Tech Forward Conference

TEAM RUBICON®

Team Rubicon: Catalyst for a Digital Transformation
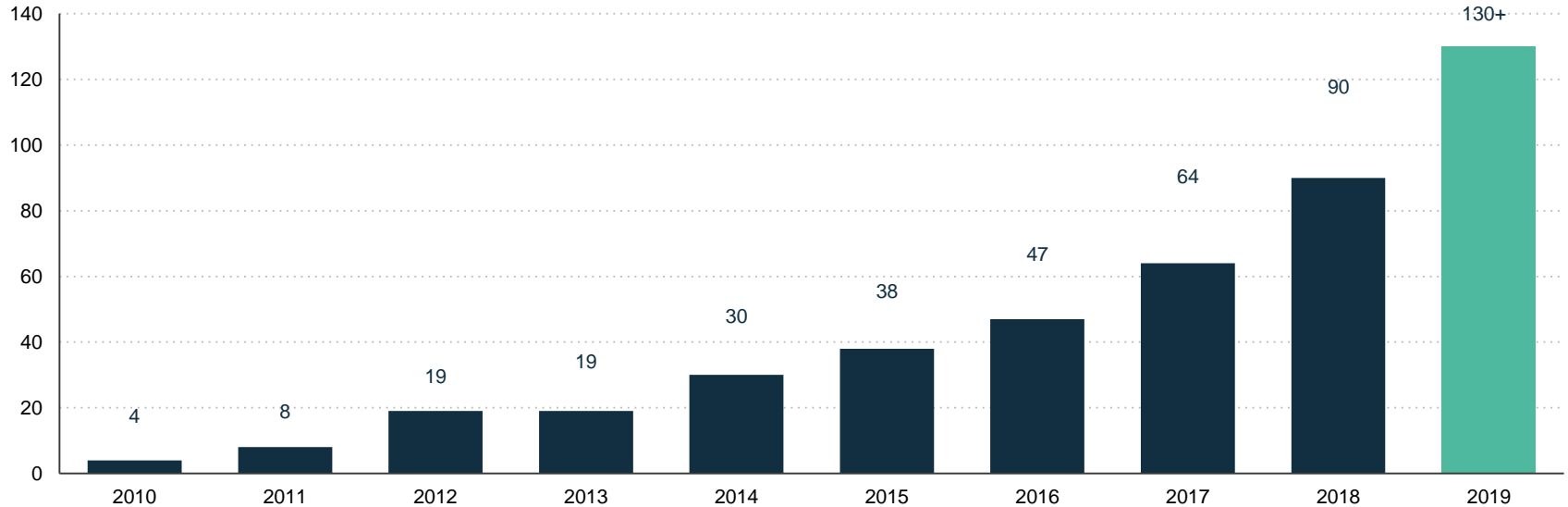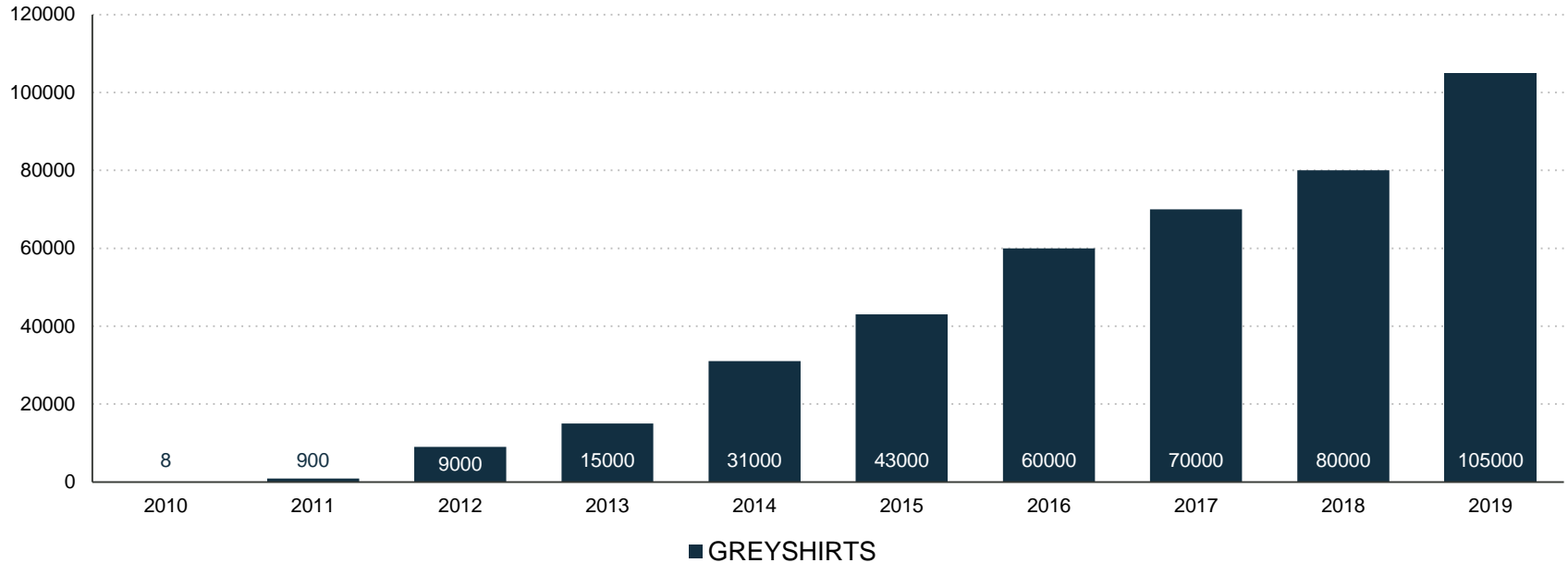
AGENDA

