Technology Leadership Academy

Module 4: IT, Cloud & Data Management

Fall 2013

John Kenyon

Connecting Up

Review Module 3

flickr image: kevindooley

Budgeting

Return on Investment

Data Goal:

CLEAN

ACCURATE

ACTIONABLE

Poll

- ✓ Currently Use Cloud – Software
- ✓ Currently Use Cloud – Server or Storage
- ✓ Have a designated Data Manager

IT Basics

Data Management

Cloud

IT Basics

Onsite & Offsite Backups, Restore Tested

Networked, Online Workstations

Documentation and Disaster Plan

Regular Maintenance & Upgrades

Investment in Resources - Human & Information

Making Good Choices

Never Start with Tools

List Your Needs in Priority Order

Check Idealware to Narrow Choices

Compare Needs Against Tools

Test Drive, Talk to Other Nonprofits, Consultants

After People

Flickr Image: CIMMYT

Flickr Image: bionicteaching

Budgeting

1. People
2. Data

Flickr Image: CIMMYT

Current: 0 - 3%

Goal: closer to 10%

Flickr Image: bionicteaching

Data Silos

Donor Database

Programs Database

Bulk Email Program

Spreadsheets

Address Books

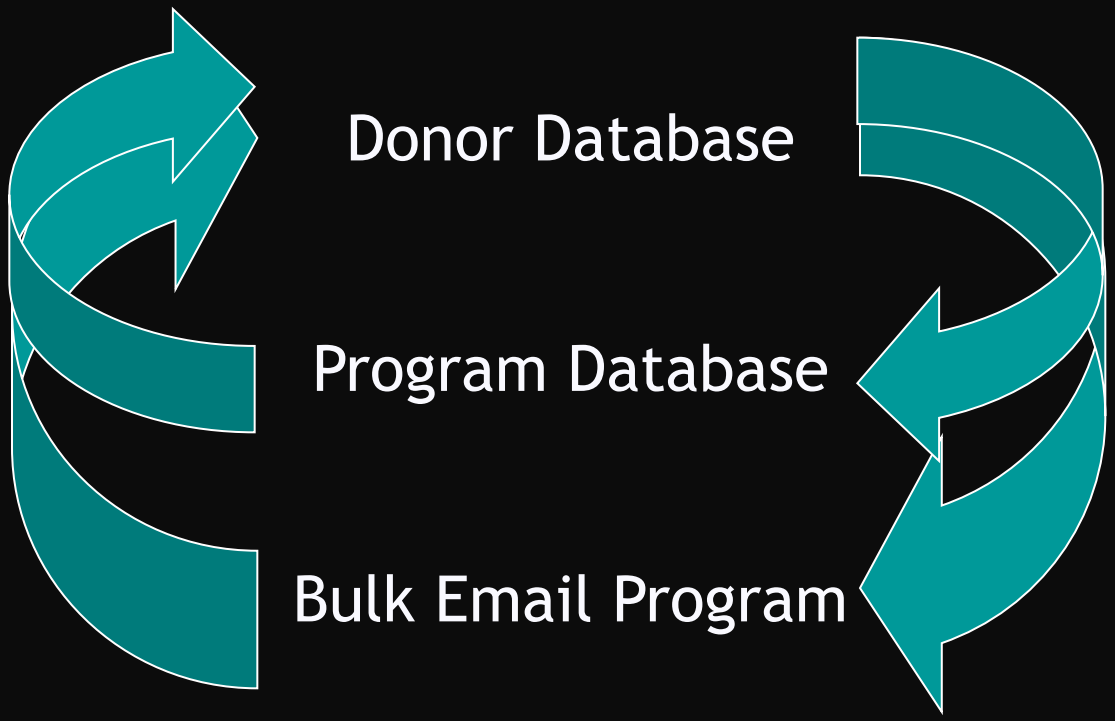
Flickr Image: dsearls

Data Silos

Flickr Image: dsearls

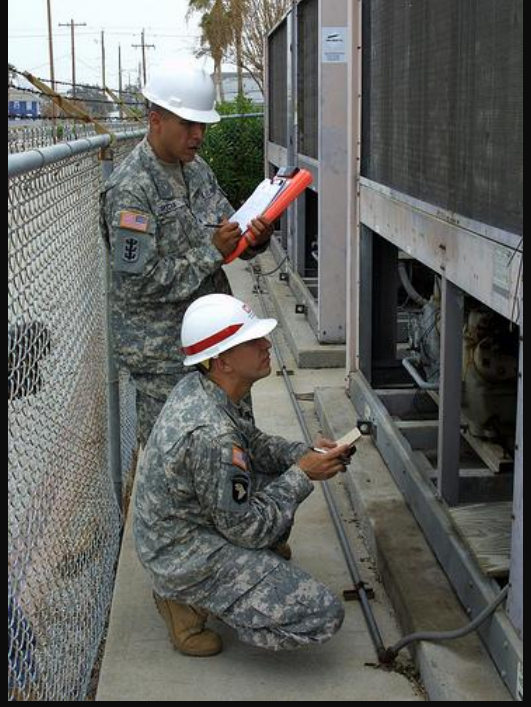
Lacks: Interaction - De-duping - Automation

Silos -> Integration



Interaction - De-duping - Automation

Tracking Interests



Flickr Image: USACEPublicaffairs

Donor Mgmt dbase
Program dbase

Bulk Email
Google Analytics
Facebook Insights

Dashboard

Preferred Communication Method
Primary Area of Interest

Database Basics

Maximize Investment: Training, Audit

Minimum Entry in 2 Systems

Dedicated Data Manager

Garbage In - Garbage Out: S.O.P.'s

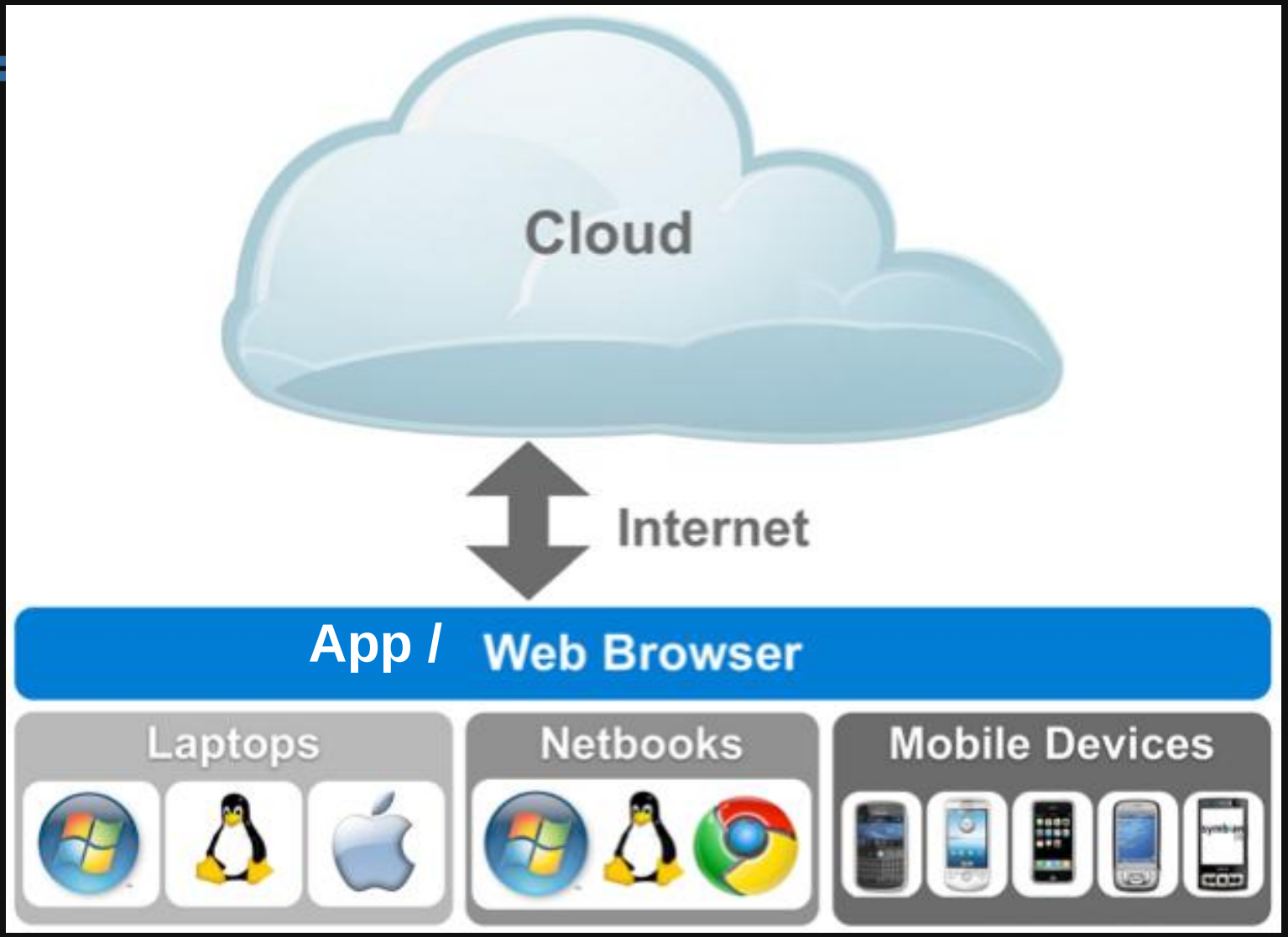
Systems for Moving Data, Safeguarding Data

