



BWF Client Partner Series

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- Welcome! We are glad you have joined us.
- Use the Q&A Feature to ask questions.
- Any unanswered questions will be addressed individually after the webinar.
- Share your thoughts with us by using **#bwfwebinar**.
- For technical challenges, support is available by emailing bwf@bwf.com.

Upcoming Webinars



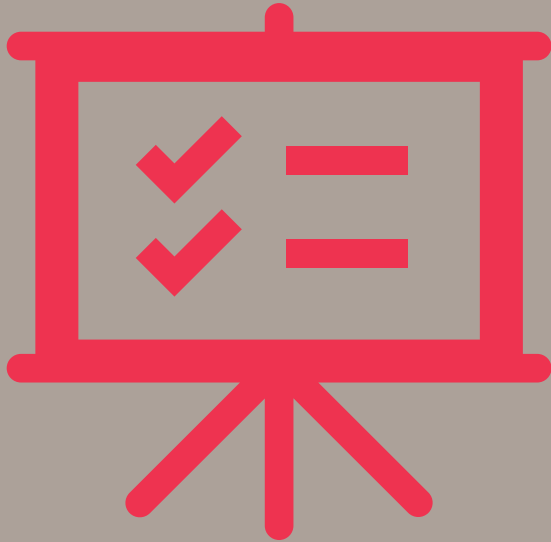
All webinars are at 2pm EST/1pm CST.

- Thursday, March 26-***The Remote Development Office – Maintaining the Mission***, hosted by Jeff Hilperts and Katrina Klaproth
- Monday, March 30-***Sustaining Optimal Board Leadership in Times of Crisis***, hosted by Dennis Prescott and Jan Cady
- Wednesday, April 1-***Reviewing Philanthropic Priorities and Alignment with the Current Marketplace***, hosted by Mark Marshall and Josh Birkholz
- Thursday, April 2-***Understanding Your Engagement Index: Priming Your Organization for Current and Future State***, hosted by Alex Oftelie



Positioning Information Strategy Teams During Mandatory Remote Work

Agenda



- Today's Context
- Getting to the New Normal
- Priorities for an Uncertain Future
- Idea Generation