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.

HISTORY OF RESPONSE OPERATIONS

Bar chart showing response operations by year:
- 2010: 4
- 2011: 8
- 2012: 19
- 2013: 19
- 2014: 30
- 2015: 38
- 2016: 47
- 2017: 64
- 2018: 90
- 2019: 130+

TEAM RUBICON MEMBERSHIP

Year	Greyshirts
2010	8
2011	900
2012	9000
2013	15000
2014	31000
2015	43000
2016	60000
2017	70000
2018	80000
2019	105000

■ GREYSHIRTS

SERVICES & CAPABILITIES
FOR IMPACTED COMMUNITIES

INCIDENT
MANAGEMENT

DAMAGE
ASSESSMENTS

DISASTER MAPPING &
WORK ORDER MITIGATION

DEBRIS
MANAGEMENT

HAZARD
MITIGATION

EXPEDIENT
HOME REPAIR

SPONTANEOUS
VOLUNTEER MANAGEMENT
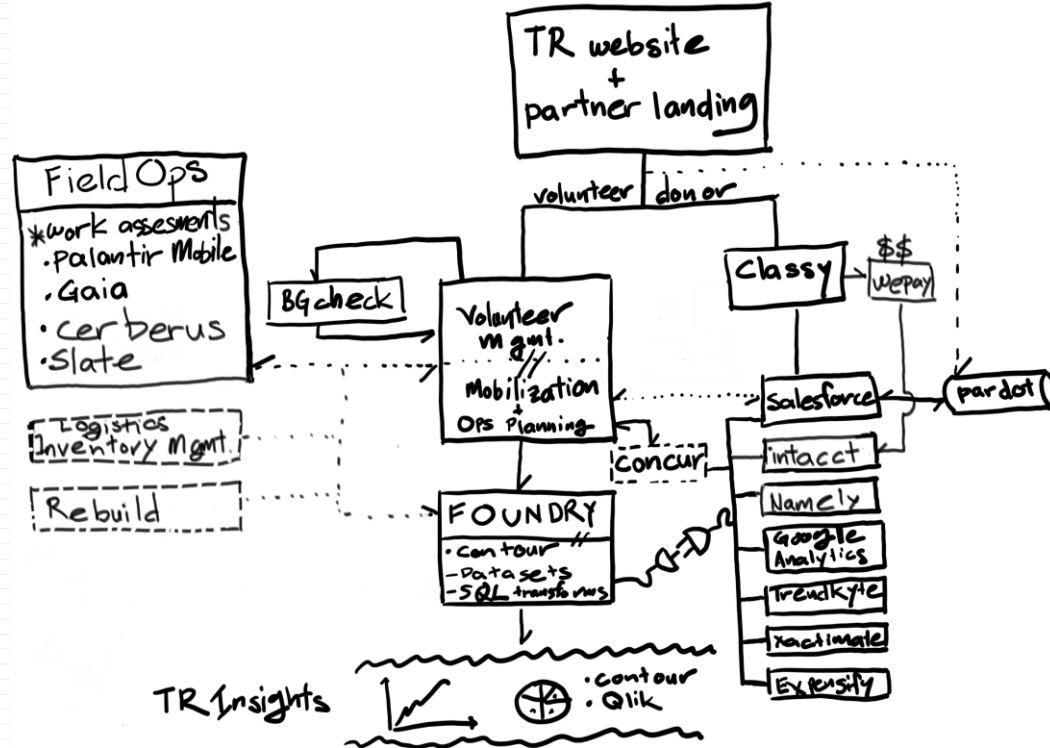
EMERGENCY MEDICINE
(INTERNATIONAL)
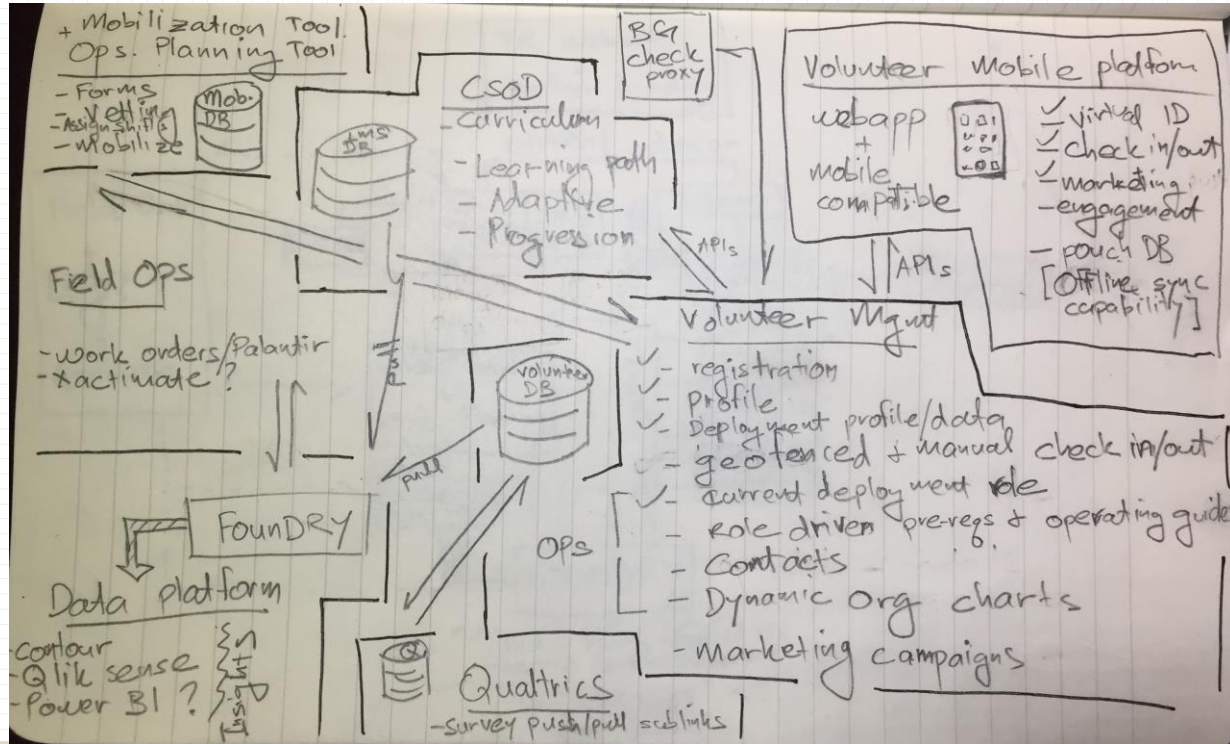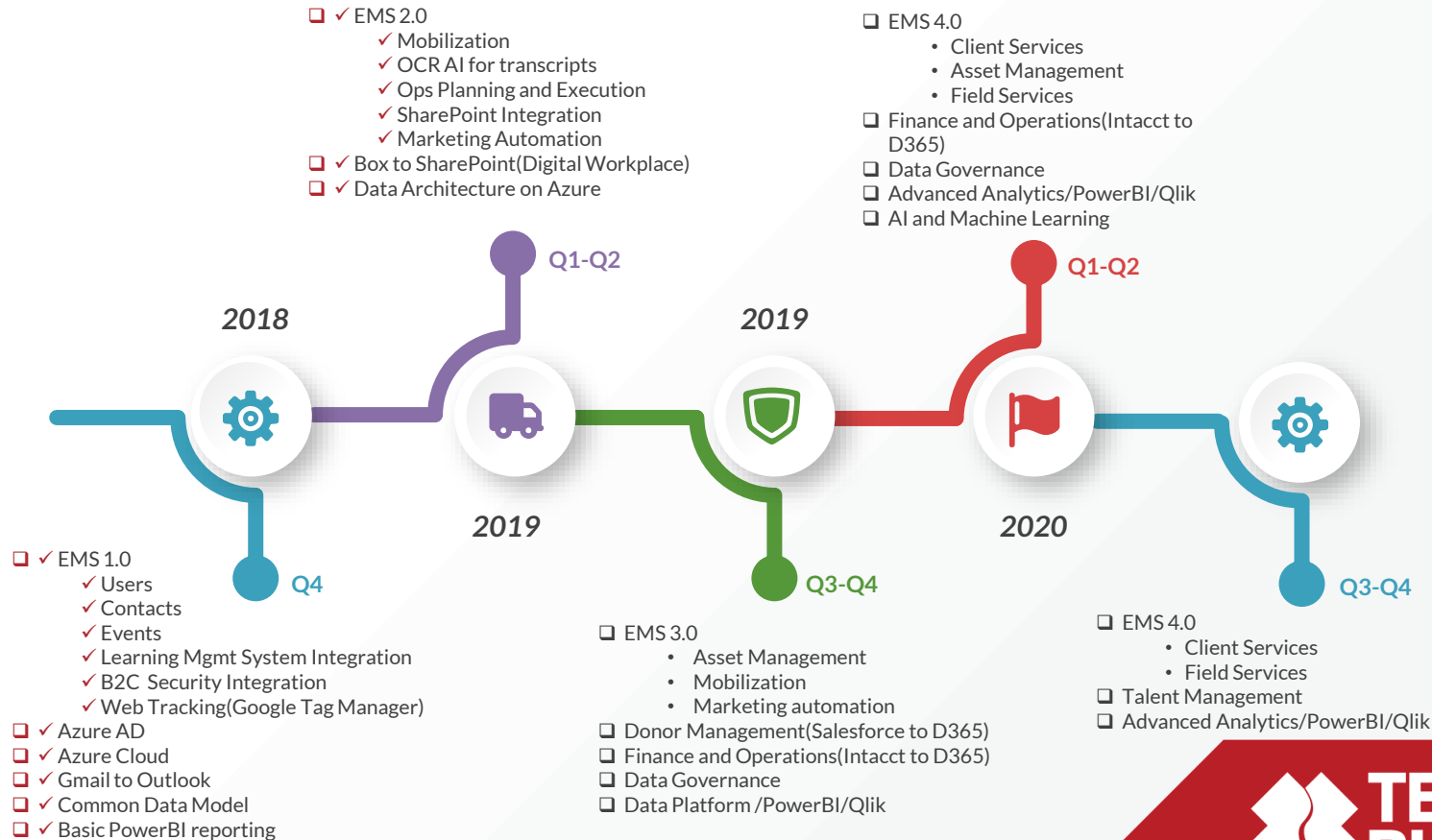
PRIMARY CARE
(INTERNATIONAL)

