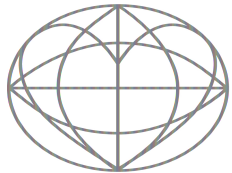


Aine McGlynn, PhD

COO The Good Partnership

An accidental techie with a penchant for organizing information, Aine learned her digital skills on the job. As the Managing Director of a small national charity that relied on over 30 different funders and 150+ skilled volunteers, Aine relied on well-designed systems to manage information and share it with the right people at the right time.

Now she is the COO of a consultancy focused on making life easier for small charities. She works with clients on solutions comparisons, tool provisioning and integrations, impact reporting, and database implementation.

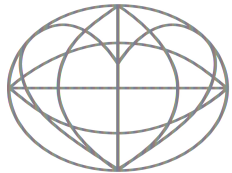


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Digital Transformation

Readiness, First Steps, How to Proceed

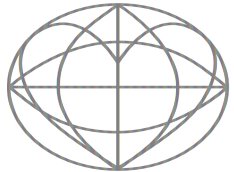


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Proliferation of Data

By 2020 there will be 200 billion devices connected to the internet

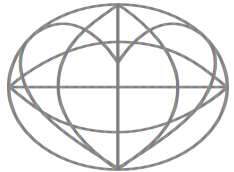
We create 2.5 quintillion bytes of data every day



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But we don't create big data

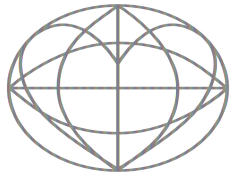
But you create a lot of "small data", and it's powerful. And overwhelming.



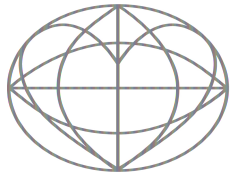
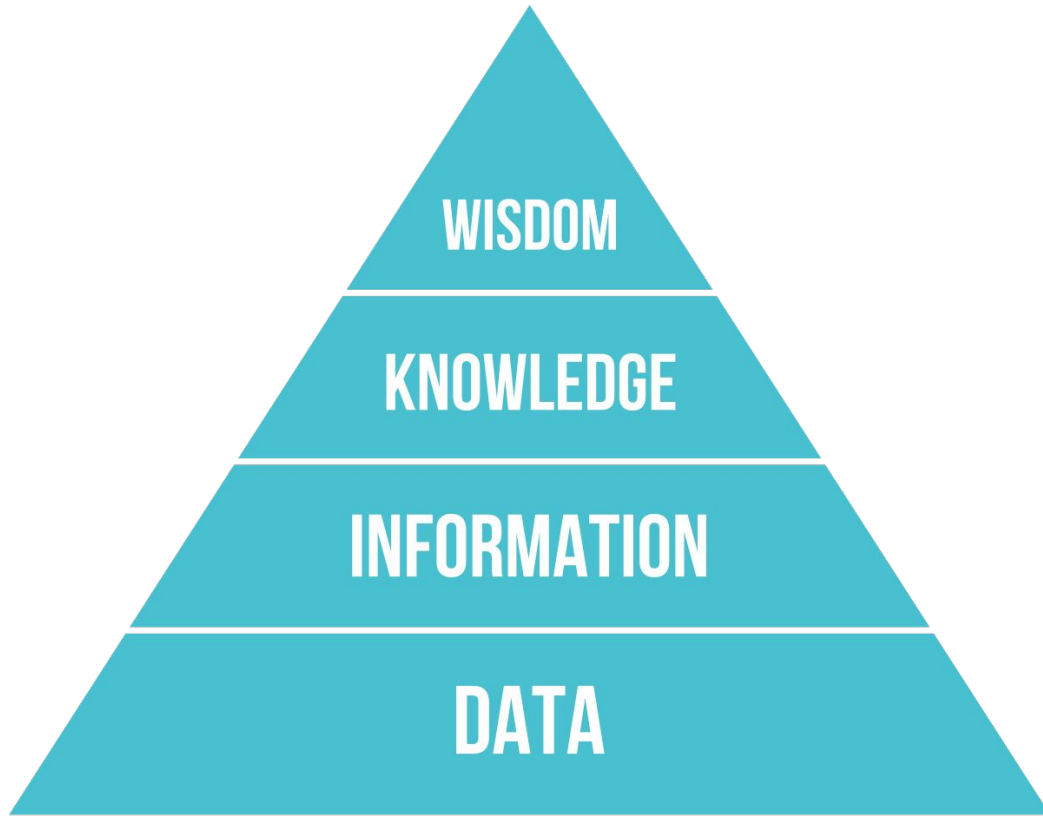
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Nonprofit “Small Data”

