



DIG - IT DISCOVERY

Systems and Processes

An engaging discovery into the current digital footprint of the Arts Councils associated with the Digital Innovation Group

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2021 - April

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Introduction

The purpose of this initiative was to assist the Vancouver Island Digital Innovation Group in reviewing the applications and digital tools being used by the DiG Arts Councils, with the goal of assisting in the evolution of each councils' operations, collaboration, and communication efforts in the digital space.

Through a series of virtual workshops and discovery sessions, we worked with each of DiG's 6 associated Arts Councils (Arts Council of Ladysmith and District; Comox Valley Arts; Salt Spring Arts Council; Hornby Island Arts Council; Cowichan Valley Arts Council and The Old School House Arts Centre in Qualicum Beach). Together we reviewed their current technology toolkits, we reviewed the software solutions that are presently in place, and what role or purpose each solution fulfills. We touched on the business requirements and expectations of each solution, how accurately it fulfills its purpose, and reviewed the gaps and challenges experienced with each councils' current technology landscape. We had a look into business processes, approach to technology solutioning, and what was on the radar for the future of their digital presence. Through these discussions we touched on ways to optimize process, set realistic expectations around technology, and discussed a path forward to leverage the knowledge and successes of the independent arts councils for the benefit of the whole.



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IT Discovery

Our IT discovery, or audit, was an extensive look at the IT solutions, applications, and systems being utilized by the various Arts Councils associated with DiG. We looked for all items within a digital footprint inclusive of local software installs, software purchased by the organization, leveraged by the organization, and cloud-based SaaS solutions. Technologies were grouped into six categories:

- **Web Presence & Social Tools:** Technologies used for external engagement, promotional and communication activities to stakeholders outside the organization and the public at-large.
- **Communication & Collaboration:** Tools focused on communication and dialogue, both within and outside of the organization.
- **eCommerce, Retail, & Transaction Processing:** Any technology utilized in the sale of goods, or monetary exchange; including donations, currency transfer, inventory management, and point of sale.
- **Operations & Administration:** Systems and tools utilized for the everyday running of the organization. Whether holistic platforms for a modern workplace or single use technologies for content creation.
- **Finance:** Software or SaaS solutions utilized in the financial management of any given council.
- **HR & People Management:** All technologies utilized in the management of people resources.

The outcome of our sessions highlighted roughly 118 digital solutions presently being utilized across the councils of the digital innovation group. Some of these technologies were common across all councils, others were single point solutions being utilized in innovative ways or to fill specific needs.

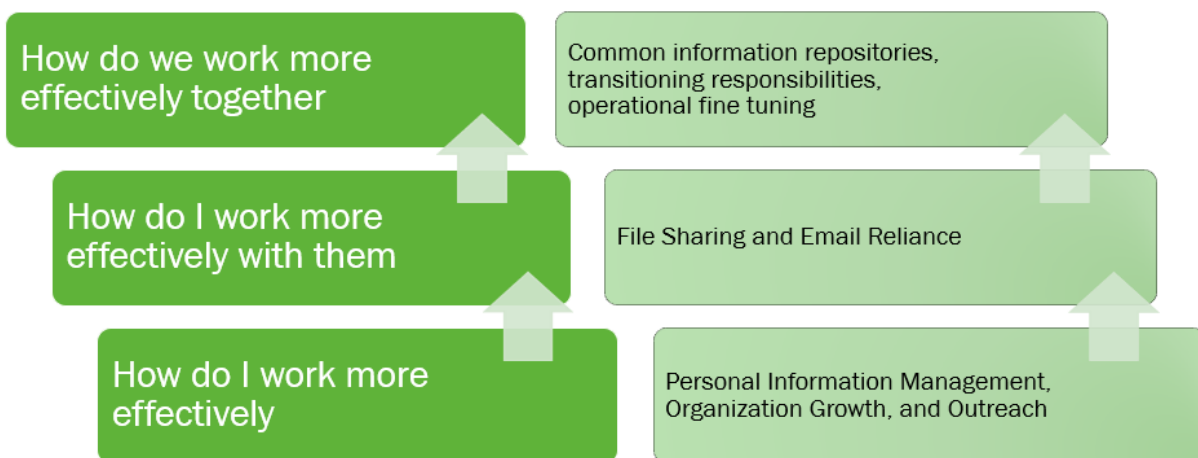


Organizational Maturity

The technology needs of any organization will be informed by many factors including an organizations size, business objectives, growth trajectory, as well as its organizational maturity. Let us first define what we are talking about when we say organizational maturity. We will use the common definition as:

“The extent to which an organization has explicitly and consistently deployed practices or processes that are documented, managed, measured, controlled, and continually improved.”