October 8, 2019

Ctrl + Alt + Del

Integrated SaaS Stack

Team Rubicon Systems Architecture

Digital Transformation Roadmap 2019 - 2020

Q1-Q2

✓ 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 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

2018

2019

2019

2020

Q4

✓ 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

Q3-Q4

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

Q3-Q4

EMS 4.0
- Client Services
- Field Services

Talent Management
Advanced Analytics/PowerBI/Qlik

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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

❏ EMS 4.0
- Client Services
- Field Services

❏ Talent Management
❏ Advanced Analytics/PowerBI/Qlik
❏ AI and Machine Learning

Q1-Q2

2020

2020

2021

Q3-Q4

❏ EMS 4.0
- Client Services
- Field Services

❏ Talent Management
❏ Advanced Analytics/PowerBI/Qlik
❏ AI and Machine Learning

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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"

INVESTMENT

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 ›

OTHER WAYS TO GIVE

OFFLINE AND CAPITAL GIVING

Prefer to send a check or gifts of stock?

LEARN HOW ›

84%

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

$$\frac{quantity \; * \; quality}{time \; * \; cost}$$

TRANSPARENCY
OPEN INITIATIVE

HOMES SERVICED
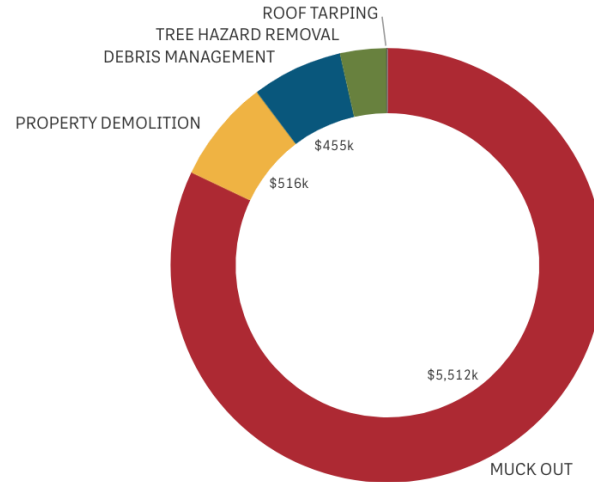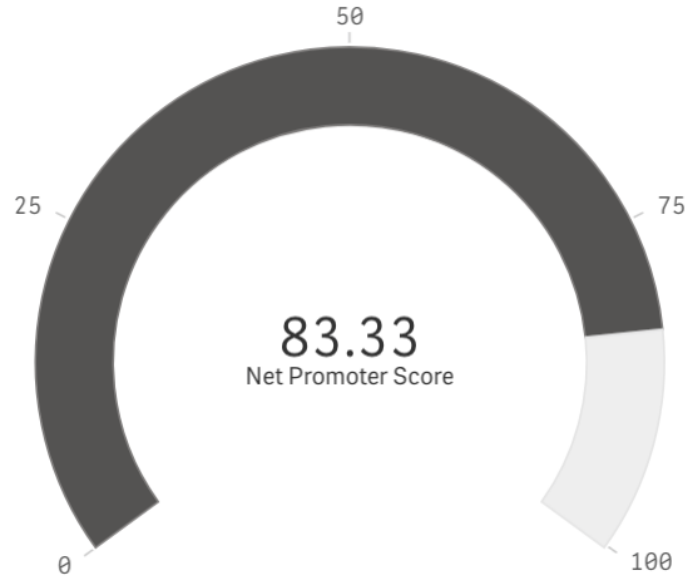
984

VOLUNTEERS DEPLOYED

2,104

TOTAL LABOR HOURS

139,910

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.

Total Work Value

6.72M

ROOF TARPING
TREE HAZARD REMOVAL
DEBRIS MANAGEMENT

PROPERTY DEMOLITION

$455k

$516k

$5,512k

MUCK OUT

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.

