MODERNIZING THE NONPROFIT WORKPLACE WITH OFFICE 365 AND POWER BI

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Today’s instructors

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National Productivity Leader

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Specialties: Power BI, Machine Learning, Data Strategy

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Director of IT  
Greater Kansas City Community Foundation
Agenda

• Intros
• Office 365 Overview and Licensing Model (10 Min)
  - Productivity
  - Collaboration
  - Security
• Power of Analytics for NFP Organizations (10 Min)
• Client Showcase (35 Min)
• Closing/Questions (5 MIN)
## Productivity and data in the nonprofit sector

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>25%</td>
<td>Productivity improves by 25% in organizations with connected employees.</td>
</tr>
<tr>
<td>21%</td>
<td>Teams with high employee engagement rates are 21% more productive.</td>
</tr>
<tr>
<td>68%</td>
<td>Work overload decreases productivity in employees who feel they don’t have enough hours in the day to complete their tasks.</td>
</tr>
<tr>
<td>1.8</td>
<td>Number of hours per day employees spend searching for information.</td>
</tr>
<tr>
<td>53%</td>
<td>Find it easy to collect program data.</td>
</tr>
<tr>
<td>47%</td>
<td>Say it is easy to analyze that data, leading to a wide range of struggles when it comes to tracking and quantifying things like impact and performance.</td>
</tr>
<tr>
<td>29%</td>
<td>Plan to leverage analytics as a core business capability in the next 2 years.</td>
</tr>
</tbody>
</table>
The modern knowledge worker

- Always mobile, always moving
- Desire for collaboration and teamwork
- Live in social networks
- Works on multiple devices
- Data driven decision making
- Work with external parties to accomplish goals
OFFICE 365 AND POWER BI FOR NONPROFIT ORGANIZATIONS
# Microsoft 365 teamwork use case guidance

<table>
<thead>
<tr>
<th>Microsoft 365 Products</th>
<th>Use Cases</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outlook</strong></td>
<td>- Email &amp; Calendar: Upgrade a DL to a group inbox with shared notes and files, Share updates with a group in email, Keep a group in sync with a shared calendar</td>
</tr>
<tr>
<td><strong>SharePoint</strong></td>
<td>- Intranets &amp; Content Management: Intranet Portals, Grant Management Process Flows, Affiliate Portals, Knowledgebase, Marketing Asset Libraries, Project Workspaces, Board Portals</td>
</tr>
<tr>
<td><strong>Yammer</strong></td>
<td>- Connect and engage across the Org: Create a community around topics of interest or areas of practice, Drive initiatives for cross-organizational innovation, Foster two-way engagement between leadership and employees including field workers</td>
</tr>
<tr>
<td><strong>Office Apps</strong></td>
<td>- Co-Author: Rich Content Generation, Coauthoring on Grant Responses, Securely Sharing Documents with Affiliates and Partners, See who's in the file with you, Track what’s changed with version history</td>
</tr>
<tr>
<td><strong>Teams</strong></td>
<td>- Hub for Teamwork: Mobile field unit communication, Project Workspaces, Department Workspaces, Global Virtual Meetings, Broadcast meetings to internal/external resources</td>
</tr>
</tbody>
</table>

### Office 365 Groups

- Microsoft Graph
- Security and Compliance

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Teamwork is how work gets done

**2x**

Teams compared to 5 years ago

**50%**

Increase in “collaborative” work

**5x**

More likely to be high performing

- **Internal & External Members**
  People outside the firewall need unfettered access

- **Geographically Distributed**
  Need varied ways to connect across locations and time-zones

- **Diverse Workforce**
  Different expectations, preferences, and tool demands

Microsoft 365 teamwork: where to start a conversation

Inner Loop
- People you work with regularly on core projects

Outer Loop
- People you connect with openly across the organization

Files
Sites
Content
SharePoint

Teams

Yammer

Outlook

Email
Ubiquitous for targeted communications

Office 365 Groups
Cross application group membership
Security and compliance

- Protect your data at all times
- Enable safe sharing internally and externally
- Empower users to make right decisions
- Maintain visibility and control
## Licensing – value for nonprofits

