



Managing and resourcing your IT function and cake

17 May 2023

About Adapta

- We are a **specialist** information systems consultancy
- We only work with **charities**, associations, trusts and others in the not-for-profit sector
- We are completely **supplier-independent**
- Our consultants have held **senior** positions in a broad range of different organisations
- Our advice and guidance is based on **practical experience** gained over many years

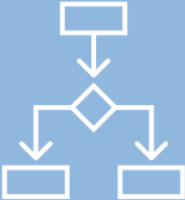
About Adapta



Digital, Data & Technology Strategies



Reviews & Health Checks



Business Processes & System Requirements



Supplier & Solution Selection



Interim Technical Leadership



Programme & Change Success



Risk, Compliance, Data Protection & Security



Governance & Business Cases



Digital Workforce & Operating Models

Programme

- 14:00 **Arrival and welcome**
Welcome - introductions and overview of the agenda for the afternoon.
- 14:10 **Technology Capabilities**
Adapta Consulting
- 14.40 **Presentation 1**
David Locke, Director of Finance and Operations, and Ryan Jarvis, IS Manager,
Royal Agricultural Benevolent Institution
- 15.05 **Tea/Coffee and cake**
- 15.20 **Presentation 2**
Elizabeth Harvey, Director of Parish Support, Governance and Administration,
and Lucy Norbury, Parish Services Manager, Diocese of Salisbury
- 15.45 **Roundtable discussion & feedback**
- 16.30-
17.00 **Review & close**

Managing and Resourcing Technology

- ❑ What technology capabilities do you need?
- ❑ What are your sourcing options?
- ❑ Managing technology resources
 - Outsourced
 - Insourced

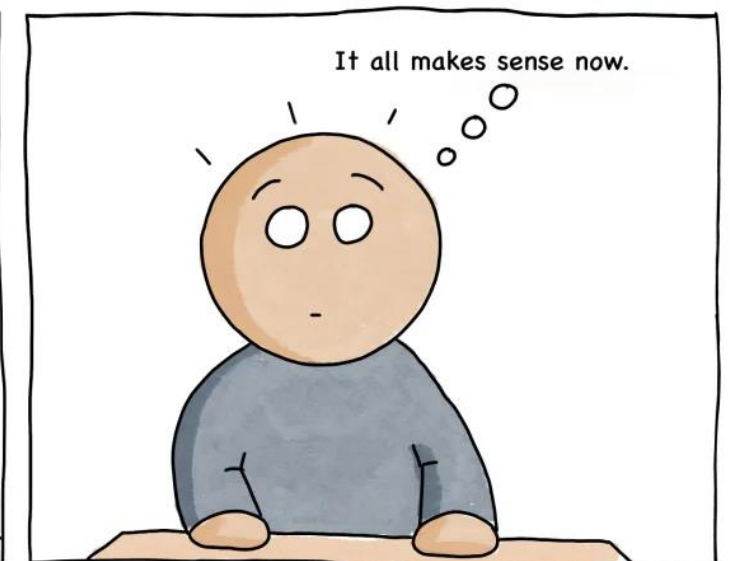
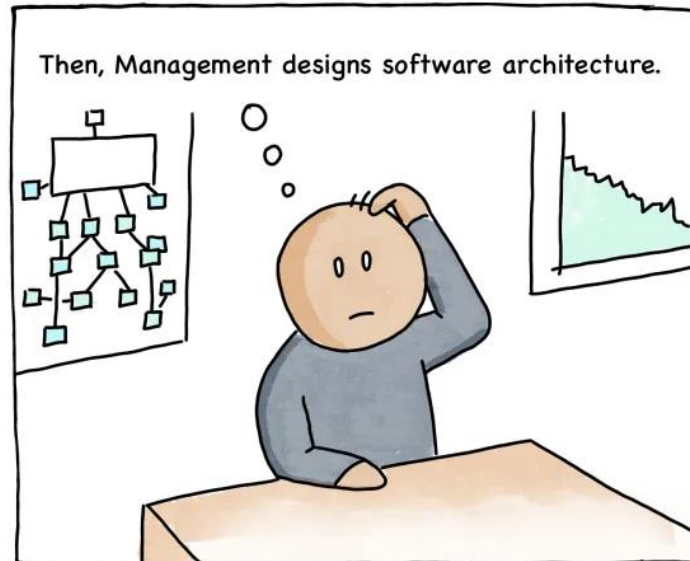
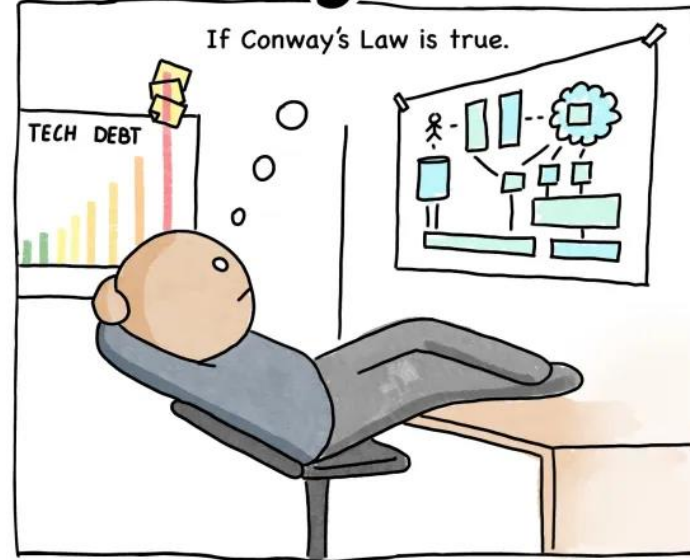
Conway's Law

The structure of your organisation influences the structure of your software architecture.

For example HRIS systems are functionally scoped to fit the accountabilities of a typical HR team.

But CRM systems are not scoped to fit the accountabilities of any team. How many organisations have a supporter engagement team?

Comic Agilé



Staff Experience

A key measure of the impact or value your technology resources is staff experience.

Employees' take on tech is different from their leaders'



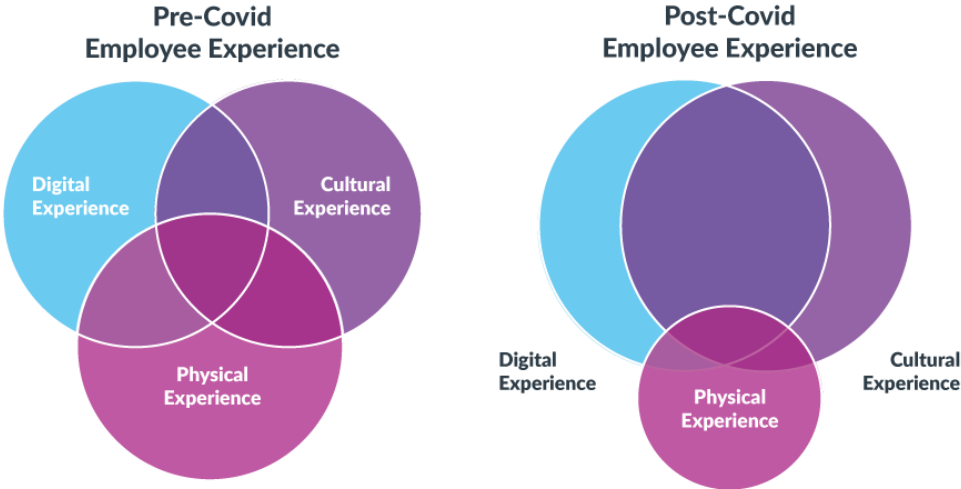
90% of C-suite executives say their company pays attention to people's needs when introducing new technology.