50

25

75

83.33
Net Promoter Score

0

100

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.
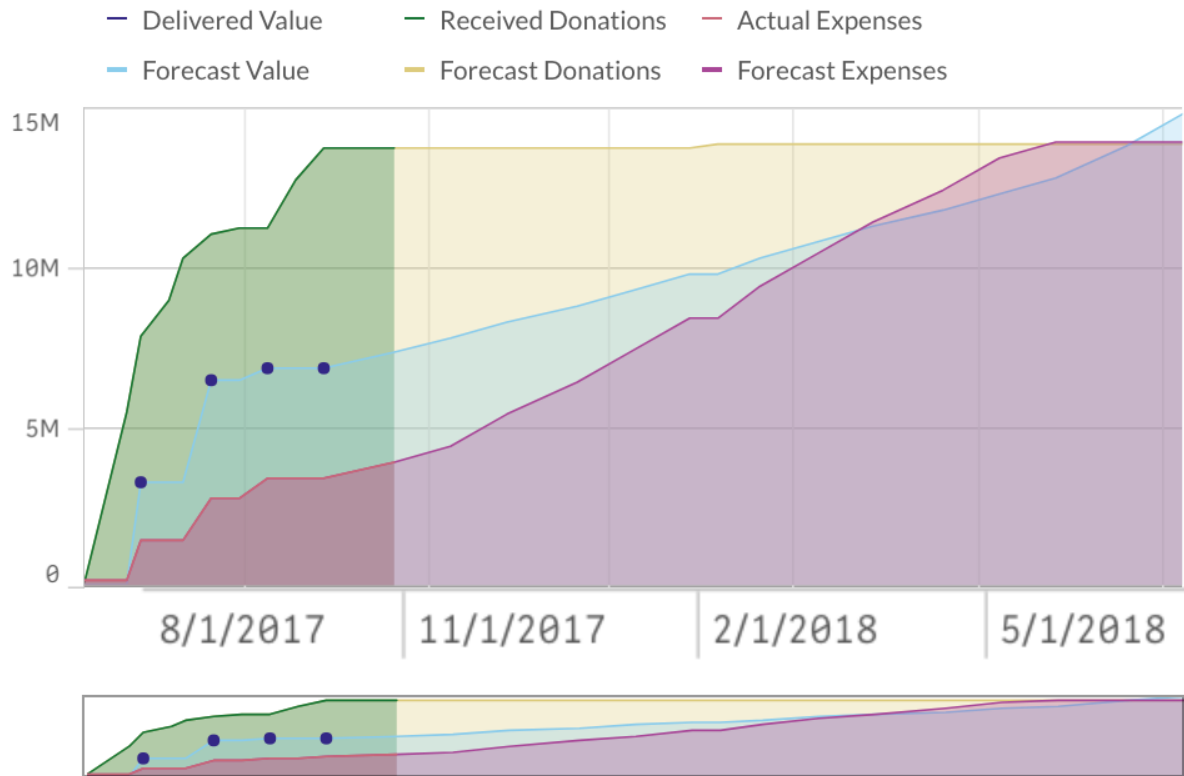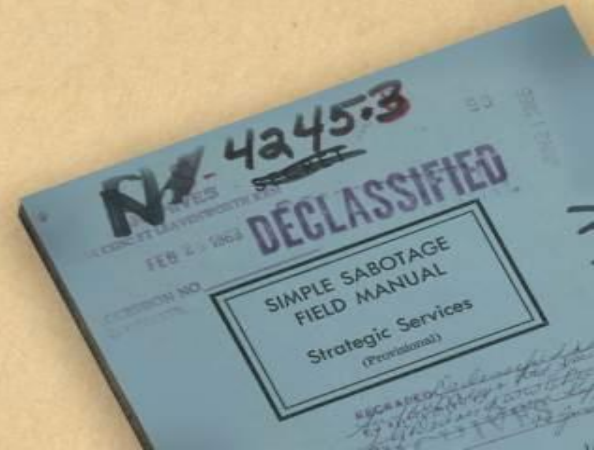
Cultural Adoption and Evangelists

1   "Are you sure something better isn't going to come along?"

2   "Have we really thought about this?"

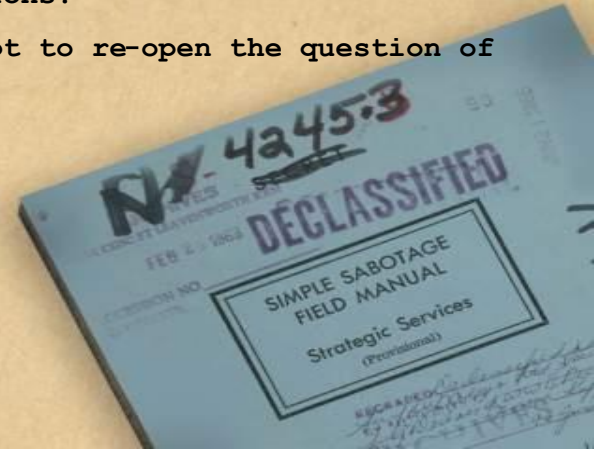3   "Why do we have to change?"

OSS Simple Sabotage Manual

- *Created in 1944 by CIA's precursor*
- *Designed to undermine productivity and order*

SIMPLE SABOTAGE
FIELD MANUAL

Strategic Services
(Provisional)

