

GLOBALWA

Proposal for Technical Audit & Recommendations for Global Washington Members

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FOR:

Global Washington Members

FROM:

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Effective Date of Proposal

This offer to perform professional services will remain in effect for sixty (60) calendar days from date of issue, as noted on the front cover.

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INTRODUCTION

Global Washington has the vision to help change the world for the better by strengthening the state's vibrant global development community. As a Global Washington member you are part of this important mission. Fuse IQ has been a significant player in our rich technical community and our mission has always been to strengthen organizations in the Pacific Northwest, nationally and internationally by helping them leverage the best of what the web can offer. This proposal, and our special offer to you, is one way we can give back, help out, and drive effective, positive change in our thriving global nonprofit community.

The typical small to medium nonprofits cannot afford an IT employee and has little to no technical roadmapping in place which can lead to inefficiencies and opportunity loss.

Even larger organizations often need an unbiased, external expert to help clarify challenges and germinate ideas and options. The challenges are many, yet the most challenging is ensuring the organization has a clear understanding of the technology landscape – how the variety of services and tools can help their organization's internal processes and external communications – and can make educated decisions on where to spend their hard earned dollars.

This proposal provides our vision on how to make this happen.

Below, we provide an introduction to what exactly a Technical Audit is and why it is important, how it evolves into the Recommendations phase, and describes several scenarios how to match those Recommendations with tech volunteers, local service providers, or 3rd party products.

If you sign by January 29, 2018 we will offer an exclusive Global Washington member incentive bonus! Read on to find out more.

WHY FUSE IQ?

Why would Fuse IQ be the ideal partner for this task? *History, Ideals and Experience.*

History

Fuse IQ has been providing web consulting, strategy, design, development and support services for nonprofit clients since 2001. We are a team of 12 professionals that each have a minimum of 10 years in our respective roles. With history comes experience and with experience comes many layers of understanding, some quite subtle. Fuse IQ has worked with a number of international organizations including various UN departments, UW Department of Global Health and many nonprofits who have an international footprint. We have been a Global WA member for many years and have provided educational seminars for them as well.

Ideals

We believe through better use of technology we can help create a better world. By leveraging the web in creative and innovative ways we help nonprofits flourish. We are as passionate as they are in their mission.

Fuse IQ embraces the spirit of open-source technology and community driven solutions – we are an independent source who is not conflicted by third party interests. Understanding nonprofit budget and staffing challenges, Fuse IQ focuses on our client's success while minimizing risk and maximizing their ROI.

Experience

Tim Godfrey and Joel Meyers created Fuse IQ in 2001 with the goal to help uplift nonprofits to be more competitive online. We have experienced the challenges nonprofits face through the variety of projects they bring to us, and we leverage knowledge gained of nonprofit culture, technology needs and business processes to create solutions for our clients.

Since 2001 we have worked with over 150 nonprofits and educational institutions on over 400 unique projects spanning 25 countries. Our solutions work in a variety of sectors including Animals & Wildlife | Arts & Humanities | Biotechnology | Community & Social Services | Education & Technology | Environment | Health & Human Services | International | Legal & Social Justice | Sustainability | Startups & For-Profits.

WHAT IS A TECHNOLOGY AUDIT?

The Technical Audit is an investigation, by way of meetings and examination of data such as reports, forms, spreadsheets, and so on. During the investigation, technology assets will be identified and cataloged. Every system used to conduct operations will be described and classified, including in some cases maps of important data flows within the organization and between outside actors (partners, clients regulating bodies, etc.).

Certain key processes, or lifecycles for products and services, will be described in some detail so that maps of the integrations of systems can be created.

Impressions from employees about what changes are required, and other feedback that invariably arise in these discussions will be collected and delivered as a part of the final report.

Finally, a report will be created containing the technology inventory, process maps and key feedback from staff.

WHAT ARE THE GOALS OF A TECH AUDIT?

