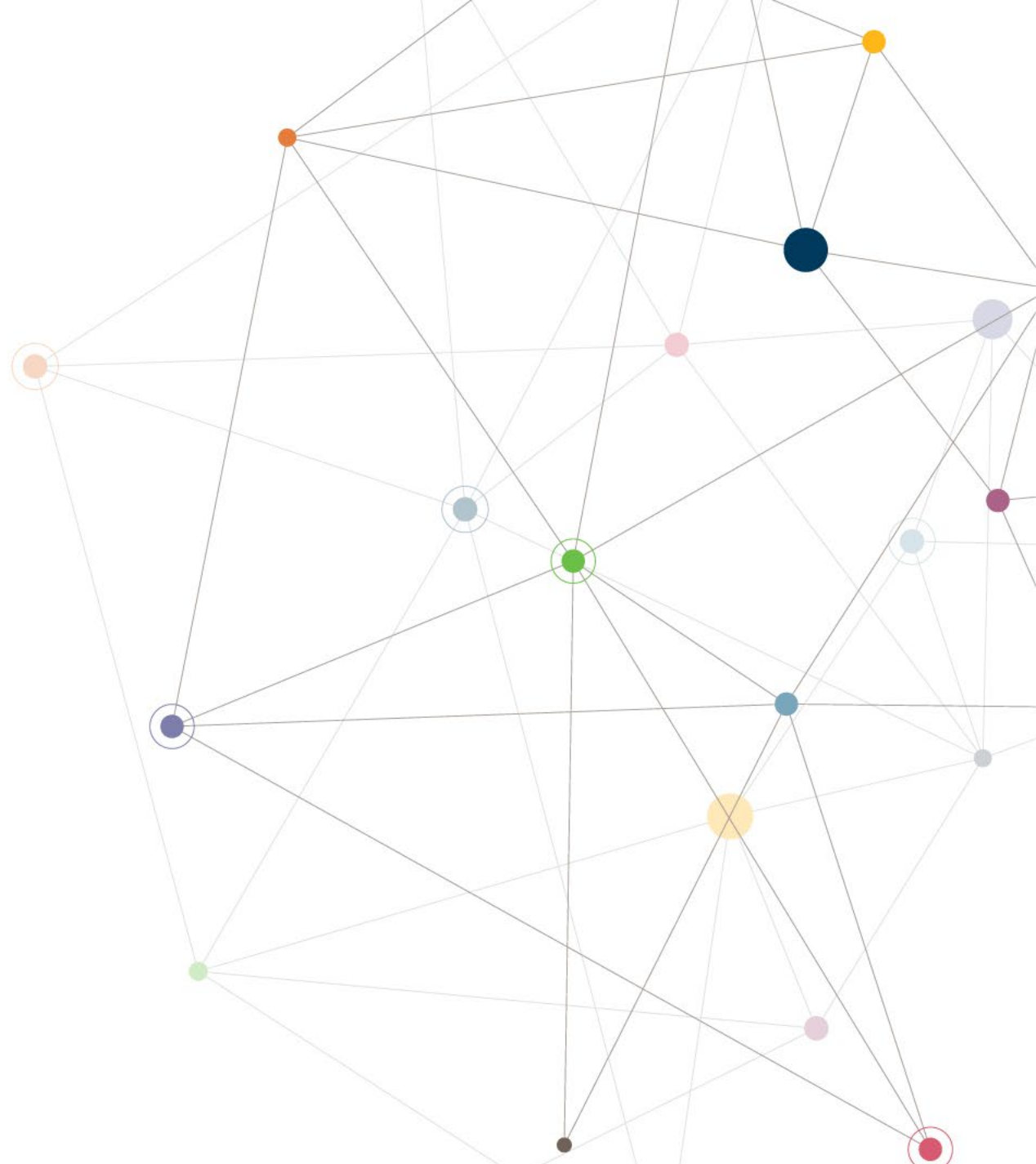


TECHNOLOGY DEBT OR INVESTMENT?

