EMPOWERING IMPACT FOR NONPROFITS THROUGH MANAGED IT SERVICES
Today’s presenters

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**Cody Damon**
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MediaCause
Boston, Massachusetts
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Objectives

By the end of this webcast, you will have a better understanding of:

• Benefits of IT outsourcing for non-profits
• How to secure donor data and protect against cyber threats
• Unified relationship management and organizing tools
• Online fundraising, mobile solutions and social media integration
• Empower staff productivity with innovative digital collaboration solutions
• Predicting outcomes and visualize program efficacy for stakeholders
• The added value of outsourcing finance and accounting
Nonprofit Audience

Approx. 350,000 non-profits in the US; almost half in California
About 10% of US private workforce employed at nonprofits

- Associations – trade, professional & membership
- International NGOs
- Charitable
- Cultural
- Research & scientific
- Religious
- Foundations – private, operating, community
- Education
IT Outsourcing Continuum

Pro Services

“We need help with a specific project”

Staff Aug

“Need a person with a specific skill to manage ourselves”

Break Fix

“Call you when we need you”

Support Contract

“Need support for this one specific system”

Managed Services

“Please take all or part of my IT dept.”

Tactical                      Reactive                    Proactive               Strategic
RSM / CFO.com’s survey also indicated that CFOs believe that outsourcing services can lead to better results.

Not your father’s nonprofit……

Unified CRM

Membership Management

Marketing and Event Mngt.

Financials, Payroll, HRMS, Payment, Other

Reporting and Analytics
Talent “Solar System”
Modern non-profit functional IT roles

Run
- Help desk
- Desktop
- Engineering
- Project mgmt.
- Vendor mgmt.

Grow & Transform
- Relationship management and strategy
- Business analyst
- Data management/Reporting
- Operations
- Security
- Architecture
Fact: When employees feel enabled to do their best work, they are engaged and satisfied.

Fact: Providing employees a digital, flexible workplace results in higher productivity.

Fact: Central office concept is being replaced by distributed teams.

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Workplace Trends

- Sense of purpose
- Harnessing ingenuity
- Multi-generational teamwork
- Expertise without boundaries
- Increased transparency
Digital Hub

Personalized digital workspace to meet the collaboration and productivity needs of non-profits.

- Boardroom
- People directory
- Social zone
- Newsroom
- Event center
- Employee handbook
- Onboarding center

- Brand portal
- Leadership corner
- Video portal
- Project teams
- File sharing
- Personal dashboard
- Enterprise search
Brainstorm QuickHelp™ End User Learning Platform

Personalized learning platform to drive real change by giving users the right learning tools at the right time.

**Learning resources include:**
On-demand library of learning content

- Searchable and sharable videos
- PDF guides to support different learning styles
- Assessments to reinforce and test learning
- Live events with industry experts
- Instant answers
- Personalized learning paths for new hires

Integration with Office ribbon and customer Active Directory available.
Security and Compliance

- We store personal information about residents in the Commonwealth of Mass.
- We have personal data of EU citizens.
- Our social services team handles “protected health information”.
- We process credit cards through ecommerce and card-present transactions.
Technical safeguards
Implementation of various security technologies within the perimeter, network, application, endpoint and data layers.

Prevention and policy management
Measures that test for vulnerabilities, enforce corporate information security policy, enable secure design and configuration, and provide security awareness training.

Operations, monitoring and response
Day-to-day management of security operations, including monitoring, security event correlation, 3rd party vendor review, proactive maintenance, and incident response processes.

Good
Fair
Bad
Diego’s Top 10 Must Have Security Items

- End user security awareness training
- Email phishing simulation
- Information security policies
- Regular security audits and scans
- Centralized auditing, logging, and alerting
- Restrictive role based access controls
- Multifactor authentication for admins and users (annual password changes)
- Mobile device management (selective wipe and PIN)
- Robust vendor contract review
- Single sign on
"It was the best of times, it was the worst of times"
- Charles Dickens, A Tale of Two Cities

"Why can’t we get better engagement from our community?"

"Our volunteers are so passionate – but we can’t tell to what extent they’re also donors."

"The most recent Voice of the Constituent results show that we need to focus more on eradicating childhood hunger."

"Pat has volunteered 150 hours this month and is starting to donate; email is the best way to engage Pat."
A tale of two organizations (cont.)

“How can we track – and communicate – our successes?”

“These grant reporting requirements are killing us – and we just lost a long-standing funding source because of it.”

“Our goal is to eradicate hunger in grade schools; our studies show it’s decreased 57% in the last five years.”

“Our award management and reporting process is so smooth, we just secured another renewal of a major grant!”
A tale of two organizations (cont.)

