Participants:

Tony Martignetti
Steve Heye
Erin Dieterich
Princessa Bourelly
Leon Wilson
Dan Rivas

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Tony Martignetti:
[00:00:00] Hello, and welcome to Tony Martignetti Nonprofit Radio. Big nonprofit ideas for the other 95 percent. I'm your aptly named host. We have a listener of the week. Young Nonprofit Professionals Network of Milwaukee. Hello, Milwaukee. They Tweeted, learning about nonprofit excellence, listening to Tony Martignetti Nonprofit Radio. Excellence. Love that. Thank you so much for that. Plus, they're very loyal ReTweeters. Thanks for that, also. I'm glad you found us. Thanks so much for listening, for loving Nonprofit Radio. I'm glad we're helping your important work, Young Nonprofit Professionals Network of Milwaukee. They're @NYPNMKE. Congratulations on being our listener of the week. Oh, I'm glad you're with me. I'd suffer with brachygnathia if I had to speak the words you missed today's show, Leveraging Expert or Tech Volunteers. We've got what you need to know about managing volunteers with special expertise. Where do you find them? What about screening and scoping their work?

Our panel is Steve Heye and Erin Dieterich from NetSuite, and Princessa Bourelly from Juma Ventures. That was recorded at the 2016 Nonprofit Technology Conference. Are you signed up for 2017? You need to. And seven 7 IT Security Pitfalls. Not sexy, but very important. Leon Wilson from the Cleveland Foundation, and Dan Rivas from Idealware walk you through bad habits that you need to change so you don't put your precious data at risk. That's also from the 2016 NTC. Sign up for 2017. **[00:02:00]** On today's Tony Take Two, your Trump challenge redux, director's cut. We're sponsored by Pursuant. Full service fundraising, data driven and technology enabled. You'll raise more money. Pursuant.com. And by We B-E-E Spelling. Super cool spelling bee fundraisers. Webeespelling.com Here is leveraging expert or tech volunteers from the 2016 NTC.

Welcome to Tony Martignetti Nonprofit Radio coverage of '16 NTC, the Nonprofit Technology Conference in San Jose, California. This is also part of NTC conversations. My guests now are Steve Heye, Erin Dieterich, and Princessa Bourelly. Let's meet them. Their seminar topic is leveraging expert or technical volunteers. Steve is solution consultant for NetSuite, and next to him is Erin Dieterich, director of corporate citizenship, and Princessa Bourelly, director of finance at Juma Ventures. Steve, Erin, Princessa, welcome.

Thank you.

Thank you.

Tony Martignetti:
You're very welcome. Welcome to Nonprofit Radio. Just indulge me for a moment while I highlight our swag item for this interview, which is from Black Mesh. Everything is in black. There's a very high gloss notebook with a calendar at the end, and we have a USB drive, flash drive I should say, and a pen. Your basic pen. This goes into our swag pile for the day, which is right here.

Steve Heye:
Awesome.

Tony Martignetti:
There it is. Thud for the our listeners who just have audio. There's a difference. Steve, you explained it off-mic. Let's have you explain it now. There a difference between using experts who are technical and non-technical. So, help us with an overview of this.

Steve Heye:
Sure. The way we first started talking about this was, we all have volunteers. **[00:04:00]**We all understand how to work with them when we all have ideas of how to best use them, but there is a very fundamental difference between using somebody that just wants to come in for a single day and do a single task versus somebody that has a very big skillset and/or is an expert. With pro bono, the key is, they're coming in and they do legal work for their living, or they do finance work for their living, or technology for their living. Then, they want to do that for you, but do it for free. So, that kind of volunteer requires a very different relationship with them, because you're allowing them to do work that with have dramatic impact on your organization and is much more critical that you understand what they're going to be doing, how you're going to use them, and build a relationship with them.

Tony Martignetti:
Erin, is it essential that these technical volunteers be supervised by other people who are technically inclined, or who are technicians?

Erin Dieterich:
I would say that it's very important that they're supervised. The level of technology knowledge that other person who supervises has will differ at different organizations. I think the most important thing is just that whoever's managing the nonprofit project and whoever is the lead volunteer, that they're on the same page about what the project's going to be. As long as they can speak the same land, then that's probably the right skill level. But if you have a volunteer who's very, very skilled and is speaking a language that you just don't understand as they describe a

project, that project's probably not going to go well until you find somebody on your side who can speak the same language and understand what you're getting involved in.

Tony Martignetti:
Okay. So, at least that level of understanding. Okay. Now, Princessa, you're using technical volunteers at Juma Ventures?

Princessa Bourelly:
We are currently using the pro bono through NetSuite. This is a multiyear, and the project is going really well, and it has been a great experience and an opportunity for Juma as well as the NetSuite pro bono to come in and offer their experience.

Tony Martignetti:
In what capacity are you using technical volunteers?

Princessa Bourelly:
[00:06:00]They are helping us now set up our dashboards within the NetSuite system to take an Excel spreadsheet and be able to pull that same information out of NetSuite without having to pull all of these different areas together. It's going to be easier for us to manage and maintain. We use their technology expertise to actually do the setup and manage the dashboards as well.

Tony Martignetti:
Okay. Do you have some lessons learned to share? Not necessarily right now, because we have another 20 minutes together. But do you have some lessons learned about using technical volunteers?

Princessa Bourelly:
The biggest lesson that I shared today would be for us to be prepared on the nonprofit side.

Tony Martignetti:
Okay. Little better preparation, it sounds like.

Princessa Bourelly:
Yes.

Tony Martignetti:
All right. We'll get there. We'll get a chance to talk about that. You have some advice on finding technical volunteers. Erin, you want to start us off there?

