

# Re-Visiting Technology for Remote and Hybrid Workplaces

Presented by Karen Graham for Hartford  
Foundation for Public Giving

# A few notes on our Zoom platform

---

You will be muted by default, to reduce background noise.

Please use Chat to answer prompts and ask questions.

Closed captioning is available (see More... menu).

We will take questions throughout via Chat, and there is also dedicated Q&A time at the end.

# Which statements describe your workplace? (choose all that apply)

---

- We have a single office location.
- We have multiple office locations.
- We have no physical office.
- We require people to work on premise at least one day a week.
- We let people choose whether to work on premise or remotely.
- Some people work on premise most or all of the time, while others work remotely most or all of the time.

**POLL**

# Think back to the beginning of the pandemic...

— — —

What changes did you make to your technology setup at that time?

If you knew then what you know now, would you have done anything differently?

## CHAT



Photo by Ketut Subiyanto: <https://www.pexels.com/photo/photo-of-mother-working-at-home-4473903/>

# What we'll cover today

---

**People: understanding staff needs and winning their support**



**Technology: optimizing your toolset for the long term**

**Process: updating policies and procedures to fit a new way of working**

# CHAT



**Karen Graham**

Karen Graham Consulting

[karen@karengrahamconsulting.com](mailto:karen@karengrahamconsulting.com)

612-314-9304

- 20+ years in nonprofit tech
- 9 years as a fully remote senior leader
- Helps nonprofits with technology strategy
- Writes and speaks about leadership and organizational development in the digital age



# What's different about the age of remote work?

**CHAT**

## Changes we like

- Less commuting
- Broader access to talent
- Collaboration across geography



## Changes we don't like

- Isolation and distrust
- Harder to find out what's happening



# What's the same?

---

Team members need to collaborate on documents, have meetings, and share ideas and knowledge.

The organization needs to protect itself.

Team members need technical support, and their equipment needs maintenance.



It's time to upgrade  
and integrate  
productivity and  
communication tools.

# File share

---

Teach and enforce expectations about naming, organizing, and storing files on the network.

Share links - not attachments - at least internally.

Use collaborative editing features.

# CHAT

A few decent tools:

SharePoint/OneDrive

Google Drive

Box

DropBox

# How well is your org using the file share platform?

---

- Everything is organized and we use advanced features like document retention and metadata
- People mostly use it but keep some files on their desktop or elsewhere, and/or files are hard to find
- Hahaha it's complete chaos

**POLL**

# Collaboration tools

---

Move from free individual accounts to enterprise accounts.

Choose tools that fit with the rest of your tech ecosystem.

Push for full adoption.

A few decent tools:

Teams

Slack

Asana

Basecamp

Trello

Microsoft Project

Todoist

# Phone system

---

Eliminate hardware

Get everyone on the same system; consider consolidating

Fine tune auto-attendant, call forwarding, transcription

A few decent tools:

Teams

Google Voice

Zoom

RingCentral

EvolveIP

Webex

# Meeting platform

— — —

Upgrade microphones, cameras, and lighting

Get everyone on the same platform

Consider privacy and accessibility

A few decent tools:

Zoom

Teams

Skype

Google Meet

Discord

# Tips for asynchronous and remote collaboration

---

Take advantage of capabilities e.g. whiteboards, digital signatures

Build in unstructured time, face time

Brainstorm virtually, decide in person

**BREAK-  
OUT?**



**Don't stop at tools;  
update your practices  
to reduce risk.**



# Update policies and procedures

— — —

Rethink BYOD

Onboarding and offboarding procedures

Data privacy, encryption

Timekeeping? Supervision?



## IT Policy Builder

Formalize your organization's policies with help from one of our tech advisors resulting in a **comprehensive computer use policy** reducing vulnerability to security and legal threats. Our process begins with the completion of a worksheet that describes any current policies in place. Then, our tech advisor reviews the details and makes recommendations, or provides solutions to fill in missing or incomplete areas. Policy topics included are:

- Acceptable use
- Bring your own device
- Data security
- Incident response
- Disaster recovery

The result is a comprehensive document that **meets the standards** required for most nonprofit organizations. Please note this plan does not include regulatory requirements specific to HIPPA, FIRPA, etc. If your nonprofit requires more complex policies to include these requirements, we will work with you to create a customized plan.

Need help updating policies?  
<https://offers.techimpact.org/en/it-policy-builder> (\$250)

# Improve security

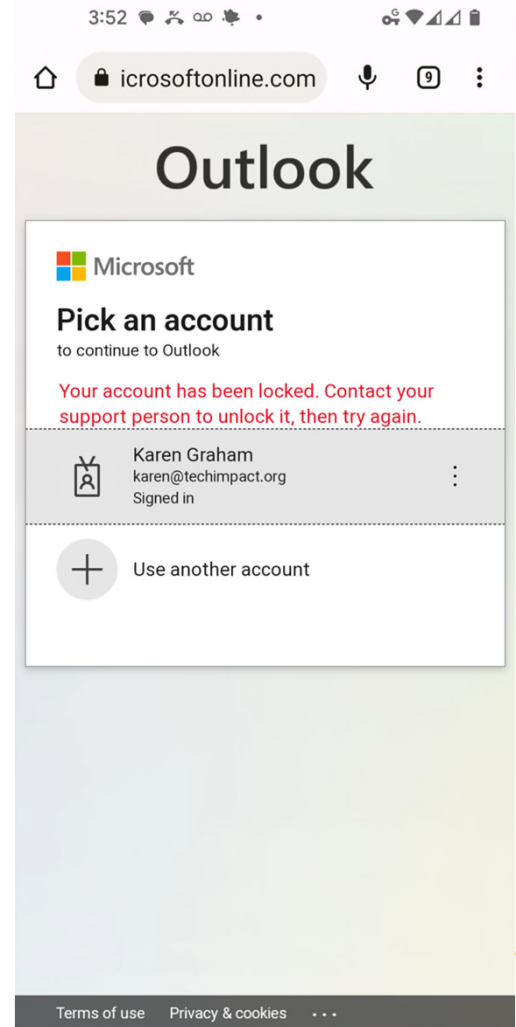
---

Larger/more varied attack surface

Lock devices, use MFA and device management tools

Incident response

**CHAT**



# Update support practices

---

Be clear on what support you provide for employee-owned devices

Procedures for requesting support, getting repairs

Consider teaching employees basic troubleshooting/maintenance

**Involve the right  
people if you want to  
succeed.**

# Who should be involved?

---

IT professional

HR

Board of directors (risk management)

Legal counsel

End users/employees



Photo by cottonbro studio:  
<https://www.pexels.com/photo/two-women-and-man-talking-3201718/>

# Wrap-up

---

What's your key take-away from this session?

Questions?

Evaluation survey

## More learning resources

[Hartford Foundation's Strategic Technology Program](#)

[NTEN, the Nonprofit Technology Network](#)

[Tech Impact's Technology Learning Center](#)

[TechSoup Courses](#)

**CHAT**

# Thank you

---

Materials are copyright 2023 Karen Graham and provided to Hartford Foundation for Public Giving under a Creative Commons [Attribution-No Derivatives](#) license.