

○ NATIONAL ≡ GATHERING → 2023

Implementing Technology Changes: Selection, Design, and Transition

Session Leads:

- **Lupe Solorio**, Vice President, Fiscal Sponsorship & Capacity Development, Community Partners
- **Noah Stockman**, Chief Financial Officer, TSNE
- **Jacob Winterstein**, Director of Finance and Operations, Movement Alliance Project
- **Asta Petkeviciute**, Social Impact Commons

PRESENTED BY



Purpose and Outcomes

- Review the available data about current technology systems' uses and practices
- Highlight fiscal sponsors and their current systems use
- Share the learnings from the selection, design, and transition approaches.

Agenda

- ❑ Welcome and Introductions
- ❑ Reflection on the overall system use across our community
- ❑ Q&A/Discussion/ Demo
- ❑ Closing Reflections

Introduction: Community Partners

Lupe Solorio, Vice President, Fiscal Sponsorship & Capacity Development

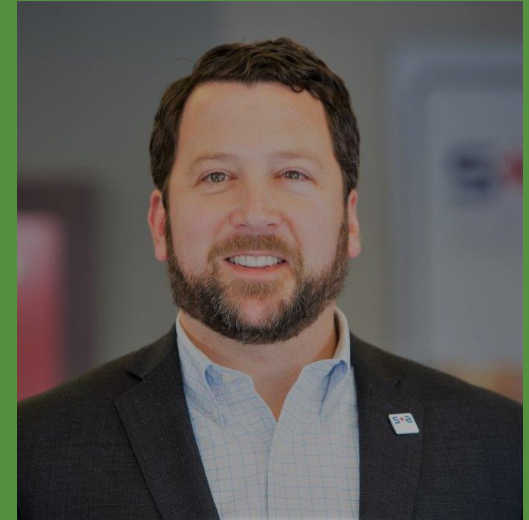
Lupe serves as the Vice President of Capacity Development and Sustainability for Community Partners, where she has provided management and fiscal expertise for the last 23 years. She has extensive knowledge in nonprofit management, organizational development and fiscal sponsorship. In her role, Lupe oversees the implementation of Community Partners' fiscal sponsorship and during her tenure at Community Partners has overseen intermediary programs. Lupe serves on the board of Educopia and most recently, served as the chair of the board of the Latinx American Cinemateca of Los Angeles.



Introduction: TSNE

- **Noah Stockman**, Chief Financial Officer

Most recently, Noah served as CFO at the Big Brothers Big Sisters of Eastern Massachusetts and comes to TSNE with over seventeen years of experience working for multi-million dollar public service and mission driven organizations including Scholar Athletes, Inc., City of Boston Department of Neighborhood Development, and the City of Boston Centers for Youth & Families, and the Boston Youth Fund. Noah is a Brown University graduate where he received a Bachelors of Arts in Economics and Organizational Behavior and Management. He has also earned a Certificate in Local Government Leadership and Management from Suffolk University and a Certificate in Urban Planning and Design from Harvard University Graduate School of Design.



MOVEMENT ALLIANCE PROJECT



Jacob Winterstein, Director of Finance and Operations

Movement Alliance Project (MAP) is a Philadelphia, PA based fiscal sponsor. MAP provides Model A & Model C fiscal sponsorship to organizations working in pursuit of social justice. Jacob has been the director of Finance and Operations since March of 2020. He was the first staff member whose work focused on the fiscal sponsorship program.

A lifelong Philadelphian, he has worked in organizing, education, and the arts in a variety of roles.



MOVEMENT ALLIANCE PROJECT



Sponsored Projects Portal Home

Welcome to the Sponsored Projects Portal. This portal was designed on Papyrx by MAP's staff specifically for the use of our sponsored projects.

This is the system you will use to contact MAP and see the status of your submissions. Only you and MAP staff will be able to see your project's submissions. Sponsored Projects Portal Home also has links to documents that are relevant to all sponsored projects like grant documents, how-to's, and sponsored projects policies. You will also find a link to your project's Google Drive folder.

















