



# BUILDING THE FOUNDATION FOR IT INNOVATION

2021

## Guidelines for IT Innovators

If your nonprofit wants to be innovative in IT, you know there are risks and benefits to consider. Some start up nonprofits have found creative IT that provides an opening for service delivery or a way to operate that has not been tried before, that gives them a competitive advantage in their sector. Some mature nonprofits have been entrepreneurial with internal IT supporting their staff, or external facing IT supporting their clients and donors. IT innovation can revolutionize benefits to your community and fuel your nonprofit mission.

However, Community IT has worked with several clients whose IT innovations created more problems than they solved.

How can your leadership team tell the difference between an IT idea that your organization can support and one that will cause wide-reaching headaches? How can you identify where to take an IT chance?

Having provided outsourced Managed IT Services to nonprofit organizations for over 25 years, we've learned that the organizations that are best able to execute and capitalize on innovative IT projects start with a solid IT foundation. Their leadership team understands and values IT as fundamental to the business needs of their nonprofit. They have a high-functioning ownership of IT decision making, and widespread organizational buy-in for IT solutions. They actively break down organizational silos and have a technology roadmap that guides long-term strategy. With that capacity, these organizations are able to be creative and find innovative, problem-solving IT uses. And by building on a strong IT foundation, these organizations are able to predict and address the impact IT innovation has on the organization as a whole, setting their innovative project up for success.

If you are an innovative nonprofit, it's important to ensure you are working from a strong IT foundation. Here is a short guide to help you toward securing your IT foundation in order to support IT innovation.

## Community IT Experience and Background

Community IT Innovators is celebrating its 20th year as an independent company in 2021, and our history stretches back almost 25 years in total serving nonprofits exclusively.

Over the past two decades we have served nonprofits at every stage of their maturity. We have served stable organizations as well as nonprofits experiencing rapid growth. We have served nonprofits who were re-evaluating and re-directing their mission, those who were shrinking their field operations or programs, and those who were rebuilding after a major change in their fundraising, mission, board, or executive team. We have been honored to serve venerable institutions and scrappy start-ups.

Our practices have changed over the years – not just as nonprofit technology itself has changed and developed, but in our approach and understanding of the needs of the sector. The field has moved from the days of “everyone is an accidental techie” to seeing IT as a fundamental part of effective organizational strategy. We have learned a lot along the way about how to effectively manage IT for nonprofit organizations.

Community IT is a 100% employee-owned company, and over half of our staff has been with us for over a decade. Our team of 37 staff is dedicated to helping nonprofit organizations advance their missions through the effective use of technology, and we support 5300 seats/staff at over 140 clients. We’re technology experts, we are a Microsoft Gold Partner, and we’ve been consistently named a top managed services provider by Channel Futures and received this honor again in 2020.

# Building the Foundation for IT Innovation

Here is a short guide on securing your IT foundation in order to support IT innovation.

How can your leadership team tell the difference between an IT idea that your organization can support and one that will cause wide-reaching headaches? How can you identify where to take an IT chance?

**FIRST STEPS** to solidify your foundation in order to build out or encourage a smart IT innovation culture at your nonprofit:

Limited IT dollars **MUST** be invested in foundational IT requirements **FIRST**. This is the IT that keeps your organization operating.

This is IT that **ALL** nonprofits have to invest in and innovation can only happen on top of this foundation.

You can't innovate your way out of needing these fundamentals in place.

• **Invest in licenses for Office 365 or an equivalent platform. As part of your IT foundation you will need:**

- » Cybersecurity (this is so important we include it in a separate bullet point below)
- » Workstation and server monitoring
- » Managed antivirus
- » Managed backup
- » Email filtering and security and continuity
- » Server hosting
- » Managed firewall
- » Helpdesk staffing and escalation support
- » Endpoint monitoring and management, to allow your staff to work from anywhere
- » Enterprise software selection assistance
- » IT planning/tech roadmap development