Mike Guerrieri, CAE
Senior Strategic Technology Consultant
DelCor Technology Solutions



MIKE GUERRIERI, SENIOR STRATEGIC CONSULTANT, DELCOR TECHNOLOGY SOLUTIONS

- 37+ years of association technology experience
- 25 years as a non-profit IT leader
- 7 years with DelCor
- Formerly with the American Speech-Language-Hearing Association
- Serve as NCACPA's Virtual CIO (since 2019)
- B.S., Information Systems Management
- M.S., Applied Behavioral Science, Organization Development

DELCOR SNAPSHOT

DC OFFICE:
SILVER SPRING, MD



MIDWEST OFFICE:
CHICAGO, IL



501(C)
COMMITMENT

39 YEARS IN
BUSINESS

90+ FULL-TIME
STAFF

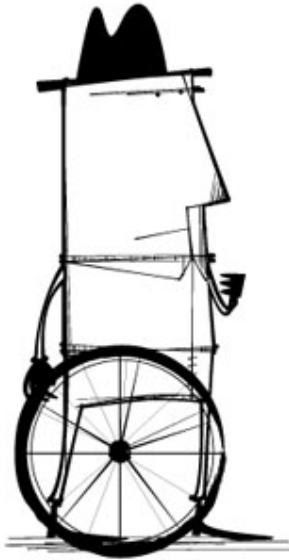
40+ DIFFERENT
CERTIFICATIONS

VENDOR-AGNOSTIC
CONSULTING

WHAT IS TECHNICAL DEBT?

Living with sub-optimal technology because of the effort/cost of improving it.

ERRR...



**CAN'T STOP.
Too BUSY!!**



WHAT AM I NOT GOING TO COVER?



TECHNOLOGY—HOLISTIC VIEW

It's more than laptops,
printers, and network
hardware



ITMM ASSESSMENT FRAMEWORK

The diagram illustrates the ITMM Assessment Framework. It features a central dark blue box labeled 'MANAGEMENT' which contains the text 'Policies, procedures, decision-making criteria, budgeting, staffing, stakeholder engagement'. To the right of this box is a horizontal bar divided into three colored segments: 'DATA' (light blue), 'DIGITAL' (purple), and 'INFRASTRUCTURE' (maroon). Each segment contains a brief description of its domain. The entire framework is set against a background of a network graph with various colored nodes (blue, red, green, yellow) and connecting lines.

MANAGEMENT

Policies, procedures,
decision-making
criteria, budgeting,
staffing, stakeholder
engagement

DATA

Systems and
processes used to
capture and manage
all data, including
member engagement

DIGITAL

Technology
supporting web, social
media, mobile
products and services

INFRASTRUCTURE

Technology that
supports staff on a
daily basis for
operational and
business needs

ITMM ASSESSMENT FRAMEWORK

The diagram illustrates the ITMM Assessment Framework. A central blue box labeled 'DATA' is connected to three surrounding boxes: 'MANAGEMENT' (dark blue), 'DIGITAL' (purple), and 'INFRASTRUCTURE' (maroon). These three boxes are further connected to a network of nodes and lines that form a larger, abstract structure around the central 'DATA' box. The nodes are represented by colored circles (blue, red, yellow, green) and the lines are thin grey lines.

DATA

Systems and processes used to capture and manage all data, including member engagement

MANAGEMENT

Policies, procedures, decision-making criteria, budgeting, staffing, stakeholder engagement

DIGITAL

Technology supporting web, social media, and mobile products and services

INFRASTRUCTURE

Technology that supports staff on a daily basis for operational and business needs

ITMM ASSESSMENT FRAMEWORK



ITMM ASSESSMENT FRAMEWORK

INFRASTRUCTURE

Technology that supports staff on a daily basis for operational and business needs

MANAGEMENT

Policies, procedures, decision-making criteria, budgeting, staffing, stakeholder engagement

DATA

Systems and processes used to capture and manage all data, including member engagement

DIGITAL

Technology supporting web, social media, and mobile products and services

THE GOAL: ADVANCING FROM RESTRICTIVE TO INNOVATIVE

Advancing along the path to maturity from 'restrictive' to 'innovative' leads to a more effective organization—one that's better equipped to accomplish its mission and goals