Map Business Processes

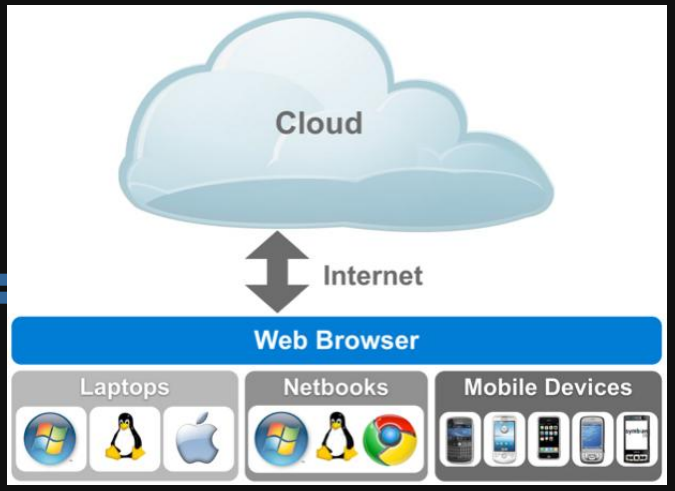
Reflection & Discussion: Data

How is this different from my orgs data management practices?

The Cloud


Cloud
Internet
App / Web Browser
Laptops
Netbooks
Mobile Devices

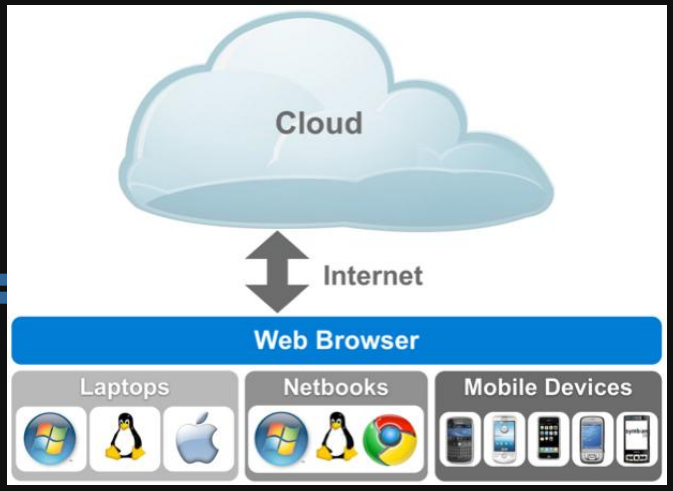
The Cloud



Scalable service accessed via Internet

- Gmail
- Facebook
- Twitter
- MSOffice 365
- Salesforce
- Survey Monkey

Strengths



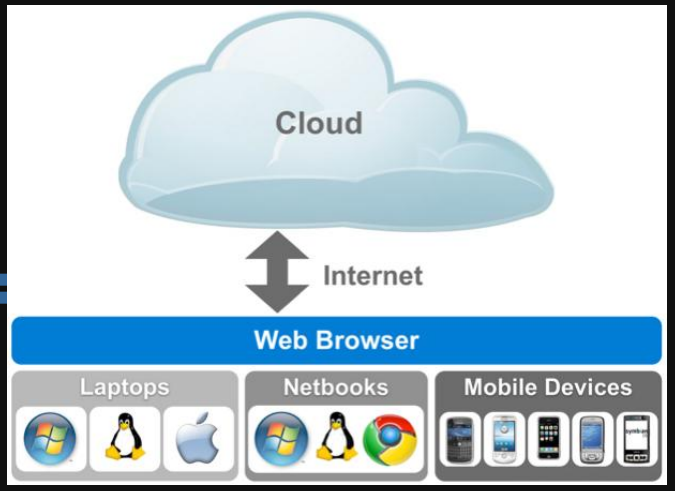
Sharing

Collaboration

Working Remotely

Scaling (add/remove people or space)

Use Examples



Replace servers

Board or work teams sharing docs vs. mailing/paper

Bulk emailing, creating/distributing surveys

Data Repository with greater accessibility

Video conference with multiple locations

Human Side

Requires training

Culture shift for teams, org

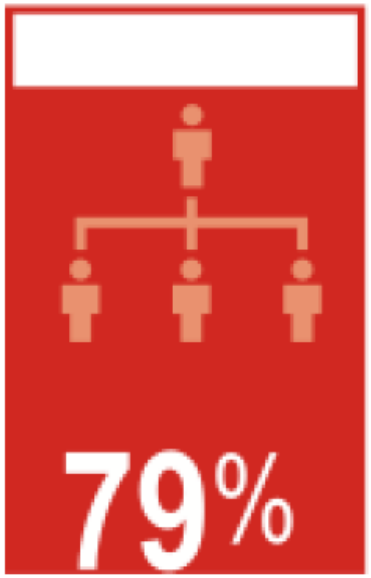
Involvement in security, backups

Show examples to open up thinking

Email Example

- Server-based: Microsoft Exchange (TechSoup)
  - Cost of server: varies
  - Windows Server + CALs: $55 + $3/person
  - Exchange Server Standard + CALs: $44 + $5/person
  - Microsoft Outlook: $6/person
  - Security, spam filtering: varies
  - Upgrade every 3-5 years
- Cloud-based: Google
  - $50/person/year
  - Also includes calendar, docs

Reported Major Advantages to Cloud Computing



Administration

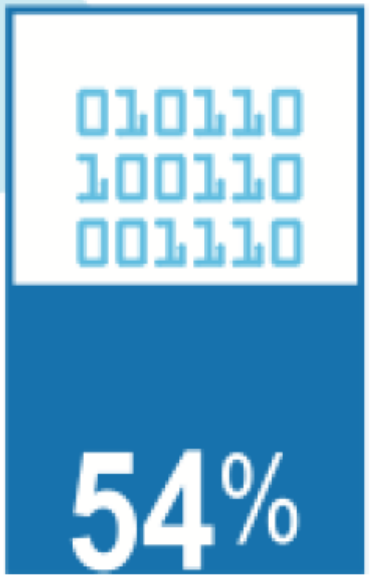
- Easier software access
- Easier disaster recovery
- Reduced system admin.
- Rapid deployment

Cost

- Low capital investment
- Fewer IT staff needed
- Transforms capital expenses to operating expenses