Resources

This portal will allow you to work more efficiently and independently. On the right (or below if you're on mobile) you will find: Contact MAP Forms, Sponsored Project Documents, Grant Application Documents, and Helpful Links. Be sure to read the entire [Sponsored Project Handbook](#) before using the Sponsored Projects Portal.

Sponsored Project Handbook

 Sponsored Project Handbooks

Contact MAP Forms

-  @ End of Employment
-  @ Job Posting Approval Form
-  @ New Hire Form
-  @ Payroll Updates and Hours Form
-  * Certificate of Insurance (COI) Request
-  * Contract Review/Submission
-  * General Contact Form
-  * Grant Report Form
-  * Lobbying or Related Activity Form
-  * Rental Car Form
-  \$ Disbursement & Reimbursement Form
-  \$ Donation Notification Form
-  \$ Grant Award Notification Form
-  \$ Invoice Request Form
-  \$ PEX Card Form
-  \$ Sub-Grant Form

@ = People Operations

* = Administrative

\$ = Financial

From email to a portal.

- Back up
- Supervision
- Prioritization
- Access to information
- Status updates

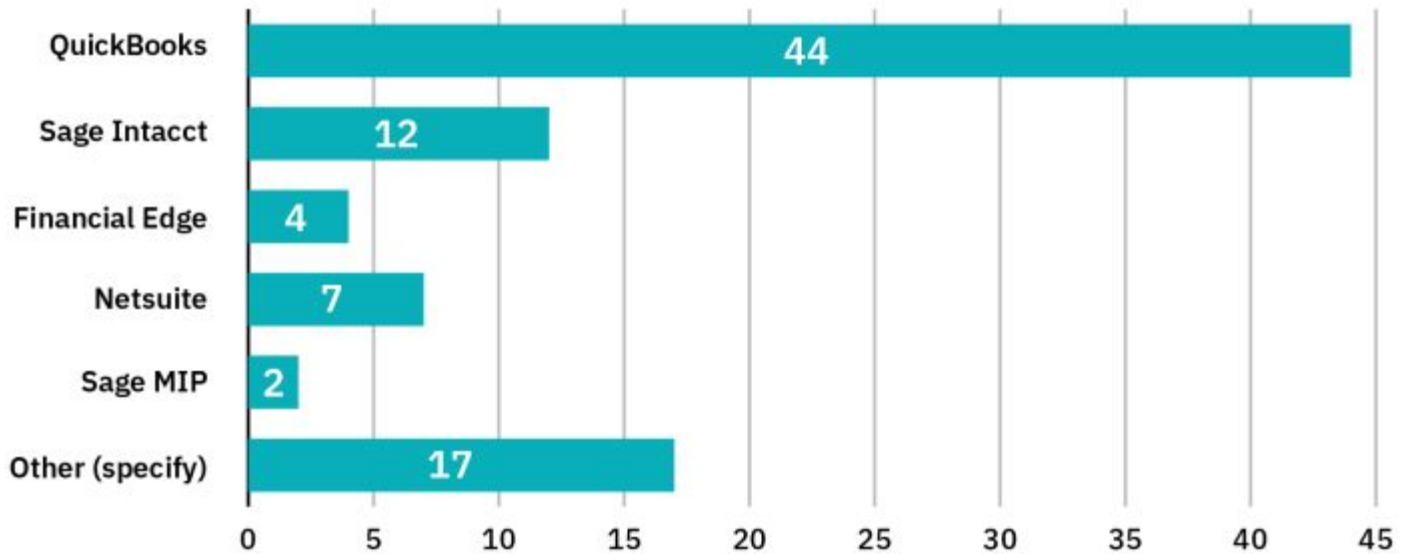
Values that guide operational changes



- Operations should be accessible to the many. Take into account different learning styles, literacy, and numeracy.
- Be transparent about *why* a change is being made (even if a decision is already made).
- Be mindful that people have a diverse relationship with money from traumatic to calming. This often stems from people's experiences with larger systems of oppression.
- The operations team is in service to the larger work of our program team and sponsored projects. This value exists in tension with our responsibility to maintain the viability of the entire network and organization.