TECH ASSESSMENT DATA SET

OUR DATA SET

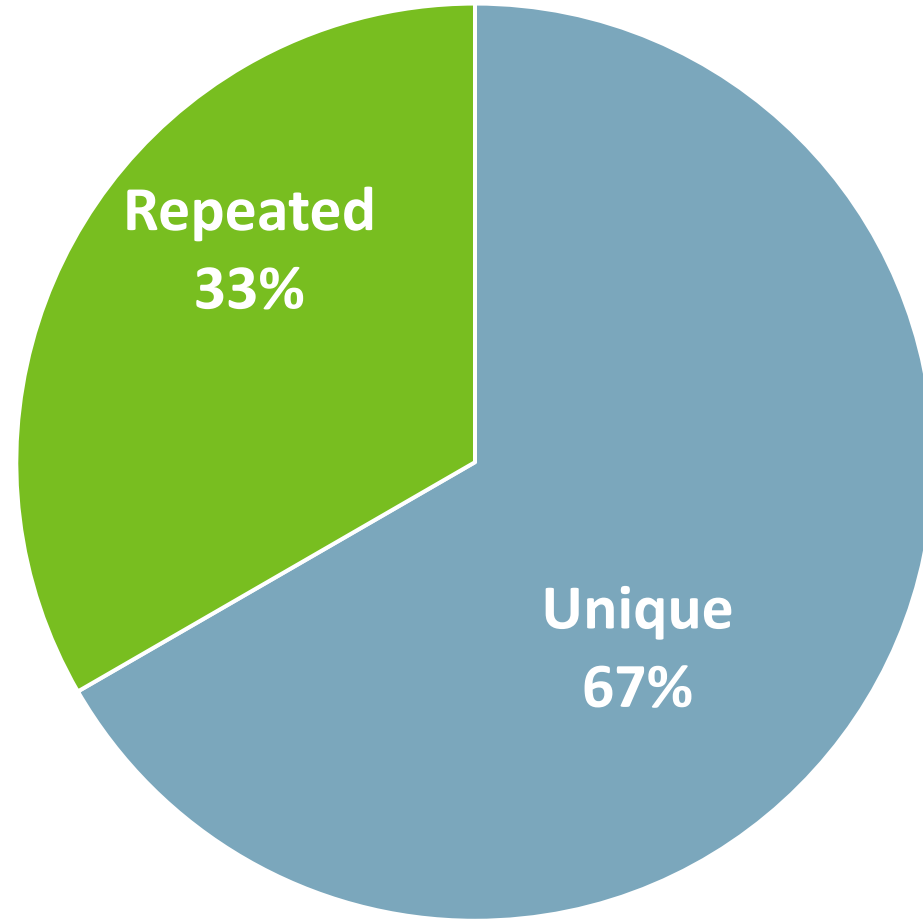
22

total assessments

760+

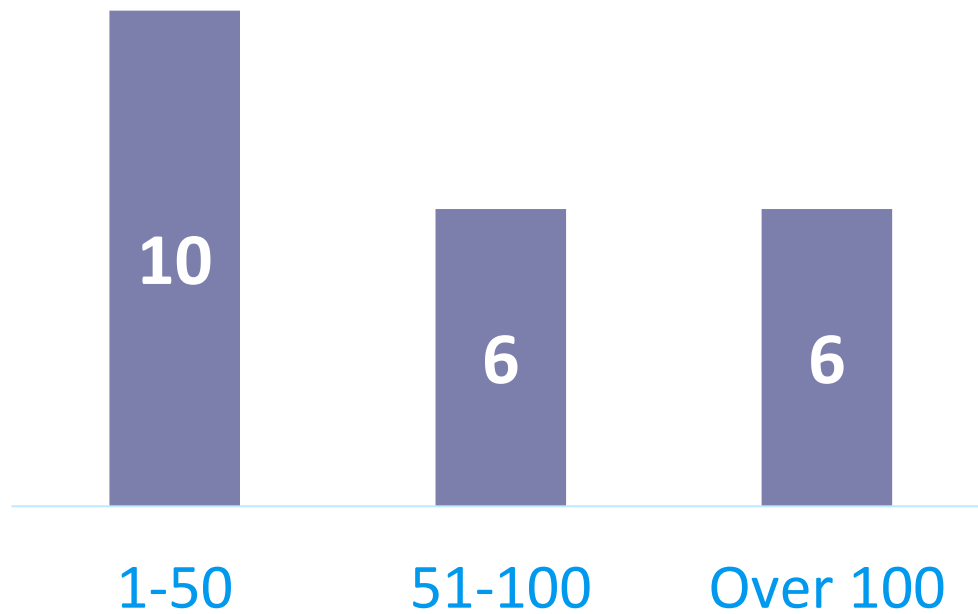
total recommendations

OUR RECOMMENDATIONS DATA SET

