

digital foundations for social start-ups

with steven hodgskin

contents

what we'll cover today

The aim of today's session is to build knowledge and skills which will help you work in your teams.



1 introduction

2 digital culture

3 core tech

4 security

5 crm

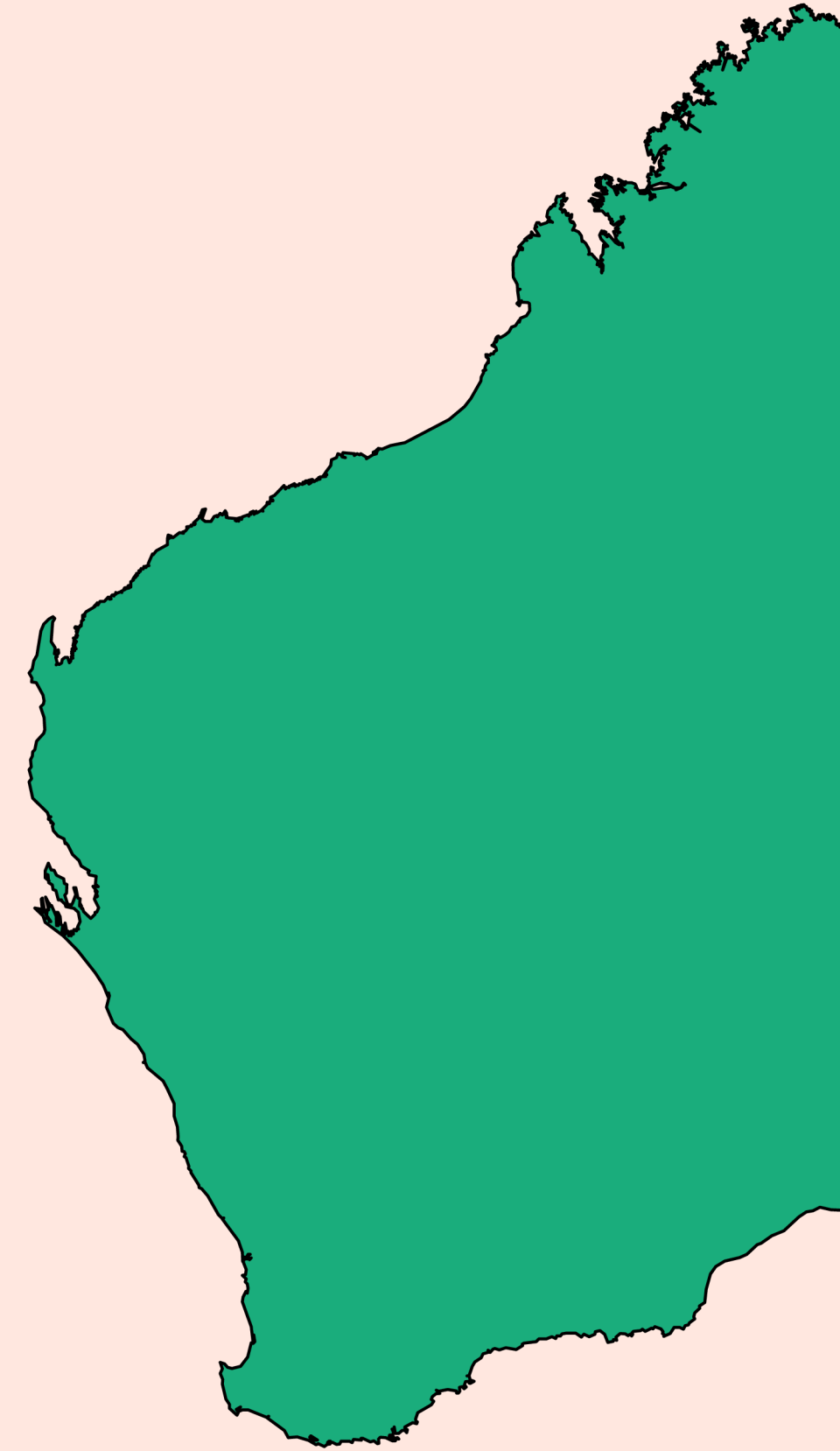
6 q&a

part 1

introduction

introduction

acknowledgement of country



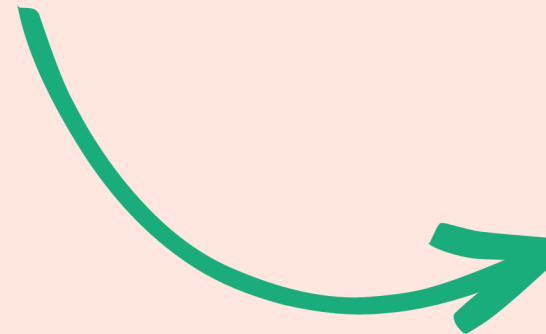
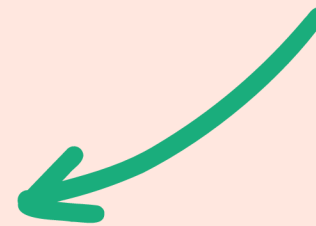
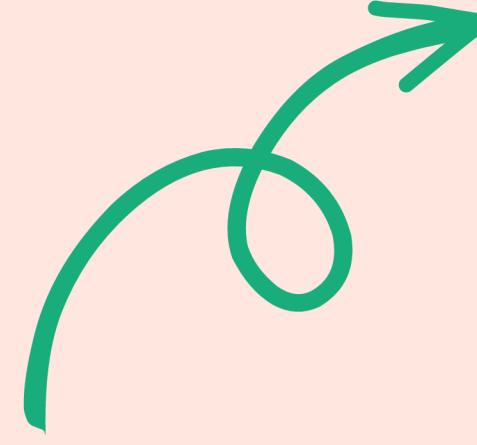
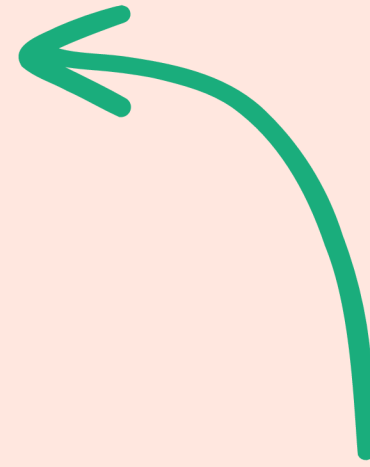
social enterprise