53% of staff say the same.

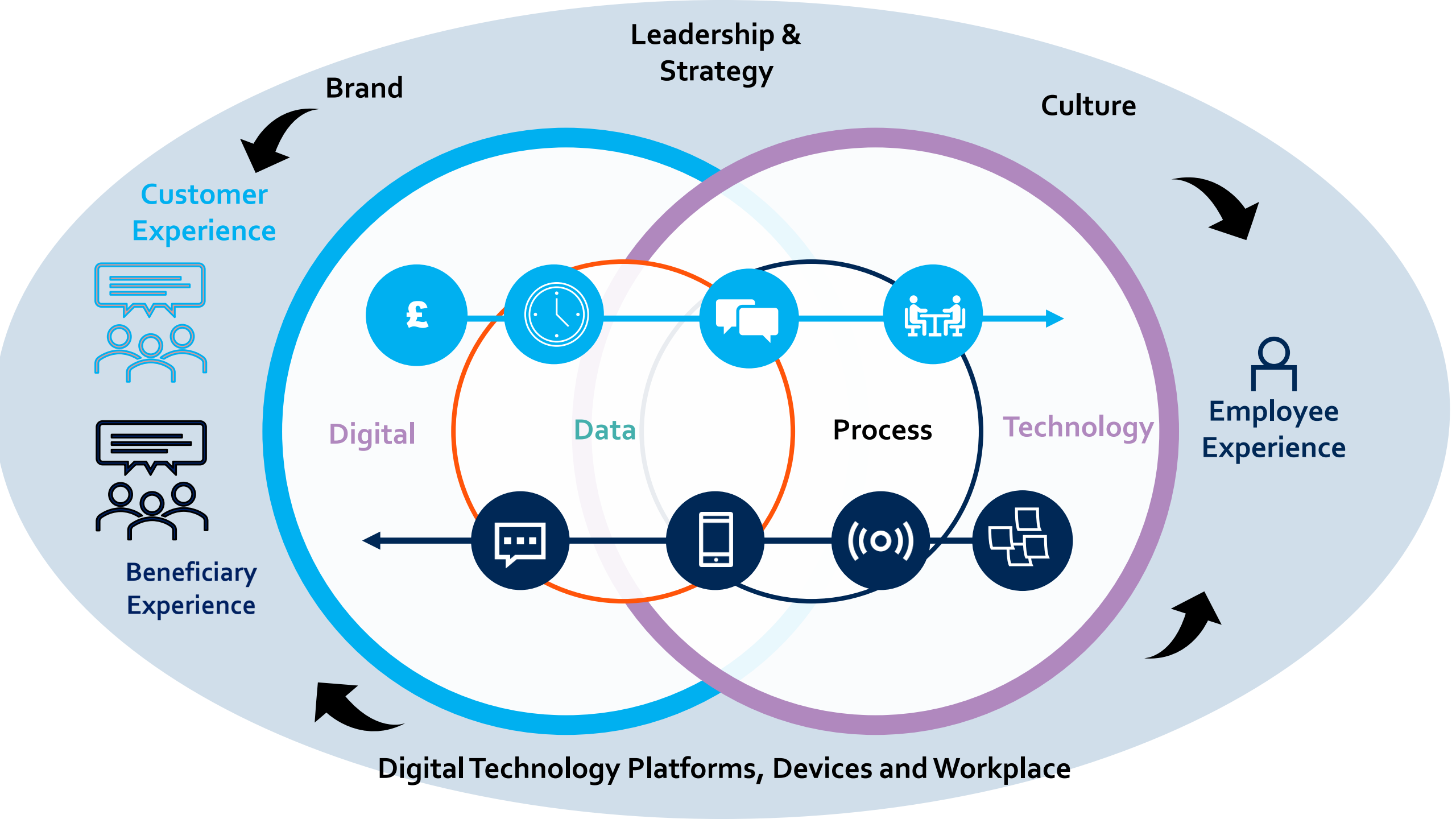
■ C-suite Executives ■ Staff

Digital Employee Experience Is Gaining Importance

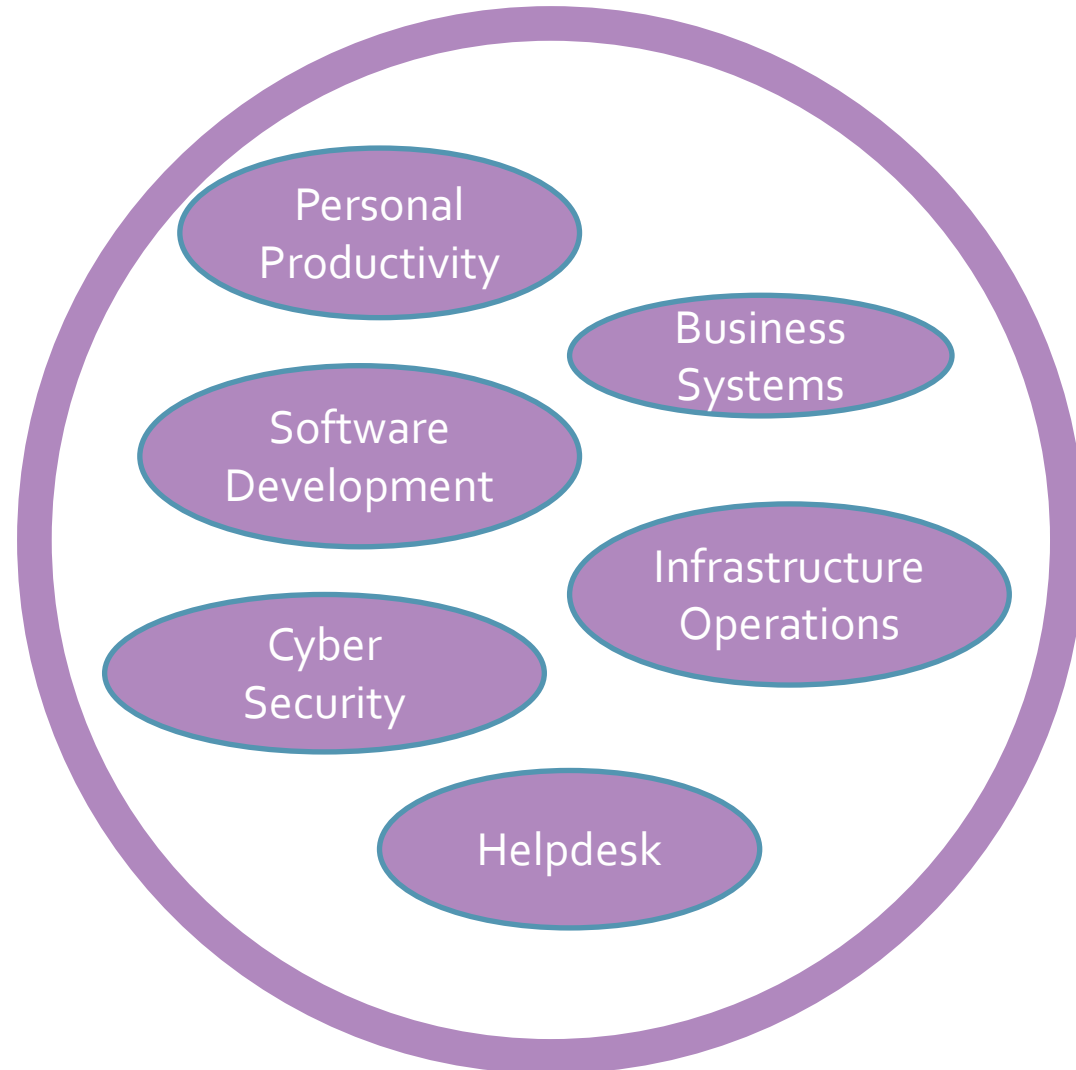


AIHR ACADEMY TO INNOVATE HR

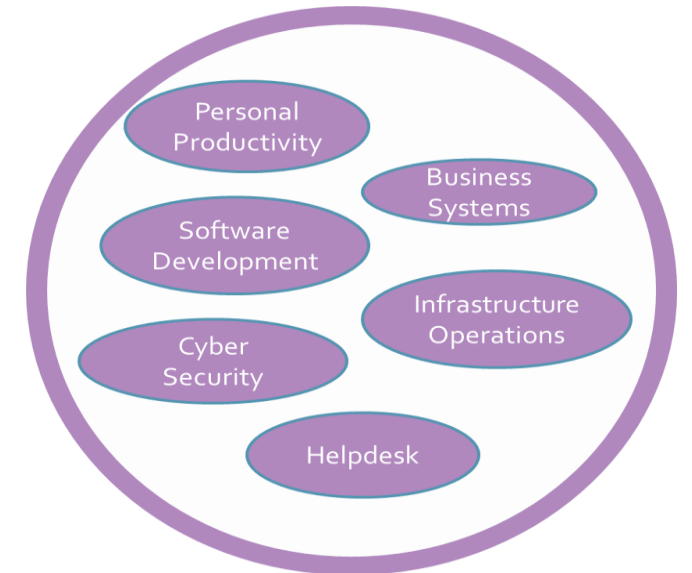