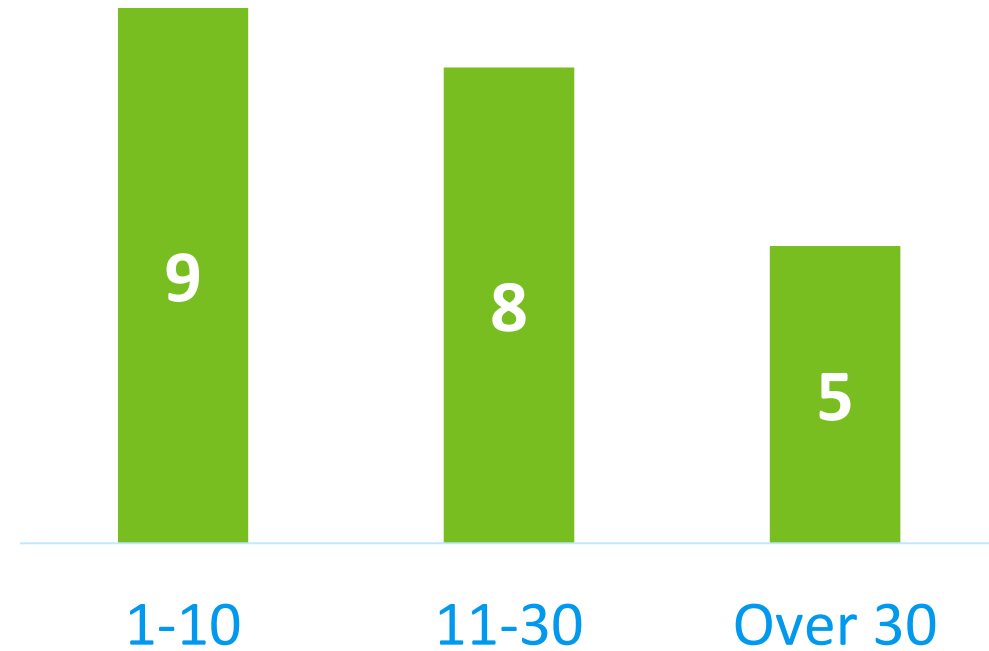


OUR DATA SET

Number of Employees



Budget Size (\$M)





COMMON STRATEGIES



MANAGEMENT



MANAGEMENT

People, Policies,
Procedures that support
technology.