The goals of the Technology Audit are to generate wisdom about systems and their integrations to identify opportunities for savings and capital investment to drive greater labor efficiency and accuracy (quality), lower operating costs, and increased visibility into all aspects of the organization and its operations:

- Understand every system (technological or not) used to conduct operations
- Arrive at an understanding of the dependencies between systems

- Identify inefficient systems and inefficiencies arising from the lack of integration of systems, or arising from incomplete or low quality (slow, cumbersome, ineffective) integrations between systems
- Document the pain points arising from non-optimal uses of technology
- Arrive at a set of opportunities that, if seized upon, move the organization towards a more optimal use of technology
- Deliver a report which includes all the above, plus estimates for any agreed upon subsequent implementations or services

In addition to the opportunities that will better serve the organization directly, Fuse IQ will keep a focus on improvements to bring the impact of the mission to the community, to measure and communicate impact and close the loop with donors, partners, and those who are served.

TECH AUDIT SCOPE AND DURATION

For *every* project we take on we do some level of auditing of technology, culture and capacity to understand and define the scope (and risks) of the project. With some clients, simply understanding the impact of implementing a new content management system (CMS) is warranted. At the other end of the scale it may involve months of work interviewing dozens of key players and studying 10 or more distinct systems to determine where efficiencies can be gained including upgrades or purchasing of software or hardware, or somewhere in between these extremes. In all cases our approach and goals as described above are the same.

The scope and duration of a Technology Audit are determined by:

- **The # of systems** - how many points of data input and output need to be studied and mapped; what is the quality of that data
- **The # of interviews needed** - how many people interact with these systems; how complex is the culture; what is the availability of staff for interviews

- **The severity and depth of the challenges the client needs to have solved** - what are the dependencies on the processes; have staff been historically change averse; are there any “sacred cows” that have impeded progress; what are the budget limitations

RECOMMENDATIONS

Once we understand the systems and data in use, needs and gaps, and the culture of an organization we can begin our Recommendations planning.

- **Analysis** – study our findings, assess the organization’s priorities, where the largest needs and gaps have occurred, how the culture of the organization has impeded or embraced progress
- **Research** – determine what tools or services may be best to implement or upgrade that will support the mission and vision, and capacities of the organization
- **Recommendations** – aggregate our Audit, Analysis and Research into a Recommendations document that summarizes our conclusions with documentation that supports these conclusions
- **Estimates** – relative to agreed upon priorities and short and long term needs, generate cost estimates, schedule and implementation plan

IMPLEMENTATION

Once the Audit and Recommendations phases are complete we will then educate you on paths for implementation. Obviously hiring the expert will provide the optimal results yet there are other avenues depending on your project size and budget limitations.

- **Local Service Providers** – when clients have budget and need closer, longer term relationships, hire Fuse IQ or similar vendor; explore the 501 Commons Nonprofit Resource Directory

- **Volunteers** – leveraging Seattle Tech4Good for smaller projects; local volunteer services like 501 Commons Executive Service Corp; leveraging corporate philanthropy from Microsoft or Amazon
- **Third Party Tools** – help the member connect, effectively, with third party tools such as software-as-a-services (SAAS)

COST ESTIMATES

In the context of what drives Scope and Duration (see above) we are offering a multi-tier structure based upon *number of employees* and *operating budget* targeting all sizes of organizations. Once we agree upon the package level you need, Fuse IQ will create a detailed scope of services contract.

Estimates

Package	Interviews	Operating Budget	Hours	Cost	**Special Offer
BRONZE	3	Less than \$500k	15	\$2,325	\$2,025
SILVER	6	\$500k - \$1.5m	25	\$3,875	\$3,375
GOLD	10	\$1.5m - \$3m	40	\$6,200	\$5,400
PLATINUM	12+	\$3m+	(7*) TBD	(\$1,085) TBD	(\$945) TBD

*For Scoping purposes only: 2 Fuse IQ Staff x one 2hr meeting with member org. x 3hr planning and document prep.