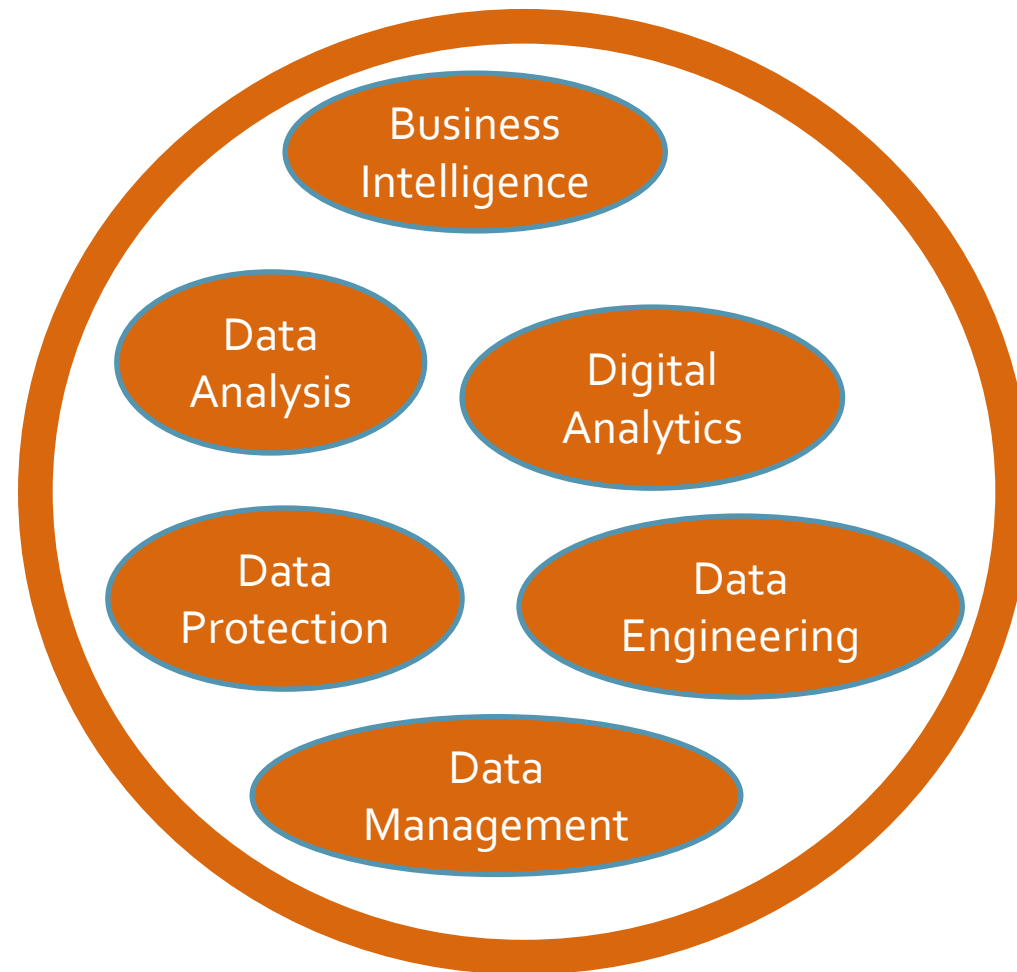
Base: 12,287 full-time employed adults. Q: Rate the degree you agree or disagree...My company pays attention to people's needs when introducing new technologies. Source: PwC's Consumer Intelligence Series, October 2018.