Today's Context

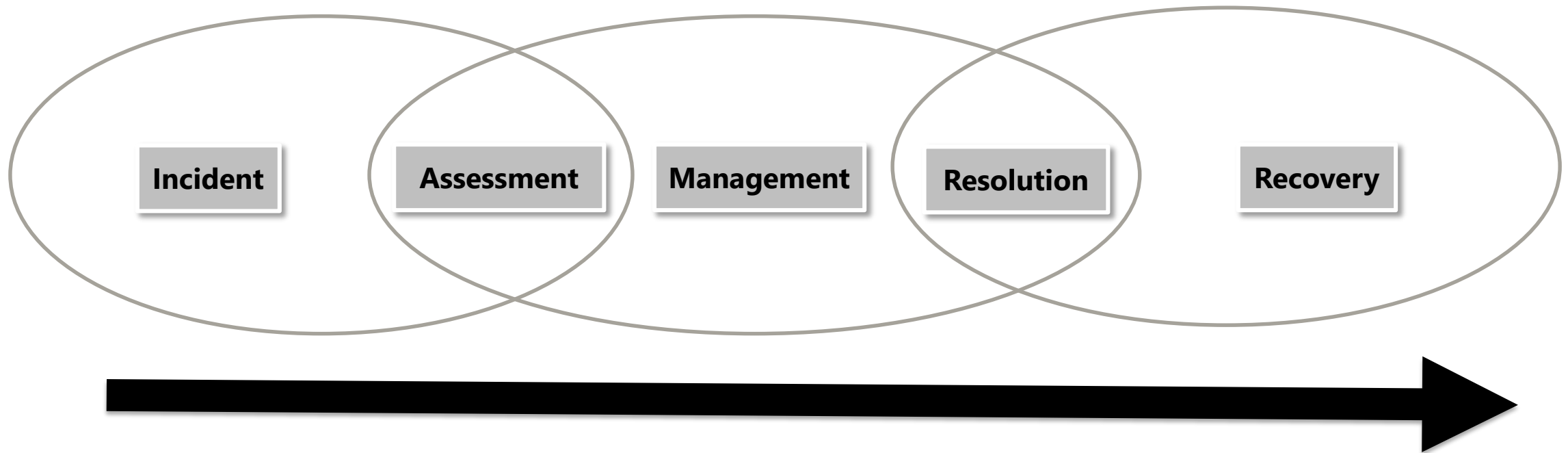


2009



- Donors shifted to urgent, recipient-level needs.
- Some major donors felt embarrassed talking about their financial situations.
- Non-retired volunteers were pulled away from campaign activities to focus on their businesses.
- Long-term commitments stalled. Pledge volume recovered in 2010. Total dollars recovered by 2011.
- Many stories of donors citing nonprofit acceptance, patience, and confidence as reasons for returning.

Incident Management Phases



Status

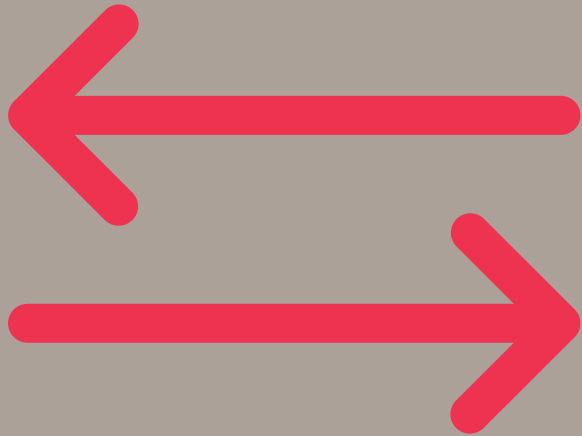
The current situation is not about risk management. The risk has been identified and we are in active situational management.

- Extended remote only work.
- Potentially limited human resources.
- Constrained budgets.
- Impact on existing project priorities.
- Disruption creates the opportunity and need for creative thinking and problem-solving.
- Organizations that continued engagement and long-term planning emerged stronger from the last economic downturn.

Getting to the new normal



Getting Your Team Up and Running



Fundamentals

- Internet Connection
- Laptops
- VPN/Remote Access
- Revised Security Classes
- Headsets
- RAM
- Mobile Forwarding
- Second Monitors