- Raiser’s Edge
- Mail Chimp
- Spreadsheets
- eCommerce/Website
- Signup Genius
- PowerBI
- Dynamics CRM
- ClickDimensions
- eCommerce/Website
A tale of two organizations (cont.)

- Multiple systems
- Each system is not specific
- No tie between systems
- Reporting by spreadsheet
- Data retrieved manually
- Administration and work in siloes
A tale of two organizations (cont.)

• Centralize system
• Seamless integration to
  • Reports
  • Email
  • Event management
• Management interacting with live data
• 360 degree view of individual/company
Reasons for disconnected data

- People responsible for a function find a system to use
- Cost
- Siloes work streams
  - Don’t see full value of data
- Limited IT resources
- Focus on mission, not technology
- Organization grew organically
Reasons to manage your data

• Management interacts directly with data
• Automation can take place
  - Thank you emails for donations
  - Marketing automation to allow drip campaigning for donations
• Real connection between campaign and donation
• Connection between donor and employer
• Understand regularity and patterns
Risks of poor data utilization

- Increased manual effort to find relevant data
  - Decreased time available to analyze it
- Inability to meet reporting requirements
  - Potential loss of funding
- Segmented views of the organization
- Frustrated employees, disengaged stakeholders
- Irrelevant or insufficiently communicated mission
- Inability to “compete”
RSM ACCELERATOR
Person centered
Real world answers

- Who is volunteering but is not donating?
- Who donated last year but has not this year?
- What campaigns has a person taken part in?
- How many new people are volunteering this month?
- Who is related to whom?
- What month yields the most donations?
Power BI Use Case

Food Delivery Impact Overview

- Total Allocated Food: 50.26M
- Cost of Delivered Food: 2.86M
- Agencies & Programs: 311
Dashboards and reporting

<table>
<thead>
<tr>
<th>Expected Amount</th>
<th>Gift Amount</th>
<th>Volunteer Hours</th>
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</thead>
<tbody>
<tr>
<td>$523.5K</td>
<td>$405.8K</td>
<td>19K</td>
</tr>
</tbody>
</table>

**Donation Amount by Donation Type**

- **Sponsorship**: $164.3K
- **In-Kind**: $15K
- **Contract**: $50K
- **Fringe**: $50K
- **Grant**: $8K

**Donation Amount by Account Name**

- City Power & Light: $132,000
- Blue Yonder Airlines: $85,000
- John and Dow Donor: $60,700
- Bill and Melinda Gates Found.: $50,000
- Alpine Ski House: $25,000
- Contoso Pharmaceuticals: $25,000
- Coho Winery: $25,000
- ABC Corporation: $25,000
- Environmental Protection...: $25,000
- Adventure Works: $19,500

**Amount by Account Name and Gift Type**

- Gift Type: Contract, Grant, In-Kind, Fringe, Single Donation, Sponsorship, Stock Gift
Dashboard and reporting (cont.)

Gift Date
- 9/1/2015
- 9/5/2016

Employer Matching Gift?
- No
- Yes

Contact Type
- Board Member
- Donor
- Member
- Organizer
- Partner
- Potential Member
- Volunteer

Amount by Account Name and Gift Type

Gift Type:
- Contract
- Grant
- Pledge
- Single Donation
- Sponsorship
- Stock Gift

- City Power & Light
- Blue Yonder Airlines
- Contoso Pharma...
- ABC Corpora...
- Fabrikam, Inc.
- Advent... Works
- Alpine Ski House
- A. Datum Corpora...
- John and Jane Donor
- Anderson Househ...
Grants Management: Common issues

- Dates and timelines are unforgiving
- Usually require input from multiple people
- Correspondence and credit become hard to track
- Lack of visibility into actions after receiving the grant
- Need Auditing capability to meet regulations
Grants management
Donations: Common issues

- No tracking for Moves Management Process
- Limited Donation Types
- Manual Entry of Online Gifts
- Difficulty Identifying and Following up on Overdue Pledges
- Acknowledgment Process is Cumbersome
- Donor Tracking is Limited
- Campaign Success is Difficult to Measure
- Limited Reporting Options
Donors: Common issues

- Cannot track Potential Donations
- Spouses are separated in a traditional donor management system
- Salutations are inconsistently tracked
- Individual Donation Summary info is difficult to find
- No way to determine other ways that a Donor interacts with the Organization
- Difficult to determine recent activity with a Donor
**Donor and gift management**