- Donor data
 - Name, Address, Email, Phone Number, Amounts, Designations, Tributes
- Volunteer data
 - Name, Address, Email, Phone Number, Availability, Hours Volunteered, Interests, Place of Work, Employee Volunteer Grants
- Financial data
 - Cheques, EFTs, Disbursements, Transaction Fees, Credit Card Payments, Bonds, Physical Assets, Expense Reimbursements, Contracts, HST Rebates
- Program impact data
 - Attendees, Survey Data, Services Delivered, Cost Per Beneficiary
- Marketing Data
 - Site Traffic, Conversions, Social Media Followers, Impressions



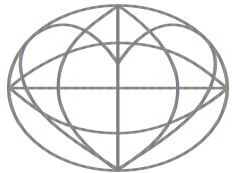
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At the heart of digital transformation is the drive to turn all that data into information.

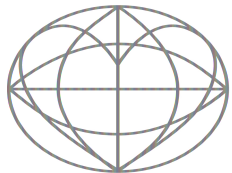


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Data is easily turned into information via machines.

But machines are stupid, and require humans to tell them how to understand and organize that data.

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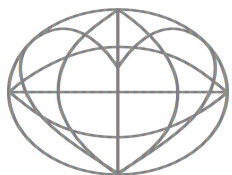
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The bulk of your efforts with regard to digital transformation is applying your human wisdom to ensure that the machine can help you to turn data into information that you can understand and make use of.

You already do this on a small scale if you use spreadsheet formulas, filtering, data validation.

Here you are taking data, applying an organizing structure (columns and rows) and turning it into usable information. When you apply a formula, you turn that information into knowledge.

Test Scores	Score Bands	Distribution
80	10	+
12	20	
14	30	
58	40	
41	50	
17	60	
84	70	
41	80	
61	90	
35	100	
45		
29		
0		
94		
49		
64		

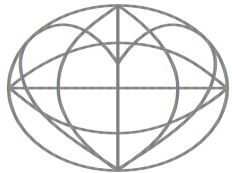


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Digital Transformation is not *JUST* about technical know how (though it is, definitely about this). Successful digital transformation requires a balance between:

- Technical Knowledge
- Business, or mission, clarity and focus
- Design principles

The first two may seem obvious, but the design is very important for getting the most out of your efforts to digitize your operations or aspects of your programs. Great design is rooted in empathy - and as leaders in the charitable space, we have that in droves.