Keeping Your Team Engaged



Our Collaboration Tools

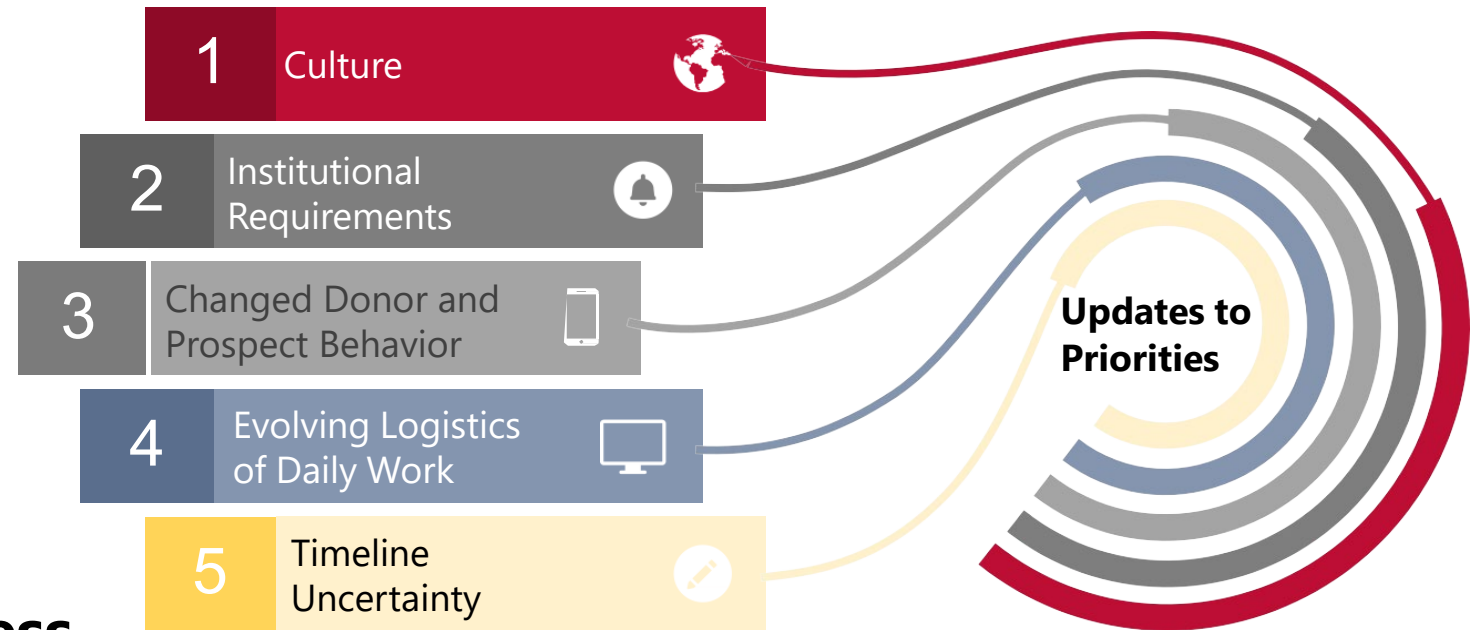
- Internal Communication—Slack
- Shared Project Management and Tasks—Smartsheet
- Business Process Mapping and Charts— LucidChart
- Video Conferencing—Zoom
- Secure Document Sharing—ShareFile