- **Three-year laptop replacement lifecycle management**
  - » Hardware replacement lifecycle management if not in the cloud
- **Accessible cloud storage if using the cloud ( you should consider the cloud! )**
- **Foundational cybersecurity**
  - » Learn more with the [2021 Cybersecurity Readiness for Nonprofits Playbook](#)
  - » Core [cybersecurity assessment](#) annually including NIST Security Survey
  - » Compliance including HIPAA and legal, cyber insurance compliance
  - » IT Policy bolstered with end user staff security awareness training
- **Collaborative tools that let teams work together. While these may seem “optional” they are a basic part of a well-managed IT structure at every nonprofit**
  - » Learn more with our [Guide to Remote Work](#)
  - » Learn more with our webinar on [Teams/Slack/Zoom tips](#)



- **IT Training/HR oversight of required training/onboarding consistency**

- » Staff need to know how to use their tools
- » Staff need to know how to stay safe and keep the organization safe
- » Training needs to be ongoing and prioritized

- **IT project management and implementation**

- » Leadership ownership of IT, both your foundation and projects/updates
- » Clear management decision-making process
- » Annual assessment and review of existing IT
- » Roadmap/strategic planning/budget process

A solid foundation is not just the technology itself, but an entire approach to managing IT infrastructure. We call this “well-managed IT” and believe it consists of these 4 critical areas:



## Size & Lifecycle

How large are you? What stage of growth is your organization in?

**Mature Nonprofits.** Organizations with over 100 staff with mature IT departments should have the budget and leadership capacity to build innovation on top of and as a complement to existing systems. They should have the leadership capacity to take risks into account and set the project up for success.

Innovation is usually successful in larger clients who have a good tech budget foundation and room to innovate because they have staff resources to see an innovation through. Some mature nonprofits have been entrepreneurial with internal IT supporting their staff, or external facing IT supporting their clients and donors. IT innovation can revolutionize benefits to your community and fuel your nonprofit mission.



**Mid-sized, middle aged.** Usually, mid-sized nonprofits need to refine their IT leadership and update their organization-wide systems. They can and should focus on putting their house in order. A good assessment will help develop a strong roadmap and set priorities of what systems to upgrade and in what order.

Don't view innovation as a way to get out of existing IT problems. Innovation can seem attractive as a shortcut to IT health at this phase, but without a solid decision-making process and widespread buy-in, innovation that promises short cuts can lead to big, expensive disappointments. Put all your “must haves” in place before you try to cut any corners with new or innovative IT.

**Start-up** nonprofits can innovate, but need to keep an eye on maturation plans and their technology roadmap – setting up good systems and good decision making now if they plan to grow

Some start up nonprofits have found creative IT that provides an opening for a service delivery or way to operate that has not been tried before, that gives them a competitive advantage in their sector. This was certainly the case when online fundraising and social media campaigns were new, when small nonprofits were suddenly able to outcompete some older organizations for new revenue.

At any level of growth or size, your existing nonprofit IT will provide the foundation for any new IT uses or innovations. Make sure your foundation is healthy and your culture is ready to embrace innovation before proceeding. If you start out on the right foot, innovative IT can help your nonprofit address internal processes, meet mission goals, and serve stakeholders in new and creative ways.





## Leadership & Culture

### Technology Roadmap/IT Strategic Plan

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Do you have one? Does everyone in your IT leadership use it to guide long-term decision making? Do your funders support your technology roadmap?

**Having a functioning technology roadmap is a leading indicator of an IT leadership team that can handle innovation.** Having an ad hoc tech strategy or worse, siloed departments competing and investing without an eye to the whole, is an indicator that IT innovation may have serious and expensive impacts down the line.

### Cybersecurity Taken Seriously Here

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If your cybersecurity stance is viewed as a business need and an organization-wide concern, this is another indicator of an IT leadership team that looks at the big picture and plans IT budget priorities effectively. See our Cybersecurity Readiness for Nonprofits Playbook for the cybersecurity foundational needs of any nonprofit. **If your nonprofit does not have a cybersecurity foundation in place with all the “must haves” addressed, there is serious potential of an IT innovation leaving your organization exposed to cyber threats to your finances, reputation, and valuable data.**



## IT Leadership

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Does your executive team prioritize IT as an integral business function? Or do they leave IT decisions up to the IT team?