Erin Dieterich:
Sure. One of the things that we shared today in our session was that it's important to look at who as a nonprofit you're already connected to. You look at who is already, from the corporate side, making donations. Who perhaps is already a partner? And look at what their core competencies

are as an organization and see if there is alignment between their core competencies and what you need help with. If there is, it might be a very easy next step to go back to them and say, hey, we love working with you. Here's something that we're really struggling with. Do you think that this is something your team would want to look at pro bono? And start the relationship that way. In addition to looking at your corporate connections, there are a lot of really awesome sites out there that can help you find an individual technical volunteer. We shared a list of resources today, but among them is the Taproot Foundation, Catch a Fire, the Community Core—

Steve Heye:
Volunteer Match.

Erin Dieterich:
LinkedIn. Lots of places.

Steve Heye:
Community Core for NPower. There's a bunch.

Tony Martignetti:
Community Core for Manpower?

Steve Heye:
NPower.

Tony Martignetti:
NPower.

Erin Dieterich:
[00:08:00] You could go on there and essentially say, we've scoped out this challenge that our organization's having. Perhaps we need a new website. You can go and find volunteers who are taking their personal time after their job to do that project for you.

Tony Martignetti:
Okay. I've had the Catch a Fire CEO on, Rachel Chong.

Erin Dieterich:
Yeah. She's great.

Tony Martignetti:
It's been a couple years, but yes. Very true. Okay. A screening is going to be important. We talked a little bit about finding. Now, we've got a prospect pool, whether it's from real time relationships and partnerships or someone we found online. Screening. We interview them, right? I would think. Same way you are interviewing a hire. Steve?

Steve Heye:
Yeah. There's a couple. It varies a little bit. First, the amount of screening, the amount of effort that you're going to put into the screening process depends on what the type of project that they're going to be working on. Based on the level of impact that the project is going to have and the risk that's involved in this project, you're going to want a varying level of screening. If it's a project where they are, as Princessa talked about, they're going to be in your financial system. They're going to be looking at helping you adjust. Or if it's a legal pro bono where they're reviewing contracts or that doing that, you're going to want to do a lot more screening.

Tony Martignetti:
You can say hell of a lot.

Steve Heye:
A heck of a lot.

Tony Martignetti:
A little proprietary information. Proprietary and potentially damaging if it's in the wrong hands.

Steve Heye:
Right. We'll do some of those. A non-disclosure agreement might be in place. Or an actual application, ask them who they've worked with before. Do some background checks if it's needed. But if it's a vendor that you already have a long-term relationship or you're a customer with them and maybe then the barriers drop a little bit because you've already had a longer relationship with that company, and because you're paying them and they have already set up an established program, it's a little bit different on the type of screening you would do. **[00:10:00]** Or, if you're just having somebody build a little widget on your website that isn't mission critical, then your screening might be a little lower, because it's not mission critical and it's not going to blow up the whole world, your world, your mission world.

Tony Martignetti:
And there isn't proprietary data involved. You still have to ensure they have a certain level of technical expertise, because they are going into the backend of your system, your coding. It could mess things up.

Steve Heye:
Right. Asking for examples of work they've done before, who they've worked with, or even asking for their resume or having them fill out a sample application. There's a number of things you can do just to get some simple information about them to screen them.

Tony Martignetti:
Princessa, any advice, lessons learned, on screening volunteers?

Princessa Bourelly:

Going through NetSuite, we didn't have to do the screening. We applied. The hardest part is narrowing down from these grand scheme of ideas that we need internally, narrowing that down for the NetSuite team to then match us to pros that could coach==me in and have the availability to target our project.

Tony Martignetti:
Okay. So, you potentially could have used more volunteers? Is that what you mean? To do other work for you?

Princessa Bourelly:
Yes. The beauty of NetSuite is that they offer it multiple times per year. So, even though we didn't get to address all of the projects, there is a possibility that we could get to it.

Tony Martignetti:
Okay. Erin and Steve are both nodding, so I guess you have a shot at this. Instead of talking around this, we may as well say, let's just have—Erin, why don't you describe the NetSuite technical volunteer program. How this works.

Erin Dieterich:
Sure. At NetSuite, we donate our software platform to nonprofits and social enterprises. Once they start using that platform, they are eligible to apply for pro bono support from our global employee workforce every quarter. At the beginning of each quarter, an application goes out to the nonprofits. They say, here are the things I need help with. Then, internally, at the company, we send out an email to all of our employees and say, hey, here are the things that nonprofits need help with on the platform. We need your technical skills. If you want to get involved, let us know. Then, our team actually does the matchmaking. So, we're the screeners in that instance. We look at all the employees' backgrounds. We look at where they work, what time zone they're on, what their expertise is, and we put together typically teams of two to four employees who we think have the right skills to get that project done that's been requested.

Tony Martignetti:
Okay. How many people on your team, Princessa?

Princessa Bourelly:
They are four.

Tony Martignetti:
You've got the max.

Princessa Bourelly:
We do.

Tony Martignetti:

Okay. Now, does NetSuite have a pro bono requirement, part of employment you'll spend weeks or 10% of your time? Is there anything like that?

Erin Dieterich:
It's not a requirement, but all of our employees are allowed to spend 20 hours a quarter on a project pro bono when they get matched up. **[00:14:00]** They could work it out with their manager that they apply and take on a project every single quarter of the year, but it's not a requirement.

Tony Martignetti:
Okay. All right, thank you. After screening, where should we go on starting to manage?

Erin Dieterich:
Scoping.

Steve Heye:
Scoping is next.

Tony Martignetti:
All right. On Tony Martignetti Nonprofit Radio, I have Jargon Jail. If this was a discussion on hiking in the Adirondacks, scoping would probably be a pretty simple thing to understand. But in this conversation, I don't know what scoping. So, get yourself out of jail. What is scoping?

Steve Heye:
I think the key to a big differentiator between using an expert or technical volunteer is, they will need something that tells them exactly the challenge you're having, what you're hoping to solve, and how you want them to help.

Tony Martignetti:
Okay. Scope of the project.

