

Pathways to Excellence Workshop

Excellence in Information Technology Systems

July 28, 2016

9:30 AM – 11:30 AM

Nonprofit Coordinating Committee of New York
135 West 36th Street, 15th Floor, New York, NY 10018

Moderator: **Mary O’Shaughnessy**, Director of Information Services, Her Justice

Panelists: **Matt Holford**, CTO, DoSomething.org
Daniel Reyes, Deputy Executive Director, New York Common Pantry

Do your policies and practices recognize the importance, expectations, availability and responsibilities of managing appropriate technology? Is technology integrated into your strategic objectives? Do you regularly use technology and other resources to increase organizational efficiency and effectiveness? How does your use of technology advance your mission-related goals? This workshop will include an exercise to help you think about the state of your IT systems and the steps you need to take to achieve excellence this area. This session will be of most interest to executive directors and staff who work on IT issues. This panel will be moderated by Mary O’Shaughnessy, Manager of Information Technology at [Her Justice](#), and will feature as panelists: Daniel Reyes, Deputy Executive Director at [New York Common Pantry](#) and [DoSomething.org](#).

Agenda

9:35 AM – 9:40 AM	Welcome
9:40 AM – 9:50 AM	Moderator and Panelist Remarks
9:50 AM – 11:05 AM	Panel Discussion & Short Exercises
11:05 AM – 11:25 AM	Q & A
11:25 AM – 11:30 AM	Wrap Up

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*The Pathways to Excellence workshop series is an outgrowth of **The New York Community Trust Nonprofit Excellence Awards Program**, managed by the **Nonprofit Coordinating Committee of New York** in collaboration with **The Trust** and **Philanthropy New York**, and sponsored by **WNYC**.*

ORGANIZATIONAL PROFILE

New York Common Pantry

2015 Gold Prize Winner for Overall Management Excellence

New York Common Pantry (NYCP) is dedicated to reducing hunger throughout New York City while promoting dignity and self-sufficiency.



NYCP is one of New York City's largest community-based food pantries (previously known as Yorkville Common Pantry). Since opening in 1980 as a small neighborhood pantry serving 30 families, NYCP has grown into one of New York City's most innovative emergency food providers, offering meals and support services to almost 400,000 visitors annually. While the programs and services have expanded and changed over the last 30 years, NYCP's mission has remained constant. Plus, their commitment to innovation and collaboration in order to better serve the community's needs has defined its unique standing among other food programs in New York City.

NYCP works toward the reduction of hunger and food insecurity through an array of programs that function to establish long-term independence for those they serve. Their whole-person approach consists of three major elements:

- Providing food through the distribution of nutritious, fresh food pantry packages in Choice Pantry and hearty balanced breakfast and dinner in the Hot Meals program;
- Addressing the causes of food insecurity with case management services through Help 365, which assists Pantry visitors in gaining access to resources, and Project Dignity, which connects homeless visitors to resources; and,
- Teaching children and adults about the importance of a nutritionally sound diet and active living through the Live Healthy! Eat Smart New York program, which also provides participants with the skills they need to make healthier choices for their families.

NYCP uses a custom-built database system for tracking program services, and spreadsheet tracking to ensure data integrity across programs. The organization uses FundEZ to maintain accounting and donor records, and all of these systems are used to help set, track, and meet goals, evaluate trends in service and resource development, communicate results to the board, and share externally among peers and partnering organizations to grow partnerships and increase impact. NYCP invested in a significant technology upgrade during their transition to Choice Pantry. This decision to frontload a moderate initial cost provided savings down the road because investing in an infrastructure allowed the organization to provide services adequately and meet demand effectively. The agency has strict technology protocols in place and has a Director of Programs and Operations who holds and manages passwords and network accounts with backup support from an outside IT consultancy.

Examples of Excellence Identified by the 2015 Selection Committee:

- Implementation of Choice Pantry model for online ordering has led to cost savings and encourages pantry members to become active participants in their food selection
- Share database models with partnering organizations to improve overall sector output
 - Data has helped influence broader community of food providers
- Benefits tracker tool records results of screening by case managers and shows what benefits are available to individuals
 - Tool also shows benefit saturation level over time to help determine adequate staffing
- Expanded web-based software to include a new mobile services program, allowing NYCP's food and benefits system to be replicated by other providers in the area

ORGANIZATIONAL PROFILE

DoSomething.org

2013 Finalist



As the largest organization for social change volunteers and community service, with 5,392,342 members and counting, DoSomething.org believes that young people can change the world. This belief guides their mission to empower their members to find a cause they're passionate about and then take action to create meaningful change. DoSomething.org also knows that when young people volunteer, they have more self-confidence, do better in school, gain leadership skills, are more likely to vote and often become life-long volunteers.

