)

Organizational Technology Assessment Findings and Recommendations

Produced by ZeroDivide 8/2014

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### Introduction

The Community Leadership Project's (CLP) goal is to help build sustainable organizations with three key characteristics: resilient leadership, adaptive capacity and financial stability. Toward that end, 57 CLP community grantees will receive general operating support and capacity-building grants as well as technical assistance during the 2012-15 program cycle.

The Community Leadership Project retained ZeroDivide as a TA provider to assess, analyze and suggest recommendations for technology infrastructure among its grantees. ZeroDivide's primary work for the CLP process was to collect data, analyze it against a baseline and identify areas for technology infrastructure improvements. The information gathered will improve an organization's use of technology resources across the organization as well as assist in planning for future technology adoption and integration in service to their mission and strategic

objectives.

This report has been designed for the following audiences:

- **Executive leaders** to use as a high level decision-making tool and a point of integration for strategic planning processes
- **Program Managers** to use as an planning, budgeting, and implementation tool, as well provide a historical reference technology decisions and projects
- **Communications, Project, and Administrative Coordinators** to use as an information gathering, budgeting, and project development tool for technological initiatives and activities
- **Technology Consultant and Vendors** to use as a tool to understand not only the structure of the organization's technology but the key drivers/requirements and concerns for technology projects and decisions

### Executive Summary

The following technology assessment and recommendations have been generated through information by ZeroDivide's online technology assessment tool and an onsite visit that included interviews with key organizational staff.

The technical assessment findings reflect information captured through our interviews and audit of the network (Internet connectivity & security), server (hardware, software, & performance), desktops (reliability), data backups and overall security. Key recommendations also take into account key areas of strategic development identified by staff in service to their mission and constituents.

ZeroDivide staff met with Father Rigoberto Calocarivas, Founder and Executive Director and, Paula Worby, Office Manager in the Berkeley, CA office and training spaces in Berkeley, CA on April 7, 2014. Father Rigoberto is a charismatic organizational leader who oversees civic, business and community partnership development and special initiatives. He, along with Paula, leads much of the deployment of technology within the organization. This is TMI's second engagement with the ZeroDivide Tech Capacity building program. ZeroDivide's interview and technical assessment revealed the following critical areas for recommendations:

### Technology Infrastructure and Security

Technology infrastructure for any organization should be reliable and accessible. Ever increasingly, technology-related services operate in the cloud and require additional bandwidth and a reliable network. Since the last engagement with ZeroDivide, TMI has made great strides to maintain and continue to refine its technology planning and infrastructure. Current directions for improvements include remote access for TMI servers, securing data through regular backups and setting up satellite computer training labs for participants. The majority of equipment at the Berkeley site is within current life cycle (3-5 years) There are some needs to acquire and upgrade some existing software and security protocols.

## CRM Database Implementation

TMI currently relies on MS Excel documents as its client relationship management solutions. Successful adoption and integration of a more robust, scalable and reliable solution has implications for program management, volunteer and donor cultivation and, fundraising campaign activities. With the full integration of a cloud-based CRM solution, critical constituent information will be securely accessible from both on and off site locations. TMI will also realize increased effectiveness in donor cultivation and management activities through its ability to more accurately target, analyze, and communicate with existing and potential supporters.

## Website and Social Media Integration

TMI has recently re-designed its website and it now includes advanced features such as online donations (Network for the Good), online registration for GED and Business Skills courses. It has also established itself in the Facebook social media channels. ZeroDivide learnings strongly suggest that a website easily managed by staff coupled with a social media strategy creates greater outreach, marketing, and fundraising opportunities. Continued development of a social media strategy will help share the organization's vision, and engage constituents and connect them to programs, services and resources in dynamic and real-time ways.

Further detail for each of these areas is provided in the body of this report, including a suggested priority for implementation, implementation steps, change management considerations, and estimated cost, if determined. Where possible, recommendations have been put forth to contain and/or save on on-going or one-time costs as well as future cost drivers.

## Mission, Current Capacity and Organizational Development

Established in 1994, TMI is a 501c3 non-profit committed assisting immigrants in their transition to la transition from poverty and isolation to prosperity and participation.