Steve Heye:
It's a scope of the project, meaning that you're going to just both sit down with a document and agree on what is the challenge we're trying to solve? What are the goals of the project? Then, talk through that together to figure out what the actual outcome will be. Usually, it starts way too big, and then you scale down into something that's actually accomplishable, because that's one of the challenges we have with experts.

Tony Martignetti:
Because these employees only have up to 20 hours per quarter.

Steve Heye:
Almost all pro bono help that you get will have some sort of a—

Erin Dieterich:
Limitation.

Steve Heye:
A limitation to how much help you'll get and how long the project can last. The real key to using a technical volunteer is having a chunk of work that's containable, it's describable, attainable, and is something that you can easily pass to someone and have them understand.

Tony Martignetti:
Yeah. Princessa, was this hard to define the scope?

Princessa Bourelly:
It was hard to narrow down internally.

Tony Martignetti:
You said there were other things you could have done. Maybe this project was even bigger than it could reasonably be.

Princessa Bourelly:
I think I shot for the moon, and they had to bring me back down. I basically put out our primary concerns. **[00:16:00]** They chose a project that they could actually accomplish within the 20 hours. The difficult part is on my end making sure that I'm providing them with the proper information to make the project successful.

Tony Martignetti:
Okay. You clearly have responsibilities as well as they do.

Princessa Bourelly:
Yes.

Tony Martignetti:
Okay. So, scoping. Yes, of course. What do we want to see at the end of this, whether again, this applies beyond the NetSuite program. You've got to have a scope document, right?

Steve Heye:
Yeah. It's helpful on both sides, not just for the nonprofit, but also for the pro bono person, because the pro bono person then knows what's expected of them and then is more able to know if their skills is the right skills and if they're able to actually achieve it. Or to start to understand if it's even possible within the amount of time that they're given to do it.

Tony Martignetti:

Okay, and that they have to donate. Okay, all right. Now, savory snacks are being served, and the announcement is being made. That is not God. He's not omnipotent. It's just somebody who knows that the savory snacks are being served. That's the extent of his omnipotence is that there's chocolate snacks, including big urns of chocolate milk here that I see. I don't know about the rest of you, but I kind of like chocolate milk now and then.

Steve Heye:
But it was weird to see milk in an urn. You don't see that very often.

Tony Martignetti:
It's clear. It's a clear urn with a silver top. It looks like a three- or four-gallon urn, it look like to me, with a spigot on it. After scoping, working with our technical volunteers, Erin what comes next? What do you need to think about?

Erin Dieterich:
Then, you really get into the meat and potatoes of getting the project done. Something that's important to think about there is project management, because sometimes you'll get a really excited set of volunteers, and if there's not somebody who's responsible for keeping the project on track, as with any project you'd work on, pro bono or not, **[00:18:00]** it can go off the rails or it can get delayed or people can wander away and it doesn't get accomplished on the time that you really had set aside for it. So, focusing, having that timeline, having that project manager who's going to lead everybody through the process is really critical.

Tony Martignetti:
Now, we're all working with volunteers. So, where you do draw the line between, team, you're too slow, and okay, team. I understand. We understand. We'll extend the timeline. You are volunteers, and we don't want to lose you, because we're 25% of the way into this now. How do we manage that?

Erin Dieterich:
It's a collaboration. So, I think that's one of the most important things about using technical volunteers, is that it's not like you're saying, I want this project done. Go do it, and let me know when it's done. It's that you are saying, I'm going to work with you, and we're going to get this project done together. If it starts getting delayed because of your timeline or their timeline, you're in that together and you can readjust expectations versus if you just set it and forget it, then you have no idea what's going on behind the scenes. If it's a true collaboration, then you're both coming to the table. You're both taking on work in order to get this delivered, and the project's going to be something that really resonates with your organization and that you can continue using for a long time if you are part of the process versus if a nonprofit volunteer just came in, did something, said, here you go, and then left. You might not know how to use that thing in the future.

Tony Martignetti:

Okay. I don't know. Princessa, I don't want to put you on the spot and say, the NetSuite volunteer employees, they're over budget, they're behind time. You want to get more out of this. Anything you want to add to this part of the project management?

Princessa Bourelly:
Internally, we had to make sure that we were prepared for our meetings.

Tony Martignetti:
So, you have periodic meetings face-to-face? Well, Skype or whatever.

Princessa Bourelly:
Virtual. Once a week, and prior to that meeting on the nonprofit side, **[00:20:00]** we had to be prepared in order to get the best benefit from the professionals and to get their insight and their feedback.

Tony Martignetti:
Okay. What do you want to say about preparation? You've got to get the right people collaborating internally?

Princessa Bourelly:
Internally, we have a great team working with the accounting team. Then also, communicating that information to the leadership team for their feedback. Then, circling back to NetSuite just to make sure that they know that things are working. Also, to make sure that we're on track and to make sure that we're pretty much on track to complete the project.

Tony Martignetti:
Okay. I should have asked you earlier, what is Juma Ventures' work?

Princessa Bourelly:
Juma Ventures works to, they're fighting the poverty cycle by providing education and financial literacy to youth, and they employ the youth at the ballpark venues around the area.

Tony Martignetti:
What's your area? Where are you?

Princessa Bourelly:
We're here in San Jose. We're in San Francisco. We're in New Orleans. We have a New York venue. We are growing, yes.

Tony Martignetti:
Yeah. You're central. You're west. You're east.

Princessa Bourelly:

Yes.

Tony Martignetti:
Nothing north? Chicago, Detroit?

Princessa Bourelly:
Not yet, but probably definitely on the horizon.

Tony Martignetti:
Okay. What's the budget there, annual budget?

Princessa Bourelly:
The annual budget is $8 million.

Tony Martignetti:
Okay. Some people might think, well an $8 million budget, why do they need pro bono? How come they couldn't pay for the help that they need?

Princessa Bourelly:
With nonprofits, we use most of that money to support the mission, and it is difficult to be able to provide income at this level of professional services.