**GIFT INFORMATION**

**Blue Yonder Airlines Pledge - $5,600.00**

### General

| **Amount** | $5,600.00 |
| **Benefit Value** | $5,600.00 |
| **Gift Scope** | Organization |
| **Organization** | |
| **Organization Gift Type** | |
| **Frequency** | |
| **Recurrence Description** | |
| **Acknowledge Type** | |
| **Acknowledged** | |
| **Not Acknowledged** | |
| **Program Commitments (Interests)** | |
| **Owner** | Ashley Benzlie |

### Gift Source Information

| **Account** | Blue Yonder Airlines |
| **Contact** | Anonymous |
| **Notes** | |

### Gift Date

- **10/10/2015**
- Tax Deductible Value
- $5,600.00
- Last Payment Date
- Next Payment Date
- 

### Related Records

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<tr>
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### Installments

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<td>1</td>
<td>$100.00</td>
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<td>Contact</td>
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<td>$7,800.00</td>
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<td>Stock Gift</td>
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</table>

2015 $50 Donation - Anderson Household |  | $250.00 | Jessica Anderson | Single Donation | Zach Greenbaum | 8/6/2016 | 11/7/2016 11:56 AM |

A. Datum Corporation (example) Grant - $1,200.00 - A. Datum Corporation |  | $1,200.00 |  | Grant | Ashley Barba | 8/23/2016 | 8/23/2016 11:36 AM |

Aaron Smith Household Pledge - $3,000.00 - Aaron Smith House |  | $3,000.00 | Aaron Smith | Pledge | Zach Greenbaum | 8/13/2016 | 8/13/2016 9:02 AM |

Adam Smith Household In-Kind - $500.00 - Adam Smith House |  | $500.00 | Adam Smith | In-Kind | Ashley Barba | 4/19/2017 | 4/19/2017 12:16 PM |

Blue Yonder Airlines Grant - $1,600.00 - Blue Yonder Airlines |  | $1,600.00 | Aaron Rasta | Grant | Ashley Barba | 10/2/2015 | 12/2/2015 9:28 AM |

Blue Yonder Airlines Pledge - $5,600.00 - Blue Yonder Airlines |  | $5,600.00 |  | Pledge | Ashley Barba | 10/2/2015 | 11/23/2015 3:49 PM |

Blue Yonder Airlines Stock Gift - $6,600.00 - Blue Yonder Airlines |  | $6,600.00 | Aaron Smith | Stock Gift | Bill Caldwell | 4/3/2016 | 3/3/2016 1:17 AM |

John and Jane Donor Grant - $4,000.00 - John and Jane Donor |  | $4,000.00 | Jane Donor | Grant | Ashley Barba | 11/2/2016 | 11/14/2015 11:42 AM |

John and Jane Donor Single Donation - $100,000.00 - John and Jane Donor |  | $100,000.00 | Jane Donor | Single Donation | Ashley Barba | 12/4/2015 | 11/24/2015 11:41 AM |

John and Jane Donor Sponsorship - $15,500.00 - John and Jane Donor |  | $15,500.00 | Jane Donor | Sponsorship | Ashley Barba | 9/1/2015 | 11/24/2015 11:39 AM |

John and Jane Donor Sponsorship - $15,000.00 - John and Jane Donor |  | $15,000.00 | Jane Donor | Sponsorship | Ashley Barba | 12/15/2015 | 11/24/2015 11:49 AM |

Rasta Household Stock Gift - $1,000.00 - Rasta Household |  | $1,000.00 | Aaron Rasta | Stock Gift | Bill Caldwell | 3/2/2016 | 3/2/2016 1:17 AM |

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Donor and gift management (cont.)
Volunteers: Common issues

• Are events properly staffed?
• Raise awareness of brand and mission
• Are volunteers able to be converted to donors?
• How do multiple people manage service to community and constituents?
• How does the day-to-day and ongoing programs run?
• How do we match skills required with volunteers?
Volunteer management

Summary

CONTACT INFORMATION

Full Name** Sidney Higa
Middle Name --
Suffix --
Primary Title --
Casual Salvation Type --
Casual Salvation Title --
Affiliation with Us --
Classification --
Board Position --

Primary Relationship Client
Owner --

Affiliation with Us --
Classification --
Board Position --

Company Blue Yonder Online
Primary Language --
Job Title --
Department --
Primary Phone --
Assistant Phone --
Assistant Email Address --

Next 50 Records

POSTS

ACTIVITIES

NOTES

Sidney Higa
2/1/2017 11:21 AM
Completed by Zach Greenbaum

Sidney Higa
1/30/2017 9:53 AM
Completed by Zach Greenbaum

Schedule an appointment with customer (Sample)
Completed by Zach Greenbaum
12/18/2016 11:22 AM

Check customer and product information. Created follow-up activities. Generated email...

12/18/2016 11:13 PM
Completed by Zach Greenbaum

Captured preliminary customer and product information. Diagnosed and created a list of...