OSS Simple Sabotage Manual

Organizations and Conferences

(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.
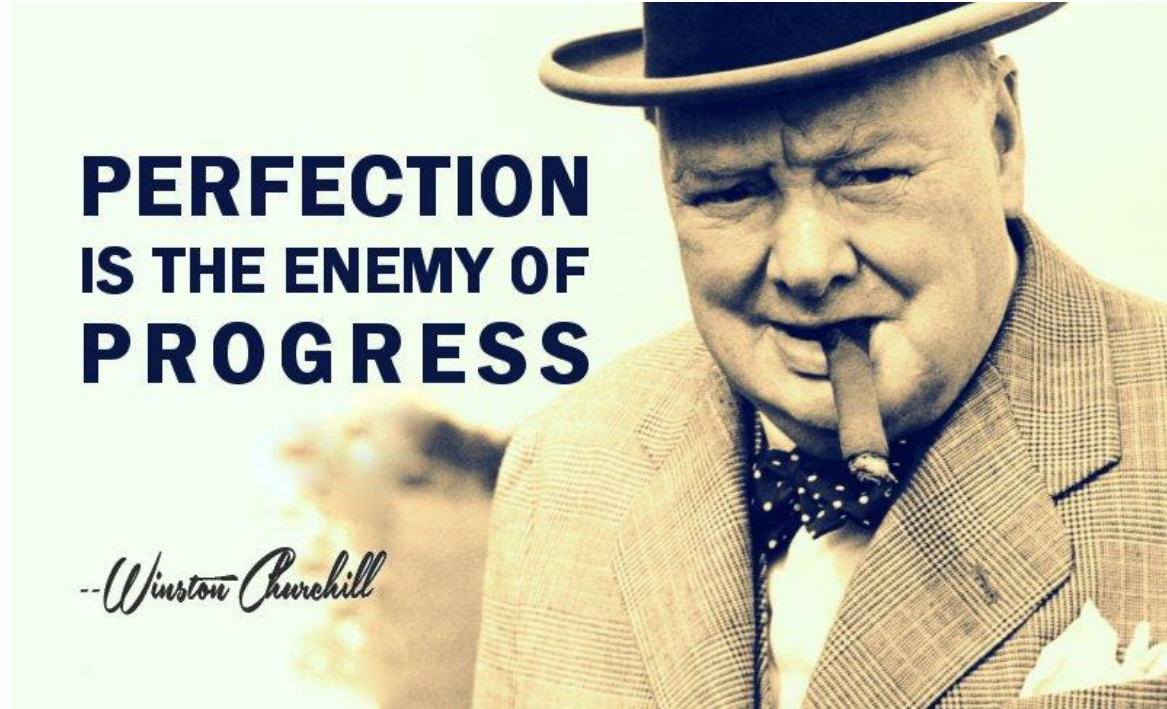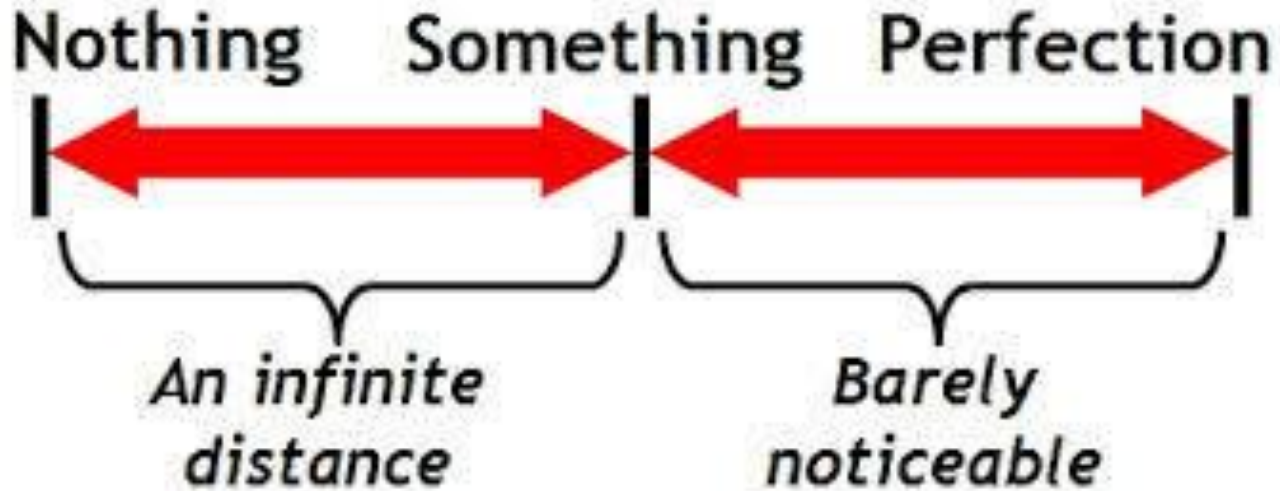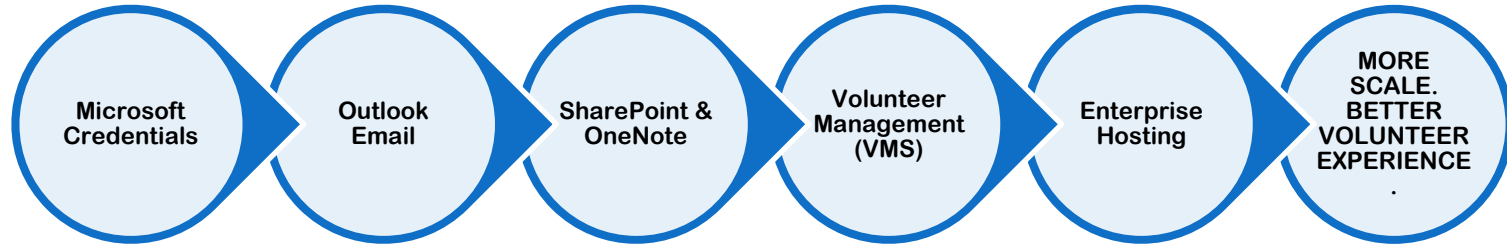
#3b: Compromise