1. Project Portfolio
Management

2. Documentation

3. Training

4. Tech Skills
Standards

5. Application
Portfolio
Management

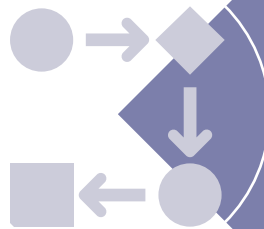
PROJECT PORTFOLIO MANAGEMENT



ID # of projects in
backlog



Explore project-
ranking schemes



Develop evaluation
and prioritization
approach

DOCUMENTATION

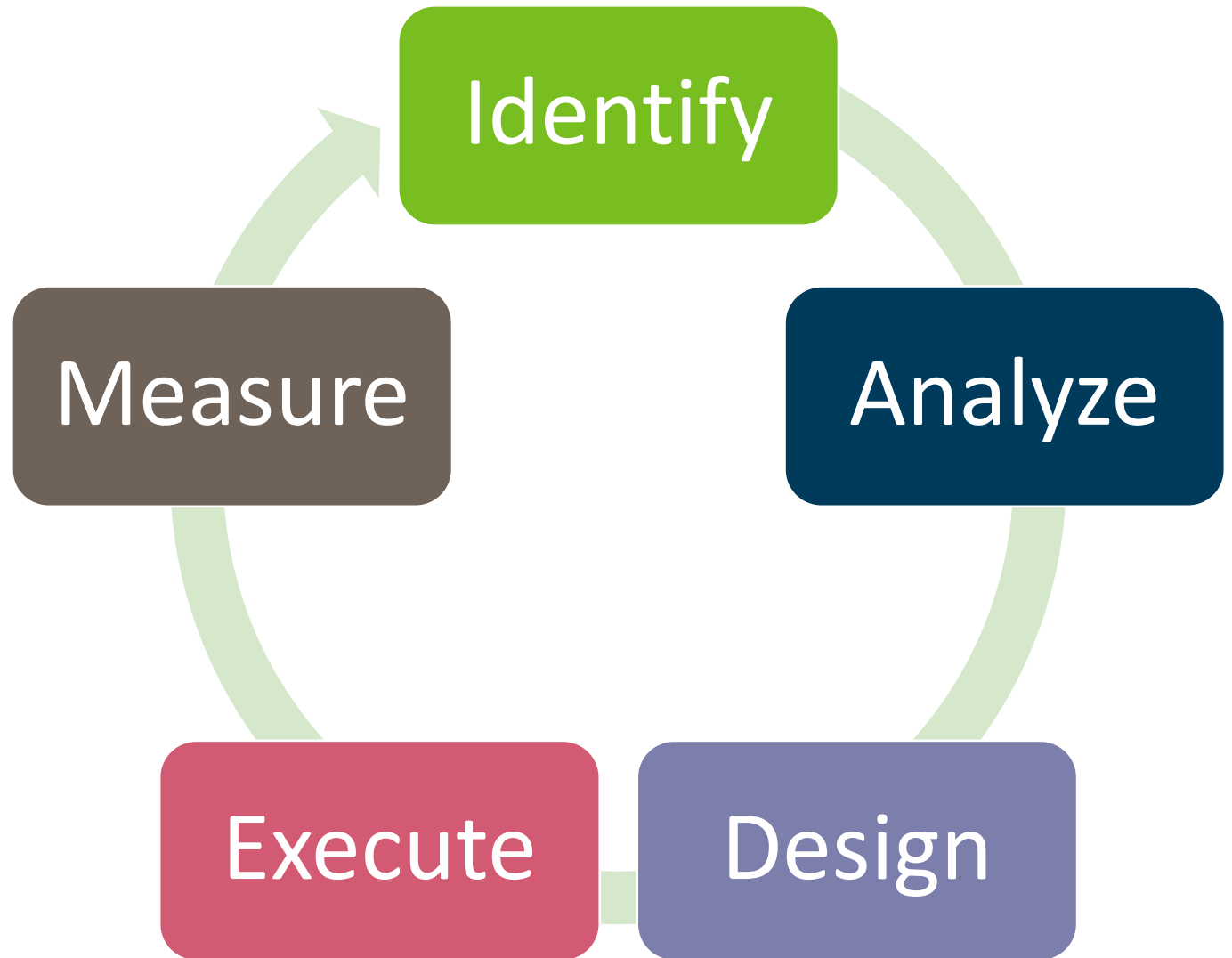


Inventory and
review existing
policies



Prioritize
documents that
need to be
created or
updated

TECHNOLOGY TRAINING



TECHNOLOGY SKILLS STANDARDS



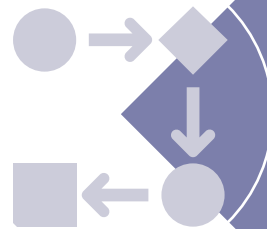
APPLICATION PORTFOLIO MANAGEMENT



ID applications
in use



Assign owners



Determine app
refresh cycle

Projected sales of main products in 2013



Distribution of market share among the major industry players



Distribution of market share among the major industry players: Player A and Player B each hold 20% and 20% percent respectively. A further change in the economic situation in the market will be characterized by a more equal distribution of market share among players.

Share of market activity



Changes in the activity of the active and passive market is uncertain. Established positive trends in various market segments.