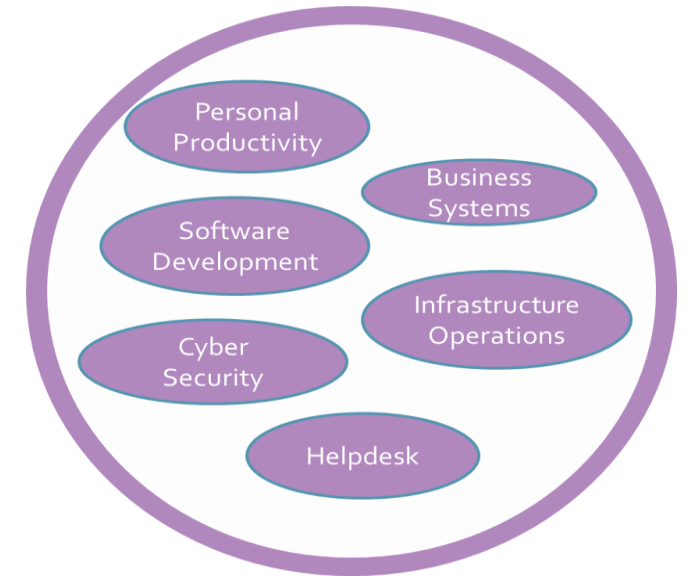
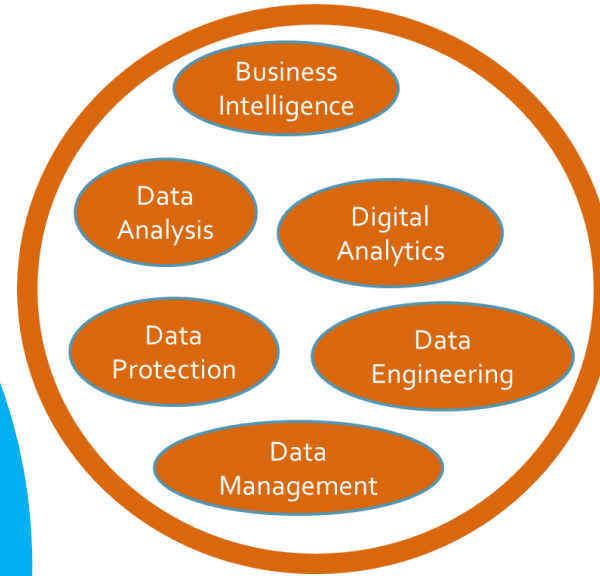
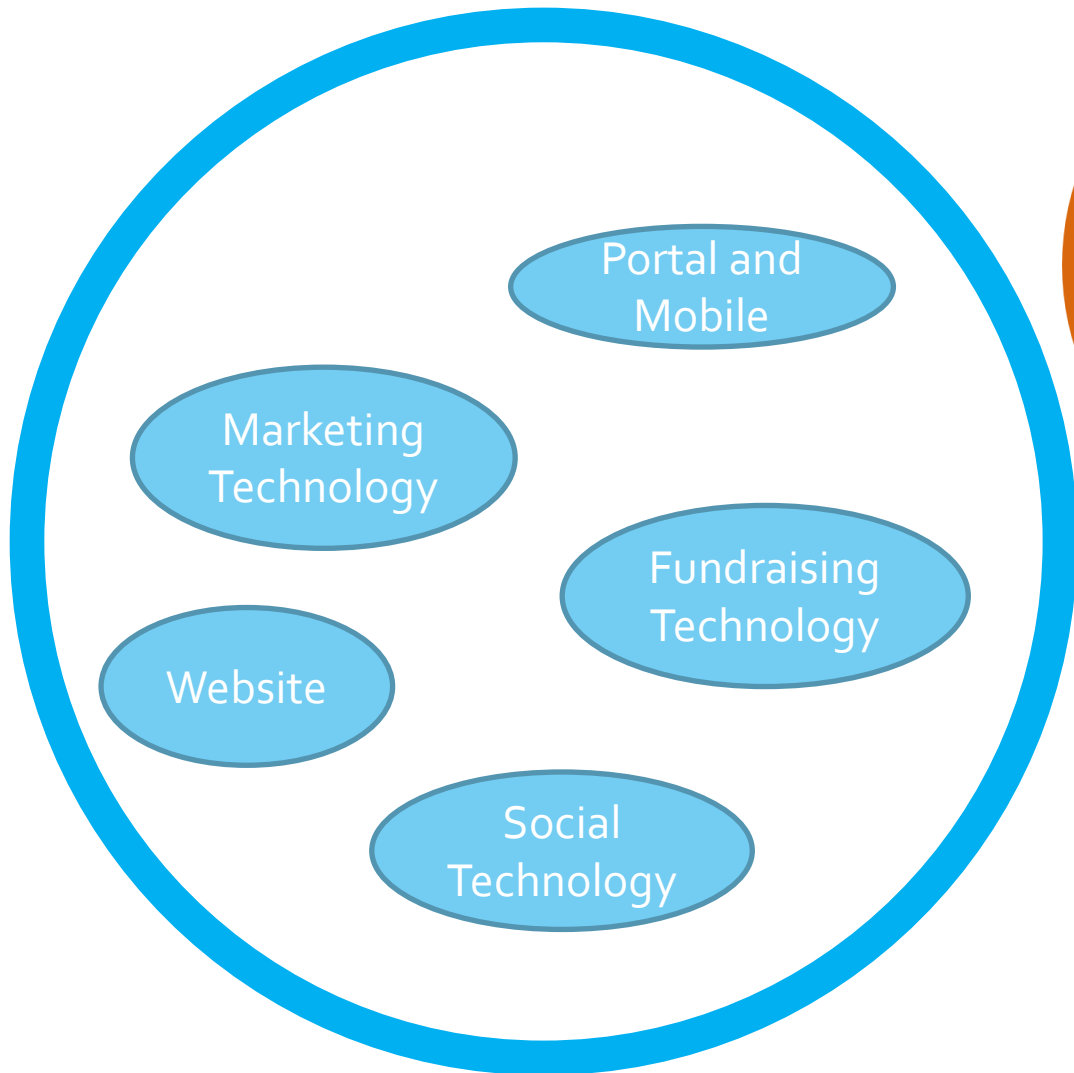
Technology Capabilities



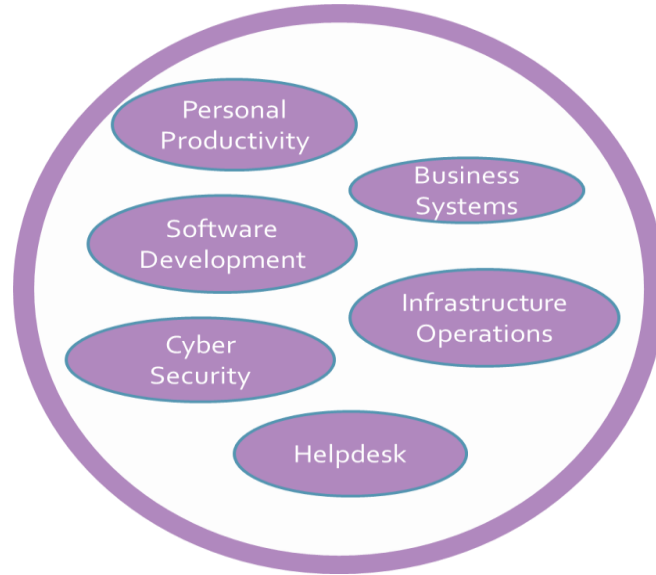
Data Technology Capabilities



Digital Technology Capabilities



Adjacent Capabilities



Digital Marketing and Events

Staff Training and Literacy

Project Management

Content and Document Management

E-Commerce

M&E/Impact Reporting/ESG

Do I have the right capabilities?

Indicators that you may not have the right capabilities.....

Technology has poor reputation

- Lack of understanding of staff real needs
- Lack of clarity over who is accountable for what
- Insufficient resources (staff, finance, skills)
- Capabilities focus on “lights on”/”break-fix” and this may still be problematic

Staff use of systems is limited as is business driven innovation

- Business teams don't know where to start
- Poor staff and management digital literacy
- Limited digital technology leadership

Data, Information, Documents and Content poorly managed

- Thought of as a “collective accountability” rather than a business capability
- Data is not central to the majority of your operations
- Content is published, not analysed.

Technology, Data, Digital and Business Silos persist

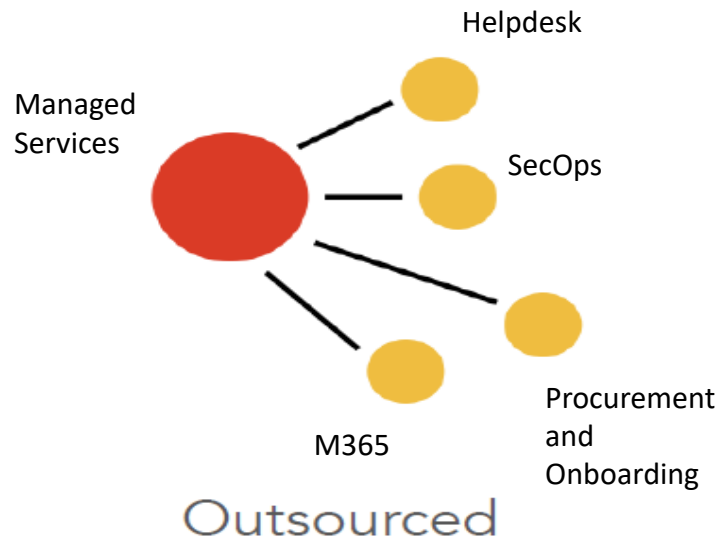
- Capabilities grow in siloes rather than considered for the whole organization
 - Technology evolution is ad-hoc, tactical, sourced by individual departments, lacks overall vision and strategy and is less than the sum of it's parts.
 - Genuine digital transformation often begets the need to reconsider existing SMT and staff accountabilities to support the redistribution of digital, data and technology capabilities.....
-