DoSomething.org relies heavily on technology to achieve their mission. Their members discover volunteer campaigns and participate by the web, over SMS and email, and with a mobile app. The DoSomething.org tech team consists of eleven software engineers, one IT specialist, six product managers, a VP Engineering, and a CTO. The team uses project and issue management software, daily intra-departmental scrum meetings, weekly inter-departmental meetings, and Slack to coordinate with the rest of the staff to plan, build, test, and deliver both internal tools to help everyone do their job more efficiently, as well as the public-facing web, SMS, and mobile app products that are at the core of their mission.

DoSomething.org constantly ships new software, builds in redundancy and recoverability to their technology, and regularly audits their tech platforms for security vulnerabilities. They centralize all communications on Slack: automated test results, security issues, software updates, server problems, all report into or are coordinated from group chat. All new staff are given a tech orientation upon starting with the organization to familiarize them with the technological tools and resources used, as well as the data security policies.

The organization benefits from the guidance of both established tech leaders on their board, and a dedicated Technology Advisory Board, with representatives from Yahoo!, Gilt Groupe, Twilio, Etsy, and others.

Examples of Excellence Identified by the 2013 Selection Committee:

- Technology orientation for new staff
- Regular auditing of website and databases to ensure that sensitive user data is secure
- Annual penetration testing and evaluation of website by external security expert
- Data Security Plan codifies processes for keeping data secure
- Regular intra- and inter-departmental meetings with tech team to plan, build, test and deliver internal tools to improve efficiency and campaign websites that are central to the mission
- Bolstered tech expertise on the board as a way of staying up to date on changing tech trends

STRATEGIES TO IMPROVE YOUR ORGANIZATION'S TECHNOLOGY

Tips from the Workshop Panelists

❖ New York Common Pantry

- **Long-Term Thinking**
Always maintain a long-view when considering technology. Consider not only what you need now, but what you may need in the future.
- **Implement Systems that Will Expand Capabilities**
When looking at databases, look for pliable platforms that will provide you the ability to expand capabilities.
- **Frontload Costs**
When considering cost, account for not just the immediate cost, but costs in the out years. Front loading cost can generate savings down the road.
- **Be Mindful of Quality**
Equally consider quality and cost. This impacts the 3 previous points.

❖ DoSomething.org

- **Feedback**
 - What are your organization's key performance indicators? How does your technology practice affect them?
 - How do you know how your systems are performing?
 - How and how often do you gather and evaluate feedback?
 - Where do you have opportunities to gather real-time data?
 - How do you and your team discuss system feedback and make decisions?
 - Pick two technology decisions your organization has made. How will you know if these are the wrong decisions? When will you know? What are alternatives?
- **Investment & Budgeting**
 - Where do you need flexibility in your budget? (Product development, R&D, experiments)
 - What are the big technology bets in your budget? How do you explain them to your board?
- **Staffing & Training**
 - How do you insure technical knowledge doesn't become siloed?
 - How can you keep your technical staff learning new tools and skills?
 - How do you define your project teams? Are the assignments static or do they change over time?
 - How do you implement a culture of feedback? How and when do your managers collect and give feedback?
- **Security & Emergency Preparedness**
 - What is the weakest link in your data security practice? How can you strengthen it?
 - How do you mitigate bad password practice?
 - Where & how can you introduce multi-factor authentication?
- **Additional Resources**
 - **Basecamp** <https://basecamp.com/> - get your conversations out of email and manage deliverables, files, and due dates.
 - **Trello** <https://trello.com/> - make lists of things using a simple interface that can adapt to any workflow.

PLANNING EXERCISE

Thinking about your own organization's technology management practices, choose one or more of the areas below and strategize next steps you are willing to take to improve your practices.

Tech Planning

- Most experts agree that nonprofits should have a written technology plan that is integrated into its short- and long-term strategic plan. The plan should include periodic assessments of technology and provide information regarding expected acquisitions, upgrades, and maintenance costs.