Do you have executives that always want the latest and greatest IT, whether or not the previous project has been successful? Do you have IT leaders who seem to constantly overestimate the organization cultural ability to adapt to new IT? Does your nonprofit seem to have a hard time following through and completing a stable implementation?

Does your IT Director question the capacity of the organization to implement your tech projects?

Do you have executives who don't believe in investing in IT at all, who would rather not fix something until it actually breaks down? Does your IT Director battle against budget constraints and always lose?



Assess your organization and leadership as honestly as possible. You may want to invest in an outsider's professional assessment of your technology, leadership, and culture. **If you are mired in bad tech decisions and bad budget cost center thinking, you can't be effective as an organization. No amount of innovation will overcome a dysfunctional tech culture.**

## Entrepreneurial Organization

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### CONS:

Entrepreneurial organizations are not always good at implementing innovative IT. Some organizations that value entrepreneurship undervalue organization and consistency, which can lead to every department investing independently in IT and developing their own processes. The departments have no regard for an organization-wide IT roadmap, and are rewarded for being entrepreneurial, not for playing on the same team. Entrepreneurial organizations can also encourage competition between departments, and the IT budget can become a zero-sum game – each team wants the biggest piece of a limited pie.

Seeing the IT roadmap as a holistic and strategic investment is crucial to any organization, especially organizations that seek to innovate.

### PROS:

An entrepreneurial culture can lead to the development of innovative solutions to typical IT challenges. And entrepreneurial organizations are generally supportive of ingenuity, and ready to bet big on big ideas. An entrepreneurial organizational may be well-positioned to support an innovative implementation, as long as the organization is able to prioritize and has a track record of seeing projects all the way through.



## Non-Entrepreneurial Organization

### PROS:

Is your organization a bit set in its old-fashioned IT ways? This is not the obvious hurdle to IT innovation you might think!

If your older and more cautious mid-sized or larger nonprofit has a solid tech foundation, then it might be in a good position to think outside the box in terms of IT investments that can deliver high value. The key is to identify entrepreneurial managers with great ideas on improving your processes, internal communications, or even your tech roadmap. Take the time with your staff to surface the internal knowledge and understanding of organizational bottlenecks, and innovative IT ideas may emerge that are the perfect fit for your needs. You may need an external consultant to administer focus groups and surveys to bring this knowledge to your leadership.

Mature organizations usually have well-established processes and protocols with widespread buy-in among staff, and regular training schedules. Mature organizations often have leadership who value IT planning and regularly consult with stakeholders. You will be able to tell if your nonprofit is ready for innovation if you have confidence in your IT foundation, decision-making process, and capacity to implement organization-wide changes with a minimum of disasters.

### CONS:

If your non-entrepreneurial organization is barely holding itself together in the IT department and facing dysfunctional budgeting or atrophied leadership, you would be wiser to focus on building up the foundational layer of IT, the “must haves” for IT to function and thrive, including a solid cybersecurity posture.





## Special Security Concerns

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If your organization deals with data or clients who require special security, such as children, healthcare, or vulnerable populations, or if your mission is in advocacy areas where security is a particular concern such as international policy or political advocacy, then you may need to exercise great care in IT innovation to ensure that all your IT is still secure against intentional hackers.

For example, in education tech there may be lots of good ideas on engaging students. But installing “homemade” apps in an online classroom may create serious security risks both among students bullying each other within the class and outsiders gaining access to exposed student information.

In healthcare, nonprofits face double security barriers to innovative IT – while there are many great and innovative ideas on connecting patients to care, many patients may be reluctant to share personal information without security assurances. In addition, your organization may face significant security risks that could expose very sensitive patient information.

There is still value in IT innovation in these mission areas! These special concerns simply add a layer of security that your IT innovation must be sure to address, or your new tech could create significant headaches and risk.