Managing and Resourcing Technology

- What technology capabilities do you need?
- What are your sourcing options?
- Managing technology resources
 - Outsourced
 - Insourced

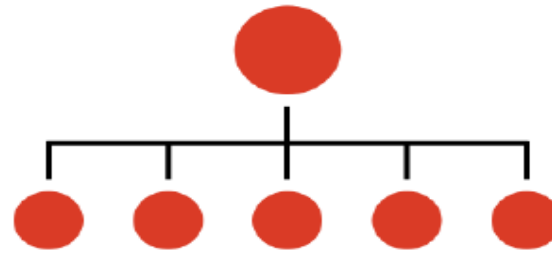
Sourcing Options

From full service outsourcing....
...to ad-hoc work out-tasking



Structure Options

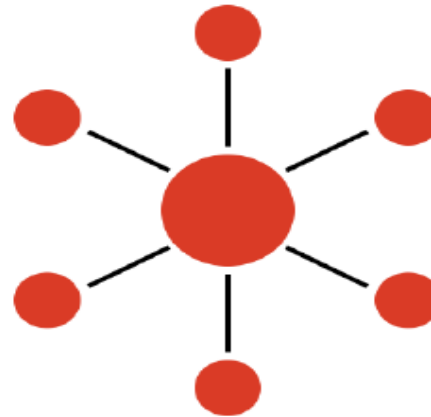
From centralised and governed....
...to distributed and self-organising



Centralised



Decentralised



Hub and spoke



Holistic

Your Situation

Culture:

- What is the culture of your organization? Is it cooperative, traditional, competitive, or innovative?

Workforce Considerations:

- Do you have existing staff that could develop into new roles? Can you easily contract consultants or third parties to quickly buy in short term capability needs? Are your technology staff motivated by working for your organization? Can you retain high skills technology staff?

Control & Governance:

- Are senior leaders willing to release decision-making authority over cross cutting technology (such as web, data or CRM) concerns?
- What type of decisions needs to be governed centrally? Where does the budget sit

Financial Perspective:

- Are you trying to save money or improve effectiveness?

Business Perspective of IT:

- Is technology viewed more as a commodity (an order taker) or is technology a value creator (an innovator)? How entwined is the capability with day to day operations?

Provision of Services and Value Creation

- Do you need 24x7 service provision (internally or for external on-line commerce or services)? Better than acceptable security operations?
- Are you supporting external digital services? Have high volume/low risk appetite internal services?

Implications for Technology Resourcing

Certain cultures may lean toward particular technology operating models. For example, a more innovative organization may prefer a less centralized technology model.

Talent inside your organisation could be developed to build technology capabilities internally (if you can retain); conversely a lack of digitally savvy staff may lead you towards outsourcing capabilities.

SLT agreement is needed to endorse the right balance between centrally and departmentally managed technology resources. This will directly impact what you can “package up” and source from both corporate and departmental perspectives. .

Outsourcing is about getting high quality capabilities delivered at a market driven cost. In sourcing is about getting capabilities delivered to an acceptable quality delivered at a cost you can control (and thus afford).

Commodity services are easier to outsource and provide internal headspace to support business change. A more transformative agenda begets more internalized capabilities closely aligned with the business

The stricter the service and security bar the more challenging internal service provision will become especially in a 24x7 context. High volume, routine services are arguably ideal to out-task. Conversely a more fluid, personalized service is less possible with outsourced models.

Managing and Resourcing Technology

- What technology capabilities do you need?
- What are your sourcing options?
- Managing technology resources
 - Outsourced
 - Insourced



Tips for managing outsourced arrangement

Be an intelligent customer



Be an intelligent customer:

Take time to understand and define what you need and communicate your vision with the supplier.

Choose a supplier that has a low staff turnover and invests time to understand the nuances of your organisation. Connect them to key internal staff that they may co-create value with.

Ensure a practical commercial arrangement



Practical Commercial Arrangement: Define and agree an SLA / KPI's that matter to you. Be open to extending the service, if required, to bridge gaps, rather than sticking to something as contracted.

During contract negotiations, consider financial penalties or credits for service breaches (and be clear when they are triggered).



Let them be your ~~IT Service's supplier~~ technology partner



Proactive management:

Do not skip review meetings just because you have their report or because there are no issues, review meetings build the relationship and allow to discuss both 'blockers' and "opportunities" to develop the service or evolve the technology.

Get them to brief you at least once a year on new technologies and services they may offer.



Maintain complementary capabilities internally



Maintain complementary capabilities internally:

An outsourced service is never a “procure and forget” service. For example, you need to have the skills internally to test web development or exploit Office 365

When there are issues, the ‘supplier’ may need to liaise with key staff to diagnose the root cause of the issue.

Dealing with multiple parties

(Suppliers / sub-contractors / third parties)



- When you have an issue where its not clear where the fault is, they may point to each other instead of taking responsibility for the issue.
- Someone will have to “referee” and bring parties together – who is this person?
- Putting aside ‘blame’ and ‘cost’ will facilitate them working collaboratively to get things back up and running – a “post mortem” can then be done afterwards...

Develop your internal capabilities..



Knowledge Management: A lot of issues that get reported to the 'supplier' are not really issues but rather a lack of knowledge with the way the system / service works (especially with new staff). It is therefore important to build training resources , identify superusers and maintain internal knowledge.

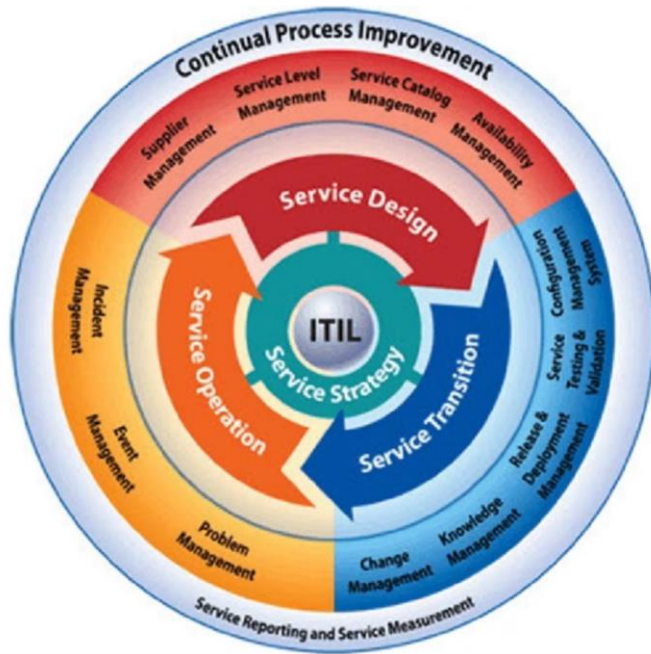
Addressing such issues can reduce (significantly) call volumes (and perhaps costs). You may even want internally technology resources to use the supplier ticketing system/ support initial triage.



Tips for managing inhouse capability

Decide what services you will provide..

- A lot of the key elements from managing an outsourced service still apply when managing it as in inhouse service;
 - Define what you need and communicate your vision.
 - Define and agree an SLA / KPI's that matter to you.
 - Regular reporting and monitoring, review meetings.
 - Training to keep staff developed with new skills
 - Establish internal governance for technology and data
- Use recognised skills and competency framework for the digital world eg. the IT Infrastructure Library (ITIL), Skills Framework for the Information Age (SFIA), which are an enabler for people who manage digital resources. Can be useful to objectively identify competency based issues and support internal staff development.
- Establish a business engagement model such that all demand is captured and there is regular outreach to all key stakeholders



Organise your staff and environment...