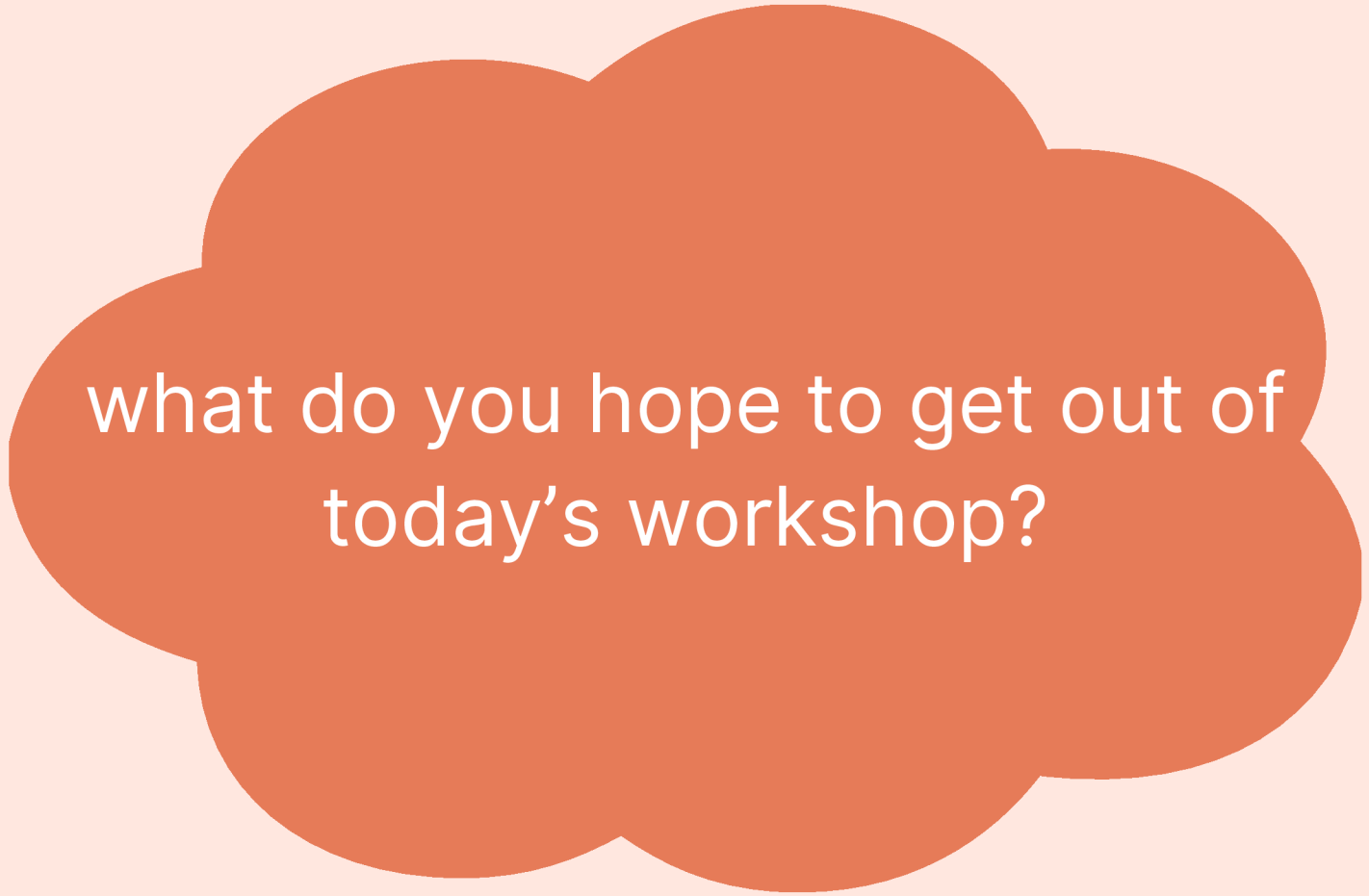
founded 2021

zentient[®]
digital cultures built for purpose

helping nonprofits

assisting with tech



A large, stylized orange cloud shape with multiple rounded lobes, centered on the page. It serves as a container for the text.

what do you hope to get out of
today's workshop?

business systems

business system

business systems

core

email calendars files
help-desk devices identity
back-ups collab wiki
task mgmt

business systems

core

email calendars files
help-desk devices identity
back-ups collab wiki
task mgmt

finance & admin

bookkeeping forecasting
budgeting payroll
procurement expense claims

business systems

core

email calendars files
help-desk devices identity
back-ups collab wiki
task mgmt

governance, risk, compliance

security passwords
policy library data privacy
risk registers
board portal

finance & admin

bookkeeping forecasting
budgeting payroll
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data & insights

dashboards data warehouse
evaluation frameworks
grant reporting

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relationship management

crm donor mgmt
member mgmt
hr & rostering
partner & grantor tracking

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marketing & outreach

website
email marketing
social media
events & advocacy

business systems

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service & program delivery

lms
field data collection
project delivery
resource scheduling

finance & admin

bookkeeping forecasting
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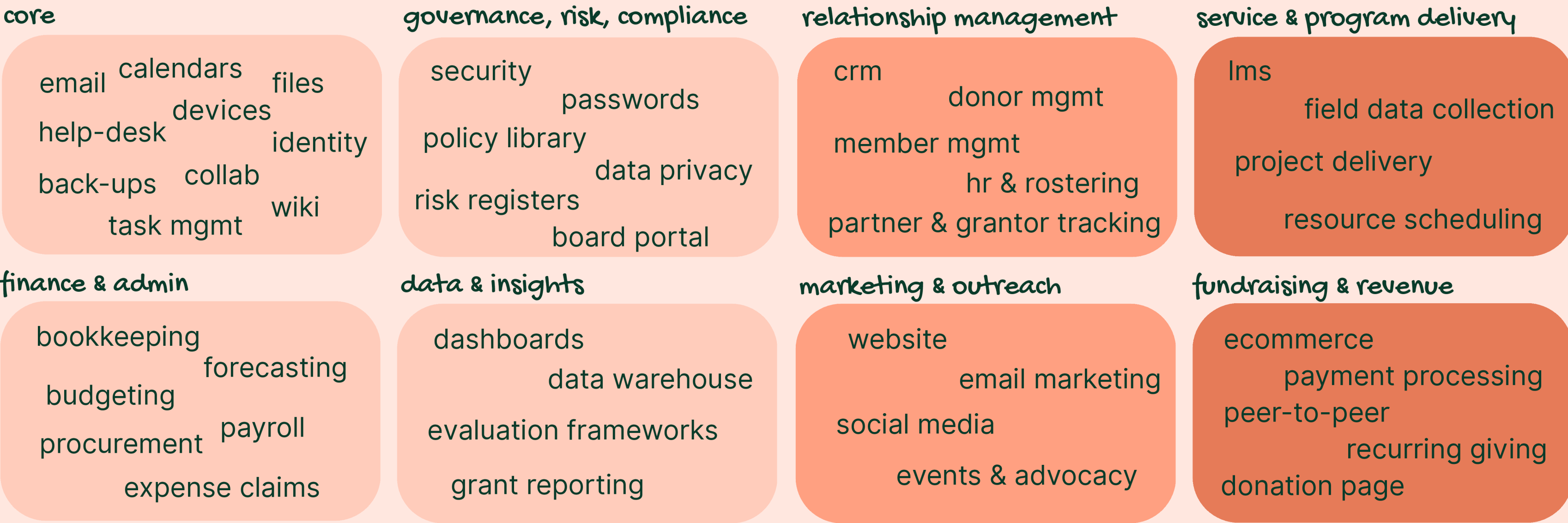
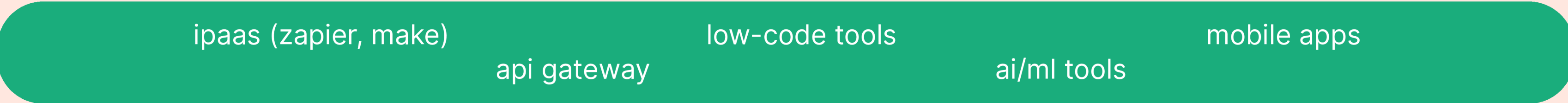
marketing & outreach

website
email marketing
social media
events & advocacy

fundraising & revenue

ecommerce
payment processing
peer-to-peer
recurring giving
donation page

integration and automation



integration and automation

ipaas (zapier, make)

api gateway

low-code tools

ai/ml tools

mobile apps

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email
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collab
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digital culture