Tony Martignetti:
Yeah. You're getting roughly 80 hours of technical help, which several hundred dollars an hour, I imagine if you had to go out and purchase it—

Princessa Bourelly:
Yes.

Tony Martignetti:
Okay. Fair enough. All right. **[00:22:00]** Project management. It seems like a pretty broad topic. Is there more we can say about strategies for project management, Steve?

Steve Heye:
The key there is just that collaboration and just trying to have regular scheduled meetings. Even having a regular format to regularly scheduled meeting, like, we're going to start the meeting. We're going to look at the goal. Did we meet the goal? How long are we on the timeline? Other than that, there's not much else to say about the project management except that it shouldn't be an attack like, we didn't meet the deadline. Or managing it that way as much as trying to ensure both sides are happy with the progress. I'd say the other big key with that project management that isn't talked about enough is making sure that the pro bono person is seeing their impact and seeing the progress that is being made and understanding how it is really helpful to the nonprofit. The nonprofit has a responsibility to keep sharing back to the volunteer of how appreciative they

are of the help and the outcome that it's going to do and what it's going to allow that nonprofit to do that maybe they couldn't do without that help. The energy of a pro bono can fade over time, especially if a project is three months. It's time. When they first start, they're excited, they're energetic, but then when they get into the weeds and then problems start or they hit a hiccup, part of that project management is keeping that person engaged and excited.

Tony Martignetti:
Reassured that there's value.

Steve Heye:
And there's a number of ways to do that, either through recognition or doing mini celebrations of hitting a milestone. Small thank yous as you go. I think that's a big part of that project management.

Tony Martignetti:
Okay. Princessa, you want to share what you're doing around sharing the value and encouraging the pro bono volunteers?

Princessa Bourelly:
I don't think I've done anything specific, **[00:24:00]** but I think what goes a long way is the fact that they can see that their work is being utilized and actually brings value to the organization.

Tony Martignetti:
How do they see that? They don't see that during the project management phase, though. They don't see it until a project is finished, right?

Princessa Bourelly:
But during the process, the fact that we're not coming back with a lot of changes, a lot of iterations, a lot of going over the time schedule and the timeframe. I think it's positive reinforcement to let them know that things are going smoothly and according to plan, and will be seen to fruition.

Tony Martignetti:
Your work is appreciated.

Steve Heye:
I think the other thing that she's maybe downplaying a little bit is that she is able—Princessa did talk about how she was able to share that backup with her leadership team. I know that the pro bono volunteers are seeing the fact that there's an investment from the leadership team, there's an engagement through the team, and their energy is staying up and excited about it. It plays into it. It doesn't have to be actually a gift or anything like that. It's just that continued conversation.

Erin Dieterich:

I think as the volunteers get the exposure of understanding more and more of what your nonprofit does, they take away a real pride of what they've helped you achieve, even if what they were building a small widget for your website. They are now feeling a part of the team. I love when I ask employees who have done pro bono projects, hey, what kind of a project did you do? What was the organization? And they automatically become the spokesperson for the organization. They tell you about it. They light up. They're like, oh, now I donate to them, or I just went a did a 5K run for them. They're so much more engaged now than they were before, and they kind of feel like they have a real responsibility for that organization because they took on actual technical work for them.

Tony Martignetti:
That's wonderful. All right. Are we at project completion now? We have a couple minutes left together.

Erin Dieterich:
Let's wrap it up.

Tony Martignetti:
Okay. Are you anxious to get out of here, Erin?

Erin Dieterich:
No. I mean the project.

Steve Heye:
[00:26:00] She's like, I got to go somewhere.

Erin Dieterich:
That chocolate milk is looking really good.

Tony Martignetti:
You're in the middle, so you can't leave until either Steve or Princessa does. Okay. Project completion.

Steve Heye:
Yeah. I think the big project completion to me, then, is where we ended our presentation was talking about connecting it back to the mission. Then, the outcome was, great, we created this financial dashboard. I think taking a minute there and just saying, yeah, you just created a financial dashboard, but now what you've done is, you've eliminated hours of work that I was doing every week in a manual spreadsheet that now I can really spend time analyzing that data and actually change the way my organization works based on this data and just taking time to celebrate that and connecting it back to the overall goal and inviting leadership maybe to come in and talk and thank the volunteers. That can be a way to wrap up and close the project.

Tony Martignetti:
Yeah. That leadership touch again. Valuable. Erin, anything?

Erin Dieterich:
I think revisiting the project maybe five, six months out is also really important for the volunteers, just to hear from you about, hey, for six months now I've been using these new dashboards and here's what we've seen that's happened at the organization. I had a pro bono project that some colleagues were working on a few years ago, where they helped build a social media strategy for a nonprofit. A year later, the nonprofit came back to them and said, hey, because of that strategy that you helped up build, we won a grant to get a full-time social media person onboard.

Tony Martignetti:
Oh. That's magnificent.

Erin Dieterich:
Those are the amazing, amazing stories, but had that nonprofit not gone back to the volunteers a year out and told them that, they would have never known. They would have just been happy about the project, but now they felt real pride.

Tony Martignetti:
Yeah. Glee. Oh, that's magnificent. Princessa, is your project finished?

Princessa Bourelly:
It is one week away from being done. The deliverables have been sent to us. The dashboards are set up. The reports are active, and it is now on me to actually play around with them and make sure that they're functioning properly, and any changes or **[00:28:00]** anything like that, we would have to communicate back to the team. But we are pretty close to signing off on that project.

Tony Martignetti:
This is an exciting time. Cool. What's planned to mark the occasion of the completion?

Princessa Bourelly:
We hadn't thought that far.

Tony Martignetti:
You only got a week left. You better get the CEO on board. It's got to be something dramatic. Okay. This was wonderful. Lots of great ideas. Are there any project management tools, online tools, that you recommend, that you like? If not, you could say no.