That said, many of the councils are not yet at a level of documented, managed, and measured practices and processes, because doing so at an early stage is not the best use of time. Continual improvement does seem to be an area of intention, but in its very early iterations. If we look more broadly at how the maturity of each council informs its technology choices, we can see that our needs change as we grow. Starting with a single individual or small group of individuals working independently for a common goal; evolving to a collaborative group working together.



As a council moves from the individual to the group, there are certain foundational technologies that need to evolve to ensure a stable foundation on which to grow. The bedrock of these are our core communication and collaboration platforms. In our early stage of development, we rely almost solely on email for communication, file transfer, and information retention. While this may work for a single individual, it becomes a barrier for growth and efficiency as we try to work more often in tandem on overlapping projects and initiatives with other individuals. We then begin to look for technologies to enable sharing of common files on a 1-to-1 and 1-to-many basis, this is where organizations tend to adopt Box, DropBox, and other point to point file share solutions. At this stage we are focusing on individual work and are attempting to work more effectively with others. After this, when our organizations continue to expand and we begin to hire more people, we try to find solutions and processes that will allow us to work more effectively together. Sharing information, adding structure and transparency to what we are working on, and focusing on making our information more accessible for all parties involved, this is where our larger solutions become more relevant. Some councils already have these technologies in place and simply need to structure them. What initially works with simply email and a file share technology, evolves into modern collaborative technologies like Google Workspace (formerly GSuite), or Microsoft 365 and its Modern Workspace.

Technology Footprint



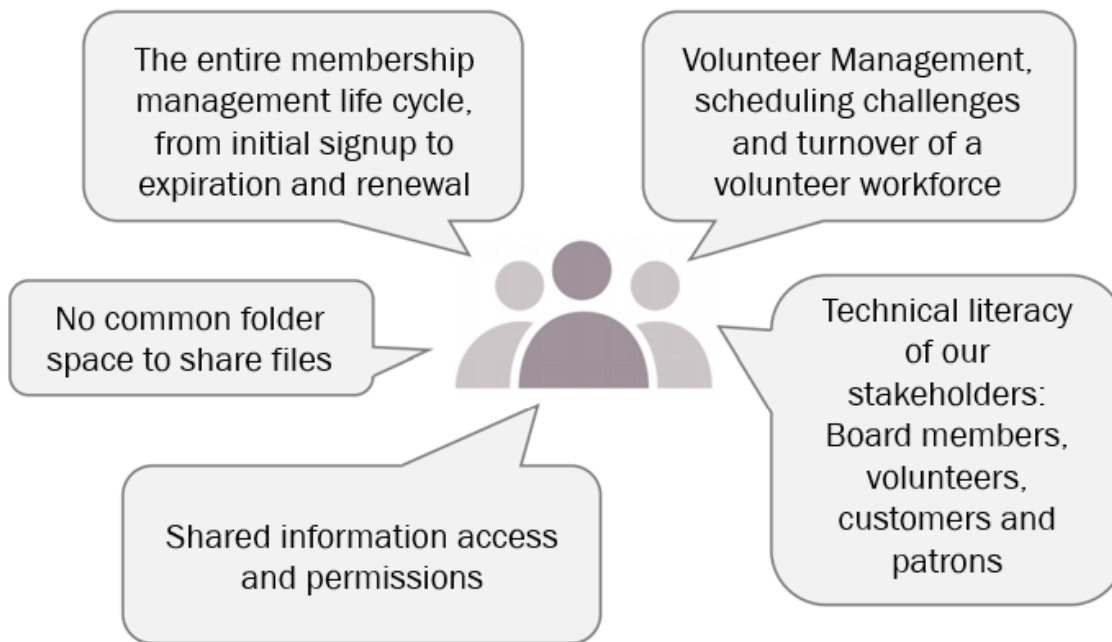
So as our technology needs adjust over time, and evolve based on current digital norms, our digital footprint grows. What may begin with the simple registration of a domain (eg. ArtsCouncil.com) grows to include email, file shares, websites, and ecommerce platforms, social media points of presence, structured internal file management tools, ticketing and event management systems...and on and on. Each solution we implement requires administration, maintenance, understanding, and ongoing education. This is all part of the modern workplace environment. The diagram above highlights 19 technology components, most of which are presently utilized in one form or another by each one of the arts councils. Though this diagram is not complete, as the average technology footprint of a council contains 39 Technologies, processes, or digital solutions. This highlights the technical aptitude required to run a modern-day enterprise, or the budget required to maintain a relevant point of presence.