- Make sure your team can deliver what you have promised; you may still need access to 3rd party expertise platform tech support.
- Offer multiple ways staff can engage with your team for urgent help and to learn or develop the technology.
- Consider the need for a service catalogue (that clarifies what services you do provide)
- Agree key (shared) processes eg joiners/movers/leavers
- Build a knowledge base / self-service portal and empower users (give them rights) to resolve their own issues rather than logging another support ticket.
- Use Helpdesk software.

Continually Improve...



- For direct reports, work out what style of relationship will work best eg. coaching, empowerment, targets etc.
- Make greater use of analytics to power data driven decision making
- Invest in training to equip your team with the skills they need to succeed.
- Empower teams to self-develop their digital capabilities in line with their technology skills.

RABI

helping farming people



Managing and resourcing your IT Function

David Locke and Ryan Jarvis

Wednesday 17 May 2023

Who are RABI?

- Provide tailored support to members of the farming community
- Including those who are no longer able work due to ill health, accident or age
- Financial support
- Mental health counselling
- Guidance
- Support well-being
- Oldest & largest farming charity
- Since 1860, in 2020 we celebrated 160 years
- Multi Charity Award winner in 2022



Starting point

- Sage Line 50 (PC version)
- Old MS Access databases for Core Systems (Service and Fundraising)
- Paper...lots of it and in duplicate!
- Small PC screens and poor equipment
- Low grade Wifi and Network system
- Many old servers...



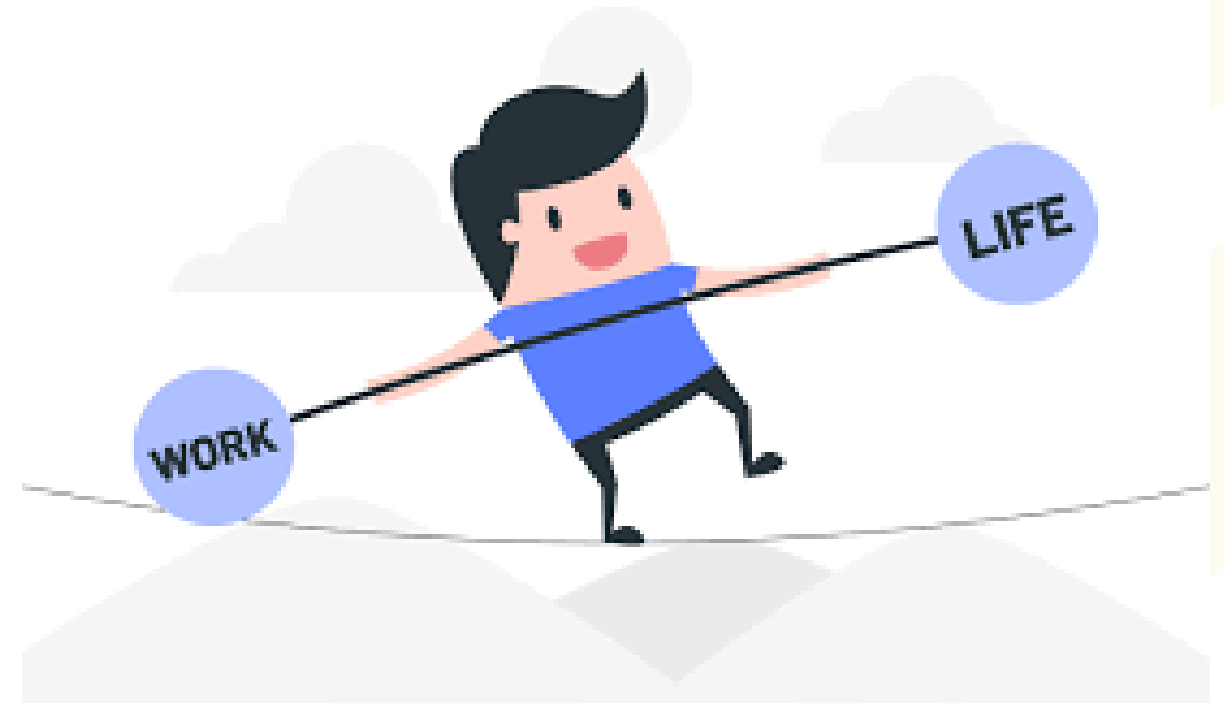
Our model: In House and outsourcing

In House	Outsourced
Business Partner Advice	Out of Hours cover
Strategic Planning	Network Security Monitoring and Systems
9 to 5 support desk for users (First Line)	Database/Software Package updates
Small projects	3 rd Party Support
Project Management	Security audit review
Build new devices (Windows & mobile devices)	Backup and Recovery
Ordering new equipment	

Looking for that optimal blend

Looking after our People

- Integration into Leadership Structure (SLT)
- Opportunity to share at Board level
- Training and Development
- Work Life Balance and Flexible working
- Open conversations re long term career path
- Good equipment and software
- Interesting projects
- Respect and Recognition
- Social activities



The Takeaway – Lessons Learnt

- CEO, Directors and Board sponsorship
- *“Not everyone will make the journey”*
- IT infrastructure
- Buy product “that has legs”...
- Quick and Tactical Wins
- Long term partnerships
- Selective use of external expertise
- Training and Development of IS Staff
- IT Roadmap and integrated into Organisation Plan
- Networking in the Sector





Managing and resourcing your IT Function

Wednesday 17 May 2023

Diocese of Salisbury – Case Study

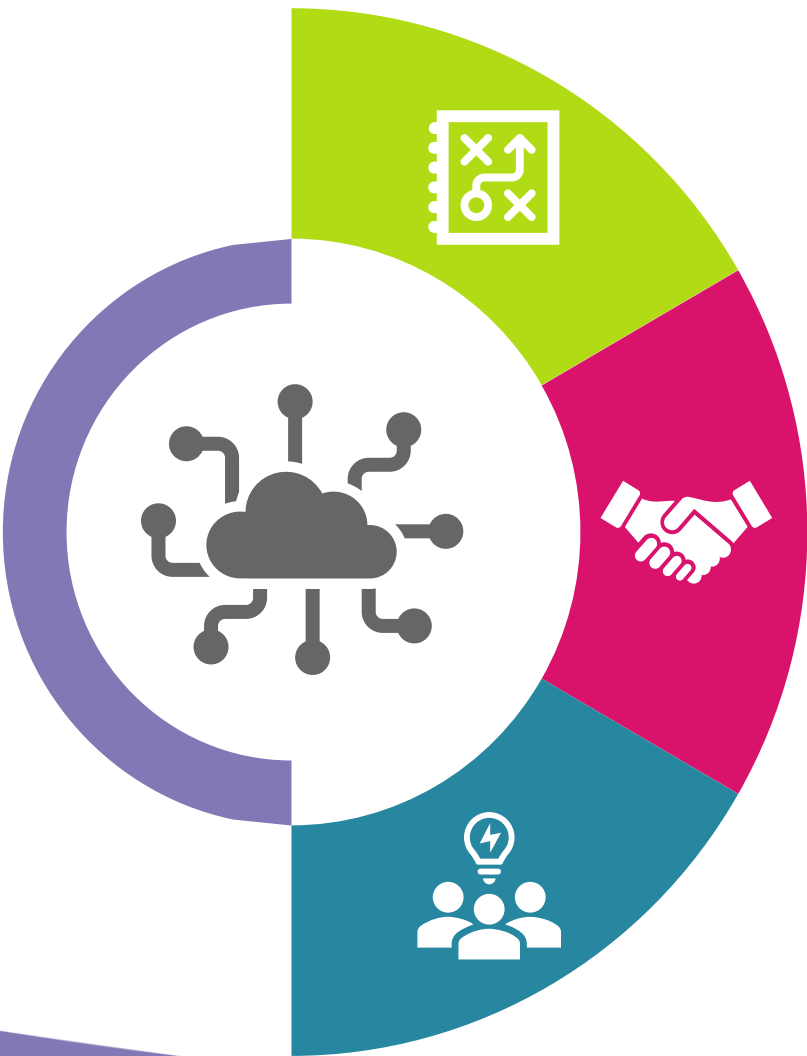
Managing and resourcing your IT function
Adapta event – 17 May 2023