Steve Heye:

Project management, for me, for this kind of a project, it depends on the severity or the scope of the project. I think keeping it simple is key.

Tony Martignetti:
Let's say scope, not severity. It sounds like a disease. It's lost a limb.

Steve Heye:
I think keeping the tool as simple as the project. Something as simple as a Google doc, just having a quick outline there, keeping your meeting minutes there, keeping the record of what happened and what got done. You can do something more complicated than that, but I don't think it really needs to be anything more than that.

Tony Martignetti:
Okay. Should we wrap it up there?

Erin Dieterich:
Yeah.

Tony Martignetti:
All right. Excellent. Great ideas. Love it. That was leveraging expert or technical volunteers with Steve Heye, solution consultant at NetSuite. Also, Erin Dieterich, director of corporate citizenship at NetSuite, and Princessa Bourelly, director finance for Juma Ventures. Steve, Erin, Princessa, thank you so much. A real pleasure. Thank you. It's Tony Martignetti Nonprofit Radio coverage of '16 NTC, the Nonprofit Technology Conference. Thank you for being with us.

Now, Tony's Take Two. Your Trump Challenge Redux, director's cut. It's still up. It's the redux of the redux. Check out Tallulah, the Jack Russell Terrier. I'm telling you, she has great insights into Donald Trump's potential impact on nonprofits, and I have minor contributions. Check out the video, the director's cut. The video is at TonyMartignetti.com, and that is Tony's Take Two. We've got to do live listener love. I'm going to do it quickly, and then of course, the affiliate affections of podcast pleasantries. If you're listening live, love out to you. You know who you are. You know where you are. Thank you so much for being with me. Podcast pleasantries. I keep saying I've got to check—we've been spiking 12,000 on some shows. However many there are, it's way over 10,000. It could be as many as 12,000 or 13,000. Pleasantries to you, our podcast listeners. And the affiliate affections to our AM and FM station listeners nationwide. You thought I was going to say throughout the country, but nationwide. Affections to you. Let your station know that you listen. I'd be grateful for that. Thanks so much for being with us. Here are Leon Wilson and Dan Rivas from the 2016 Nonprofit Technology Conference. Seven IT Security pitfalls.

Welcome to Tony Martignetti Nonprofit Radio coverage of '16 NTC, the Nonprofit Technology Conference. We're in San Jose, California, at the conference convention center in San Jose. My guests now are Leon Wilson and Dan Rivas. **[00:32:00]** Leon is chief technology and

information officer at the Cleveland Foundation, and he's sitting right next to me. And Dan Rivas is managing writer for Idealware. Gentlemen, welcome.

Leon Wilson:
Thank you.

Dan Rivas:
Thank you.

Tony Martignetti:
Welcome to Nonprofit Radio. Pleasure to have you.

Leon Wilson:
Pleasure being here.

Tony Martignetti:
Your session is seven highly risky habits of small to midsize nonprofits, IT security pitfalls.

Leon Wilson:
That's correct.

Tony Martignetti:
Leon, let's start with you. Why are nonprofits just not paying enough attention to IT security?

Leon Wilson:
The whole emphasis behind the presentation was just my travels over the last four years just working with small and midsize nonprofits and constantly seeing the same challenges that they're dealing with. Some of it is just naiveness **[sic]**, ignorance, complacency, or assuming that it really doesn't impact them until it does impact them. We felt that this session was critically important to just remind them of some of the simple, basic, and block building things.

Tony Martignetti:
Okay. We're trying to avoid crises here. Is that right, Dan?

Dan Rivas:
That's right.

Tony Martignetti:
Yeah. How bad can it be, IT security? Dan, do you have an actual example? Or just make it hypothetical, but how bad could it be?

Dan Rivas:

Yeah. I don't have examples. We worked on a report recently where we talked to security experts and learned from them what are the things that nonprofits are dealing with. We found that nonprofits are in an interesting space. As we all know, low budgets, very little time. IT security often gets overlooked or gets neglected.

Tony Martignetti:
That's not particularly sexy.

Dan Rivas:
No. It's sort of the vegetables of the nonprofit world. We were surprised by how many people came to our session, because the reality is, it's the last thing you really want to do, but I think people have seen enough of the data breaches. **[00:34:00]** They've seen enough of the issues come up.

Tony Martignetti:
It's like weekly, there's data breaches, and that's on the commercial side, where they presumably have so much more money to throw at this. That's where we see so much of the trouble. Okay. It's pretty simple stuff. I don't mean the topic. I mean the details of it, the way you've organized it. Seven highly risky habits. All right. You shouldn't be sleeping with the bad partners. Why don't you start us off, Leon?

Leon Wilson:
You bring up an interesting point. They were all very common sense things that are happening. What we wanted to do is share with them, you're going to do these things, but we wanted to educate you on how you can mitigate the risk. For example, one of the first things we talked about was allowing people to use personal computers in the workplace. We know it's going to happen because for a lot of nonprofits, it's the way that they can save money because you don't have to worry about purchasing a computer for someone. But keep in mind that you have to put some provisions around that, like making sure that they have the most up-to-date software running on that computer, making sure they have antivirus running on that computer. And who else has access to the computer when they're at their homes? Their family members, friends, other types of things.

Tony Martignetti:
That's a disaster.

Leon Wilson:
Exactly. So, we know it's going to happen, and that's why we said that we're not telling you something that you don't already know, but what we do want to do is provide you with some wisdoms and some thoughts as far as how can you mitigate, prevent, or at least contain some of the challenges that you're going to be dealing with? So, that's a good example right there.

Tony Martignetti:

We need to have policies, I presume, Dan, around the use of the personal technology in the workplace? What are some of these policies?