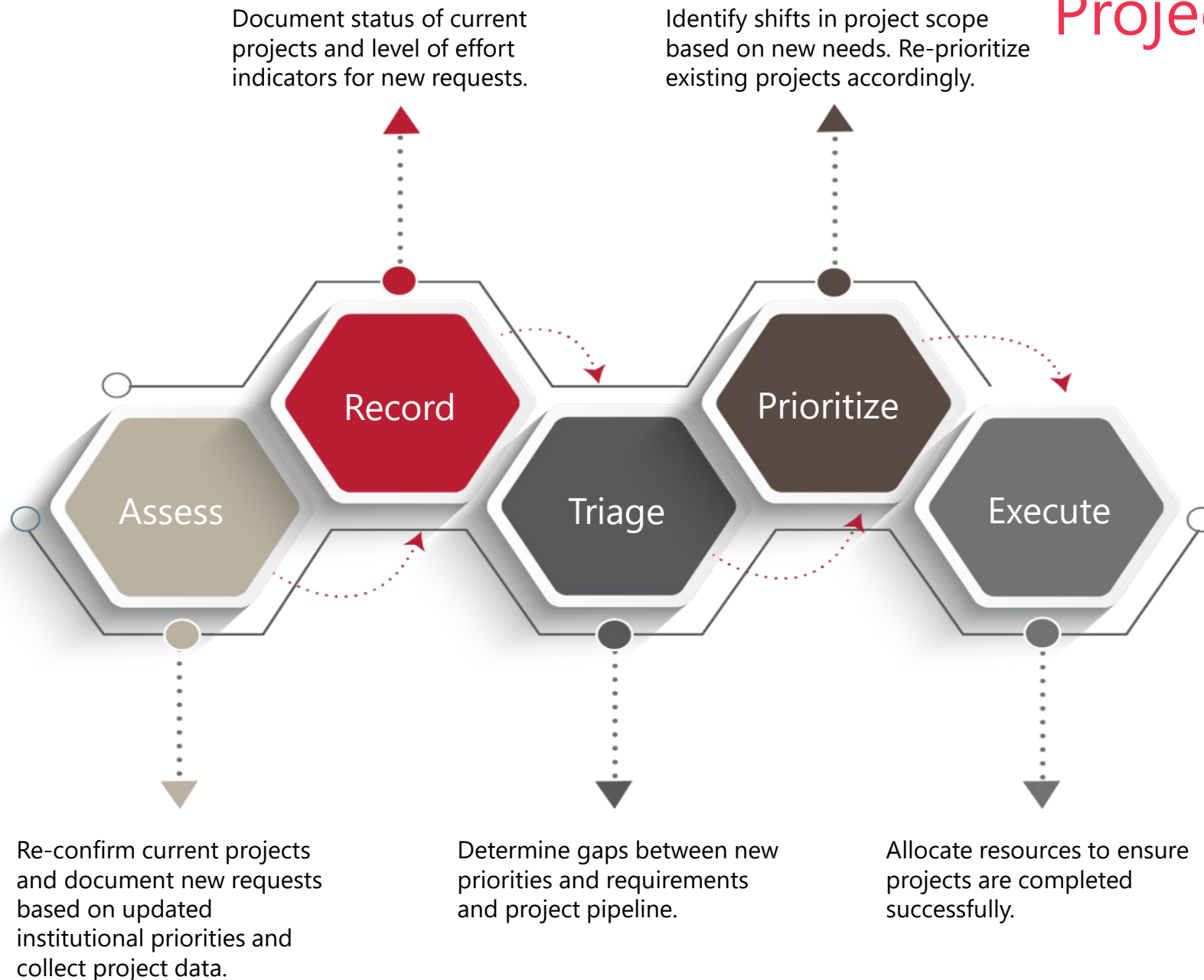
Priorities for an uncertain future

Changing Priorities

1. Physical Distancing, Closed Campuses
2. Loss of Revenue, Altered Needs
3. Financial Insecurity, Less Personal Contact, Shift to Online Environment
4. Work at Home, Altered Work Hours, Need to Maintain Privacy and Security, Information Access
5. Impacted Institutional and Project Timelines and Milestones



Project Approach



- Classify by Creation
 - Existing Projects
 - Newly Identified Projects
- Collect Key Project Metadata
 - Project Owner/Sponsor
 - Project Manager
 - Audience
 - Status (percentage/red, yellow, green)
 - Assigned Resources
 - Cost
 - Benefits
 - Summary
 - Vendor Dependencies

- Focus on Documenting the Essentials
- Maintain a Project Portfolio
 - Grids can be easily re-ordered.
 - Quickly conveys the volume and status of projects.
- Project Portfolios are a Shared Resource
 - Maintain grids on a collaboration tool such as Smartsheet.
 - Access should be expanded to leadership.

		Project Category	Priority	LOE/ Resources	External Vendor Use	Lead	Support	Timeline	Est. Start Date	Est. End Date	Status	Date Identified
		Completion of dashboard inventory and review				UCF - ITS	BWF	FY20 Q2		12/31/19	Complete	From FY19
		✦ Development of "functional management" reports										
		✦ Development of DataMart										
		Special Projects										
		✦ Implementation of Athletics data transfer										
		✦ Implementation of new counting guidelines and reports										
		Implementation of data and technology components of grateful patient program			TBD	UCF	BWF	TBD		TBD	On Hold	From FY19
		Create and import velocity scores				UCF - ITS	UCF - PD	TBD		12/31/19	Complete	New FY20
		Import of DonorSearch scores			DonorSearch	UCF - ITS	UCF - PD	FY20 Q2		12/31/19	Complete	New FY20
		✦ Configuration audit of Apollo										
		✦ Hosting Transition										
		ServiceNow Transition										
		KnowledgeBase set-up				UCF - ITS		FY20 Q1		08/30/19	Complete	From FY19
		Data request form set-up				UCF - ITS		FY20 Q1		09/30/19	Complete	From FY19
		Develop workflows and complete configuration set-up				UCF - ITS		FY20 Q1		09/30/19	Complete	From FY19