There are some technologies used consistently by all or most councils, these include Mailchimp, Facebook, Square, GoDaddy, YouTube, GSuite, Zoom, and MS Office. There is a reason for this, as these technologies have become a core part of our modern experience with less viable alternatives in the market. Though there are spaces where we differentiate, this is where more comparable offerings are available. Areas like Website and eCommerce technologies: Wix vs SquareSpace vs WordPress; or Shopify vs WooCommerce, and so one. Unique purpose driven applications such as Clockify, LastPass, and Glide are also used in very innovative ways with great benefit to the organizations using them.

For a comprehensive list of the technologies utilized please refer to the Full list of Technologies at the end of this report.

Social & Web Presence	Communication & Collaboration	eCommerce & Transaction Processing	Operations & Administration	Finance	HR & People Management
<ul style="list-style-type: none"> Facebook Instagram Mailchimp Square Space Wix GoDaddy Vimeo YouTube Glide 	<ul style="list-style-type: none"> Google Suite Microsoft 365 Mailchimp Zoom Drop Box We Transfer Email 	<ul style="list-style-type: none"> WooCommerce Shopify Stripe Square Tickit PayPal Merchant Services 	<ul style="list-style-type: none"> Canva Standard Office Suite LastPass Access Database Basecamp Carva Windows MacOS 	<ul style="list-style-type: none"> Sage QuickBooks 	<ul style="list-style-type: none"> CRA Calculator Spreadsheets Payroll Systems Clockify ADP

Primary Challenges



While each council is at a different level in its digital maturity, there are common challenges voiced by the majority. These include:

- Digital File Management: Lack of a unified space for storing and sharing information.
- Volunteer Management: Challenges with scheduling, onboarding, training, and retaining a volunteer workforce.
- Membership Management: The entire lifecycle of a member - initial member signup, payment, expiration, and ongoing contact information upkeep.

Though many of these challenges will not be fixed by technology alone, they also highlight the lack of defined process, practice, and internal refinement in this space.

Reliance on key individuals / single points of failure | Communication and collaboration - Information sharing with key stakeholders (Board, Contractors, Volunteers, Staff) | Digital change has the biggest impact | Accessibility and transparency | Culturally inclusive | Unified ecommerce transaction space | Amplifying our message, drawing greater attention to what the arts councils are doing | SEO | **Volunteer Management** (onboarding, training, consistency, turnover) | Giftshop organization and automation | Resourcing challenges | Time management | Website Management (Content Schedules, Technical / Brand Consistency & Guidelines) | Onboarding | Collaboration and file sharing, digital replication of water cooler | Lack of internal communication system | Communications with internal / external (tools and guidelines) | **Digital File Management** | File Shares and Structure | Understanding of current technology | Membership registration - Recording who and in good standing | Wasted paper in the process | **Full cycle Membership management** | Lack of a consistent File Share / Central Store | Lack of defined Roles and Resp.