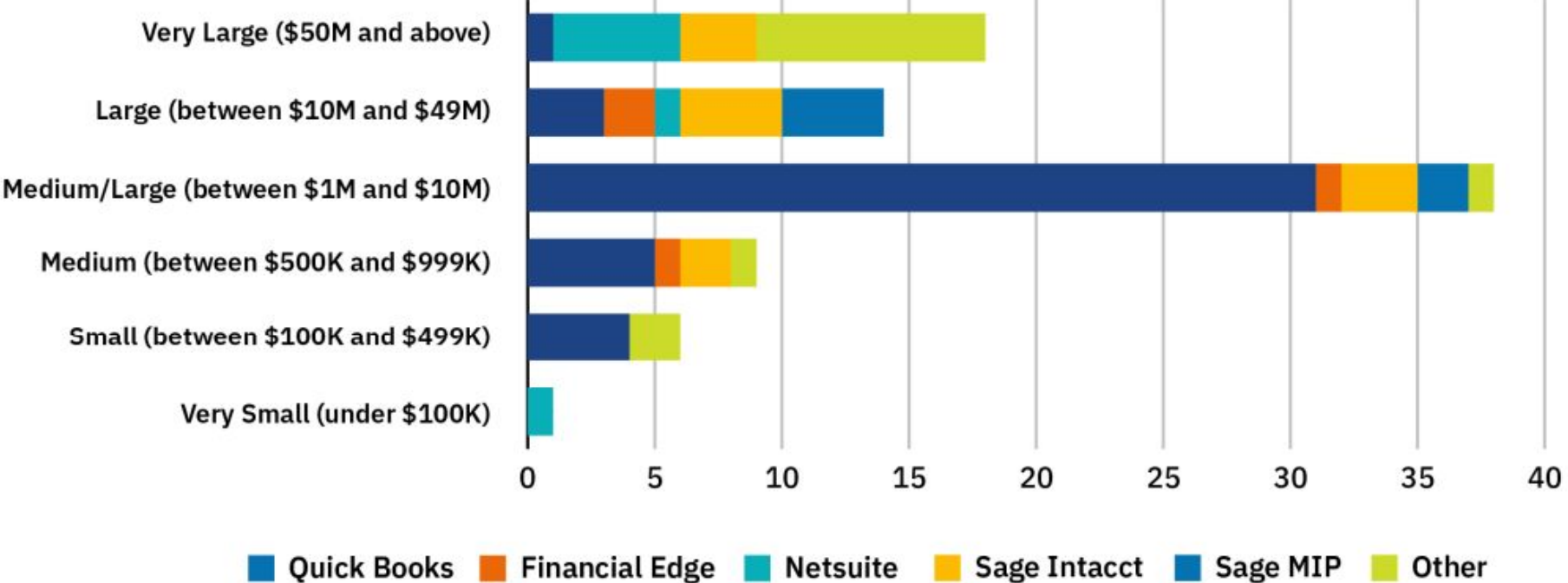
What can we learn from the field scan?