## Further Resources

To help you assess whether your IT provider or department is providing a solid foundation for innovation, Community IT has created several free resources:

### [How Do I Know If an MSP Is Right for My Organization?](#)

Take this short self-assessment to learn the pros and cons of the Managed Service Provider (MSP) model and whether your nonprofit could benefit from outsourced IT support. “Managed services” can mean different things to different people. This self-assessment will guide you to an understanding of the impact the size of your nonprofit, the stage of lifecycle growth, and other factors have on your IT needs, in accessible language.

### [The Nonprofit Guide to Vetting a Managed IT Service Provider](#)

Looking for a better managed IT support provider? Not all MSPs are equipped with the experience to serve nonprofits like yours. Finding an MSP that is the right fit for the mission and culture of your organization requires asking the right questions up front. This free download includes 12 questions you can use to evaluate service quality and fit.

### [Cybersecurity Readiness for Nonprofits Playbook](#)

Non-profit organizations are challenged to develop an appropriate security plan that recognizes the difficulty in managing the security of their data assets, engages their staff with sensible practices as an important line of defense and keeps costs effective. Community IT Innovators completely revised this Cybersecurity Playbook in 2021. Whether hiring a Managed Service Provider (MSP) or using an in-house IT Department, organizations need to establish a good foundation of updated systems, regular backups, good user training including passwords and crisis management, and effective security policies that can evolve with the organization.

### [The Nonprofit Guide to Remote Work: Microsoft SharePoint and Teams](#)

If you are an Office 365 subscriber you already have access to some of the best file sharing and video chat/productivity platforms available: Microsoft SharePoint and Teams. But are you utilizing these tools to your best advantage? This Guide will help you understand these tools, learn where they can help your productivity (especially as you work remotely), and find more resources to help you use your IT effectively. The final section of this Guide includes tips on humanizing the remote work experience and setting yourself and your teams up for success. If you've been working remotely for a while, check out our tips to retune your experience

## Summary

In our experience of over 25 years of serving nonprofits with outsourced Managed IT Services, we've noticed that the organizations that are best able to execute and capitalize on innovative IT projects have already created a solid IT foundation.

You may be innovative with your IT at any stage of size and growth. However, nonprofits generally get into IT trouble when they see innovation as a way to cut corners without doing the day-to-day work of investing in the “must have” IT products and support.

When was the last time you had a technology assessment that came back with a clean bill of health? How confident are you that your organization can implement an innovative project on top of your other IT needs and functions?

After considering your size, budget, and stage of lifecycle, you should try to take as clear-eyed an assessment of your leadership and culture as you can. Does your organization have a technology roadmap? Do you invest in cybersecurity protections and understand risk? Does your leadership have a generally good decision-making structure? Are you entrepreneurial on the whole? Non-entrepreneurial (that's not a bad thing!)? And do you have any special concerns or sensitive populations that require stronger security on any innovative IT products or processes?

### Do you have a solid IT foundation in place?

If your leadership team understands and values IT as fundamental to the business needs of your nonprofit, has a high-functioning ownership of IT decision making, a technology roadmap in place and widespread organization buy-in of IT solutions, you are in good hands.

With a solid IT foundation providing capacity, your organization is more likely to successfully find innovative, problem-solving IT uses.

If you are an innovative nonprofit, it's critical to work with a company that understands nonprofits and can provide high-quality service that fits.

# Looking for a Managed Service Provider You Can Trust?

Hopefully, this framework is helpful as you consider your need for innovation and options for building your IT foundation. If you're looking for more help, let's talk.

At Community IT Innovators, we've exclusively served nonprofits for almost 25 years, empowering them to accomplish their missions with better IT support.

We have low technician turnover and certifications across all major platforms. We're strategic, tactical, and tailored to you; we constantly research and evaluate new technologies to ensure that you get cutting-edge solutions that are crafted to the needs of your organization, and that will last into your future.

We'd love to talk through our services framework with you in detail, or to discuss any other questions you might have around managed services.

If you're looking for a managed services provider you can trust, contact us at **202.234.1600** or online. One of our consultants will be in touch quickly to talk through your needs.



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