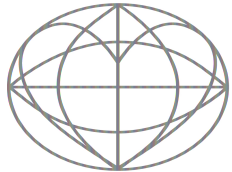
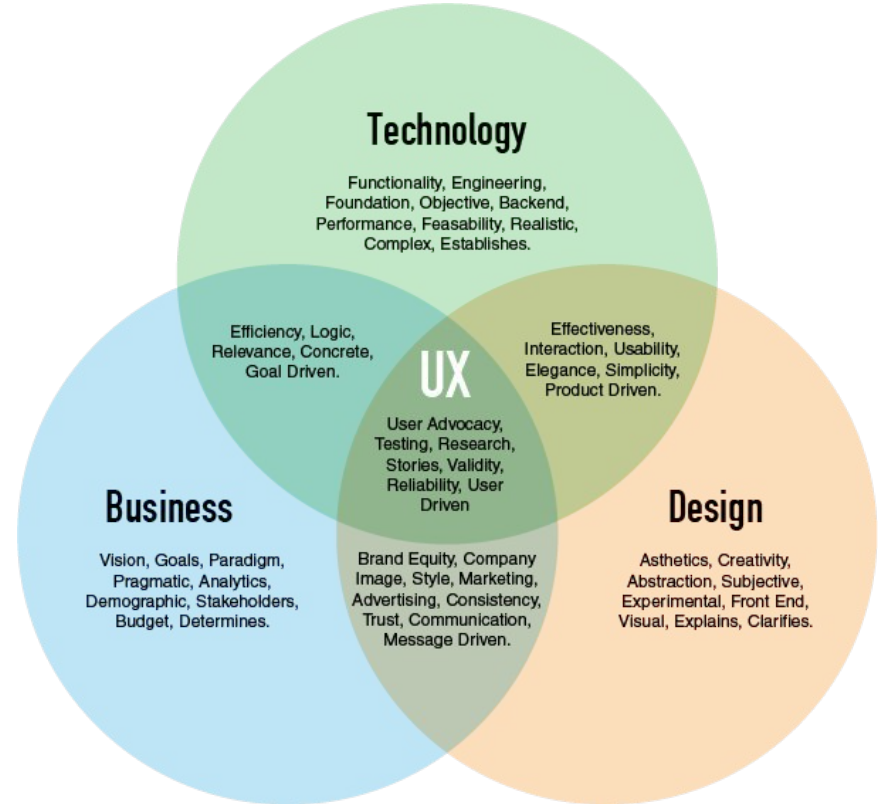


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Turning Data to Information

Ensuring that the machine turns data into information requires some technical capabilities, but it also requires the application of design considerations AND business objectives (or mission objectives)

All three convene in the role of the UX designer, or a User Experience designer.



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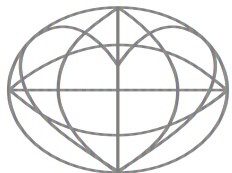
Design in Digital Platforms

How many of you use Instagram?

Did you notice that they recently made a decision to hide the number of likes a post received? This is a design decision driven by empathy for the user.

How many of you use Airbnb?

Have you noticed how the address of your Airbnb magically shows up on your google maps? This is a design consideration rooted in understanding the needs of a traveler.

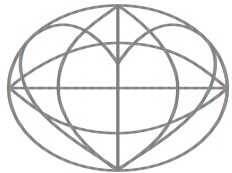


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5 Principles

Most of us working in the nonprofit sector can't afford to hire a UX designer dedicated to running our digital transformation - but we can learn to think like one. Here are five principles to keep in mind as you consider how to digitize your programs or operations.

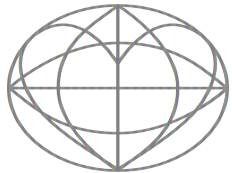
- Open architecture is best
- One-version of the truth
- Share by default
- Create information once
- Design with the end in mind



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Design with the end in mind

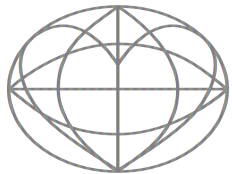
What will you do with the information you are gathering? Think of that ultimate use and work backwards. For example you want volunteers to sign up for shifts and then show up on time. Work backwards from that need to arrive at the best way to gather and share that information so that you can achieve that result.



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Open Architecture (OA)

Open Architecture is modular, like your smartphone. With apps, you can customize it to your interests, budget, storage space, data plan etc. A small nonprofit tech infrastructure can be modular. You don't have to invest in one tool that does "everything". Rather you can invest in multiple tools that allow you to add or subtract "applications" depending on your needs.

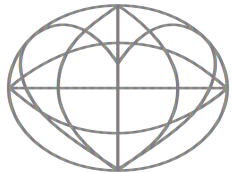


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Open Architecture (OA)

A key pillar of OA as interoperability.

An open architecture approach to your technology infrastructure asks you to keep one key question top of mind; how well do your tools (or “modules”) talk to each other.

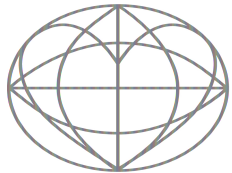


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Open Architecture (OA)

Interoperability is achieved by open API's or application programming interfaces.