Partnership

- Improved collaboration
- Easier to partner with other orgs.
- Rapid deployment



Data

- Improved data security
- Better data organization
- Data under my control

Reported Major Barriers

60%

Lack of Knowledge

- Inadequate training
- No management support for cloud
- No funder support

49%

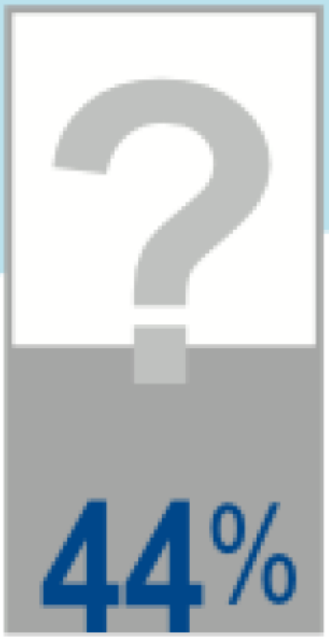
Cost

- Monthly costs
- Setup costs
- Migration costs
- Internet costs

45%

Data security

- Data security concerns
- Data loss concerns



44%

Lack of trust

- Cloud not ready to depend on
- Integration issues
- General lack of trust

34%

Noncontrollable externalities

- Gov't. regulations
- Unstable electric grid
- Lack of dependable Internet connectivity
- Foreign currency issues

Cloud Security & Risk

Flickr Photos: Cesarharada.com;

- Availability
  - Internet may go down
  - Service provider may go down/out of business
- Confidentiality
  - How well is data protected

Cloud Security & Risk

Security

- Is service protected from unauthorized access?

Privacy

- Process and policies agree with yours/requirements?

Cloud Security & Risk

Availability

- Uptime usually better than on-premise

Service provider may go down/out of business

- Recovery period usually short/Notice given of closure
- How long can you operate without it?
- Important to keep copy in-hand

Cloud Security & Risk

Security

- Generally better than most small/medium nonprofits
- Requires org have good practices:
  - Security levels, passwords