The program involves a number engagement points for community members and the general public:

- Day Laborer's Program - Referral and Placement Services
- Youth Academic Programs - Mentorship and Literacy
- Business Skills Development - Small Business and Self-Employed
- Legal and Health Referral Services
- Various Community Events

## Plans to Grow

TMI has recently expanded to include a satellite locations in San Mateo County and Richmond, CA. This new sites will allow TMI to expand digital literacy, workforce skills training and other

educational and employment support services. Central to this effort will be the establishment of on-site computer labs.

## Findings and Recommendations

The following finding and recommendations represent immediate opportunities to stabilize and secure TMI's technology tools and systems and optimize the delivery of these solutions in order to enhance program quality, increase volunteer and donor engagement, and better engage the community. ZeroDivide is prepared to support TMI in the following areas:

### Technology Infrastructure and Security

#### **Support and planning assistance for the interconnectivity, automated backups and data security of new server devices**

TMI has identified a number of technology improvements to enhance administration and service delivery at its offices. Chief among these are the interoperability of desktop and laptop units with a new server that will do backups and allow remote access. Because of security, sensitive data and privacy issues, TMI would prefer not to have these systems be cloud-based. Solutions meeting this requirement include external drive storage systems such as MyCloud (Western Digital) which allows one to select what data is backed up and store locally and what data (if any) is backed up to a cloud service. In addition, there is a need to develop access and security protocols for the office devices.

#### **Support and planning assistance for multimedia hardware and software**

TMI's administrative, programmatic and communications work will be greatly enhanced through acquisition and upgrading of audio/visual equipment that support video/telephone conferencing, field presentations, distance learning (e-learning) and multimedia production for program documentation and asset distribution through its social media channels. In addition, TMI should consider a workstation specifically tasked for media production activities (i.e. a Mac All-in-One with Adobe CS 6.0/Final Cut) to support media production and dissemination.

#### **Support and planning assistance for "digitized classrooms"**

TMI is developing two computer labs at satellite sites and has spec that each location be able to accommodate 10 users PC based. Activities support at these sites will include digital and computer literacy skill development, e-learning opportunities, and workforce development supports. ZeroDivide staff can assist in developing technical specifications for the establishment of the labs as well as use protocols and security documentation. *Note: Below, costs related to Digitized classrooms have been broken out and assume no in-kind donations.*

### Client Relationship Management System

#### **Support and planning assistance for a CRM, a client database and mobile fundraising devices**

TMI would like to explore various CRM solutions beyond Salesforce as a means to manage

data related to its programs and constituent base. Chief among their consideration has been extending the capabilities of a non-cloud-based, customized Access database to track client services and relationships.

The staff has also identified a primary need to establish a CRM system to specifically track volunteer, donor cultivation and contribution activity. For this focused purpose, ZeroDivide would also recommend Donor Pro as an option. Donor Pro is a cloud based fundraising and donation management solution. The system is highly intuitive but also includes unlimited customer support. It also integrates with Quickbooks accounting software through exporting features. Another, more cost effective solution might be Little Green Light (LGL). LGL integrates with Paypal services, Constant Contact and can be use for events tracking. LGL does not, however seamlessly integrate with Quickbooks. As TMI moves forward in its determinations and decision making process, ZeroDivide anticipates continued advising and support for the integration of a CRM solution.

## Website and Integration with Social Media

### Support and planning assistance for integration

TMI's current website platform allows for straightforward content updating. Enhancements for the site might include connectivity to TMI's community events calendar, and social media channels. ZeroDivide can provide support for further integration of TMI's website with community calendaring and social media tools.

## Implementation Support and Suggested Timings

The following table summarizes the findings, the implementation support that ZeroDivide can offer and suggested timings for the activities. The findings have been prioritized according to their impact on the organization's ability to fulfill its goals and mission.