<table>
<thead>
<tr>
<th>Product</th>
<th>Market</th>
<th>NFP</th>
<th>Office Web</th>
<th>Office Client</th>
<th>Window 10</th>
<th>EM+S</th>
<th>Advanced Security</th>
<th>Analytics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft 365 E3</td>
<td>$32.00</td>
<td>$8.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
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<tr>
<td>Microsoft 365 E5</td>
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<td>$23.00</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Office 365 Enterprise E1</td>
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<td>$2.00</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office 365 Enterprise E3</td>
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<td>$4.50</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Office 365 Enterprise E5</td>
<td>$35.00</td>
<td>$15.20</td>
<td>✓</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Power BI Pro</td>
<td>$10.00</td>
<td>$3.00</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
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</table>

### Microsoft.Com - Non Profit Eligibility

**United States**

Organizations must be recognized by the Internal Revenue Service (IRS) as exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code (IRC).

Library Eligibility

Public libraries may qualify as an eligible nonprofit organization without charitable status only for on-premises software donations and only where such software is made accessible to the general public. Please visit the [Microsoft Volume Licensing website](https://www.microsoft.com/en-us/volumelicensing) for more information about licensing programs for public library operations.
POWER OF ANALYTICS FOR NONPROFITS
RSM’s definition of business intelligence (BI)

BI empowers organizations to leverage their data as an organizational asset, fostering innovation, driving organizational excellence and creating competitive advantage.

**Self-service analytics**
- Business users can jump in and start analyzing data themselves, rather than wait for IT to run complex reports.

**Actionable information**
- This democratization of information access helps users back up decisions with data that would otherwise be based only on gut feelings.

**Traceable results**
- Trends and the impact of business decisions can be tracked which allows for continuing improvement of business processes.
## Value of BI for nonprofits

<table>
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<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organize and utilize data</strong></td>
<td>Your organization is full of useful data that can give insights into your daily operations, financials, and successes. Organizing this data using a BI solution allows you to make actionable decisions that can lead to lower costs, more efficient processes, and better outcomes.</td>
</tr>
<tr>
<td><strong>Understand donors and contributors</strong></td>
<td>By analyzing data around contributions and volunteers, you can understand the best way to market your organization and build relationships with your donors.</td>
</tr>
<tr>
<td><strong>Quantify campaigns</strong></td>
<td>While success can be measured in many ways, quantifying the success of your campaigns can allow you to understand how to continue to make a positive impact.</td>
</tr>
<tr>
<td><strong>Increase beneficiary satisfaction rate</strong></td>
<td>In the end, the most important goal of your organization is to deliver value to your beneficiaries and target recipients. By measuring their satisfaction and what causes that satisfaction, you can make changes that will increase approval and reach more individuals.</td>
</tr>
</tbody>
</table>
RSM’s BI approach

The Data Foundation

Strategy and Data Management (“Data-Managed”)
- Proactively defining and managing as a strategic enterprise asset to foster innovation, drive organizational excellence and create competitive advantage

Report, Analytics, Information Delivery (“Data-Out”)
- The ability for end-users to consume the integrated data in an efficient and effective manner

The Data Foundation (“Data-In”)
- The integration of data from multiple, disparate sources into a trusted, understandable form
RSM’s BI approach

**Data strategy**

- Big data & Internet of Things
- Exploratory analytics
- Near real-time analytics/alerting
- Predictive analytics

**Data architecture**

- Cloud BI
- Mobile BI
- BI Portals
- BI Dashboards
- SharePoint Integration

**Data governance**

- Data strategy
- Strategy and Data Management ("Data-Managed")
  - Proactively defining and managing as a strategic enterprise asset to foster innovation, drive organizational excellence and create competitive advantage
- Reporting, Analytics, Information Delivery ("Data-Out")
  - The ability for end-users to consume the integrated data in an efficient and effective manner
- The Data Foundation ("Data-In")
  - The integration of data from multiple, disparate sources into a trusted, understandable form

**The Data Foundation**

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What is Power BI?