- Acknowledge that All Projects are Not Possible
- Respect Workloads – Especially Now
- Shifting Priorities
 - Determine who is setting and owning priorities.
 - New projects should be measured against current priorities.
 - Triage current projects.
 - Proceed
 - Postpone
 - Cancel
- Establish a Singular Intake Method for New Projects

Impact Assessment

General Impact

- "Quick Win"
- Length of Project
- Strategic Alignment
- Financial Resources
- Human Resources
- Vendor Resources

Internal Impact

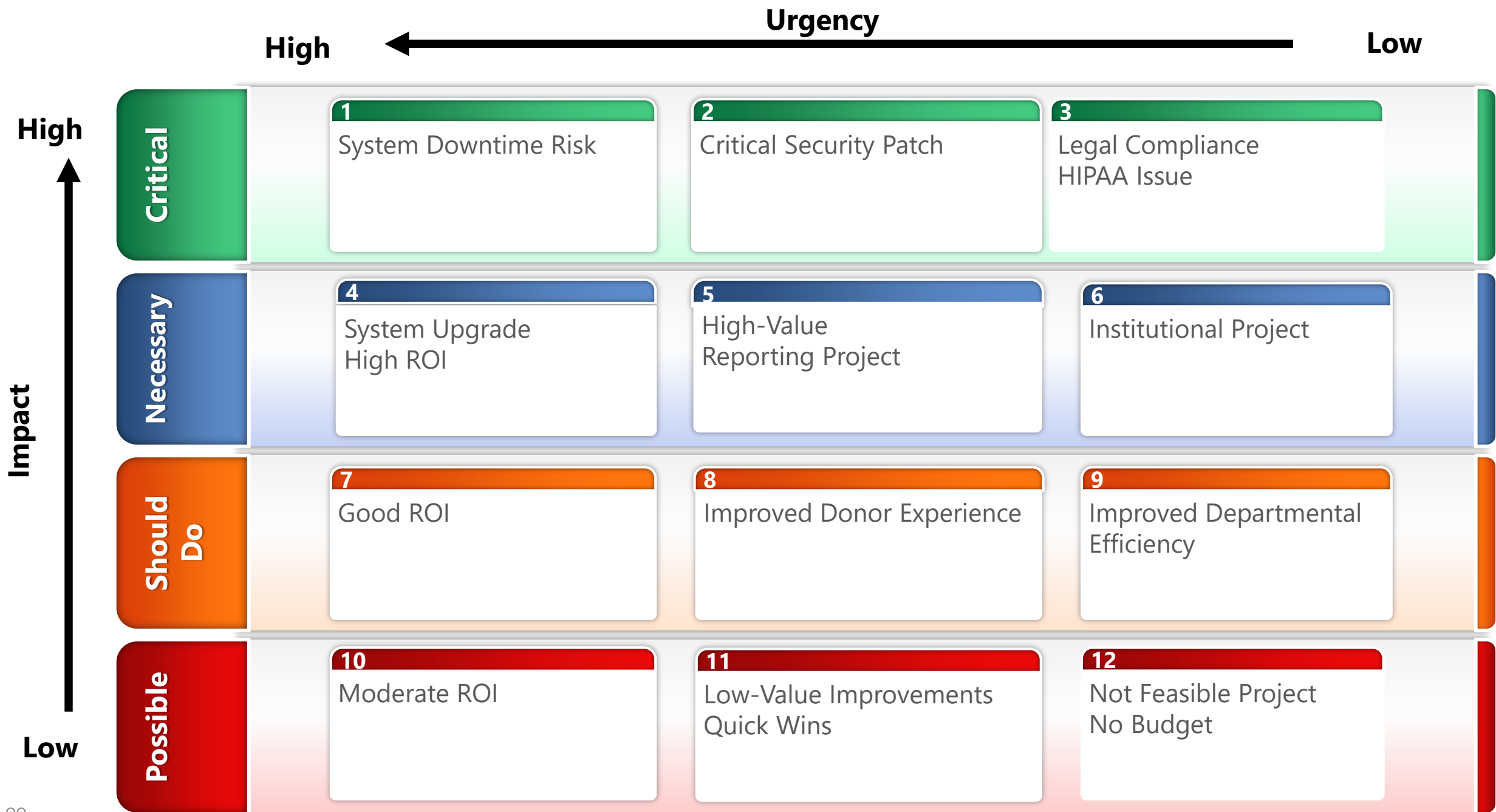
- Increased Process Speed
- Resource Availability
- Technical Feasibility
- Cross-Department Impact

