Tech Forward Conference
Team Rubicon: Catalyst for a Digital Transformation
1 Who We Are
2 Digital Transformation
3 Demonstration
Team Rubicon serves communities by mobilizing veterans to continue their service, leveraging their skills and experience to help people prepare, respond, and recover from disasters and humanitarian crises.
TEAM RUBICON MEMBERSHIP

GREYSHIRTS

October 8, 2019

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Ctrl + Alt + Del
Team Rubicon Systems Architecture
Digital Transformation Roadmap 2019 - 2020

EMS 1.0
- Users
- Contacts
- Events
- Learning Mgmt System Integration
- B2C Security Integration
- Web Tracking (Google Tag Manager)
- Azure AD
- Azure Cloud
- Gmail to Outlook
- Common Data Model
- Basic PowerBI reporting

EMS 2.0
- Mobilization
- OCR AI for transcripts
- Ops Planning and Execution
- SharePoint Integration
- Marketing Automation
- Box to SharePoint (Digital Workplace)
- Data Architecture on Azure

EMS 3.0
- Asset Management
- Mobilization
- Marketing automation
- Donor Management (Salesforce to D365)
- Finance and Operations (Intacct to D365)
- Data Governance
- Data Platform / PowerBI / Qlik

EMS 4.0
- Client Services
- Asset Management
- Field Services
- Finance and Operations (Intacct to D365)
- Data Governance
- Advanced Analytics / PowerBI / Qlik
- AI and Machine Learning

2018
EMS 1.0
- Q4

2019
EMS 2.0
- Q1-Q2
EMS 3.0
- Q3-Q4
EMS 4.0
- Q1-Q2

2020
EMS 4.0
- Q3-Q4

TEAM RUBICON
Digital Transformation Roadmap 2020 - 2021

- **EMS 4.0**
  - Client Services
  - Asset Management
  - Field Services
- Finance and Operations (Intacct to D365)
- Data Governance
- Advanced Analytics/PowerBI/Qlik
- AI and Machine Learning

Q1-Q2 2020

- **EMS 4.0**
  - Client Services
  - Field Services
- Talent Management
- Advanced Analytics/PowerBI/Qlik
- AI and Machine Learning

Q1-Q2 2021

- **EMS 4.0**
  - Client Services
  - Field Services
- Talent Management
- Advanced Analytics/PowerBI/Qlik
- AI and Machine Learning

Q3-Q4 2021
DIGITAL TRANSFORMATION

1. Buy-in (funding, support, commitment)
2. Cultural Adoption and Evangelists
3. Technology partners and solutions
1. “IT is an expense / cost”
2. “We have so many other things we need to do first”
3. “We’ll have to wait…”
4. “We only need to solve this problem”
YOUR DONATION MAKES A WORLD OF DIFFERENCE

☐ One-Time  ☐ Monthly

$  500

DONATE

DISASTER RELIEF

Team Rubicon is providing relief in North Carolina, Florida, and CNMI. Support our teams on the ground today.

SUPPORT NOW

OFFLINE AND CAPITAL GIVING

Prefer to send a check or gifts of stock?

LEARN HOW

PERCENTAGE OF YOUR DONATION THAT GOES DIRECTLY TO OPERATIONS ON THE GROUND

Review our 2017 Financials to see how your support impacts communities affected by disaster

READ NOW
Opportunity vs. Problem

Action, Consequence, Consequence, Consequence
GOOD ORGANIZATIONS
SOLVE PROBLEMS
GREAT ORGANIZATIONS DON’T HAVE PROBLEMS
quantity * quality

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time * cost
In the spirit of being open, we've created the dashboard below to share key data points from our response to Hurricane Harvey, ranging from financial support and impact to membership growth and operational metrics. These data points help us make deliberate investments, draft operational planning objectives, and ensure we deliver impact to communities affected by disasters. Our hope is this data proves applicable and insightful to our volunteers, donors, fellow non-profit organizations, academics, and anyone else focused on the goal of helping people and communities in need.