Key Recommendation(s)	Implementation support/Items	Suggested Implementation Period
Technology Infrastructure	ZeroDivide to identify specs for compatible devices and purchasing options; provide advice on tech integration to support administrative and programmatic activity and investigate options for discounted technology systems/hardware.	Sept 2014

a) PC Server		
b) External Storage and Back System Device - MyCloud		
c) Video Conferencing/ E-Learning between site -	Audio/video conferencing/e-learning package - including a web camera, monitor, speakers, conference phone and supporting software/services.	
c) ii) Multi-Media Workstation	Desktop video editing Photo/Graphics Production Package - camera, mics, etc.	
d) Digitized Classrooms	Specs and protocol related to satellite computer labs	
<b>CRM/Database/Project Management:</b>	<b>ZeroDivide to provide advice on CRM options and considerations</b>	Sept/Oct 2014
a) Donor Relationship Management	Advising on options and planning support.	
b) Constituent Relationship Management (non-cloud-based)	Advising on options and planning support.	
<b>Website Integration with Social Media</b>	<b>ZeroDivide to provide advice and support on development of integration communications strategy utilizing website and social media; identify training needs.</b>	September 2014
a) Website Integration -	Phone consultation from ZeroDivide	August 2014
b) Social Media Strategy	-Social Media Audit -Training options for social media communications	September 2014

## Budget Recommendations

<b>Hardware</b>	Number	Cost/item	Extended cost
External Storage and Back up device - MY Cloud	1	\$180	\$180
Mac - All in ONE ( Multimedia Production)	1	\$1600	\$1600
Audio conferencing device (Polycom)	1	\$400	\$400
GoPro Hero 3+ White Video camera (1080HD)	1	\$200	\$200
Optima 1080P HD Projector	1	\$900	\$900
Epson Duet Ultra Portable Projector Screen projection screen	1	\$140	\$140
PA System (Mic/portable Speakers/amplifier) - Phonic-Powerpod-820 S710-PA-Package	1	\$300	300
Samsung Screen (55" LED 120Hz 1080HD)	1	\$800	\$800
Security cables for mobile devices - SKILCRAFT® Laptop Security Lock	5	\$37	\$185
<b>Computer Labs/Digitized Classrooms</b>			
20 - Chromebooks (In-kind)	20	\$350	\$7000
<b>Total Hardware</b>			<b>\$4705</b>
<b>Software</b>			
Adobe CS Essentials From	1	\$45	\$45

TechSoup (Photoshop and Premiere)			
Final Cut Pro X (FCP)	1	\$299	\$299
Adobe CS6 (advanced features)	1		\$500
Little Green Light CRM Solution	1 year License	\$421	\$421
<b>Total Software</b>			<b>\$1265</b>
<b>Technology Services Per Year</b>			
<b>Professional Services</b>			\$0
CRM Data migration			TBD
<b>Total Professional Services</b>			<b>TBD</b>
<b>TOTAL:</b>			<b>\$5970</b>

## Next Steps

Please review the scope of work with your colleagues and key stakeholders. If the scope is consistent with your needs, we would like to further discuss a timeline to implement the projects outlined above.

As part of the CLP Technology Capacity Building Program we will also be organizing regional trainings beginning in Fall 2014. We warmly invite you to provide us with the priority training topics for your organization to facilitate our planning process.

## Some Additional Considerations

With regard to technology governance and policy development, please look to ZeroDivide to provide your organization with examples and template from our many years of work in the field. In addition, Zerodivide staff also stays abreast of

developments in technology and implications for community based organizations and can provide guidance as the landscape evolves.

## Technology Governance

TMI, like any organization planning to invest in technology, needs a way to ensure that the technology function is sustained and aligned with the organization's strategies and objectives. It must also take into account the interest of all stakeholders—donors, staff, senior management and board—where relevant in order to deliver value and not simply technology for technology's sake.

The best way to accomplish this is to practice good technology governance. Technology governance is about putting structure and accountability around who makes the decisions and how they are made. Technology management is about what decisions get made around implementing the necessary systems and policies. There are many ways organizations practice technology governance.

Below are some best governance practices, to help TMI strengthen its governance model.