innovation

collaboration

digital mindset

customer centricity

digital strategy

data-driven

open culture

versatility

operations

tools & technology

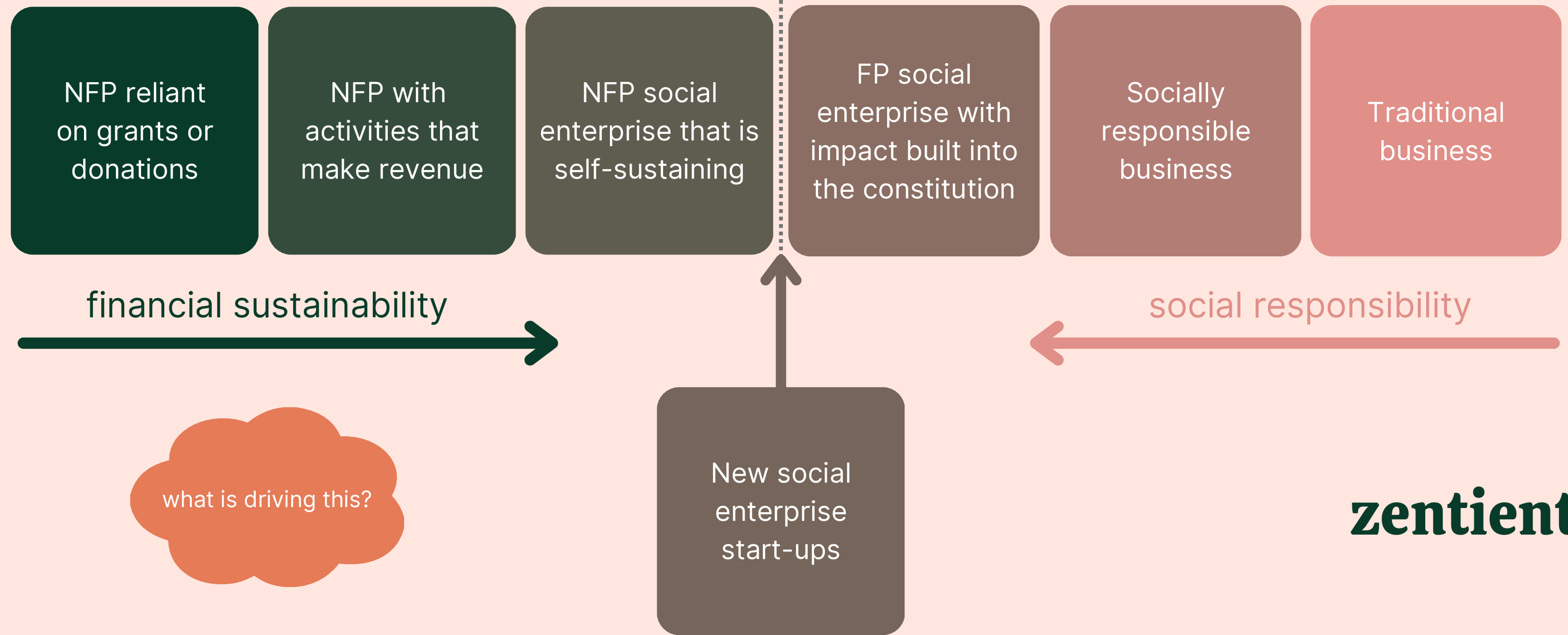
part 2

why is digital culture important?

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why is digital culture important?

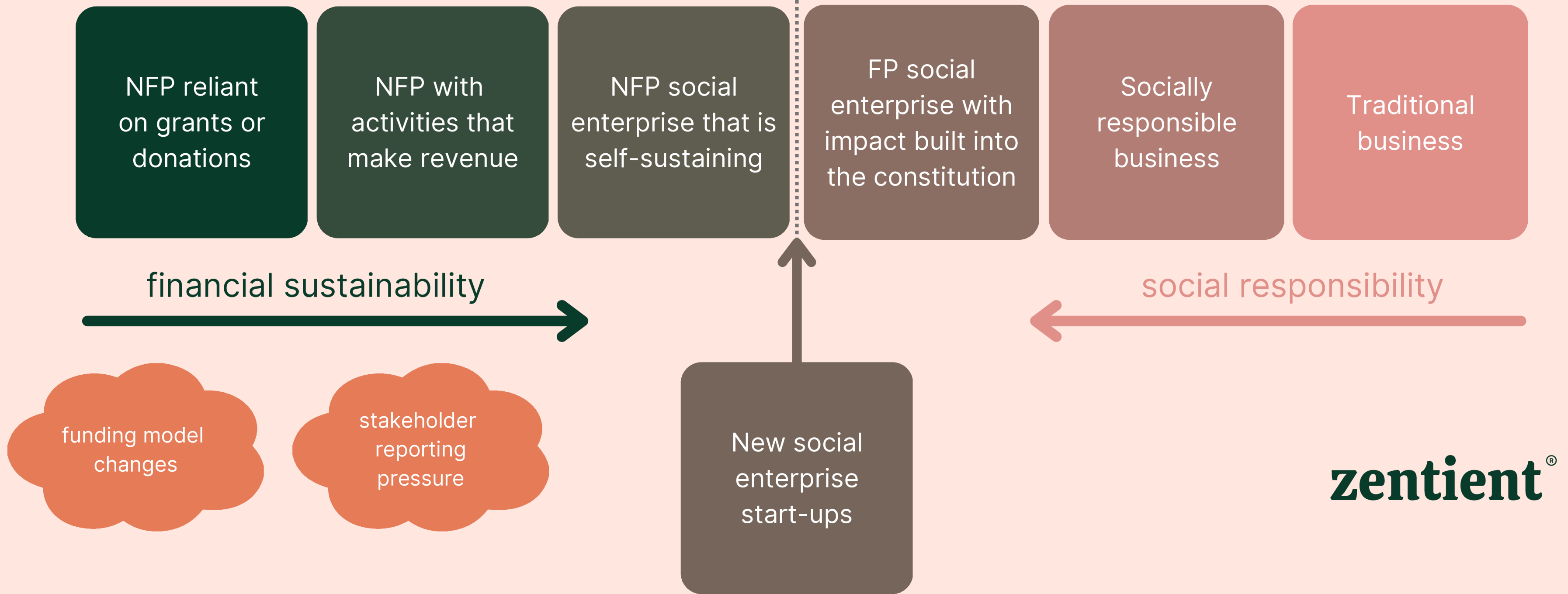
for-purpose competition



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why is digital culture important?

for-purpose competition



why is digital culture important?

**a sector in
crisis: added
difficulties**

1978

last time that
donor numbers
were this low

18%

fall in volunteer
numbers over
the past decade

80%

of NFPs report
inability to meet
size of demand

Based on data collected by the Australian Bureau of Statistics (2010 - 2022)

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why is digital culture important?

**so, organisations
need to do more good
with less resources.**

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why is digital culture important?

**sounds like something
technology can help with**

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why is digital culture important?

**please mind the gap
between the nonprofit
and for-profit sectors**



not-for-profit



for-profit

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why is digital culture important?

why technology is hard for nonprofits

Let's look at a typical process that a not-for-profit organisation might go through, and what is difficult at each stage.

1 challenges with getting started

2 unable to recruit for tech skills

3 becomes reliant on outsiders

4 progress is made with projects

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why is digital culture important?

how does a typical nonprofit start out?

- Typically founded by a person who is:
 - Personally affected by, or passionate about, an issue
 - Lack of expertise in technology
- Typically run on one of the following:
 - Pen and paper or spreadsheets
 - Patchwork of free software resulting in data siloes
- Leader is isolated, with very little staff turnover, meaning that it sometimes takes decades before issues are pointed out
- Funding is available but requires reliance on one-off grants



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why is digital culture important?

do things improve when they grow?

What number employee
do you think someone with
tech skills is typically?



←
10 years later

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why is digital culture important?

they don't improve for a looong time

- Typically, a NFP will hire more than 50 people before they hire their first tech employee
 - Even then, it's often a business support position which is also responsible for things such as maintenance
- Almost no NFP, regardless of size, has a CTO
 - Instead technology is usually under the control of the CFO
- It might take a NFP to earn \$10m per year before they even consider hiring a tech specialist.



10 years later

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why is digital culture important?

so why don't they hire tech employees?