Projected sales of main products in 2013





DATA

The currency of the
twenty-first century

1. Data
Governance

2. Analytics
Strategy

3. Data
Integration
Strategy

4. Awards
Management

5. Improve
staff data
literacy

DATA GOVERNANCE



Establish data
governance team



Identify data goals

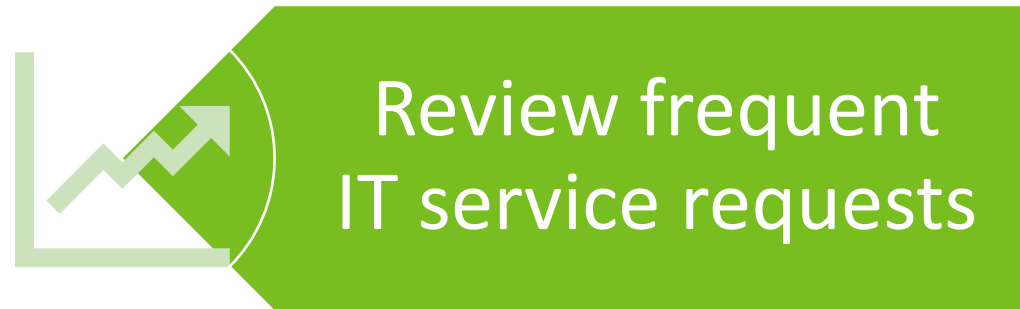


Plan to tackle most
pressing goals.

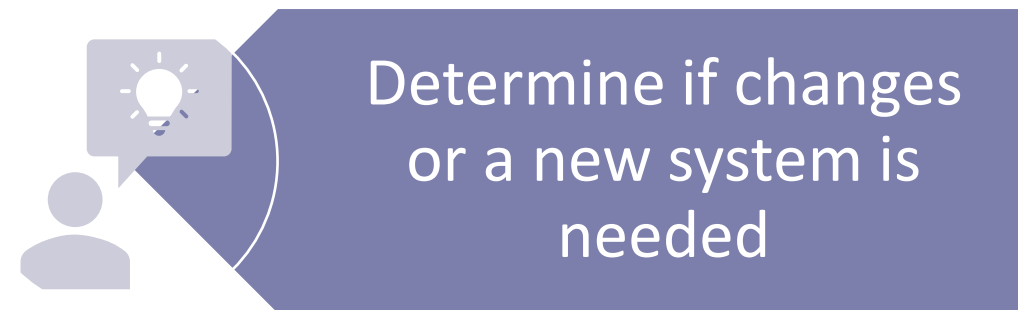
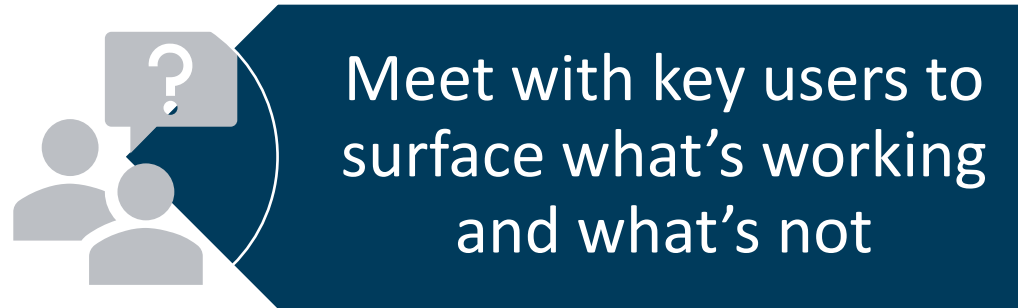
DATA STRATEGY