IT Resource challenges

- Capacity
- Capabilities
- Operational and internally focused
- Budget
- Lack of market / industry trend awareness
- No IT Roadmap



Developing IT capacity and capabilities



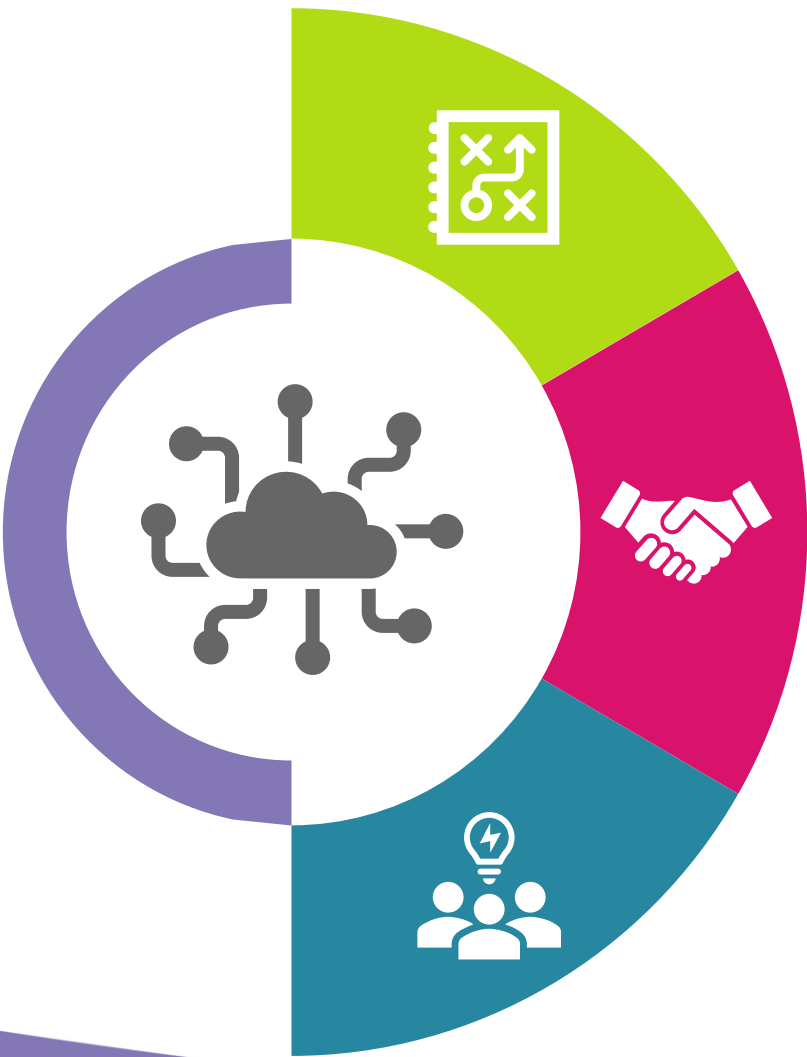
CONSULTANCY

- Time-limited arrangement with clear brief/outcomes
- Wide range of IT **expertise and experience**
- **Objective** analysis and assessment
- Industry **insight and benchmarking**
- **Critical friend** (could become a business partner)

ENABLES

- **Distilling to critical challenges / opportunities**
- **Shaping priorities and IT roadmap**
- **Input & insight for business cases**
- **Independent and trustworthy** analysis and assessment
- (Cyclical) Longer-term it **increases IT competency** within the organisation, enabling change of internal resource requirements

Developing IT capacity and capabilities



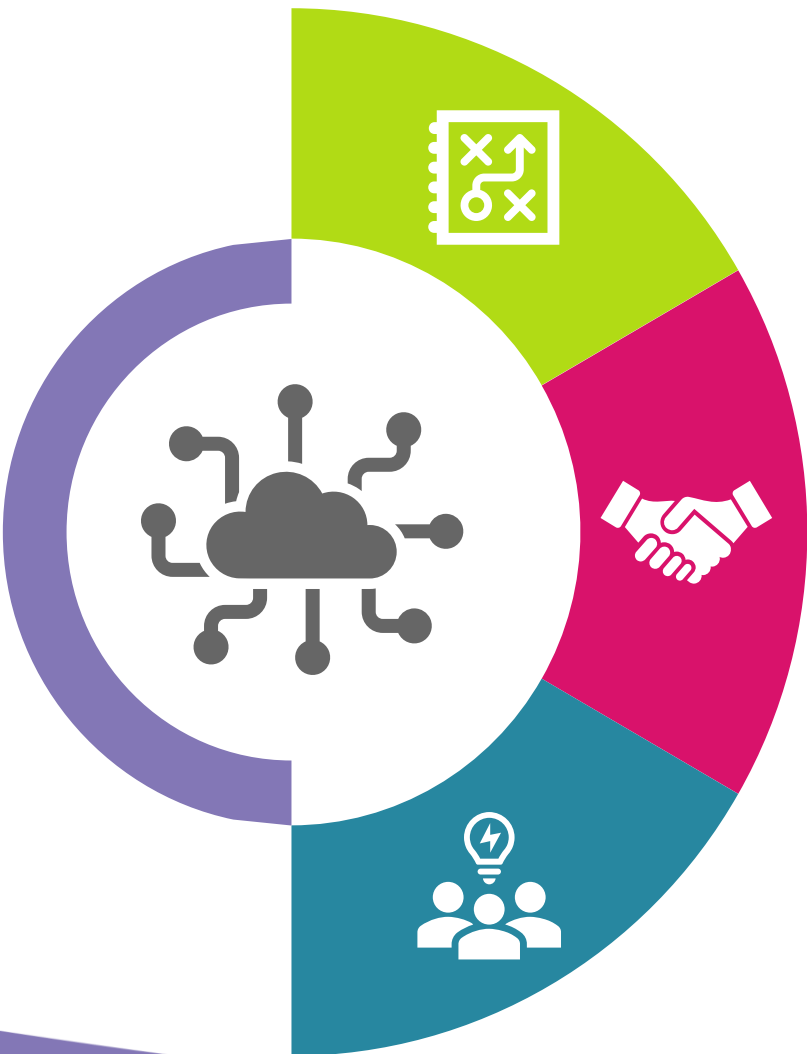
OUTSOURCING

- **Providers:** off the shelf solutions with no real strategic or bespoke solution (evaluate through cost benefit analysis)
- **Partners:** dynamic relationship, ability to customize and influence; trusted partner to achieve IT roadmap (evaluated through tender process)
- **Consortiums:** buy-in to an off the shelf solution; sharing cost; development fund with collaborative evolution; standardisation