Activity: Describe 2 technology systems you need to effectively meet your mission. Consider:

- What are your organizational goals over the next 3 years?
- What new projects does the organization have for the next 3 years?
- What organizational changes do you foresee over the next 3 years?

Investment & Budgeting

- Your organization should create a technology budget and invest in computer hardware and software, email and website hosting, internet access, communications equipment, and any other technology infrastructure deemed appropriate to enhance and streamline its ability to achieve its mission.

Activity: Begin to forecast your technology budget for the next year. What technology improvements are needed to support the goals identified above? Consider:

- What are the costs of maintaining your current system?
- What existing products or services will need to be updated?
- What new products do you foresee needing to meet your goals?
- What resources will you need to train your staff, volunteers, and board members to use your systems effectively?

Staffing & Training

- Your nonprofit should designate responsibility for maintaining its information systems to more than one staff member, volunteer or board member – one person should be primary and at least one should be back-up.
- Your staff, volunteers and board members should all have current training to use the technology and information systems that are relevant to their work.

Activity: Consider who is currently in charge of your technology. Who else from your staff, volunteers or board members might act as your back-up? Describe 2 steps you can take to improve your team's use of your technology and information systems. How might you encourage a higher degree of comfort with technology?

Security & Emergency Preparedness

- To ensure that secure or confidential information is appropriately protected and not taken from the organization in any manner unless expressly authorized, your nonprofit should strongly consider a written security policy on how critical information is gathered, stored, and accessed.
- Your nonprofit should maintain and implement a business continuity plan (or catastrophic recovery plan) that includes hardware and software inventories. Off-site recovery should include back-up copies of software installation, key data and information that should allow for remote and/or alternative access in the event of an emergency.

Activity: Begin drafting a technology policy. Consider:

- How does your organization gather information?
- How is information stored and shared?
- How and what information is backed up?
- To whom is information made available?
- How do you address personal use of your organization's IT systems?
- How do you ensure security if staff have remote access to confidential information?

Activity: _____

Response:

Current Practice:

Improvements/Next Steps:

EIGHT KEY AREAS OF NONPROFIT EXCELLENCE

The 40,000 nonprofits in the New York City area represent one of the largest and most diverse communities of nonprofits in the country. They provide most of our art and music and crucial services that improve the welfare and well-being of individuals, neighborhoods, and communities. Managing nonprofit organizations has become increasingly complicated. Today's successful nonprofit must regularly demonstrate progress toward its mission, balance its books, comply with a staggering number of regulatory requirements, recruit, motivate and manage a strong staff and board of directors, raise money, communicate the organization's "story," be diverse and inclusive, manage changes in information technology, and demonstrate transparency, effectiveness, and accountability to donors and the public. Strong management requires focusing on all of this and key performance criteria that have been shown to produce great results.

Ten years ago, NPCC developed the ***Eight Key Areas of Nonprofit Excellence*** to provide nonprofits with a roadmap of core management excellence areas and performance strategies. The eight key areas, and the concrete examples of management strategies that follow from them, outline standard practices and aspirational best practices. They are not all-inclusive or one-size-fits-all, and they certainly should not be viewed as a checklist of all that is excellent in running nonprofit organizations. Underlying each of these areas is an assumption that the organization has established an explicit code of ethics that encompasses ethical and legal standards that cut across all management areas and programs. The nonprofit sector varies in size and mission and the art and science of management is ever evolving – the eight key areas are a good starting point for evaluating an organization's areas of excellence and potential for growth and improvement. Each of the eight areas includes: (1) an explanation of the topic; (2) baseline standards that NPCC believes must be met in order to demonstrate strong nonprofit practice; and, (3) aspirational goals that demonstrate progress and deepening strength of the nonprofit sector. In line with our understanding that excellence evolves, we expect the list to change over time as we all further define nonprofit excellence.

NPCC's **New York Community Trust Nonprofit Excellence Awards** program provides nonprofits with an opportunity to learn about the eight areas, assess their own organizational management, access resources and education that support improvement and apply for an Award that recognizes their excellence and allows them to share their proven practices with the entire sector. The Nonprofit Excellence Awards encourage a growing number of today's nonprofits – as well as those who observe, support, and study them – to pursue excellent management practices and to contribute to our field's growing legacy of excellence. We hope these ***Eight Key Areas of Nonprofit Excellence*** inspire your organization to grow and evolve.