- Ensure that technology has a seat at the table in organizational strategy discussions and decisions
- Convene a cross-functional governance team (subject matter experts) that reviews and decides on any significant technology investment or direction and is kept abreast of project progress
- External review of projects for unbiased and objective feedback before implementation and at times, post implementation
- Resource management to ensure that technology has skilled and efficient resources to meet organizational needs
- Embed risk management as part of decision-making, review, and status-update process to mitigate risks that could negatively impact the organization or project
- Articulation of value or benefits provided by an investment in technology, which usually translates into an investment in human capital, organizational efficiency, fundraising, etc.
- Performance management reporting to determine progress made towards technology (project) objectives and any gaps that need to be addressed; also helps to enforce accountability

## Technology Policies

Establishing, documenting, and communicating technology policies is a best practice to ensure technology controls and management clarity across an organization. Such

policies are extremely helpful for knowledge transfer to new technology staff, general staff, and technology vendors. Organizations often use an intranet to disseminate and update policy information. The recommendation is for TMI to develop technology policies for the areas suggested below and others as relevant.

- Email and internet usage
- Support of mobile devices (smartphones, iPads, etc.)
- Laptop security
- New user set up
- Former user data and account archiving/deletion
- Ergonomics
- Green technology
- Equipment donation and/or recycling
- Desktop and password security
- Server security
- Planned application and network downtime
- Remote access & support of personal home machines for TMI's work
- Data disaster and recovery
- Hardware standardization and replacement
- Use, licensing and copying of software
- Project implementation/Change control
- Downloading
- Non-work related technology use (personal digital cameras, iPods, etc.)
- Information access, usage, and distribution to ensure confidentiality and privacy of certain data

## Additional Resources

ZeroDivide's #TechThursday webinar series was designed in view of the CLP cohort's training needs and can be accessed by you and your colleagues throughout the duration of the project at: <http://zerodivide.org/techthursday>.

- Internet Essentials Program – This Comcast program offers home Internet service for \$9.95/month and a computer for \$149.99 to community members. ([www.internetessentials.com](http://www.internetessentials.com))
- California Teleconnect Fund (CTF) - The CTF provides a 50% discount on select communications services to nonprofits. Go to the website, download attached forms to submit and apply for the reimbursement. Once accepted, you will get 50% off your broadband internet bill. This can help pay for faster internet options your organization can use to better support its infrastructure. <http://www.cpuc.ca.gov/puc/telco/public+programs/ctf/>
- Grovo is an educational website that trains users and businesses on Internet tools, cloud services, and professional skills through 60-second, personalized videos. Grovo is a freemium service featuring 4,500 video lessons covering more than 100 subjects. The videos combine voiceover, screencasts, and animation, and are accompanied by quiz questions, glossary terms,

and downloadable PDF takeaway notes. They have training videos on popular cloud applications and services such as Google Apps, Microsoft Office 365, DropBox, Salesforce CRM, and internet tools such as Twitter or Evernote. Please enjoy this shared CLP Premium Grovo account.

Grovo Login:

<http://www.grovo.com/login>

User: it@zerodivide.org

Password: CLP2014 (case sensitive)

Appendix I:  
**Online Technology Assessment Score**

The table below represents average scores collected through the on-line application and on-line staff assessment tools for TMI. This information provides a technology capacity baseline for the organization at its initial engagement with the Tech Capacity Building Program. Please review the Technology Matrix Appendix 2

Technology Vision and Leadership	2.6
Program and Services Delivery	1.8
Communications	1.78
Fund Development	1.25
Operation and Finance	2.5
Technology Planning and Management	2.23

ZeroDivide has been providing tech adoption and capacity building services for nonprofit organizations for years. Through this work, we have developed an assessment scorecard for organizations to use to assess their overall “tech joy” and to begin to develop strategies for implementing improvements to their existing systems. Please review the **Technology Matrix in Appendix 2** for more insights.