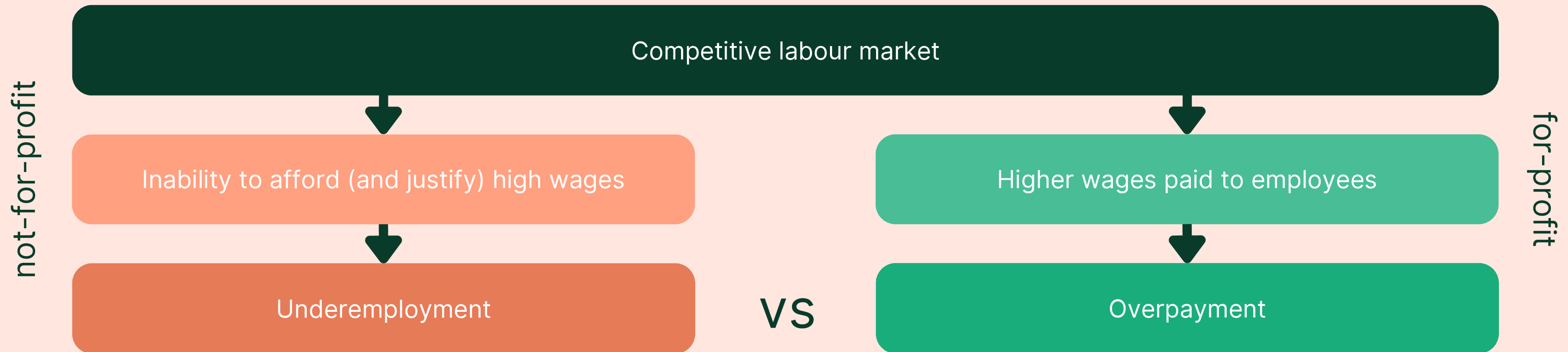
Hiring tech employees is particularly difficult in the nonprofit sector for the following reasons:

- 1 don't know what role to hire for
- 2 external pressure - wages look bad
- 3 internal pressure - opportunity cost
- 4 competitive labour market

why is digital culture important?

labour market impact

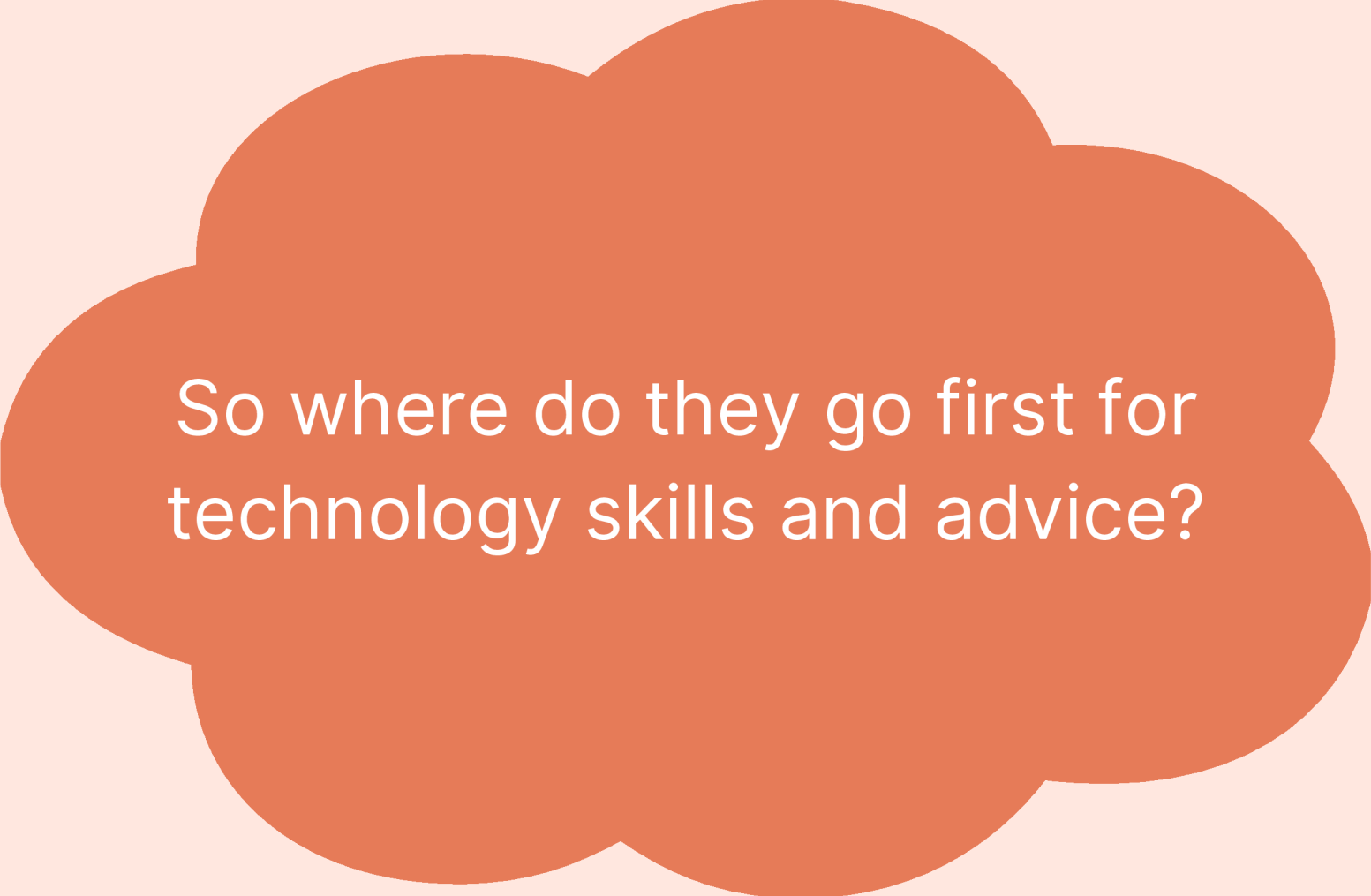
A competitive labour market impacts not-for-profit organisations differently, compared to corporate.



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why is digital culture important?

question



So where do they go first for
technology skills and advice?

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why is digital culture important?

managed services in the nonprofit sector

- Often when an organisation is between 5 and 10 FTE, they will sign up for an MSP (managed services provider)
- An MSP will often look after their Microsoft 365 and provide general assistance with IT-related issues

Why might getting all of your tech advice from an MSP not be a good idea?



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why is digital culture important?

managed services in the nonprofit sector


- Often when an organisation is between 5 and 10 FTE, they will sign up for an MSP (managed services provider)
- An MSP will often look after their Microsoft 365 and provide general assistance with IT-related issues
- Unfortunately, they operate on a break-fix model, meaning that there is a perverse incentive to never truly address the underlying issues
- Often, MSPs will be paid kick-backs by software companies each time they sell it onto an organisation
- Ultimately, they grow the deficit by building dependence



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why is digital culture important?

question



Now, where do organisations
turn for capacity-building tech
transformation projects?

why is digital culture important?

consultants (to the rescue?)

- Sometimes, organisations will decide what they need (for example a new website) and go straight to the vendor
 - This almost always ends badly
- More often they receive strategy consulting (sometimes pro-bono) about their technological needs
- Next, they set about finding someone to deliver the project
- They get a quote and submit this as part of a grant proposal
- When the grant is approved, the project gets underway and proceeds as specified in the grant application
- At the end of the project, hopefully there is a handover



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why is digital culture important?

things that make it difficult for nfps

- Because they may work with a different firm each time, the consultancy may lack domain knowledge
- Overall, integration is very rarely considered as each firm is brought in to do one specific thing, leaving a tech mess
- Grant funding is given out based on a project plan, so if you discover a better approach during the project, you can't easily change to it
- At the end of a project, NFPs are often ill-equipped to be able to maintain and build upon the tool that has been delivered



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why is digital culture important?

**when tech projects succeed, it's
often because the organisation
already has a strong foundation**

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why is digital culture important?

**and when you don't have the
foundation to manage the tool,
another project just adds more
clutter to your digital ecosystem**

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why is digital culture important?

we've been focusing on the wrong thing

In order to ensure that technology is received successfully by organisations, we need to shift our thinking.

1 digital capability, not capacity

2 digital culture, not transformation

3 focus on training, not tools

4 aim for self-sufficiency

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part 2

what is digital culture?

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what is digital culture?