ENABLES

- **Management of resources** (money, capacity & capabilities) in line with impact on IT roadmap
- **Building longer term relationships**, more insightful solutions offered
- **Strategic outsourcing** arrangements to enable systems integration

Developing IT capacity and capabilities



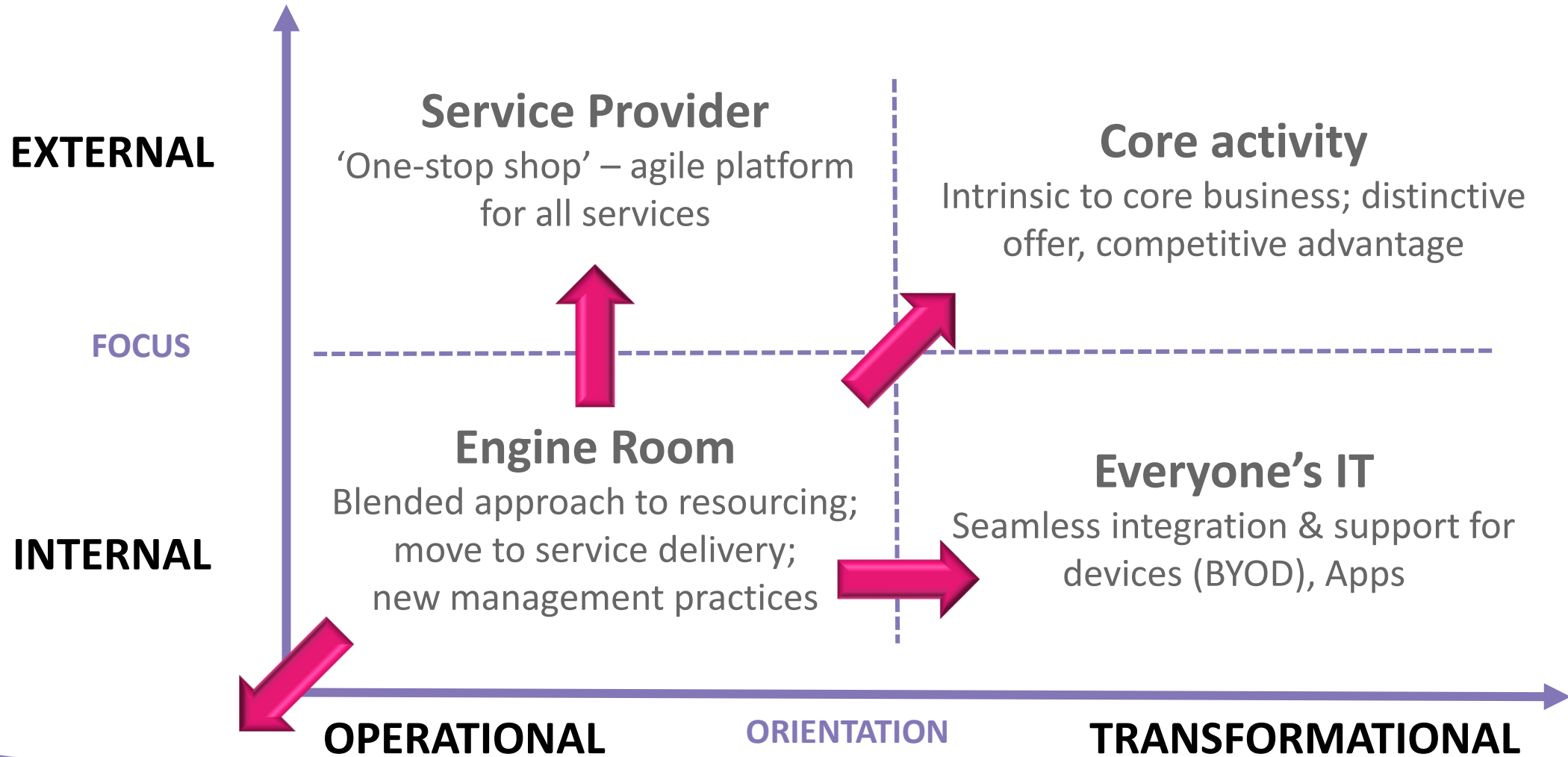
IN HOUSE

- Expertise and skills move **away from technical to service provision**
- Key skills and expertise: change & project management; networking & collaboration; business analysis; procurement & relationships management; data & systems integration

ENABLES

- **'One stop shop'** service provision, dealing with technical and non-technical problems alike
- **Blended approach to IT resourcing, capabilities**
- Agile **business change** linked to organisational vision & strategy
- **IT integrated with other service functions**
- **Business focused IT management practices and governance** – addressing needs beyond technology

The changing IT function and capabilities



What has helped us to transform IT

- **Senior sponsorship / buy-in**
- **Change to IT governance & management practices**
- **IT as service provider and integral core activity**
- **Blended approach to IT resourcing**
- **Trustworthy partnerships**
- **Stakeholder change management**, including training, early adopters, peer-to-peer learning
- **Networking** with other charities

The End

Thank you

Roundtable discussion



- What is your experience with outsourcing and insourcing technology capabilities?
- Should digital capabilities sit within marketing? Should CRM sit within fundraising?
- If you could choose to have one new digital, data or technology capability today what would it be?

Various leaders and managers source technology capabilities independently

Organisational governance and standards exist for technology; often business systems remain departmental

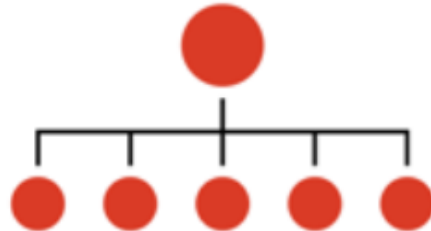
All digital, data and technology capabilities are co-ordinated through a central function

All digital, data and technology capabilities are co-ordinated as necessary within the context of an agreed operating model or framework

DECENTRALISED



CENTRALISED



HUB AND SPOKE



HOLISTIC



Skeptics

Adopters

Collaborators

Differentiators

DIGITAL MATURITY

Event feedback

Please use the QR code to view and complete the online feedback form.



Thanks & Goodbye!



Upcoming events...
Digital strategies and cake
13 July 2023, 2pm-5pm
Live at The RCN, London.

www.adaptaconsulting.co.uk/adapta-events

We hope you find this presentation enjoyable and thought-provoking. Please note that this document (or this recording of the presentation, as applicable) is provided for general information purposes only and does not constitute professional advice. No user should act on the basis of any material contained in the presentation or any of its supporting materials without obtaining proper professional advice specific to their situation.

Adapta has made reasonable efforts to ensure that the information provided is accurate and reliable, however no warranty is given regarding the accuracy or reliability of such information. All content is subject to change at any time and without notice.

The presentation may include references to specific products or services and/or links to other resources and websites. These references and links are provided for your convenience only and do not signify that Adapta endorses, approves or makes any representation or claim regarding the accuracy, copyright, compliance, legality, or any other aspects of the products, services resources or websites to which reference is made.

Additionally, the presentation may contain confidential and/or proprietary information, and must not be re-used or disclosed to third parties without the prior written approval of Adapta Consulting LLP.

© Adapta Consulting LLP 2023

If you would like further information or any advice regarding your own specific issues, then please do contact the Adapta team at hello@adaptaconsulting.co.uk



hello@adaptaconsulting.co.uk



www.adaptaconsulting.co.uk



5 St John's Lane, London, EC1M 4BH



020 4558 8070