DATA LITERACY



ASSESS ENTERPRISE SYSTEMS



DATA INTEGRATION STRATEGY





DIGITAL



DIGITAL

The first – and
sometimes only – face
of the association

1. Content
Audit

2. Improve
Search

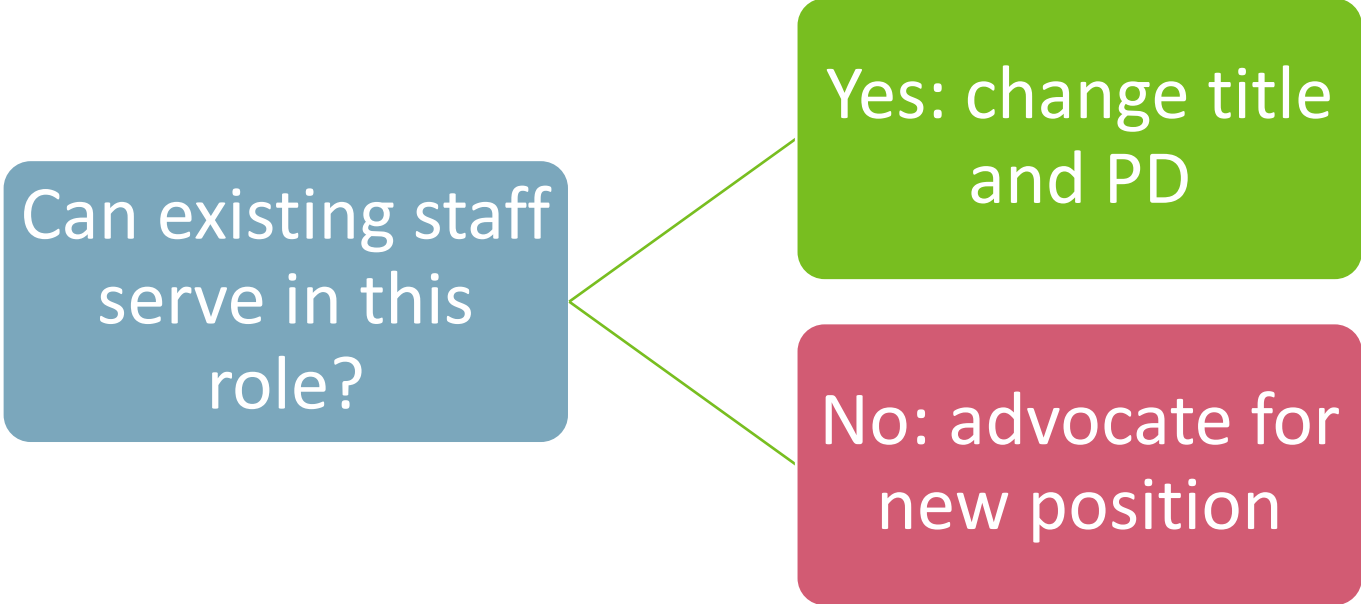
3. New
CMS/Website

4. Strategy

5. Ownership

DIGITAL OWNERSHIP

Can existing staff
serve in this
role?



```
graph LR; A[Can existing staff serve in this role?] --> B[Yes: change title and PD]; A --> C[No: advocate for new position];
```

Yes: change title
and PD

No: advocate for
new position

NEW CMS/WEBSITE



Determine
requirements



Evaluate
systems/vendors



Select and plan
implementation

IMPROVE WEBSITE SEARCH



Faceted or
Federated?