**digital culture is the ecosystem
of software, data, people and
documentation that interact
within an organisation.**

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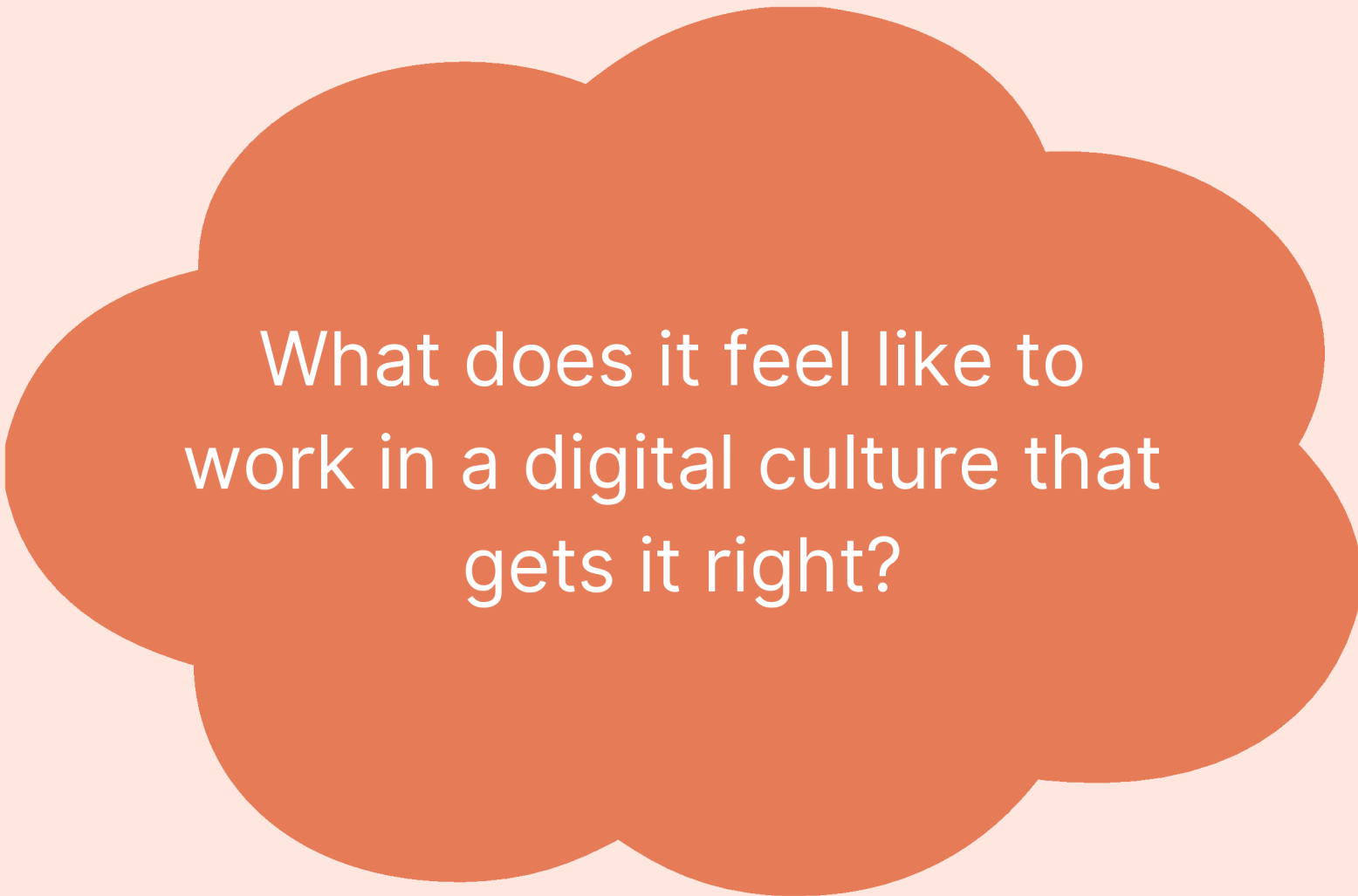
what is digital culture?

**If digital transformation is
getting a fish, then building
digital culture is like learning
how to fish.**

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what is digital culture?

what a mature digital culture feels like



What does it feel like to
work in a digital culture that
gets it right?

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what is digital culture?

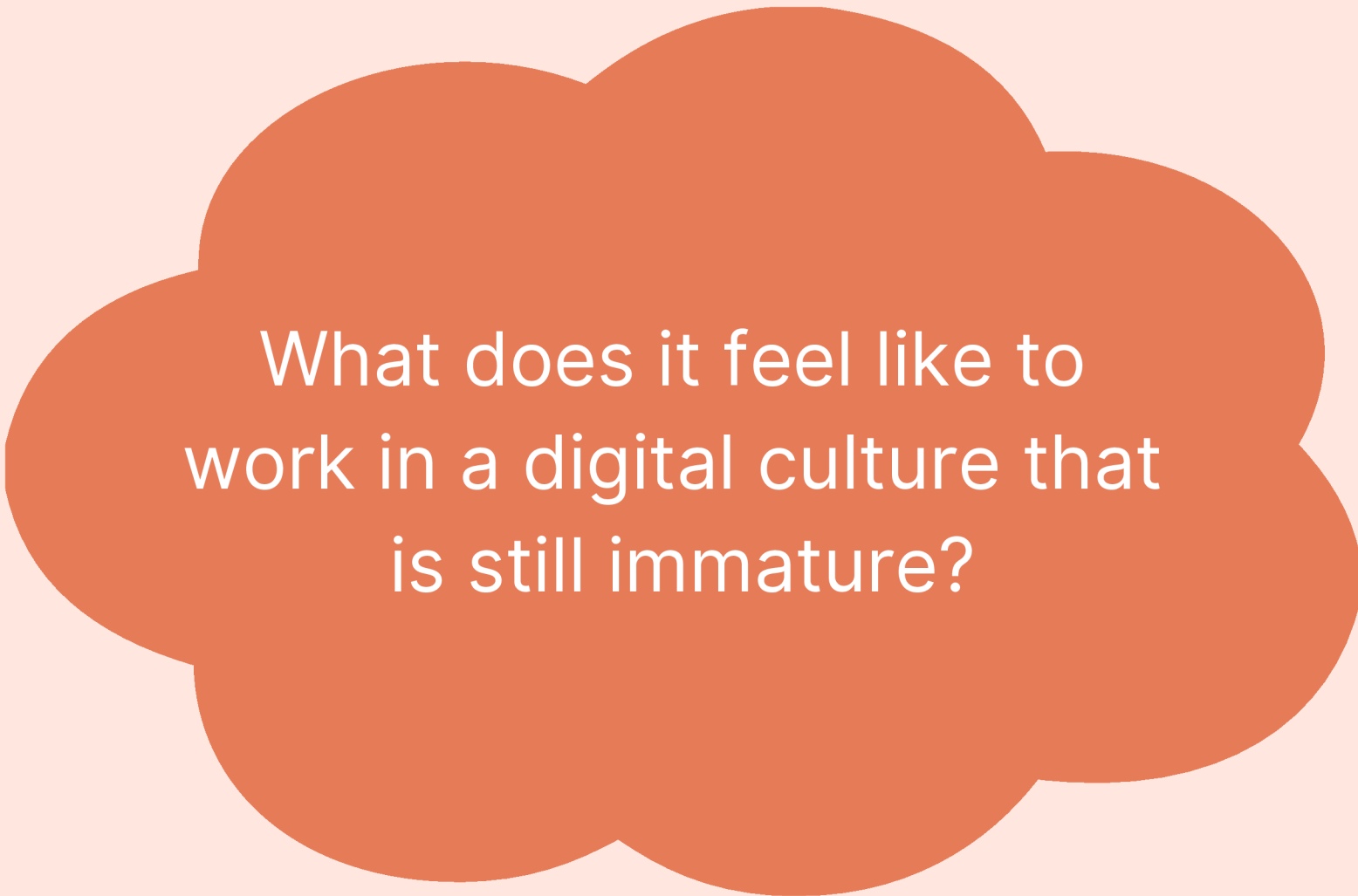
what a mature digital culture feels like

- “Digital Feng Shui”, “just works”
- Onboarding is effortless - a form automatically sets up accounts for you with the click of a button
- Training takes little time - navigating the organisation online is simple and you can view documentation on how they use certain tools
- Everything that exists offline is mirrored online - you can easily navigate through data about everything that matters
- Digital is on the fronts of everyone’s minds and online is the default, not just the last resort

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what is digital culture?

what an immature digital culture feels like



What does it feel like to
work in a digital culture that
is still immature?