**Special Offer

As a fellow Global Washington member we also believe in empowering the sector, and to help we would like to offer an additional discount to our already discounted Nonprofit service rate.

If you sign by January 29, 2018 we will provide the Special Offer rate as shown above.

Contact us today to set up a FREE 1.5 hour exclusive consultation with our Director of Client Solutions, Joel Meyers and Director of Business Development, Alex Sum.

Call 206-788-4484 x108 or email us at info@fuseiq.com. We look forward to hearing from you!

TESTIMONIALS

“FUSE IQ has been responsive, accommodating and fun to work with. They’ve helped us greatly improve our website, and have found creative ways in doing so. After meeting with both our staff and faculty, they guided us through choosing a CMS, defining the types of content we need, the relationships between our content, and the best way to highlight what our department does. They also created a theme for our new site that managed to meet institutional design criteria, meet WCAG 2.0 compliance, and gain approval from our faculty, no small task!” *Kristofer Lewis, Senior Computer Specialist, Department of Neurological Surgery, UW Medicine*

“Designing and launching a new website was a critical and massive undertaking for our nonprofit, and we’re lucky to have Fuse IQ as our partner on this project. Fuse IQ has been responsive and accommodating from the very beginning. Their audit process was an essential step that helped our organization define our technical needs and priorities. Those findings informed not only our website, but sparked us to make upgrades to other technology tools.

They brought a wide swatch of talent to the project, and have created a new website that will make it easy for people to find our services and support our mission. It is beautiful and thoughtfully designed, and will make a positive impact on our organization and the community. We look forward to working with Fuse IQ on future projects!” *Dan Weisbeck, Digital Designer & Manager, YWCA Seattle | King | Snohomish*

“Fuse IQ helped us build a new website for the AIMS Center which is housed within the UW Department of Psychiatry and Behavioral Sciences. They helped us take a "bottom up" approach by having us think about our content first and building our navigation and functionality around that, rather than starting with the navigation and working "top

down." They custom built several modules including a searchable database of our projects and an online training module. The graphic designer listened to our ideas and opinions throughout the process. The project manager did a great job of keeping us on task and staying within budget. The overall end product was terrific and everyone was very satisfied. I would recommend Fuse IQ and am hoping to work with them again!" *Rebecca Sladek, Assistant Director of Communications, UW Department of Psychiatry and Behavioral Sciences*

"Fuse IQ has been the IT contractor on the Healthier WA Practice Transformation Support Hub Resource Portal. We have worked very closely with them and they have given us a great deal of one on one time so that we could work through ideas and goals for the website with them. Joel Meyers, the founder, is a great visionary. Jeanne Cost is an efficient, get-it-done project manager. It's been our privilege and good fortune to have them as our IT Contractor. They have always charged us fairly and been very professional and forthcoming about budgeting, time issues, and amount of work involved for different functionalities. Great IT Contractors who seem to respect and enjoy working with us on our mission to improve healthcare in the state of Washington through easy accessibility to resources and help for clinics through our website." *Stacey Morrison, Project Manager, Healthier WA Practice Transformation Support Hub Resource Portal*

"I came to Fuse IQ with a very vague idea of what I was looking for, and even less knowledge about how the website development process works. Tim, Naomi, Ben and the rest of the team were incredibly knowledgeable, patient and responsive to all my questions. They worked with me to figure out my goals for our new site and came up with a fantastic design that has gotten a great response from my organization and our readers. I can't recommend them highly enough." *Sarah Ostman, Communications Manager, ALA Public Programs Office*

"I do want to take this opportunity to quickly express how great it has been working with your team on this project. I have particularly appreciated Sean's [Fuse IQ developer] quick attention to our issues and the occasions that he was willing to work through some sticky points with me on the phone." *Jodi McKeeman, Manager, Program Operations, Accessible Technology Services, University of Washington*