Dan Rivas:
Just having a policy, thinking ahead of time, what should we allow and what we should not? That's probably the first, most important thing, just to think it through so you're not doing it in an ad-hoc way or that people aren't making it up as they go along. **[00:36:00]** Then, from there, some of the things we talked about in our session, things that you already know. You need antivirus software. You need to make sure if it's on your phone, that your apps are not downloading something malicious that's pulling data from your phone. There are things that you have probably all heard somewhere in your life, but in the work context, we assume that they're somewhat on the IT end, who's taking care of everything, and we forget once we bring it home it's up to us now. So, if you as leader of your organization aren't making sure your employees are doing those things or helping them do these things, there's a lot of risk in that.

Leon Wilson:
Yeah. We did a strawman poll where we asked a lot of people—we had about 40 or 50 people in our session, and we asked them, how many of you have antivirus software on your cellphones? I was expecting to see about at least half. Only maybe about six people raised their hands.

Tony Martignetti:
I don't even think most people know that that exists.

Leon Wilson:
There you go. So, now we are allowing folks to sync up their email, their contacts, also get access to certain files off their mobile devices because again, it's how we operate these days, and it works for a lot of us. But what happens when that smart phone gets stolen, lost, and or if you're constantly upgrading your smartphone and you don't properly clean out your smartphone? Well, if you don't have password protection and also if you're not using antivirus software in there, imagine how others can get at that information.

Tony Martignetti:
All right. Where do we start to look for antivirus software for our phones?

Leon Wilson:
It's right out there. If you go out to the iPhone store and just search for antivirus software, if you go to the Google Play store and search for antivirus software, it is out there. It's just again, it's not sexy. It's not something you're downloading. You're usually downloading games and apps and things of that nature. You're not downloading office productivity apps. As well as, especially for Android phones, **[00:38:00]** because they're not as policed, the apps are not as policed. There's a lot of malicious apps that are out there. So, you're downloading what you might think is a free gaming software, but it is designed to then go after your contacts, your emails, and other types of information that can then work its way into your organization.

Tony Martignetti:
Leon, let's stay with you. How do we enforce these policies that you both are saying are important in this one, on the personal technology side? How do we make sure that people are doing with their equipment what we're asking them to do if they want to use it in the workplace?

Leon Wilson:
Great question, and that question came up a couple of times in our talk. Part of it is human policing. Some of it, you can enforce through technology, through certain kind of tools, but sometimes it's just about writing that policy in place, creating a BYOD policy and then requiring all your staff members to comply with that or to sign off and understand it. A lot of it is education and then trying to do certain times, basic auditing and checking with people's equipment to verify that they are compliant with those policies. If you have the luxury of adopting technologies to enforce those rule, and some of them are very commonplace with Microsoft Exchange and Office 365, you can do some of those things. It costs you nothing to write a policy to put it in place, to enforce it.

Tony Martignetti:
There's actual verification? Are we actually going to look at their device and see that they've got on it what we are asking them to put?

Leon Wilson:
Well, imagine if you're working for a social services organization and you have health and human services information on there, and that information gets lost. Would you rather not go and once a year check and verify that they are in compliance with that as opposed to falling prey to a HIPAA compliance issue?

Tony Martignetti:
Okay. Dan, let's move to number two, a second one. I don't mean necessarily to be in sequence, but what's another one out of the seven?

Dan Rivas:
Another one that I think it falls in line with, it's a **[00:40:00]** bad habit that people just aren't really necessarily very aware of is, they're not always very discerning about which cloud platforms they're using. Often, people want to use Dropbox. It's easy. They probably have a personal account already. So, you jump on Dropbox and you're putting data files from your organization on there. The reality is that consumer-based cloud services just aren't as secure as ones that are oriented more toward business and enterprise type cloud service. So, people think they're doing fine. They think they're doing good. They trust Dropbox, but they don't really understand there is a difference between using that and a more business oriented—

Tony Martignetti:
Commercial. What are some of the commercial ones?

Dan Rivas:
Leon could probably list those off.

Leon Wilson:
Again, what we're talking about, rather than using the Dropbox, the personal version, use Dropbox for business or Dropbox for team. Rather than using GDrive, use GDrive as part of Google apps. Rather than using Microsoft One Drive that you get for free if you have an Outlook.com account, use it as a part of One Drive for Business as a part of your Office 365. You have greater securities. The IT department or whoever is your tech support provider has greater control over containing who has access to that information. Plus, you can retrieve that information more efficiently. Imagine if you, using your own personal Dropbox account and it's synced to five or six other different devices. When you leave that organization, how do we get that information back from your personal Dropbox account?

Tony Martignetti:
We don't.

Leon Wilson:
There you go. So, information's out there. Now, you're basically are storing your data in everybody's home on everybody's personal device. I don't know how many people have tried to retrieve a lot of information off of Dropbox personal accounts and been successful at it.

Tony Martignetti:
Okay. Thank you, because you named three resources right off the top of your head. Excellent. **[00:42:00]** All right. So, safer use of cloud services. Okay. What else have we got of our seven?

Leon Wilson:
Well, the one thing that we always harp on, and people get a chuckle out of it, but we have to deal with it is proper password management. Strong password, using stronger passwords and ensuring and requiring that your staff members, whether they're using their personal devices or if they're using company-owned devices to use strong passwords and not just using 123456 or password as their password. But also, changing that password periodically.

Tony Martignetti:
People are still doing that? Is that still out there?

Leon Wilson:
We show the chart. We show the chart, and still, 123456, password, nopass, are still the top passwords being used by most folks. Again, we think that we're past that, but we're really not. And what we're doing in our talk is really just reminding folks and educating them of the things that they know but they just need to be reminded of.

Tony Martignetti:
People, please. Have a secure password. Do not use 12345 or password. What was the other one, nopass?

Leon Wilson:
Nopass.

Tony Martignetti:
Do not use those. You'll be better than probably two-thirds of users if you just eliminate those three things. Don't use them. All right. Again, you're right. These are things we hear, but we're not doing it.

Leon Wilson:
Exactly. We're not doing it.

Tony Martignetti:
But it should be numbers. It should be symbols. It shouldn't be a word out of a dictionary.