A Path Forward

The path forward has a lot of different considerations. As each council is unique, and at a different space in their digital journey. There are some principal ideas that will help us as we move forward:

DiG Aligned foundational technologies. Across the DIG community, there is a wealth of knowledge and a rich diverse history of experience, great business acumen and a depth of technology expertise. Along with that people power, there is also a broad spectrum of IT technologies that have been deployed, leveraged, researched, and retired. Ensuring that this group keeps an ongoing dialogue in the way of technology will be critical. Where possible, aligning technology for leveraged spend and understanding will be an easy way to lighten the load. Each council tends to research and adopt technology on its own volition. Going forward, I would recommend deferring to an existing solution that is presently adopted by an existing council or partnering with another council in adopting a technology to overcome the common challenge. Avoid trying to recreate the wheel. You may not be able to reduce the 40 technologies used by an average council, but you can reduce the 118 technologies across the board.

What is Sustainable. Time and Effort are two resources that are consistently in short supply amongst the councils. That said, throwing time and money at a 'quick fix' technology solution may not serve you in the long run. Slow sustainable growth is the best path forward, which does not always align to the ever-evolving exponential curve of modern technology. Before creating new Social Media channels, or adopting new platforms, ensure you have the time available to dedicate to this space. Look at your other channels or platforms and see if they are still servicing your needs. Take the time to remove your old technology accounts or services, before adopting new ones. Keep your footprint well maintained, it will service you in the long run. Closing off old technologies may allow you the time to adopt new ones and prevent the dormant solutions from becoming liabilities.

Defined Organizational Roles and Responsibilities. This is critical for both technology as well as the engagement of your internal resources. When an individual or employee clearly understands what is expected of them, and have clearly defined responsibilities, it makes a job easier. Less time is spent on the ambiguity of a new role, and onboarding tends to be shorter in nature. Additionally, technology is easier to maintain if there are definitions for 'who does what' within a system. A RACI chart is a common tool utilized in this space to define the people who are/need to be: Responsible, Accountable, Consulted, and Informed of/for the various tasks associated with a given solution.

Build and maintain a foundation. This is very important for all councils. Taking the time to properly setup foundational internal systems and cleaning up legacy technologies is very important to any growth efforts you want to make. Think of this as the business equivalent to 'self-care'. If you do not take care of 'you', you are neglecting the most important part of what you do. Whether it is Microsoft 365 or Google Workspace that you are moving forward with, take the time to build out a proper file share and work with you team to ensure everyone is aligned on how and where to store their files. Migrate your files and content away from isolated local desktops and into a secure cloud-based environment. Ensure you document your practices and processes; your reasons for application configuration; and your practices around information management. Define your onboarding practices and store them in a place that is findable and accessible for those who need them. Consolidate your email accounts into a single environment and remove the old ones. Update any systems or dependencies related to those legacy

accounts. The weight of historical technologies can become unbearable, allow yourself the time to address these items and lighten the load.

Adherence to Processes and Practices: First we need to ensure we have clearly defined and well documented processes and practices around what we do and why we do it. After this, we need to ensure adherence to these processes and practices. Otherwise, they are all for naught. Building a folder structure for sharing and maintaining organizational information is great, though if nobody puts their files in said structure, the folder store is useless. Having a practice of exporting and maintaining social media analytics for long term growth and trend mapping is great, but if you only store ad hoc and sporadic segments of data, the information is far less valuable, and may fail to give any accurate insight. Ensuring documentation and alignment to processes and practices is in place, will allow you to see challenges more clearly, and disconnects with greater clarity. So then, when it comes to adopting new IT solutions, you will have a better understanding of what your needs are, and the problems you are trying to overcome.

Considerations for Technology Adoption

Cost vs Convenience: Short term vs long term solutioning. IT solutions come with cost, whether that is time or money, and all prebuilt solutions have their pros and cons. When making decisions around spend, take the time to review what your objectives are and decide if the cost over the long term is worth the convenience. There is nothing wrong with the 'right solution for right now', but also consider your exit or transition planning.

Data Integrity: What that looks like for your organization? (**Data integrity** is the maintenance of, and the assurance of, data accuracy and consistency over its entire life cycle and is a critical aspect to the design, implementation, and usage of any system that stores, processes, or retrieves data.) Who maintains the data integrity of your member list? Or your phone list? Do you have processes in place that align, or collect the information that is important to you? If this responsibility and action has no assigned owner, a new application or technology will not fix this problem.