Accounting Systems



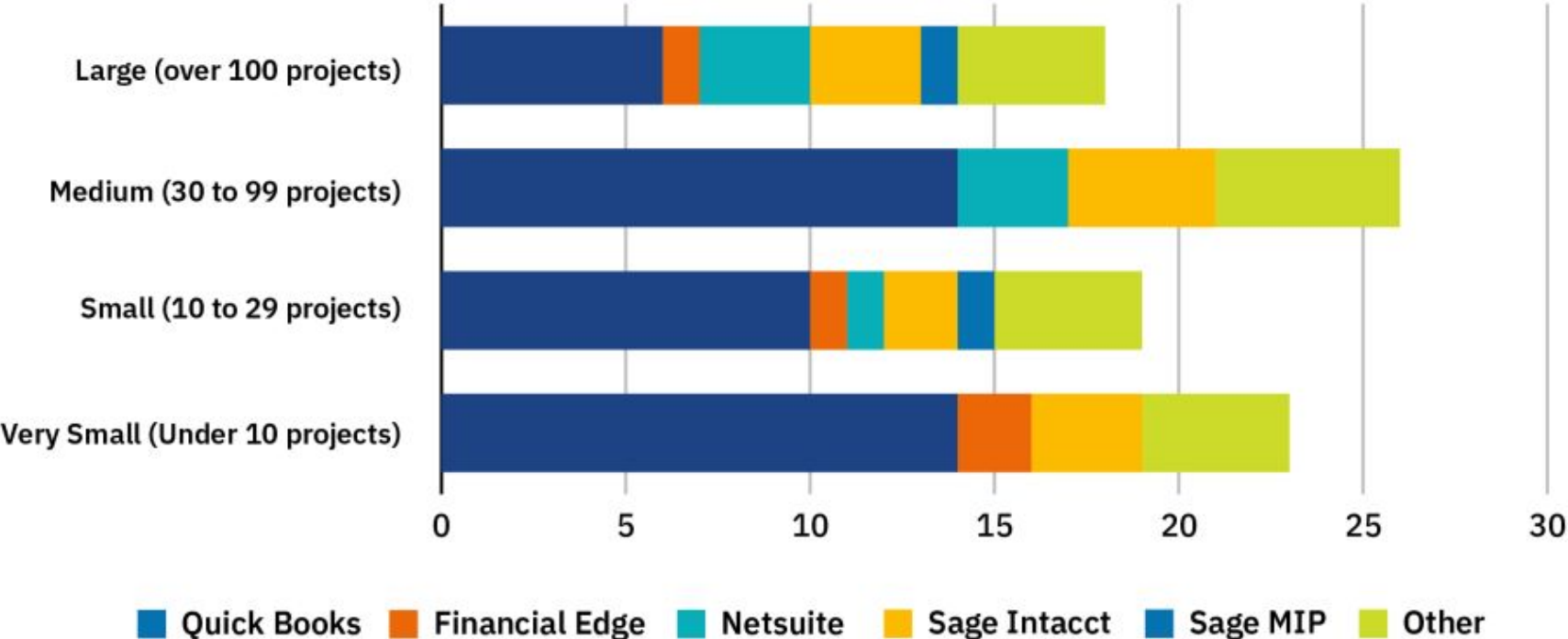
What can we learn from the field scan?

Accounting Systems used across different sizes of organizations



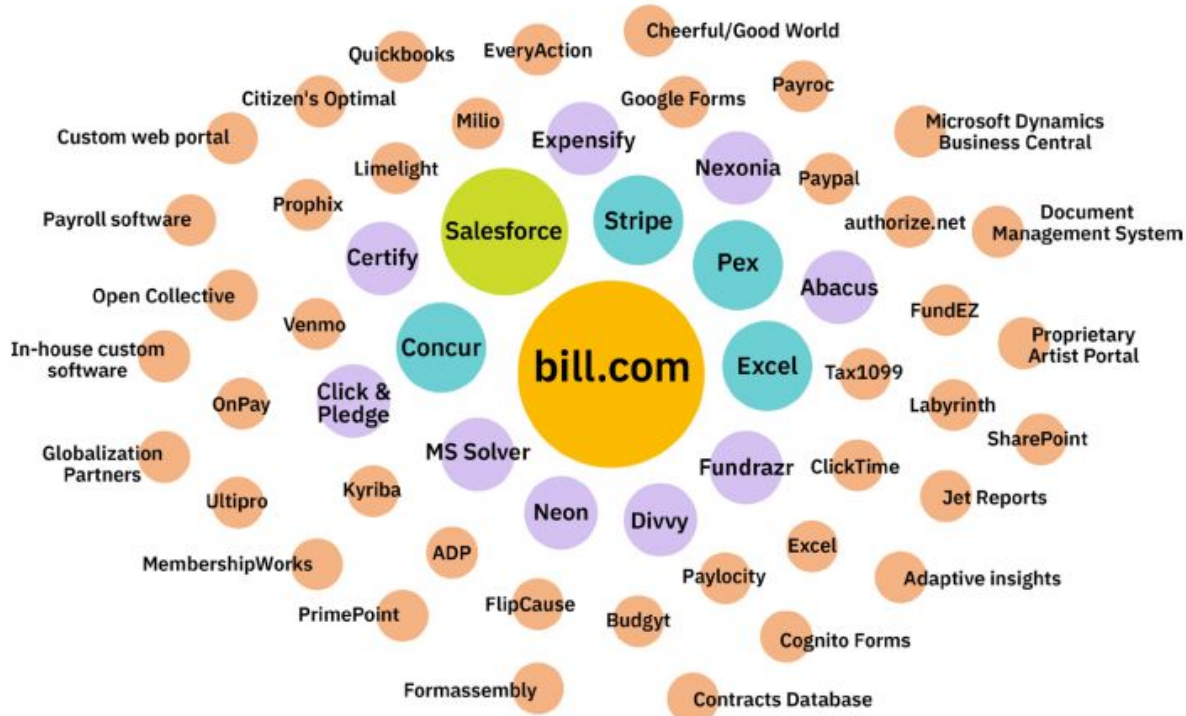
What can we learn from the field scan?