Leon Wilson:
What a lot of people are talking about now is maybe using phrases. So, you can't expect your staff members to come up with a cryptic password like abJc123o@ and all that sort of stuff. But they can come up with a phrase. I always use the example of if you use BigM@cfries but capitalize the B and the M in Mac and then use an ampersand for the A in Mac. That is going to be far harder to crack than some more simple password. But you'll remember it.

Tony Martignetti:
Or maybe a phrase that's just known to you or your family. It's from your grandparents, **[00:44:00]** and then you choose the first couple letters of each word of that phrase or something.

Leon Wilson:
Exactly.

Dan Rivas:
And using symbols and numbers and those things to make it somewhat cryptic, still, because really what happens, you're lengthening the time it takes to crack your password. If they know, if it's just 26 characters, A-Z, they can do that a lot more quickly than if there's 26 characters plus 10 digits, plus then you have upper case and symbols. You just magnify the difficulty.

Leon Wilson:
Yeah. Absolutely, exponentially.

Tony Martignetti:
Okay. Give us another one, Dan. Throw something else out from our seven.

Leon Wilson:
Yeah. One that is another pretty basic thing, people aren't necessarily always backing up their data. They don't have a plan for—

Tony Martignetti:
Backup.

Dan Rivas:
Yeah. Disaster recovery. Not just the disaster where, say, a server breaks down or something gets erased, but real disasters. What happens if you have a flood and your servers get destroyed that way? A fire? Those sorts of situations?

Tony Martignetti:
Actually, at least year's NTC, I interviewed, I remember—you can search, listeners, if you want to find this one. Her name was Dar. Veverka. It was all about—do you know them? Do you know her?

Leon Wilson:
Yep.

Tony Martignetti:
You know Dar. It was all about your disaster recovery plan. So, that's was just one year ago. First of all, you've got to have a plan. It may not be airtight. It may not be hurricane-proof, but have a plan. Let's get started.

Leon Wilson:
That's the key thing, and we were saying that a lot of nonprofits have become more mature as far as backing up their data, but backing up your data is just one part of it. When you talk about disaster recovery, you're talking about protecting the entire environment. If your server crashed, it's going to take a lot longer to bring that server back up, depending on how you've been proactive in disaster recovery than just restoring the working files. **[00:46:00]** How long is going to take for you to get the operating system back up, apply all of the security patches and all that sort of stuff? Depending on the type of nonprofit you are, is that okay or not for you to be down a day, a week, two weeks? When we talk about disaster recovery, we're talking about, you've got to go beyond just backing up the data. You've got to be concerned with the environment as a whole and what is your what-if analysis for if this were to occur, what are we going to do?

Tony Martignetti:
Yeah, okay. Dar even went into the possibility that some organizations may need offsite places to go. You've got to have some place rented or have a shared agreement for when you need it in an emergency for physical location.

Leon Wilson:

It is conceivable. Obviously, going to the cloud has helped out tremendously as far as people can still, if they're storing in their information in the cloud, using Google apps, Office 365, things of that nature. They have access to their working files and they can still use things like Microsoft Office or Google Docs and things of that nature, but if you're trying to get to your donor management system, and hopefully that's in a cloud as well, but there might be still some things that are on that physical server. What happens if that server was to crash? Or the building that you're operating out of is in accessible?

Tony Martignetti:

Or loses power?

Leon Wilson:

Yeah.

Tony Martignetti:

Okay. Excellent. What else you guys got?

Leon Wilson:

Well, one of the things that we also talked about that we wanted to touch on was about software management. This is about basically ensuring that when you're doing software updates, patch updates, and things of that nature, that you do it in an intelligent manner. Not every update is a good update, and a lot of the hackers these days are going through the Adobes, the Java VMs and things of that nature. You want to be mindful of that, and you want to make sure that if you're allowing people **[00:50:00]** to download software and do updates on their own, what are your provisions around that if they're actually downloading malicious software? We talked about again, more policies, the potential of actually locking down the workstations and requiring an IT person or tech support person to basically whitelist that particular software patch updates before it comes down? Because once you do that, then it will help out with office productivity.

Tony Martignetti:

Okay. Anything else, Dan, you want to add about the software management side?

Dan Rivas:

No. I think that covers it pretty well.

Tony Martignetti:

Okay. I don't want to go through these too fast.

Leon Wilson:

No. That's quite all right.

Tony Martignetti:

Feel free to elaborate.

Leon Wilson:
I will share that one thing that, in the audits when we were giving this talk, the thing that came up a lot is security, especially when you start talking about cyber security. They said, well Leon and Dan, if you're telling us we have to have stronger passwords, if we have to be responsible about where we're storing our data in more business-grade cloud storage solutions as opposed to consumer-grade cloud storage solutions, what does that say for cyber security? What are your thoughts on cyber security? Were we were sharing with them is that we feel that a lot of the cloud storage, a lot of the cloud vendors, are doing a decent job as far as doing that. What we need to start looking at when we start talking about password management is looking to some of the cloud password management solutions out there, because now we're requiring our staff members to remember five or six or seven different passwords. Because they log into their computer one way. They log into Google apps using another password. Because we now no longer have single sign on anymore. So, they were asking questions regarding that. We were giving them recommendations on tools like LastPass and so froth.

Tony Martignetti:
Okay. Let's not gloss over this now. LastPass?

Leon Wilson:
LastPass. It's one of those cloud password management solutions, and there's two or three others that are out there, if you go out there and Google them. But what they allow you to do is almost like a password vault. **[00:52:00]** You can upload a key and all your primary passwords and then you have one master password with some kind of token key that allows you to then login one time and then those solutions will then log you into your Office 365. Those solutions will then log you in, because they hold into your credentials. So, as we're now moving into this more hyper mode where we still have to log into a local network but we have a lot of our systems out in the cloud, we have to now deal with how we're managing our passwords across both in the cloud and on premise.