External Impact

- Customer and Donor Satisfaction
- Increased Efficiency
- Increased Revenue
- Growth Potential
- Marketing Impact

Risk

- Legal Compliance
- Security Risk
- Work Stoppage



Prioritize

- Rank Projects by Impact and Urgency
 - Approach urgent but feasible projects that can be undertaken remotely.
 - Crisis triage depends on quick assessment of available resources, feasibility, budget, and impact.
- Prioritize the Donor Experience
- Executive Sponsorship
 - Project alignment should be coordinated with executive sponsorship.
 - Executives should support project prioritization.
- Fully Communicate Project Portfolio and Align with Priorities
- Now Is a Time for “No”

- Adopt a Meeting Methodology
 - Scrum or stand-up meetings are critical to managing your team's workload.
 - Scrums can be utilized to review continually changing priorities.
- Block Calendars
 - Balance time between long-term and short-term projects.
 - Allocate appropriate time to 'tactical' work.
- Utilize Project Management Tools
 - If you are not currently utilizing a PM tool, now is the time to explore options. They range from simple to complex.
- Determine Feedback Process to Project Stakeholders

Project Management Methods and Tools

Monitoring Your Team's Activity

- PM Tools
 - Asana
 - Smartsheet
 - MS Project
 - Wrike
 - Trello
 - Basecamp

- Work cannot stop.
 - Managers face a unique challenge in motivating employees while acknowledging boundaries at this time.
- Intake methodology is critical at this time. Expect a barrage of new requests from various sources.
 - Centralize review with an appropriate executive.
- Take notes during this crisis.
 - Pains experienced at this time can be quickly forgotten. Keep a list of issues to be mitigated in future planning
- Coordinate saying “No” with executive leadership.



Idea Generation

If you needs ideas...

Things our clients are currently working on.



Strategic Projects

- Skill Development
- Self-Service Reporting
- CRM/Technology Ecosystem Assessment and Planning
- Data Governance
- Grateful Patient Data Management
- Short- and Long-term Strategic Planning

If you needs ideas...

Things our clients are currently working on.



Tactical Projects

- Data Audits
- Revising Business Processes
 - Updating Gift Communications to Align with New Messaging
 - Re-allocating Staff to Address Online Inquiries
- Remote Training and Relationships
 - Remote Office Hours
 - How-To Videos
 - Consolidating Tips, Articles, Webinars
 - Strengthening Relationships with Fundraisers
- Electronic Signatures and Forms
- Recurring Donations
- Policy Development
 - Gift Acceptance
 - Prospect Management
 - Gift Counting

Closing Thoughts



- The current situation will end. However, lessons learned during this time should impact future priorities.
- The pandemic has the potential to revolutionize charitable giving.
- Healthcare organizations face a unique challenge with grateful patients—everyone will be touched by COVID-19.

Discussion



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