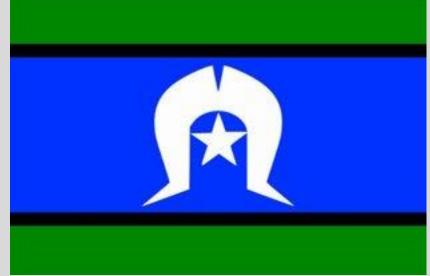


Acknowledgement of Country

We acknowledge the traditional custodians of the land and pay our respects to Elders past, present and emerging.





Webinar Outcomes

We're going to cover:

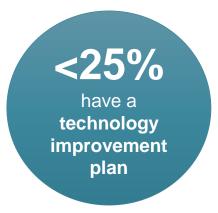
- » Not-for-profit technology domains and capability
- » Digital roadmaps that enable not-for-profits to develop their capabilities and enhance their impact
- » How non-profits leverage technology to transform their services and operations
- » Free resources and discounted products and services to assist in the journey

Infoxchange Digital Technology in the NFP sector survey

If your organisation feels challenged or hindered by technology, you are not alone



70%
did not have
the
technology to
work from
home



Five domains structure the technology jungle



Tech Foundations

PCs, network, servers, telephony, email, file sharing and collaboration infrastructure



Information Systems

Systems that support delivery of your services, measure your impact and corporate systems



Digital Marketing

Website, email/social media outreach, content production and fundraising systems



IT Management

IT strategy/planning, budgeting, governance, run activities and disaster recovery/ business continuity



Cybersecurity

Keeping your information safe with thorough information security & device management systems and processes

Staff can collaborate, work productively and access information anywhere

Painless reporting, efficient processes and client outcomes tracked

Attract new funders, supporters, volunteers, staff and clients

Maximise Digital impact

Reputation, client & staff information protected





Poll: What is your priority?

- » Tech Foundations (collaborate anywhere)
- » Information Systems (efficient services & outcomes)
- » Digital Marketing (new funders, supporters & clients)
- » IT Management (make the most of scarce resources)
- » Cyber Security (protect information, staff & clients)

NFP Digital Technology Capability

	Basic	Intermediate	Advanced
Technology foundations PCs, phones, tech infra & NFP Cloud collaboration platforms	Non-profit cloud platforms used but not configured to best practice. Tech reliable	Tech foundations supports the organisation effectively and is used well by staff	Best practice remote working & collaboration. Staff & management highly satisfied
Information systems Data, service delivery & operational systems	Reasonable system to support service delivery & finances. Activity & contract deliverables measured & reported	Effective service delivery, HR and finance systems exist. Activity, impact and outcomes are measured & valued	Integrated, effective systems support efficient processes, service delivery & impact measurement
Digital marketing Website, social media, events & fundraising	Engaging and responsive website & email and social media are used to communicate with stakeholders	Engaging, responsive website & social media presence supported by EDM campaigns achieves tracked outcomes	Your stakeholder engagement is strategic and integrates across each marketing platform
IT management IT strategy & plan, value, engagement & disaster recovery	Approved 12m IT plan supported by budget for refresh, operations and improvements. Appropriate backups	Multi-year digital strategy, strong exec/staff engagement enables cost vs. value discussions. Documented disaster recovery plan	Strong partnership between IT, exec & staff delivers tangible (measured) value & regular innovation. Proven disaster & business continuity plan
Cybersecurity Tech protections, education, information classification, policies, compliance & risk mgt	User devices auto-patch. Induction covers cyber education, policies & obligations. MFA used. Exec engaged	Effective risk mgt addresses cyber risk, supported by proven processes & technical controls. Information is classified & appropriately secured	Best-practice technology protections, educated staff and effective processes are proven to mitigate cybersecurity risks

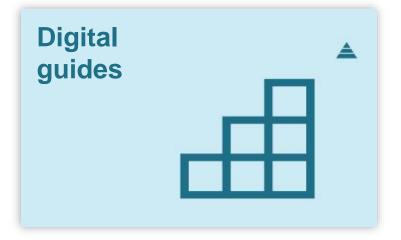




Digital Transformation Hub

Technology to transform non-profit operations









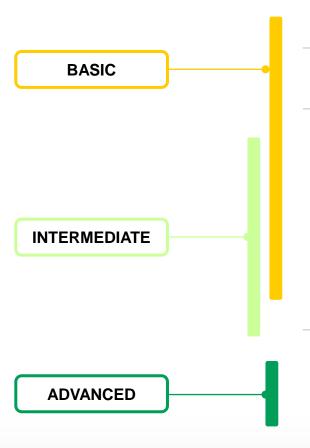






The NFP Tech Foundations roadmap

Organisations should develop their technology foundations capability according to the following roadmap, adjusting to prioritise areas of significant value.