The Open Initiative will at first focus on our response to Hurricane Harvey, but in future iterations will expand its scope into more disaster responses, as well as Team Rubicon's business operations as a whole.
**HOMES SERVICED**

984

**VOLUNTEERS DEPLOYED**

2,104

**TOTAL LABOR HOURS**

139,910

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**Xactimate Value**

While all services are provided free-of-charge, we still track the financial value of the work we complete. Xactimate calculates work value based on common market rates. [Learn how we calculate the retail value of our assistance.](#)

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**Total Work Value**

6.72M
Client Satisfaction

The Net Promoter Score (NPS) is similar to customer satisfaction, but is more useful in measuring a client’s feelings about an organization as a whole.
Fundraising / Burn Rate / Value Returned

Disaster response requires a significant amount of resources and flexibility. Thankfully, Team Rubicon is supported by a generous group of individuals, foundations and corporate donors. By tracking our fundraising against our burn rate (spending), we’re able to project how long we are able to continue operating and set goals on future fundraising efforts. Further mapping these metrics against the estimated value of Team Rubicon services provided to affected communities ensures we are using our donor’s funds responsibly and effectively; as we put more resources towards a response, it should follow that the breadth and impact of our work should increase. If spend increases and the value of our work decreases, then we need to reevaluate how we are supporting those in need.

As we plan to rebuild 100 homes in we strongly believe the value generated will exceed total donations. We’ll be speaking to this further as we begin rebuild in the spring.
Cultural Adoption and Evangelists
1 “Are you sure something better isn’t going to come along?”

2 “Have we really thought about this?”

3 “Why do we have to change?”
• Created in 1944 by CIA’s precursor
• Designed to undermine productivity and order
(1) Insist on doing everything through "channels." Never permit short-cuts to be taken in order to expedite decisions.

(2) Make "speeches." Talk as frequently as possible and at great length. Illustrate your "points" by long anecdotes and accounts of personal experiences. Never hesitate to make a few appropriate "patriotic" comments.

(3) When possible, refer all matters to committees, for "further study and consideration." Attempt to make the committees as large as possible – never less than five.

(4) Bring up irrelevant issues as frequently as possible.

(5) Haggle over precise wordings of communications, minutes, resolutions.

(6) Refer back to matters decided upon at the last meeting and attempt to re-open the question of the advisability of that decision.

(7) Advocate "caution." Be "reasonable" and urge your fellow conferees to be "reasonable" and avoid haste which might result in embarrassments or difficulties later on.

(8) Be worried about the propriety of any decision – raise the question of whether such action as is contemplated lies within the jurisdiction of the group or whether it might conflict with the policy of some higher echelon.
VMS D365 Initiative – UAT 3 Kickoff

May, 21st 2019
#3b: Compromise

PERFECTION IS THE ENEMY OF PROGRESS

--Winston Churchill
Nothing  Something  Perfection

An infinite distance  Barely noticeable
TR’s Dx Change Journey

WHO is impacted > WHY is it a win for you > WHAT is changing > WHEN is it changing > HOW can we support the change.
80%
PARTNERSHIP GOALS
1 “It is too expensive to get outside help.”

2 “Why do I have you, if you can’t do it?”

3 “If you can’t build it, how can we use it?”
PARTNERSHIP GOALS

Leverage Best in Class Expertise

Mentor and Teach Young Team on Process and Techniques

Semper Fi (Always Loyal)
K.I.S.S.
NOT
K.I.C.S.
EVALUATING AND RESPONDING

WINNING

 LOSING
FAIL FAST
KNOW YOU ARE WINNING EARLY
Success looks like…. the Future State

- Better management of information – one version of the truth
- Easy to find information: navigation is intuitive, and search just works
- Improved existing workflows around document and unstructured data
- Finding more than just documents... like expertise or to-do lists
- Simplified sharing with partners
- Keeping each other informed
<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
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<tbody>
<tr>
<td>Sharepoint Synch</td>
<td>12/6/18</td>
</tr>
<tr>
<td>Design Meeting 1</td>
<td>12/12/18</td>
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<tr>
<td>Teams Initiate Box Clean-Up</td>
<td>12/12/18</td>
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<td>12/19/18</td>
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<td>12/19/18 – 1/5/19</td>
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<td>File Migration</td>
<td>1/15/19 – 1/17/19</td>
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WE HELP NONPROFITS AND COMMUNITIES THRIVE

Technology Services, Education, and Training that Makes an Impact

Learn More About Technology Services  Get Unlimited IT Support

We're a nonprofit on a mission to use technology to better serve the world.

Services that Empower Nonprofits

Help Desk - Managed IT Services  Strategic Consulting Services  Data Management