Accounting Systems used across different portfolios

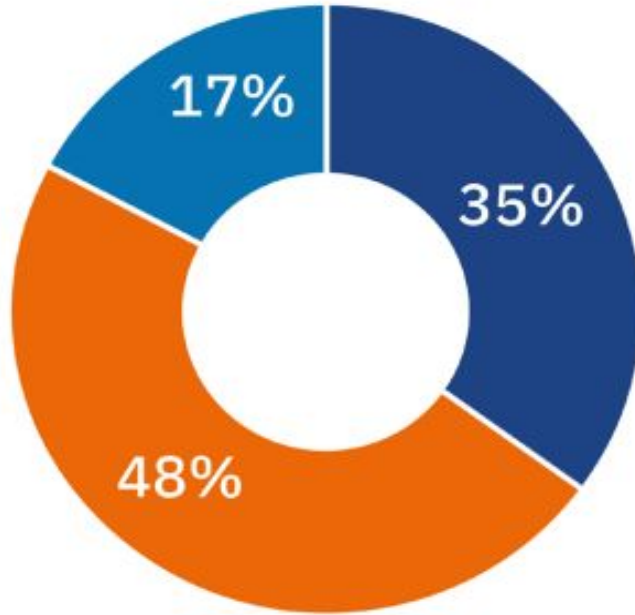


What can we learn from the field scan?

Additional Financial Systems used



Do we have adequate technology resources?