This isn't as complicated as it sounds. The API brings info back and forth between software tools (or modules). Like a waiter bringing orders and food between the kitchen and the diners.

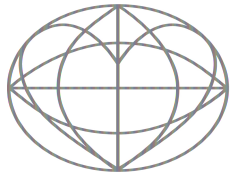


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One-Version of the Truth

Let's liberate you from "right click, save as" syndrome!

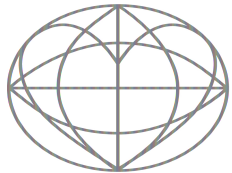
This principle asks you to change your habit from attaching files to emails, to sharing links to shared documents. This will result in only one version of the document, automatically updated when changes are made. It means adding links to documents in your database rather than attaching files



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One-Version of the Truth

Tools like Google Docs, or OneDrive allow you to collaborate in real-time, meaning no one ever has to attach files again! You can always be sure that you are working on the most up-to-date version of the document, spreadsheet, presentation or form.



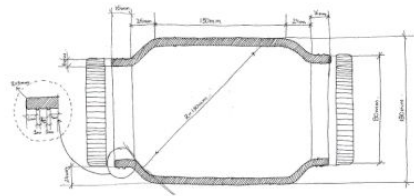
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Product Proposal Double Lid Peanut Butter Jar

Project status:

PROBLEM STATEMENT

Even for the tiniest hands, it is sometimes difficult to get that last bit of peanut butter out of the bottom of the jar.



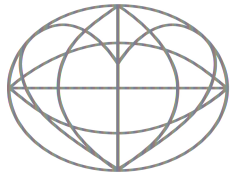
Suggested Edits — a new way to collaborate in Docs

Share by default

When you create new information ask: is this information readily available for the rest of the team to access?

Related question; how much of your or your colleagues' days are spent making or responding to requests for information? This information could include:

- Contact details
- Program data
- Location information
- Vendor invoices or receipts
- Funder agreements
- Logos and image files

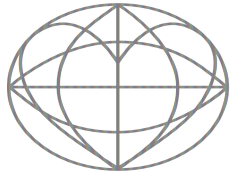


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Create Information Once

...and put it to work in multiple places.

Data entry is boring and time consuming. Whenever possible think about how your volunteers, parents, donors, and kid coaches can do your data entry for you! That means creating forms or intake tools that connect directly to your database.



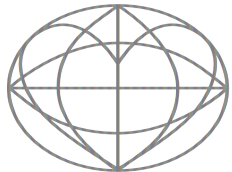
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Essential 1st Steps

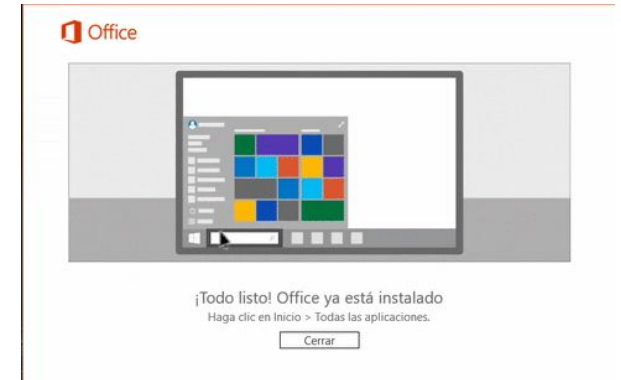
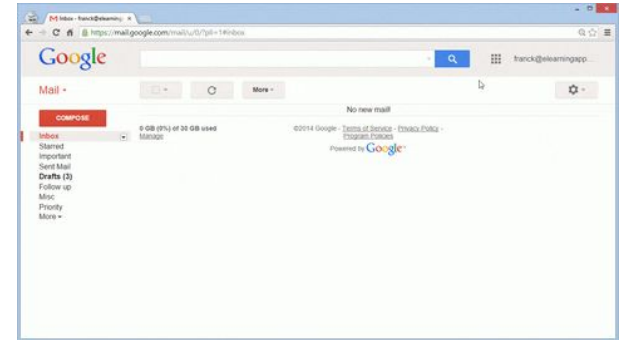
Pick a team.