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what is digital culture?

what an immature digital culture feels like

- Reporting for stakeholders is difficult or impossible because data is messy and not integrated between apps, with no source of truth
- New staff are confused by which system to use when, and experienced employees have each come up with their own ways of doing things
- Efforts to embrace a new system are often met with cynicism, hesitancy and resistance from staff who like their own idiosyncratic approaches

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what is digital culture?

the impact of digital culture on performance

1 immediate: better productivity

2 ongoing: better ability to improve

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part 2

how is digital culture measured?

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how is digital culture measured?

10 things we assess against

Innovation

Does your digital culture support innovation?

Data-Driven

Is data you collect used to make strategic decisions?

Collaboration

How common is collaboration in your organisation?

Open Culture

How transparent are you with your team and partners?

Digital Mindset

How top of mind is technology when faced with issues?

Versatility

How quickly can you adapt to changing stakeholder needs?

Customer Centricity

How guided are you by your customers?

Digital Strategy

Is there a plan in place for how to use technology?

Tools and Technologies

How fit for purpose are your systems?

Operations

Are there guidelines in place for how to use the systems?

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how is digital culture measured?

our process

In order to ensure that technology is received successfully by organisations, we need to shift our thinking.

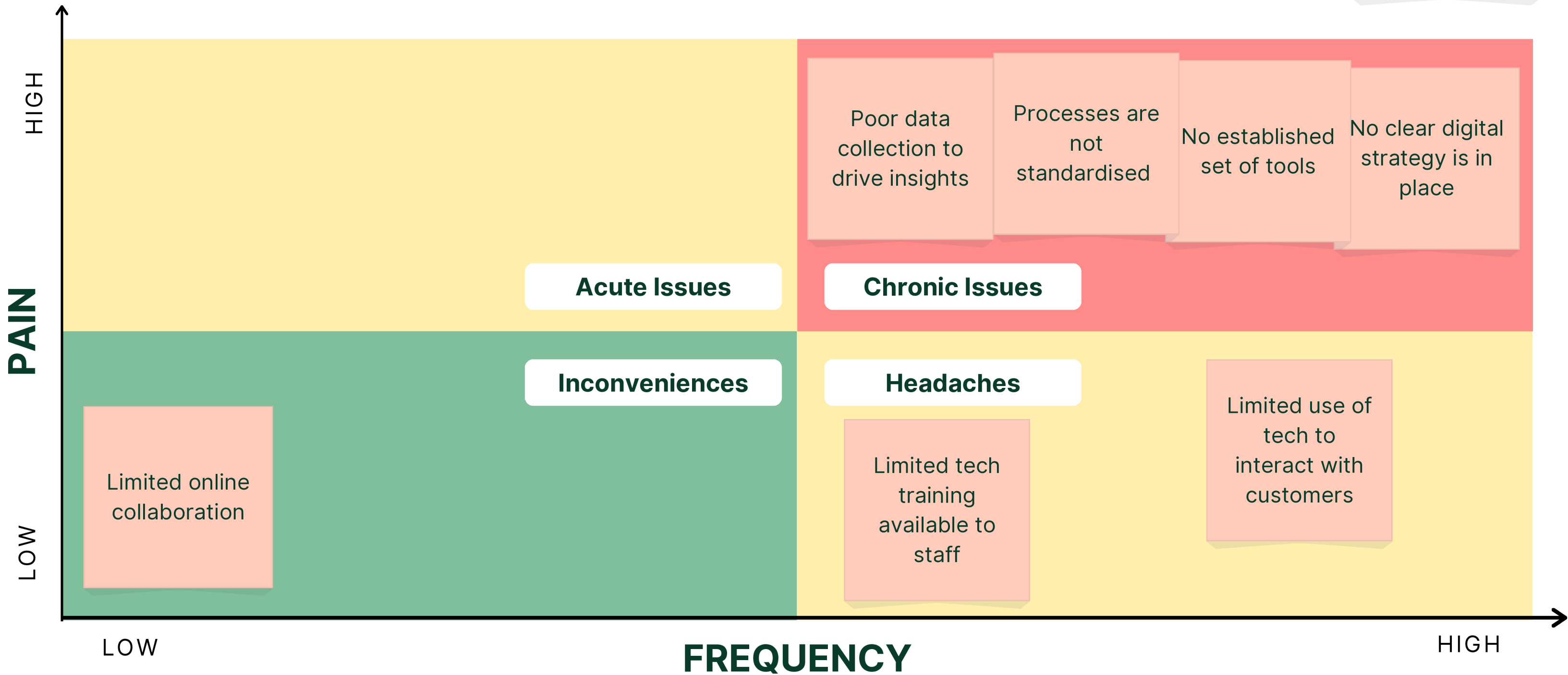
1 interviews with individual staff

2 group workshop to discuss issues

3 group workshop to discuss ideas

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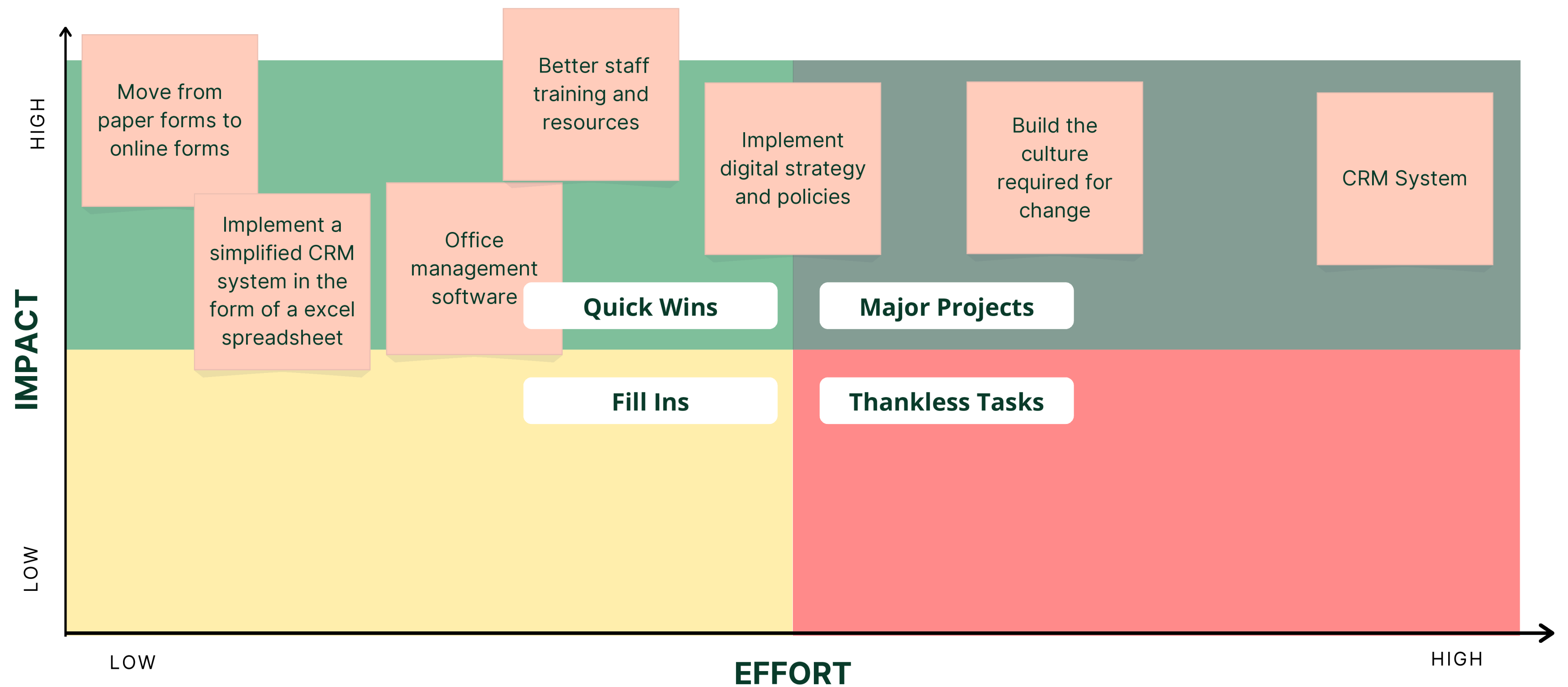
Issue Matrix



Other:

Limited understanding of ways that tech can help

Idea Matrix



part 2

how is digital culture built?