12/18/2016 11:13 PM
Completed by Zach Greenbaum

No Connection records found.
Volunteer management (cont.)

Volunteer Management

Volunteer Hours by Location

Volunteer Hours by Month

Volunteer Recruitment by Location

Active Volunteer Locations

<table>
<thead>
<tr>
<th>Contact</th>
<th>Volunteer Date</th>
<th>Number of Hours</th>
<th>Location Name</th>
<th>Location Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jessica Anderson</td>
<td>7/4/2018</td>
<td>8</td>
<td>12th Street Community Center</td>
<td>Aaron Smith</td>
</tr>
<tr>
<td>Alex Jackson</td>
<td>9/5/2016</td>
<td>20</td>
<td>Demo Tent</td>
<td>Aaron Facts</td>
</tr>
<tr>
<td>Jane Donor</td>
<td>9/6/2016</td>
<td>23</td>
<td>Johnson County Animal Shelter</td>
<td>David Doppler</td>
</tr>
<tr>
<td>Alok Singh</td>
<td>10/4/2016</td>
<td>40</td>
<td>Rice Soup Kitchen</td>
<td>Mario Campeol (camp)</td>
</tr>
<tr>
<td>Neeta Silhu</td>
<td>10/4/2016</td>
<td>15</td>
<td>RSM Office Food Drive</td>
<td>Aaron Facts</td>
</tr>
<tr>
<td>Nancy Anderson (sample)</td>
<td>10/9/2016</td>
<td>70</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aaron Smith</td>
<td>12/1/2016</td>
<td>80</td>
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</tr>
</tbody>
</table>
Navigating Digital Trends:
Leverage your marketing tools and use digital strategies that drive growth
Connect with supporters where they hang out: online.

According to Blackbaud, people who use online tools for fundraising raise six times more than those who only use offline tools.

Leverage your supporters’ digital network.

Fundly’s research shows that friends asking friends to donate increases the likelihood of a gift by 10 times more than other solicitation methods.

- 62% of all donors world-wide prefer to give online
- 75% of all donors agree social media is the best way to stay connected with their favorite orgs.
Marketing Automation is smarter marketing.

Supporters are the heart and soul of an organization - and behavior-based communications (ex. email) put user experience first. Organizations can now personalize their messaging to stay authentic and talk to supporters when it matters most.
Peer-to-Peer Fundraising leverages your supporters as advocates of your campaign.

Call on supporters to fundraise on your behalf, rather than commit a one-time donation. By giving supporters a plan, platform, and toolkit, organizations can reach a larger audience and develop ambassadors.

Set goals → Develop content that inspires and educates → Integrate platforms → Nurture supporters

What is your campaign impact story - and did you tell it effectively?
In today’s digital age, Media Buying has become DIY.

While self-service means more control, it also means you need to know what you’re doing in order to spend your advertising dollars effectively. It’s important to develop a strategy before putting content out there.

Perform a “discovery” phase.
Take the time to figure out who the target is - and why.

Not all channels are created equal.
Tailor ad placements to specific goals and target audience.

It’s all about the data.
Set up the technical tools to track and measure success.
We specialize in: community-centric marketing. We utilize: the latest digital platforms and tools.


1. Create awareness with the right target audiences
2. Recruit people to join email, social, and web communities
3. Small asks engage supporters across all communication channels
4. Bigger asks activate community to drive important goals
5. Inspire supporters to recruit more supporters
6. Analyze data at each stage, optimize messaging and approach

We work exclusively with nonprofits and cause-driven, social good organizations.
Where do you go from here?

• Happy with my internal staff/outsourcing provider, digital strategy, and security posture -- learned a few interesting things -- thanks!

• Like the above, but wouldn’t mind having access to vCIO level resource from time to time to stress test our strategy.

• In a few areas it feels like we have significant room for improvement. Would be helpful if someone came out and did an assessment of one or more areas for us.

• Feel our IT situation is chaotic. Need a full review of all aspects of IT from security to staffing to systems to strategy
Managed IT Services for Non-Profit

The Essentials
- Helpdesk Support
- Asset Management
- 24x7 Network Ops
- System Administration
- Staff Onboarding

Modern Workplace
- Microsoft Office 365
- Reporting and Analytics
- Digital Hub
- Learning Platform

Security and Continuity
- Security Training
- Security Monitoring
- Threat Protection
- Disaster Recovery

Strategy and Management
- Digital Strategy
- Risk Management
- IT Budgeting
- Project Management

Service Add-Ons
- Unified CRM
- Cloud | Hosting
- Laptop as a Service
- Onsite Support

Per user per month subscription services
Contact information

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