Technology Choices / Digital Roadmap: Your technology choices will inform your path forward. Think long term and map out your solutions on the road ahead. When choosing a website solution, think about what your holistic presence will look like, perhaps that involves ecommerce. Will the solution at hand be able to fill that requirement as well? Or should your ecommerce considerations be a factor taken into account when deciding which Website technology you choose. This same 'downstream' thinking will apply across your digital workspace. Your technology choices are an investment in your business and your future; they cost money, time, effort, and resources. Remember, this is a digital journey you are on, you can always take a left turn and back track to another destination, but it does cost both time and money. The bigger the solution, the more complicated and costly it is to swap out down the road.

Change Management: Change is expensive and not just financially, it costs time, energy, and familiarity. Change can be very draining on all your resource pools, and consistent or continual change can lead to burnout. Change fatigue is real, for both your staff and your stakeholders. So, when you are introducing new technologies, be conscious of how well your audience adapts to change, what their level of technical literacy is, and how much time that they have/or have had to adapt to a new solution.

We all consume change at a different pace, so be conscious of your target demographic / audience, you do not want to lose engagement.

Sustainable People Practices: The Internet is 24/7. It operates at all hours, day and night, around the world, and with that your Social Media channels are continually running, and your ecommerce solutions are always open for business. It is important to set expectations up front with your staff or volunteers working in this space. Outlining is your expected response time on social media comments, or on product-based questions for your store. Do you review analytic information? If so, at what frequency? Do you track growth over time and if so, how? This can be a very time-consuming space, and expectation setting up front will help set sustainable goals and practices.

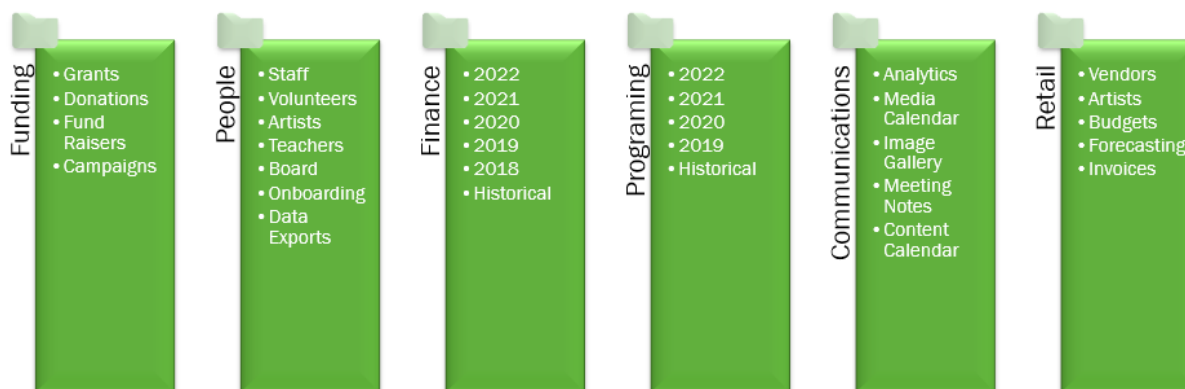
Internet Redundancy: Many of us operate in remote locations, where we may be at risk of extended internet outages. When building business practices on web-based solutions, ensure you have a failover plan. Would it be detrimental to your business if you lost internet connectivity for 24-48 hours?

Technical Debt: Technical debt is a concept in software development that reflects the implied cost of additional rework caused by choosing an easy / limited solution now, instead of using a better approach that would take longer. As with monetary debt, if technical debt is not repaid, it can accumulate 'interest', making it more difficult to implement changes. Unaddressed technical debt increases software entropy. Much like monetary debt, technical debt is not necessarily a bad thing, it may allow you to reallocate funds to more important areas in the near term. Though letting your computers age longer than necessary, relying on outdated Operating Systems, and pushing software or solution updates out for a 'few more years', will cost more in the long run. This is a debt that will always be collected.

In Summary

The greatest strength of this group of councils is each other. The exposure, expertise, and cumulative knowledge can continue to be leveraged to make the technology journey easier. 40 technologies used by a single organization is not a high number, though looking to standardize the solutions used would be to everyone's benefit. Be mindful of the technologies you are using, try to better leverage the technologies you already have, and focus on internal processes and practices before purchasing new technologies. To paraphrase one council member 'The best technology to get is the one your friends are using', is a statement I completely agree with.