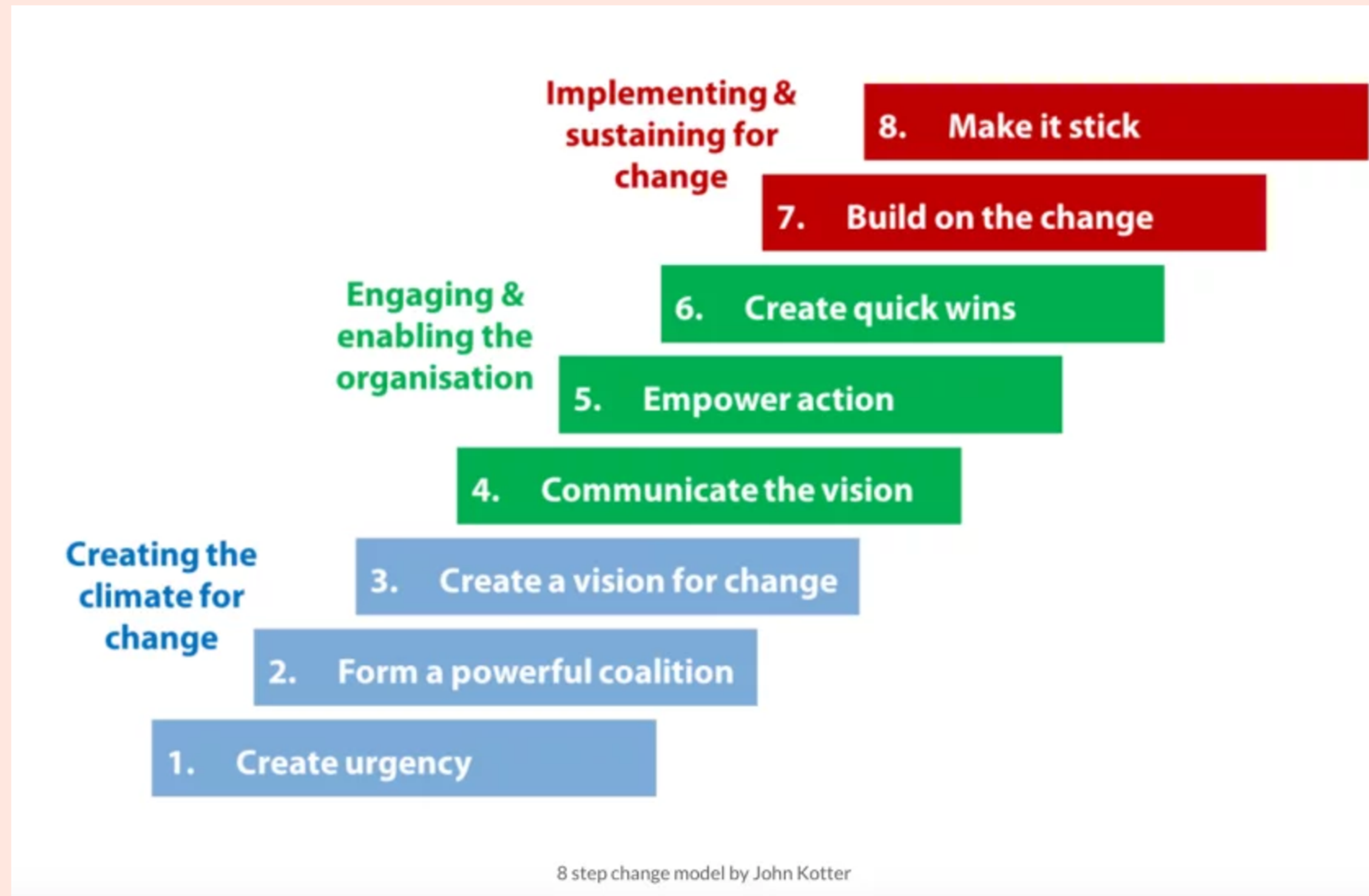
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what is digital culture?

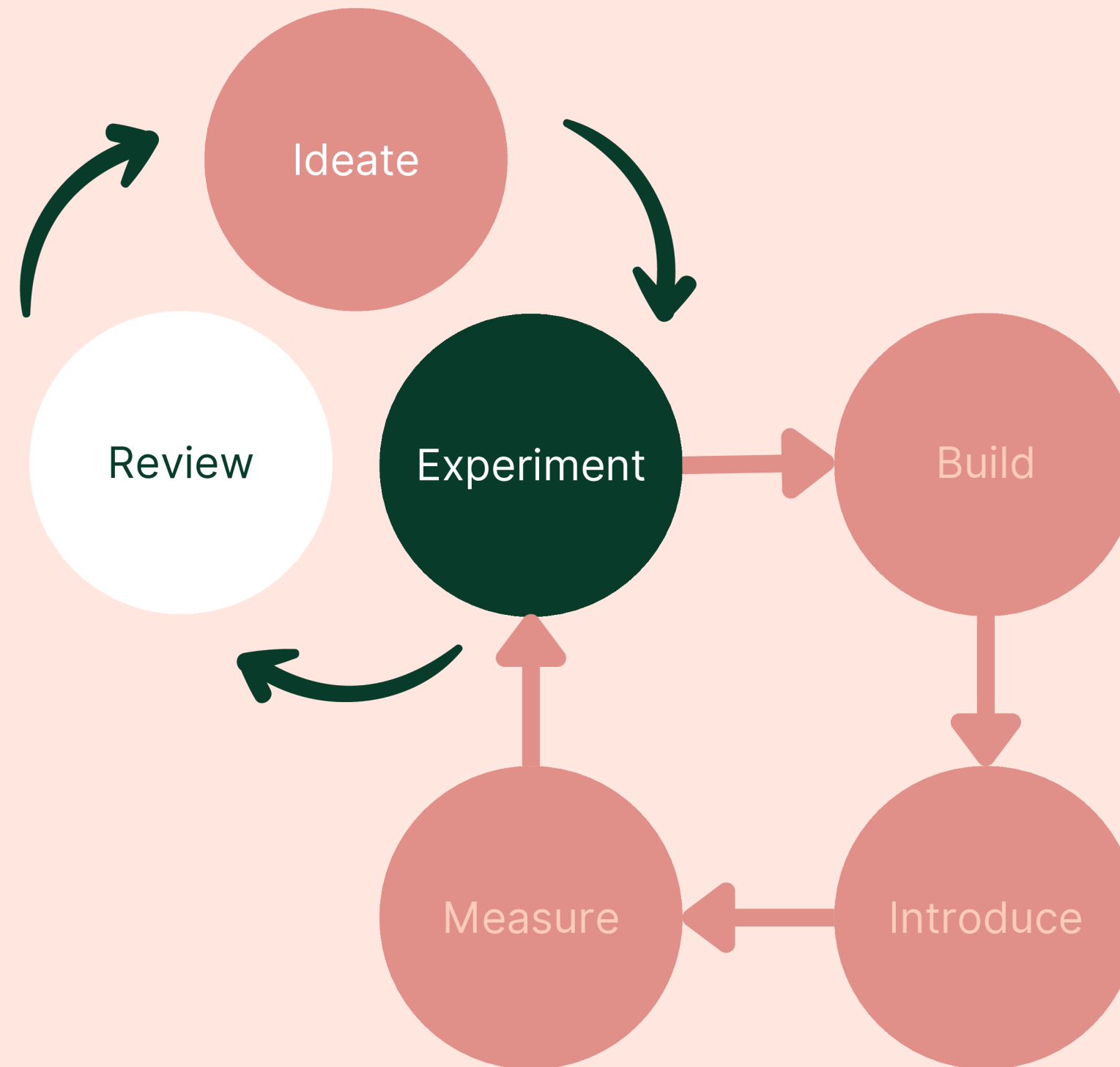
**technology is easy,
people are hard**

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what is digital culture?