Area Six: Use of Information Technology (IT) Systems Improves Efficiency and Advances Mission is copied below. To see the full document, visit <https://www.npccny.org/nonprofit-excellence-awards/eight-key-areas-of-nonprofit-excellence/>.

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AREA SIX: USE OF INFORMATION TECHNOLOGY (IT) SYSTEMS IMPROVES EFFICIENCY AND ADVANCES MISSION

Responsible Use of IT

- The organization complies with all regulations and industry standards relating to the types of data it collects, transmits, and stores (e.g., confidentiality, safety, accuracy, integrity, reliability, cost effectiveness, and legal compliance) including the necessary safeguards against systems breach and data loss.
 - Standard:
 - The organization has off-site electronic backup of all data.
 - The organization has surge protectors, virus scans, firewalls, anti-spyware and passwords for all computers.
 - The organization has security and privacy policies posted on its website.
 - Aspiration:
 - The organization has safety policies for protecting against online harassment.
 - The organization has mechanisms for ensuring accountability and appropriate responses substantiating all data gathered, stored, and used through its use of technology.

IT Use Increases Efficiency

- The organization regularly uses reliable information technology systems that provide timely, accurate, and relevant information to facilitate workflow, track its data, and increase efficiency and effectiveness in accomplishing its mission-driven goals.
 - Standard:
 - The organization invests in technology resources that are deemed appropriate to enhance and streamline its ability to achieve its mission and strategic goals (e.g. computer networking, remote access strategies, etc.).
 - The organization ensures that its staff and management use the IT systems effectively.
 - Aspiration:
 - The organization establishes and monitors goals for future performance and technological growth.
 - The organization engages in strategic thought about how to leverage technological advancements to further mission goals.
 - The organization has enabled remote access strategies and computer networking to permit off-site work, as applicable.

Properly Employing IT Expertise

- The organization has appropriately allocated financial and human capital to support the organization's technology goals and operations.
 - Standard:
 - The organization has designated staff, consultants, or volunteers who have the expertise to effectively support the organization's technology goals and operations.
 - The organization ensures that technology hardware and software are regularly assessed, updated and standardized.
 - The organization trains all staff in IT relevant to their work, including appropriate backup and safeguard protocols to ensure the data are not compromised.
 - Aspiration:
 - The organization factors in the role of existing and potential IT systems and strategies in all organizational decision-making and program development.
 - The organization has in place an effective disaster preparedness and disaster recovery plan and training process that assures business continuity and defines the process by which the technology infrastructure would be rebuilt in the event of a catastrophic occurrence.
 - The organization regularly assesses the state of the technology field and adopts new technologies that appropriately and effectively move the mission goals forward.

New York Community Trust Nonprofit Excellence Awards
29 Winning Organizations 2007 – 2015

- **America Needs You**, 2015 Winner
- **BRC**, 2015 Winner
- **BronxWorks**, 2013 Winner
- **Center for Urban Community Services**, 2007 Winner
- **City Harvest**, 2011 Winner
- **Community Health Action of Staten Island**, 2008 Winner
- **CSH**, 2013 Winner
- **Families United for Racial and Economic Equality**, 2007 Winner
- **God's Love We Deliver**, 2010 Winner
- **Good Shepherd Services**, 2007 Winner
- **Graham Windham**, 2014 Winner
- **Groundwork, Inc.**, 2009 Winner
- **Harlem Academy**, 2011 Winner
- **Harlem RBI**, 2009 and 2012 Winner
- **Ifetayo Cultural Arts**, 2008 Winner
- **Institute for Family Health**, 2008 Winner
- **Leake & Watts**, 2014 Winner
- **Neighborhood Economic Development Advocacy Project**, 2009 Winner
- **New York Cares**, 2009 Winner
- **New York Common Pantry**, 2015 Winner
- **New York Lawyers for the Public Interest**, 2010 Winner
- **Open Door Family Medical Centers**, 2012 Winner
- **Red Hook Initiative**, 2012 Winner
- **Row New York**, 2014 Winner
- **Sadie Nash Leadership Project**, 2010 Winner
- **Sanctuary for Families**, 2011 Winner
- **The Children's Village**, 2013 Winner
- **Vera Institute of Justice**, 2009 Winner
- **WITNESS**, 2007 Winner