Develop
search
improvement
plan

DIGITAL STRATEGY



Review org's
strategy

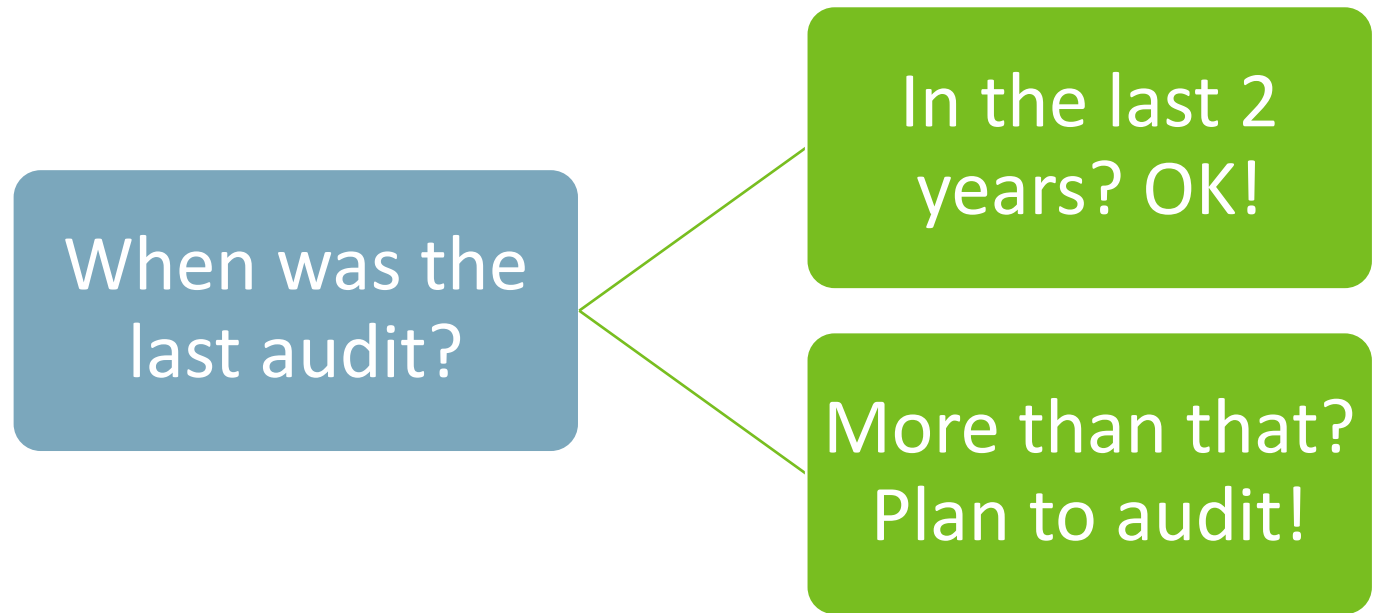


Identify
technology SWOTs



Develop the plan

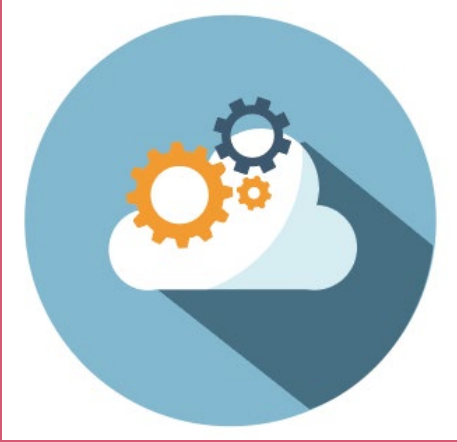
CONTENT INVENTORY & AUDIT



Get the ROT out!



INFRASTRUCTURE



INFRASTRUCTURE

Hardware, software, and services that support the association's technology.

1. MFA

2. SSO

3. Security
Training

4. Monitoring
& Alerts

5. Retire old
servers

MULTI-FACTOR AUTHENTICATION



Determine which
solutions support
MFA



Develop and
implement training



Start implementation
with “high value”
VIPs

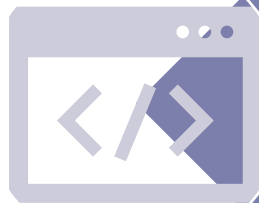
SINGLE SIGN-ON



Identify all applications and prioritize by usage



Select Identity Provider (IdP)



Phase implementation by application

CYBERSECURITY TRAINING



Evaluate
training
options



Work with HR
to implement
and enforce

MONITORING AND ALERTS



Identify critical
services



Select tool (from
MSP or stand-alone)



Phase in based on
service criticality

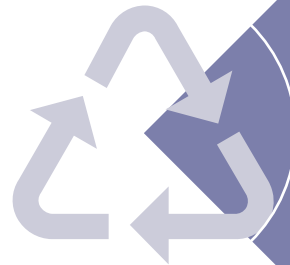
RETIRE OLD SERVERS



Confirm no usage (the old “turn it off and see who complains” trick)



Turn off permanently
and remove from asset
lists



Send to secure
destruction and/or
recycling.

THE TOP 20

Management

1. Project Portfolio
2. Technology Skills Standards
3. Documentation. Documentation. Documentation.
4. Training
5. Application portfolio

Data

1. Governance
2. Strategy
3. Data literacy
4. Awards Management
5. Integration Standards

Digital

1. Content inventory & audit
2. Search
3. New website/CMS
4. Develop a digital strategy
5. Ownership

Infrastructure

1. Multifactor Authentication
2. Single Sign-On
3. Security Training
4. Monitoring and Alerts
5. Retire Old Servers

QUESTIONS?



*“Do what you can, with
what you have, where you
are.”*

—Theodore Roosevelt

CONTACT ME

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