what is digital culture?



part 3

core

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integration and automation

ipaas (zapier, make)

api gateway

low-code tools

ai/ml tools

mobile apps

core

email calendars files
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back-ups collab wiki
task mgmt

governance, risk, compliance

security passwords
policy library data privacy
risk registers board portal

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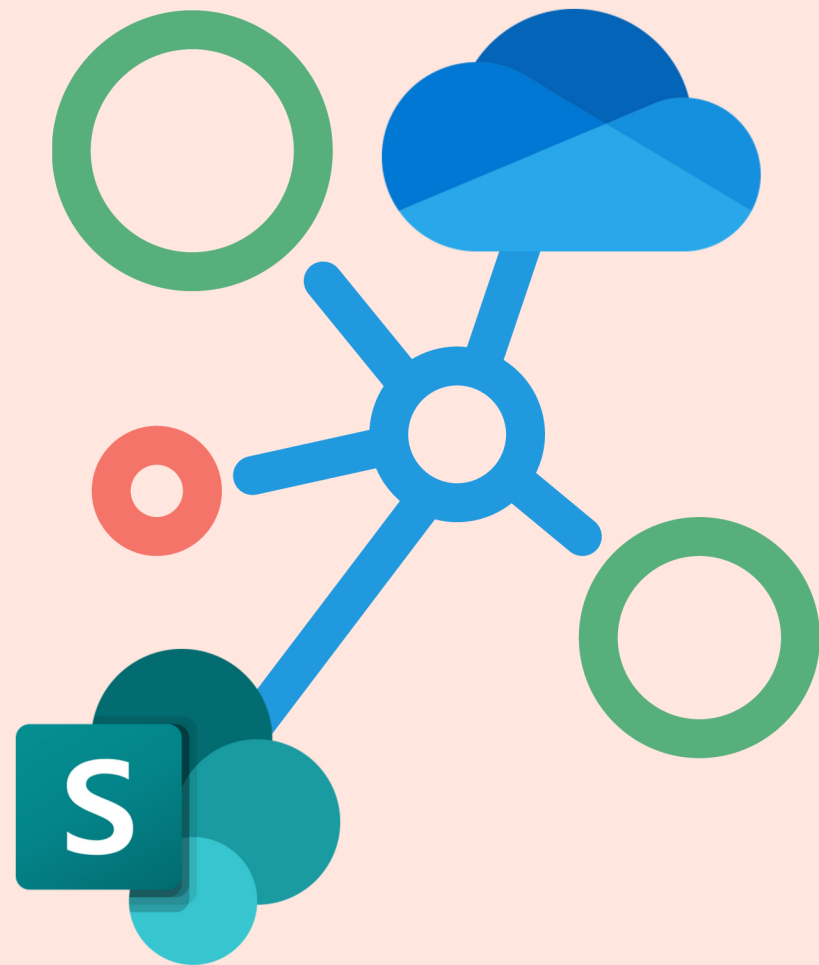
digital culture

innovation collaboration digital mindset customer centricity digital strategy

data-driven open culture versatility operations tools & technology

digital foundations

core



set up from day one



google workspace or microsoft 365

benefits



email, calendar, storage, backups



security, identity, authentication



collaboration, wiki, task management



nfp discounts

part 4

security

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security & data privacy

question

what are you most concerned about?

have you experienced an incident or close call?

how would you rate your readiness?

security & data privacy

responsibilities



protecting our
clients



protecting our
mission and trust

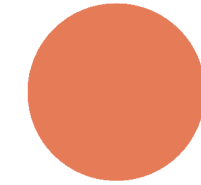
security & data privacy

responsibilities

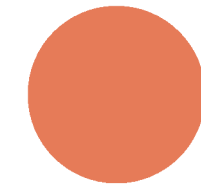
protecting our
clients

protecting our
mission and trust

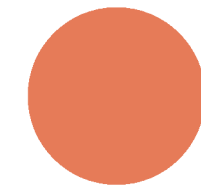
legal landscape



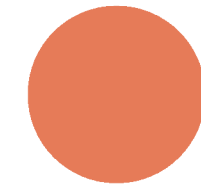
privacy act (1988)



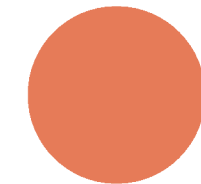
australian privacy principles (app)



privacy reform bill (2024)



oaic guidance on ai (2024)



ethical considerations

security & data privacy

common threats



watch out for

  compromised passwords

 phishing scams

 ransomware

 business email compromise

 human error and device loss

security & data privacy

safeguards



take action with



strong, unique passwords



multi-factor authentication



keep backups and software updated



staff training & appropriate access



security audits, risk reviews, policies

security & data privacy

resources

aicd & aisa handbook



asd sme cybersecurity



part 5

crm


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crm

question



how are you
currently tracking
contacts?



what are your
biggest
challenges?

crm

why a crm matters for social good

centralise stakeholder details and interactions (donors, vols, clients, members, partners, ...) into one database, giving your organisation a single, reliable view of its community

1 single source of truth

2 better relationships

3 smarter decisions and reporting

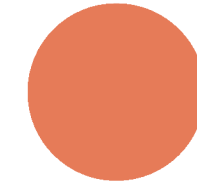
4 efficiency and growth

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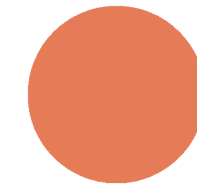
crm

considerations

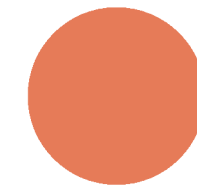
key selection criteria



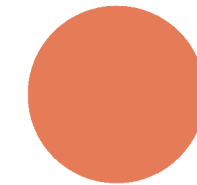
goals and needs



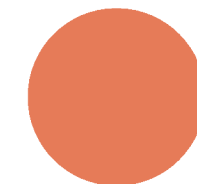
budget and licensing costs



ease of use



customisation and scalability

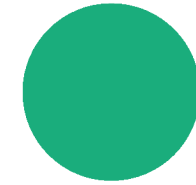


integrations and support

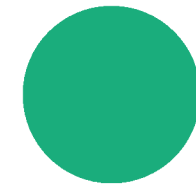
crm

best practices

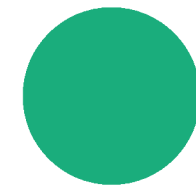
data quality and team adoption



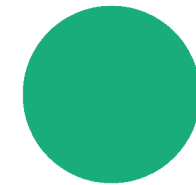
single source of truth & data hygiene



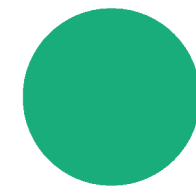
integrate with your systems



restrict sensitive data



start with why, involve the team early



automate where possible

crm

comparisons



what may fit



powerful, customisable, enterprise



user friendly, strong marketing crm



affordable, flexible, business suite



visual, project mgmt turned crm



custom built solutions

security & data privacy

resources

m365 basic
seats

canva free for
nfps

google
workspace nfps

salesforce nfp

google ads
grants

connectingup.org

infoxchange.org

3entient.app



raisely fee-free
platform

aws cloud
credits

part 6

q&a

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next steps

like what you heard?

Here's how you can stay in touch with us



1

follow us on LinkedIn

2

message us to learn more

3

book a demo, zentient.app