Information Architecture



Information architecture (IA) is the structural design of shared information environments to support usability and findability. The concept applies across the digital landscape from system and interface design (websites, intranets, online communities) to file and folder management.

One challenge experienced frequently is the lack of a shared file/ folder structure. This is a fundamental piece of any organization's collaborative efforts. Some councils already have an existing technology in place ready for utilization, but simply have not prioritized the creation of a shared space. Like many small businesses, organizational housekeeping and internal refinement does not rank high on the priority list, because it does not engage customers, spread organizational awareness, or bring in revenue. Though it can allow an organization to work more effectively and save time, and time seems to be in universally short supply. It has been mentioned by many councils, that they simply do not know where to start. So, the example above, is that starting point.

In whichever file share technology an organization is using, simply creating a couple folders, like the ones listed above, and then begin to build/ create additional folders inside. The example above lists some elements that are common across councils. After folder creation, simply adjust your given permissions to allow your stakeholders the access they require. Defaulting to open access and restricting when necessary is always the easiest approach to managing permissions. If the system you are using allows you to create permission groups, try leveraging them. It makes adding and removing permissions much easier. Tools like Google Workspace (formerly GSuite) and Microsoft 365 are built to make this process easy and accessible.

Full list of Technologies

Web Presence and Social Tools

- Arts Spaces Kunst Matrix
- Elementor
- Facebook
- Facebook Ads - Paid boosted content
- Glide
- GoDaddy
- Google Ads (Not for Profit)
- Google Analytics
- HotJar
- Hootsuite
- Instagram
- Issuu
- LinkedIn
- Monster Insights
- Plannily
- Signup Genius
- SquareSpace
- TickIt
- TikTok
- Tumblr
- Twitter
- Vimeo
- Wave
- Website Forms (Gravity Forms)
- Wix CMS
- Wix Analytics
- Woo Commerce
- WordPress
- YouTube

Communication & Collaboration

- BaseCamp
- Box
- DropBox
- Evernote
- MS Exchange
- FaceTime
- Gmail
- GoDaddy eMail Management
- Google Drive
- Google Calendar
- GSuite
- Google hangouts
- Google Meets
- GoToMeeting
- iCalendar
- iPhone
- Loom
- Mailchimp
- Microsoft 365
- MS Outlook
- OneDrive
- Quire
- Slack
- Survey Monkey
- Text / SMS
- Trio
- WeTransfer
- Whiteboard
- Wix File Drop
- Zoom

eCommerce, Retail, & Transaction Processing

- Airtable
- Asana
- Access database
- Assets / Quickbooks
- Consign Pro
- Eventbrite
- Excel Workbook Application
- Facebook - Donations
- JointIt
- Membership Works
- PayPal
- Merchant Services POS
- Moneris
- Shopify
- Square
- Square - Point of Presence
- Stipe
- Thinkific
- Ticket
- Wix - ecommerce
- WooCommerce

Operations & General Administrations:

- Access Database
- Adobe Creative
- Android Devices
- Canva
- Google forms
- Filmora
- Google Forms
- GSuite
- iPad / iMac / iOS devices
- Mailchimp
- Microsoft365 for non-profit
- MS Publisher
- Photoshop
- SideDoor / OBS (free / livestreaming)
- Time Machine Backups
- iCloud
- Windows PC

Finance

- eTransfer / Cheque
- Excel Models
- Manual External backups
- Online Banking (Banks and Credit Unions)
- Quickbooks Desktop
- Quickbooks Online
- Sage Cloud Services
- Sage Desktop

HR & People Management

- ADP
- Clipboard - manual signup
- Clockify
- CRA software / Online Calculator
- Indeed
- LinkedIn
- JotForm
- Excel Spreadsheet / Manual Payroll
- Sage Payroll
- Quickbooks Payroll
- Facebook Recruiting
- Manual Volunteer time tracking (clipboard / Excel / Cloud Doc)
- Website Job Board