Privacy

- Must monitor internal processes to maintain

Other Considerations

Customization

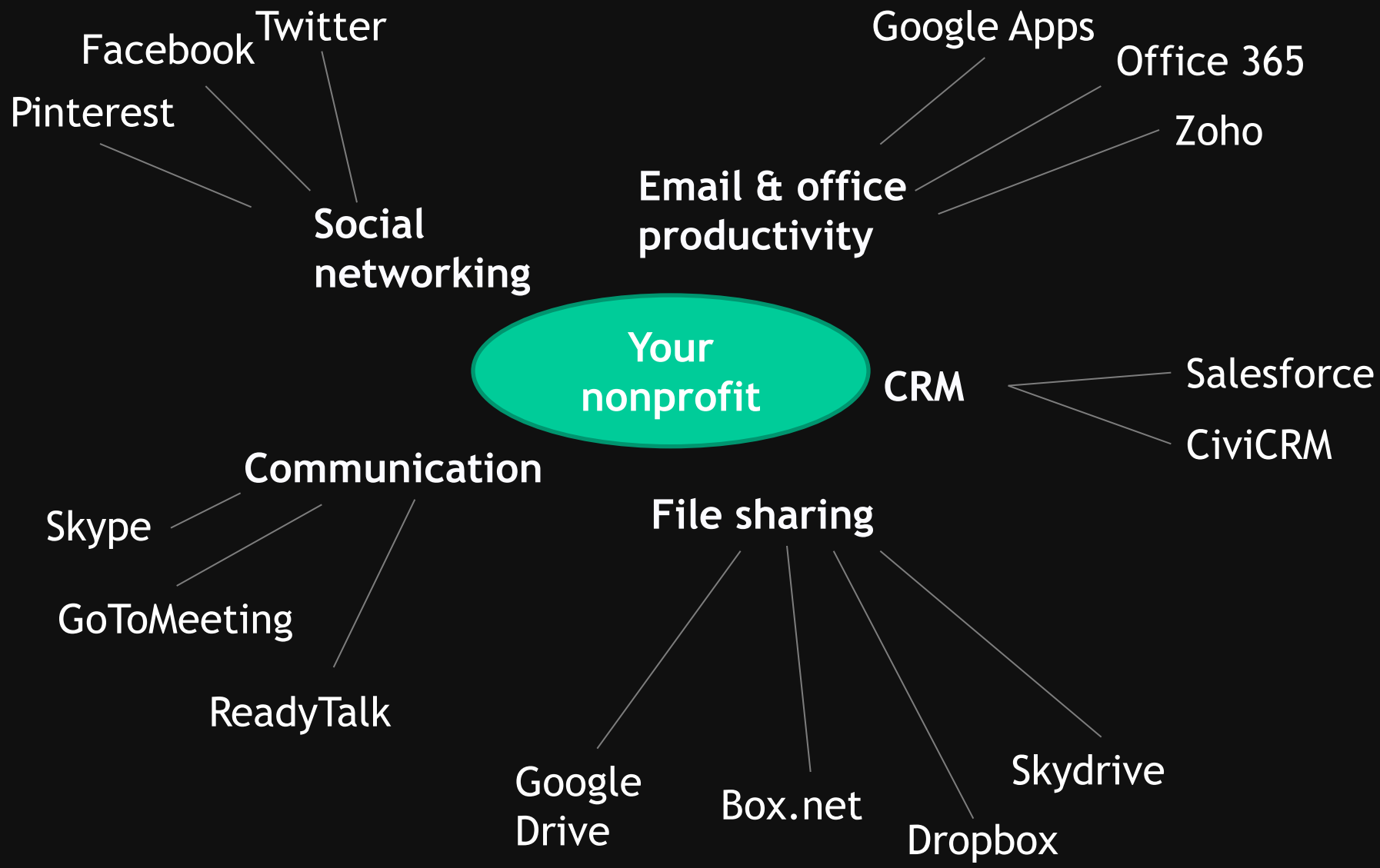
- Usually little or none

Updates

- Happen “on the fly”
- Functions, look might change
- Need to keep up internally on changes to support users

Your Tasks

- Privacy
  - Fines/penalties on you, not provider
  - Reputational impact on you
  - May need to limit what data is in the cloud
- Data in-hand
  - Regular backups, sync process
- Exit strategy
  - Data movement, storage, upload/download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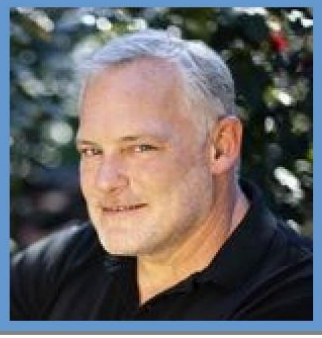
Email & office productivity
Your nonprofit
CRM
Salesforce
CiviCRM
Communication
Skype
GoToMeeting
ReadyTalk
File sharing
Google Drive
Box.net
Dropbox
Skydrive

What is a new way your org could use the cloud?

John Kenyon - Nonprofit Technology Educator & Strategist

Nonprofit Technology consulting, training and writing about appropriate, effective solutions.



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Tony Nissen

Data Management

New Australian Government Policy…

http://www.protectivesecurity.gov.au/

Data Management

New Australian Government Policy…

"The Australian Government Policy and risk management guidelines for the processing and storage of Australian Government information in outsourced or offshore ICT arrangements"

Data Management

In a nutshell..

ICT Arrangement	Unclassified information that is publicly available	Other unclassified information that is not publicly available	All information requiring privacy protections[1]	Security classified information
Offshore and **Outsourced - Domestically hosted (onshore) public cloud**	Agencies can enter into these arrangements following a risk assessment. The handling, storage, transmission, transportation and disposal of information in these arrangements should be done in accordance with the *Australian Government Information security management protocol*.	Agencies can enter into these arrangements following a risk assessment. Agency heads must also document that they have calculated and accept the associated security risks as per the guidelines developed by the Attorney-General's Department.[2]	Agencies cannot enter into these arrangements, unless: 1) relevant portfolio Minister agrees that sufficient technological or other measures have been implemented to mitigate the risk of unauthorised access, and 2) there has been consultation with, and agreement from, the Minister	These guidelines do not focus on the controls for Australian Government security classified information which are detailed in the *Australian Government Information security management protocol* and Information Security Manual.

Source: http://www.protectivesecurity.gov.au/informationsecurity/Documents/PolicyandRiskmanagementguidelinesforthestorageandprocessingofAusGovinfoinoutsourcedoroffshoreICTarrangements.pdf

Question Time!

Don’t be shy…

There are no stupid questions… Only good ones ☺

Question Time!

What barriers do you face around cloud adoption in your org?

What are fears/concerns and what are ways to allay those?

Thank You!

Connecting Up