Tony Martignetti:
Okay. How about Dashlane? Either of you familiar with Dashlane password management?

Leon Wilson:
Yep. It's in that same camp. It's in that same camp with LastPass and so forth. There's two or three that are out there. Okta is another one that's out there that a lot of people are trying to use for single sign on between their Microsoft Active Directory network as well as in the cloud. Some of them tie in with things like Salesforce.com, embraces these kinds of things. So, the more major players out in the field, the major software vendors, are making sure that there are cloud management solutions being able to be accessible through these cloud password management systems.

Tony Martignetti:
Okay. Cool. Dashlane, LastPass, Okta. Okay. Any other one you want to shout out as worthy?

Leon Wilson:
There was another one called—

Tony Martignetti:
Worthy of Nonprofit Radio listeners, now.

Leon Wilson:
Oh, yeah. OnePass.

Tony Martignetti:
That's a high threshold.

Leon Wilson:
Yeah. OnePass is another one as well.

Tony Martignetti:
OnePass. Okay. All right, cool. Very good. What else? What else is in our list of seven?

Leon Wilson:
The other thing that we talked about, it kind of coincides, we already talked about personal computers.

Tony Martignetti:
Right. You introduce it, but I'm going to let Dan talk about it. Go ahead.

Leon Wilson:
Exactly. Dan, if you want to talk about, we were talking about the mobile devices and so forth, and the issues that come with that.

Tony Martignetti:
Mobile.

Dan Rivas:
Right. We talked about bringing your own device, whether it's your PC or your laptop. Similar concerns with mobile devices. You need policies in place. You need to make sure that there's a reality that people are using their phones, their tablets, for work. **[00:54:00]** We're taking our work everywhere now. So, how do you manage that? There's a reality there that everyone's probably living with on some degree. How do you minimize the risk and manage it so that you're comfortable with how people are using their mobile devices for work?

Tony Martignetti:
Okay. How do you?

Dan Rivas:
How do you? Well, I think some of those things that we've already talked about, making sure you have antivirus software on your phone, is a really important thing. You'll be able to manage on some level the device so that if someone, say, leaves your organization that you can either—it's complicated, potentially, but you potentially could delete some of the information, in particular apps. You're not likely probably to be able to delete their whole phone, and that's probably good for everybody, but just having a little bit more control on how people are using their mobile devices when it comes to work. Leon mentioned he's sort of old school, and I think maybe very prudent in the sense that he has his personal device and he has a work device, and he keeps those separate. I think for an organization, if you can do that, it really is the most prudent approach, because the reality is, you can't control someone else's device. They're passing it around with their family. Someone borrows it to look something up or use the phone. That data can travel, is the reality. So, you have to think about that risk, and if your organization is willing to take that risk or if it needs to take some steps to minimize that.

Tony Martignetti:
Okay. We have time for one more. Dan, you want to introduce the last one?

Dan Rivas:
Yeah. The last one is a lack of network security. So, we often are using Wi-Fi. You have a router, but did you make sure to set a unique password for that router? **[00:56:00]** Or are you just using the factory setting and in just admin? Which is public. Anyone could look that up and get on your router at any time. Things like that, making sure firewalls are in place. Making sure your network is secure throughout. I think Leon could probably go into more detail.

Tony Martignetti:
You want to add any more about network security?

Leon Wilson:
The one thing is, it's a multilayered approach. So, you have to have the external protection with your firewall, but that's also where you need to also maybe have a firewall running at the PC level as well, along with the AV and malware software. Additionally, what we were talking about is, if you're providing Wi-Fi access within your organization, you definitely want to have a separate Wi-Fi space for guests, contractors, visitors, and things of that nature versus staff.

Tony Martignetti:
You should.

Leon Wilson:

You definitely want to do that, because again, if you have people just coming in off the street in public and brining in their laptops, you don't know what's running on their laptop. Again, it goes back to a lot of the other issues we were talking about. It's like bringing another personal workstation in there.

Tony Martignetti:
So, have two Wi-Fi networks.

Leon Wilson:
Exactly. You want to have a separated one, where even if you give them a password to login, that password maybe times out after two hours or three hours before they have to reauthenticate separate from your staff, where they are always going to be able to go on and have constant access to it. You want to keep it separated.

Tony Martignetti:
Okay. We're going to leave it there.

Leon Wilson:
Okay.

Tony Martignetti:
Cool.

Dan Rivas:
Sounds good.

Tony Martignetti:
All right. They are Leon Wilson, chief technology and information officer at The Cleveland Foundation, and Dan Rivas, managing writer for Idealware. Gentlemen, thank you very much.

Dan Rivas:
Thank you.

Leon Wilson:
Thank you very much.

Tony Martignetti:
I have to highlight an intent swag item. We're doing that each interview, and I neglected to do it in the beginning. We have this USB flash from Tech Soup. We add that to the pile over here. You might have thought we just have a messy set. That's not true. This is the intent swag pile. Very well organized.

Dan Rivas:

Cool.

Tony Martignetti:
See? Tony Martignetti Nonprofit Radio coverage of NTC '16, the 2016 Nonprofit Technology Conference. Thank you so much for being with us.

Dan Rivas:
[00:58:00] Thank you.

Leon Wilson:
Thanks.

Tony Martignetti:
Next week, Zombie Loyalists. If you missed any part of today's show, I beseech you, find it on TonyMartignetti.com. We're sponsored by Pursuant, online tools for small and midsize nonprofits, data driven and technology enabled. And by We B-E-E Spelling, super cool spelling bee fundraisers. Webeespelling.com. our creative productive is Claire Meyerhoff. Sam Leibowitz is the line producer. Gavin Dahl is our AM and FM outreach director. The show's social media is by Susan Chavez, and this great music is by Scott Stein of Brooklyn. Be with me next week for Nonprofit Radio, big nonprofit ideas for the other 95 percent. Go out and be great.

[00:58:50]

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