This is especially for those of you out there using Google forms and Outlook. Or those of you using Gmail and Powerpoint.

In 2019 there are two major office productivity players on the market; Microsoft's Office 365 and Google G Suite. If you're not on either one of those platforms, your to do list is simple: convert to either one.



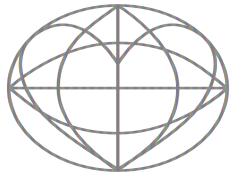
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Why do I have to choose?

In choosing to deep dive on one or the other system, you are making a decision that will clarify how all other tool selections will be made.

Once you know what each Core Productivity tool offers out of the box, and have maximised the functionality, then you can begin to think about adding other tools. You'll choose those tools based on their compatibility with either MS or Google.



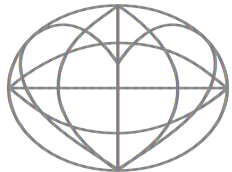
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Invest in what you have

There is A LOT of things that you can do with just the Office 365 or G Suite tools. With advanced formulas, named and protected ranges in a spreadsheet you can turn any sheet into a lightweight database. Pair this with Forms (both MS and Google have a forms tool) and you've got a pretty powerful intake and data management tool. Add data visualization (Data studio or Power BI) for beautiful dashboards that are connected to your sheets and you're doing really well.

Take a course on how to maximise these tools and their functionality.

[Ben L Collins courses are fantastic and accessible](#)



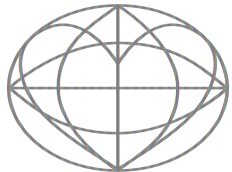
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Integration as a Service

Many tools don't have "native integrations" which is to say they themselves haven't built anything within their platform to automatically connect the data there with, say, an Excel spreadsheet or a Google Sheet.

The good news is that a number of companies have arrived on the market to bridge that gap.

- Zapier
- IFTTT
- Workato
- Tray.io

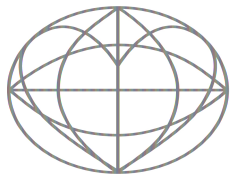


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API's

Remember the waiter bringing information between the table and the kitchen?

These IaaS tools allow you to take advantage of the open API's in either Microsoft or GSuite's products and the same open API's in a range of tools from Learning Management Systems, Financial tools, Email Marketing and more.



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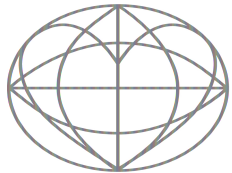
The screenshot shows the Zapier 'Edit Step' interface for a Zap named 'api-testbed' that triggers on 'Google Drive' and performs the action 'Upload File'. The configuration panel on the right is titled 'Set up Google Drive Upload File' and includes the following options:

- Folder (optional):** A dropdown menu currently set to 'Signed Documents'. Below it is the instruction: 'Folder where to place file. Keep clicking the dropdown to go inside folders. Defaults to the top-level folder if left blank.'
- File (required):** A text input field. Below it is the instruction: 'Must be a file object. See this [help doc](#) for more information.'
- Convert to Document? (optional):** A radio button option. Below it is the instruction: 'If yes, we will tell Google to convert this into an editable document.'
- File Name (optional):** A text input field. Below it is the instruction: 'By default, we use the same name and extension as the original file.'
- File Extension (optional):** A text input field. Below it is the instruction: 'Advanced: Can only be used if you also specify a file name.'

At the bottom of the interface, there is a 'Get Help' link with the text 'Response Time: ~2h | M-F 9am-5pm PST'.

Key Takeaways

- Consider business needs, technological skill and design thinking when you are thinking about digital transformation
- Pick a side - MS or Google
- Go deep on the tools provided with MS or Google
- Become familiar with IaaS
- Practice the 5 principles of good digital practice in incremental ways. Start small and practice as a team
- Investing \$5000 - \$7,500 in your technology stack (for subscriptions and occasional support) can get you pretty far.



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