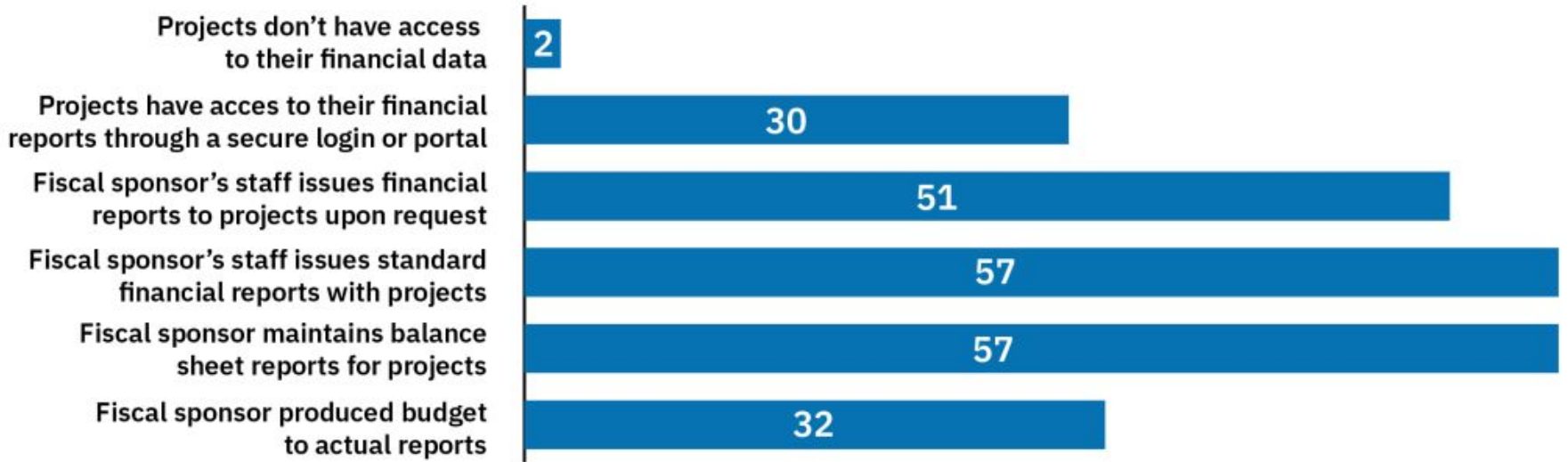


■ Yes ■ No ■ Somewhat

n = 86

Differences in Reporting Practices

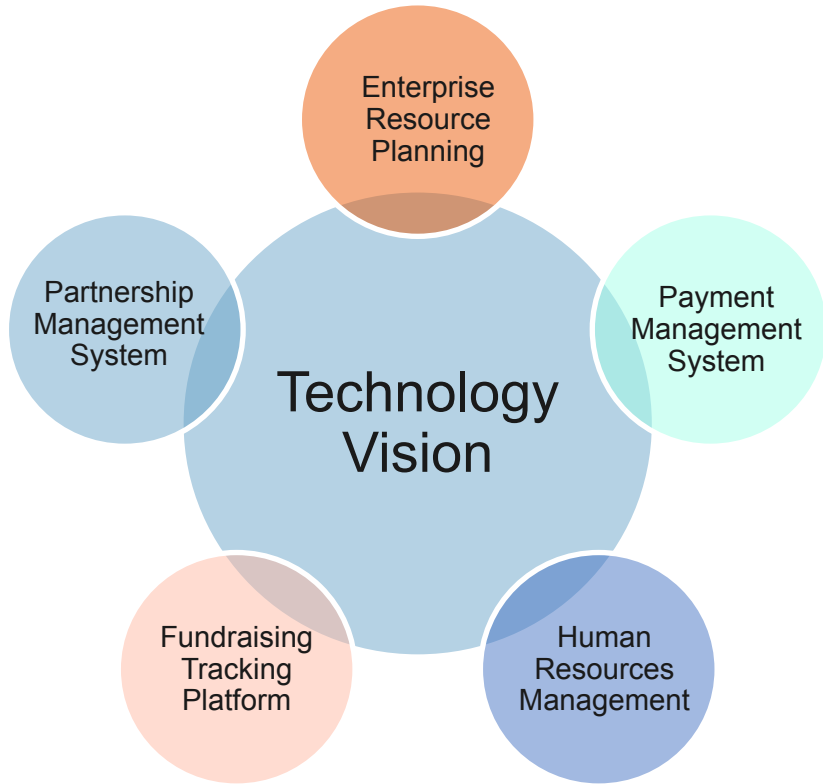
Access to real time financial data increased from 4% in 2006 to 35% in 2023



Reflection Questions

- What was your approach in defining a problem that you hoped to address with technology-driven solution?
- What was your approach in selecting the technology provider? Any lessons learned in negotiating fees with technology providers?
- What tactics did you use to increase systems use during implementation?
- What surprised you the most from the most recent system implementation?
- What has been the most important lesson learned in designing and implementing technology change? How did you approach training?

Strategic Approach to Technology



Core expectations:

- **Less is more:** fewer systems and more effective systems
- **Automation:** use of artificial intelligence and the ability to integrate with other selected systems
- **User-friendly:** intuitive for current staff and partners to interact with
- **Build space for testing**
- **Flexibility:** Scale together with the organization
- **Integration,** integration, integration

Fill Out The Session Evaluation Form

Scan the QR Code below to access the form!