- Power BI is a collection of business analytics tools and services, developed by Microsoft, allowing users to connect to and integrate multiple data sources, as well as create interactive reports and dashboards.

- Power BI provides an organization greater insight into their business by leveraging analytics that allow you to monitor performance, interpret trends, and make informed business decisions.
Power BI components

- Power BI Desktop: Data transformations & report creation
- Power BI Service: End-user access, collaboration
- Power BI Mobile: App available on Android and iOS
## Power BI benefits and options for nonprofits

### Benefits
- Lower License Costs
- Scalable and customizable reporting solution
- Create useable reports in a short amount of time
- Easy to share and collaborate on reports
- Integrates with O365 and other Microsoft Products

### Options
- **Power BI Free (Desktop)**
  - Report creation and development
- **Power BI Pro**
  - Monthly license per user
  - Collaboration and report sharing
- **Power BI Premium**
  - Capacity-based pricing
  - Power BI Pro for larger solutions
CUSTOMER CASE STUDY
Data and Digital Transformation at Greater Kansas City Community Foundation
## Nonprofit profile: Greater Kansas City Community Foundation

<table>
<thead>
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<tbody>
<tr>
<td><strong>Locations</strong></td>
</tr>
</tbody>
</table>
| **Key Information** | • ~200 Employees  
• Over $3 billion in assets under management  
• Houses more than 3,800 charitable funds established by individuals, families and businesses to support the charitable causes that are important to them.  
• Has provided more than $4 billion in grants since its inception.  
• Ranks in the top one percent of more than 700 community foundations in the country in terms of total assets, gifts and grants. |
| **Mission** | The mission of the Greater Kansas City Community Foundation is to improve the quality of life in Greater Kansas City by increasing charitable giving, educating and connecting donors to community needs they care about, and leading on critical community issues |
| **Core business** | To make giving convenient and efficient for donors through donor-advised funds: charitable giving accounts that maximize and organize giving |
Tenured partnership with RSM

- **7 Years Relationship**
- **8 RSM Service Lines**
- **29 RSM Projects (non-managed services)**
- **197 Distinct Consultants Served**

**Misc. Managed Service Projects**

- Technology Assessment
- Managed Services
- Infra Upgrade
- SharePoint Deployment
- Office 365 Deployment
- SharePoint Phase II
- Data Management and Analytics
- Cloud Security

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The “why”

**Compelling Issues**

- 14 separate information management system databases
- Reporting from databases is difficult.
- Need to report data from other applications.
- Minimize development of other custom tools such as Crystal Reports, and Excel.
- Custom Apps were complex to maintain, slow, consumed too many resources, and hard for us to support
We were looking for a data driven environment to support our end users and decision makers.

Our vision of the end state data solution was:

- Supported
- Powerful
- High availability
- Scalable
- In the cloud
- Consolidated
Planning

Expertise needed

• We needed help:
  • Gathering requirements for a solid implementation roadmap.
  • Identifying tools and technology.
  • Building the solution to proper standards.
  • Ensuring it was both convenient and secure.
GKCCF data initiative highlights

**Where are we today?**

- Building reports that are used for:
  - Operations
  - Analytical
  - Auditing
- Integrating to other applications.
- Training end users.
- Finding new reasons to use PowerBI.

**Challenges**

- Daily support while implementing a project.
- Scheduling of project activities and internal/external resources
- Complete test plans and availability of UAT resources prior to production releases.

**Keys to Success**

- Support from the senior executive team.
- Dedicated project owner/coordinator.
- Dedicated team and resources.
- Weekly status updates/meetings
- Proof of Concept
- Pilot Deployment

**Data Environment**

- Centralized data warehouse aggregating several information sources
- Replication of data to reduce performance issues on production systems
- Self Service environment for our analysts and decision makers
- ‘One source’ of truth to ensure trust and consistency to organization
Contact information

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Specialties: Power BI, Machine Learning, Data Strategy
THANK YOU FOR YOUR TIME AND ATTENTION