Appendix II:  
Matrix Table



**Z E R O D I V I D E**  
COMMUNITY / TECHNOLOGY / OPPORTUNITY

## Technology Capability and Integration Matrix

	DEVELOPING	ASPIRING	PROGRESSING	LEADING
Average Score Range	1.00-1.50	1.51-2.50	2.51-3.50	3.51-4.00
<b>Technology Vision and Leadership</b>	Nuts and bolts, break-fix approach with no strategic vision or integration, minimal leadership support.	Some leadership support of strengthening tech capacity and strategic planning in progress.	Tech viewed as a strategic tool to achieve greater organizational strength across functions, leadership proactively dedicates resources to such efforts.	Management level oversight/accountability for building, sustaining tech capacity; annual review of strategic plan, budget to ensure integration across the organization.
<b>Communications</b>	Email as primary tool for staff communication. No communications plan or performance metrics guiding offline/online presence, activities.	Sporadic use of collaboration, live chat tools among staff. Plan, processes for external communications, especially social media activities, in development.	Consistent use of collaboration, live chat tools across staff. Use of digital media. Communications plan with clear goals, metrics in place including social media strategy that is aligned with organizational mission.	Internal use of social media for collaboration, discussion is governed by policies for content and use. Annual review of communications plan supported by data systems, tools to determine progress towards mission-based outcomes.
<b>Program and Services Delivery</b>	Ad hoc, inconsistent use of tech, lack of understanding and clarity around value/applicability of data.	Some systematic efforts to use tech, leverage data to improve efficiency internally and to understand constituent perspective, use of tech.	Constituent perspective on and use of tech incorporated into program design. Database in place to track program information, activities. Data collection, storage, management occurring on a consistent basis. Data is used for problem solving.	Active management, validation, and data clean up for accurate reporting/analysis. Program staff using mobile tools and piloting solutions using constituent-appropriate tech.
<b>Fund Development</b>	No formal fund development planning in place. Experimental and ad hoc use of tech for organizing/planning campaigns and events.	Fund development plan in place. Tech and information/data used for raising funds, but it's not integrated with fund development plan or with other parts of the organization.	Fund development processes use tech, integrate with other organizational systems and processes. Qualitative and quantitative data from program shared with communications/fund development to tell mission-related stories.	Fund development plan includes strategies for raising tech funding, fundraising activities are evaluated against goals to measure effectiveness of using technology and identify areas for improvements.
<b>Operations and Finance</b>	Processes undocumented and/or do not leverage tech. Measuring organizational effectiveness across various functions through generation of reports is cumbersome, time consuming.	Processes documented across some functions and incorporate tech for managing/tracking results of overall work of the organization. Financial data stored/managed using technology applications, e.g. Quickbooks or a custom application.	Processes documented/adopted across the entire organization. Systems/tools in place for efficient management of daily activities, sharing data, evaluating organizational health.	Processes used for onboarding new staff; periodically revised to ensure appropriate use of tech. Staff actively using data via reports and dashboards for internal assessments of organizational health.
<b>Technology Management (Planning)</b>	Very limited resources invested in tech, desires to make a more balanced and planned investment.	Resources dedicated to some key areas of tech. Some tech planning/policies in place.	Tech plan, budget in place and supported within the organization. Policies/procedures around use, management of tech documented & discussed with staff.	3-5% of organization's budget allocated towards the tech plan with dedicated funds allocated for staffing/training. Tech projects planned in advanced.
<b>Technology Management (Infrastructure)</b>	Tech management/support provided on break-fix, as needed basis; often part of someone's FT, non-IT job role or done by volunteers. Basic infrastructure in place with minimal to no steps to ensure centralized data access/security.	Tech infrastructure supports day-to-day operations adequately. No long-term provisions for equipment upgrades, overall tech sustainability and support.	Tech infrastructure supports the organization's processes, data management requirements in a secure way. Management support and provisions for equipment upgrades, and overall tech sustainability and support.	Processes, systems in place to ensure tech staff stay current in their skills/knowledge and provide quality IT management and support.
<b>Technology Management (Adoption &amp; Training)</b>	Staff has varying levels of comfort with tech, does not "connect the dots" between use of tech/data and improvements in their work, the organization	Staff uses tech in order to work more efficiently and/or engage constituents. Training is mostly self-learning and informal peer	Tech training and education plan/associated budget in place, aligned with the organization's skill requirements. Staff	Staff sees the big picture value of tech, actively introduces and engages in discussions around use of tech for internal/external purposes. Training solutions

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Read about our evolution as an organization, and how we have been supporting culturally responsive technology solutions to transform underserved communities over the last 15 years at

[www.zerodivide.org](http://www.zerodivide.org)