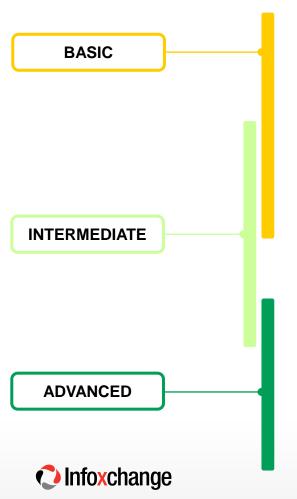
- 1. Choose a NFP collaboration platform Google Workspace or MS 365
- Find the right partner(s) a combination of your staff & external vendors (MS Admin & GGL Admin training available also)
- In parallel
 - a. <u>Design and implement the foundations email, file sharing, collaboration, intranet, video conferencing, MFA, knowledge sharing, etc</u>
 - b. Train staff and support them through the change
 - c. <u>Upgrade IT infrastructure to be 'cloud first'</u>
 - d. Refresh devices to support mobile operations laptops, mobile phones, etc
- 4. Then
 - a. Migrate applications & telephony infrastructure to the Cloud
 - b. Extend into more advanced areas such as external collaboration, strengthening organisational culture to innovate & delivering even greater value

Poll: Which of the following best describes your organisation:

- » We don't have an IT Plan we roll with the times
- We have a rough plan in someone's head
- » We have a plan that's written down and covering the next 6-12 months.
- » We have a plan that's written down, covering the next 6-12 months with appropriate budget allocated
- We have a 3 year digital strategy embraced by the board, management and/or executive team.

IT management roadmap

Organisations should develop their IT management capability according to the following roadmap, adjusting as required to focus on areas of significant value earlier.



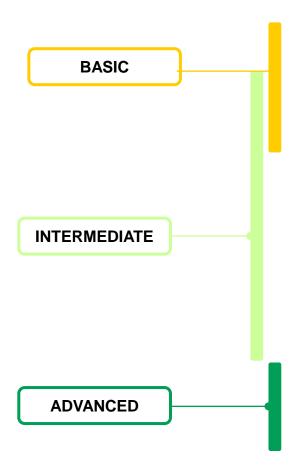
- 1. Document and understand your IT assets, systems and spend
- Engage the Executive to develop your Digital Technology Roadmap, identifying planned improvements over the next year and the required budget for operations, asset refresh and <u>improvements</u>
- 3. Deliver on the roadmap, demonstrating the value digital technology can bring and further engage both staff and the management team, considering <u>change management</u> and whether you need a <u>Digital Steering Group</u>
- 4. Develop a three year <u>Digital Strategy</u>, linked to organisation's strategic goals. Deliver to the strategy, engaging staff and the executive in discussions on IT cost, value and benefit realisation.
- 5. Develop and test your <u>Disaster Recovery Plan</u> (and business continuity plan)
- 6. Further build, encourage and <u>support innovation</u>, digital service delivery and <u>technology</u> <u>stewardship</u>

Poll:

What proportion of basic cyber security protections, defined as multi factor authentication, patching (for PCs, servers, network infrastructure and applications), user education, backup of critical data, antivirus, firewalls & accurate user accounts do you have in place?

- » Nil
- » Less than half
- » Most
- » All
- » Don't know/not sure

Cyber security roadmap



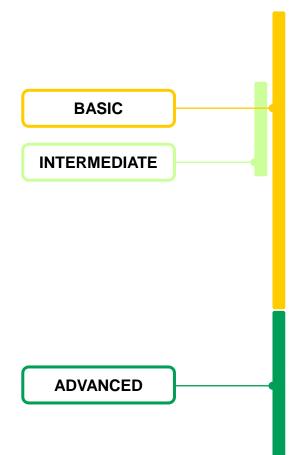
- 1. <u>Understand</u> the <u>fundamentals</u> and get the <u>basic protections</u> in place multi-factor authentication, patching, <u>user education</u>, data backups, antivirus, firewalls and user accounts are confirmed
- 2. Begin the <u>governance</u> journey develop and communicate an <u>end-user security policy</u> while engaging also the management team to manage cybersecurity risks
- Classify organisation's information, define where it should be stored, how it must be protected and control who has access to it
- 4. Enhance the organisation's <u>cybersecurity protections</u> improve patch and asset management, password practices, user access rights, administrative privileges and incident response processes
- The organisation's legal, regulatory & contractual obligations are understood, and reasonable steps are taken to comply
- 6. Strengthen your backup protections and document these
- 7. Assess the organisation against the <u>Australian Cyber Security Centre's Essential 8</u> and mitigate important risks
- 8. Implement a risk-based approach to managing cybersecurity, validated by planned penetration tests, phishing tests, vulnerability scans
- 9. Continue the cybersecurity journey through a continuous improvement program, and certification to external security standards (refer <u>advanced cyber information</u> & <u>additional resources</u>)

Poll: Which of the following best describes the core systems you use (CRM, client & case management system, etc):

- » We use one system to deliver our services and it doesn't work well for us
- » We use one system to deliver our services and it works well for us
- » We use 2-4 systems to deliver our services and overall they doesn't work well for us
- » We use 2-4 systems to deliver our services and overall they work well for us
- » We use >4 systems to deliver our services and overall they don't work well for us
- » We use >4 systems to deliver our services and overall they work well for us



Information systems roadmap



- Data understand your data collection <u>requirements</u> considering your activity measures, contractual requirements and impact/outcome measures
- 2. <u>Core system</u> <u>select</u> (after identifying your requirements), implement and extend your core service delivery system so it optimally supports staff and clients/members.
- 3. Reporting develop your management reporting and impact measurement capability
- **4. Finance** ensure your finance solution is fit-for-purpose and used to the fullest extent possible
- **Human resources** ensure your HR solution is fit-for-purpose and used to the fullest extent possible
- 6. <u>Supporting systems</u> leverage additional systems to support operational business requirements (where they can't be supported with existing systems), integrating these systems where appropriate. Supporting systems might include support for functions such as approvals, electronic signatures, project management, contract management, etc.

Digital marketing roadmap

BASIC

We have seen the results of digital marketing, and want to invest more

INTERMEDIATE

Digital marketing has a strategic importance to advance our purpose

ADVANCED

The organisation has an online presence and communicates to clients, supporters, donors via these channels. You are testing the potential of digital marketing. You dedicate time and resources to:

Engaging and responsive website

Social media

Email marketing

Digital fundraising

The organisation has the capacity and priority to reach new users and improve the digital experience for existing users You are now beginning to consider the strategy behind your digital marketing. You dedicate time and resources to:

Communication plan

Optimisation of channels

<u>Analytics</u>

The organisation has an engaged digital community that are targeted with personalised communications

Digital marketing is a strategic investment to improve your organisation's reach, You dedicate time and resources to:

Maximising campaign results

Marketing strategy

Targeted and integrated communications

Digital Transformation Hub

Technology to transform non-profit operations















Digital Transformation Hub

www.digitaltransformation.org.au

Our top recommendations

1

Have a plan. Don't try to do everything at once

2

Pick a non-profit collaboration platform.
Use it well

3

Take cybersecurity seriously

4

Move to the cloud and enable remote working

5

Leverage NFP discounts

6

Use a core system that suits your services, staff and future

7

Provide staff with training options to develop their skills

8

Measure your outcomes and impacts

9

Develop, measure and refine your digital marketing plan **10**

Find the right technology partners and engage effectively with your team



Questions







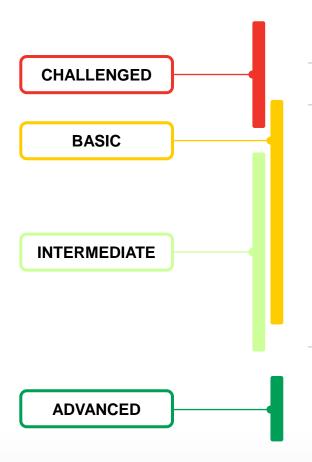
Appendices





The remote working roadmap

Organisations should develop their remote working capability according to the following roadmap, adjusting to prioritise areas of significant value.



- 1. Choose a NFP collaboration platform Google Workspace or MS 365
- 2. Find the right partner(s) a combination of your staff & external vendors
- In parallel
 - a. Design and implement the foundations email, file sharing, collaboration, intranet, video conferencing, MFA, knowledge sharing, etc
 - b. Train staff and support them through the change
 - c. Upgrade IT infrastructure to be 'cloud first'
 - d. Refresh devices to support mobile operations laptops, mobile phones, etc
 - e. Select the right system in the cloud to support staff deliver services
- 4. Then
 - a. Migrate applications & telephony infrastructure to the Cloud

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b. Extend into more advanced areas such as external collaboration, strengthening organisational culture to innovate & delivering even greater value



- » Established with seed funding from Lord Mayors Charitable Foundation & Gandel Philanthropy
- » Launched in June 2021
- » Aims to help 10,000 NFPs over a two year period to leverage technology more effectively
- » Currently offering additional free advisory services for smaller (<\$5m revenue) charities providing health or social services to NSW residence (thanks to NSW DCJ)</p>