PERFECTION IS THE ENEMY OF PROGRESS

--Winston Churchill

Nothing   Something   Perfection

An infinite distance

Barely noticeable

TR's Dx Change Journey

Microsoft Credentials > Outlook Email > SharePoint & OneNote > Volunteer Management (VMS) > Enterprise Hosting > MORE SCALE. BETTER VOLUNTEER EXPERIENCE.

WHO is impacted > WHY is it a win for you > WHAT is changing >
WHEN is it changing > HOW can we support the change.

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SECTION 003

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.

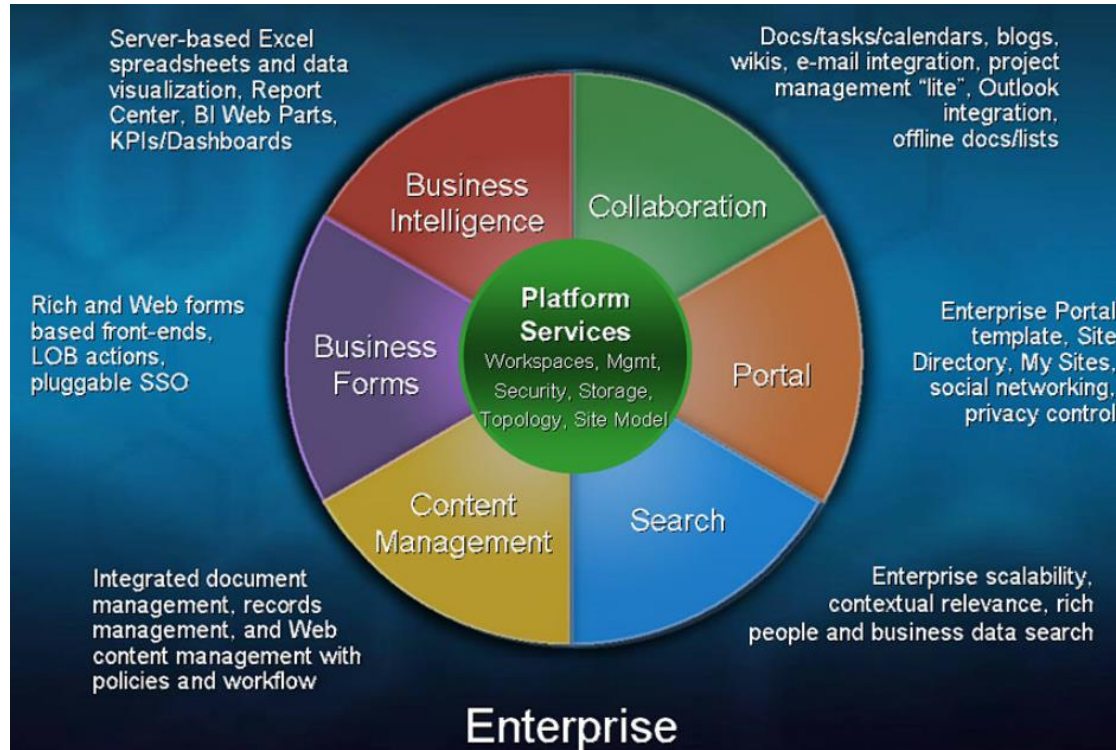## NOT

K.I.C.S.

EVALUATING AND RESPONDING

WINNING

LOSING

FAIL FAST

KNOW YOU ARE WINNING EARLY

SharePoint for Dummies

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

Timeline

Activity	Date
Sharepoint Synch	12/6/18
Design Meeting 1	12/12/18
Teams Initiate Box Clean-Up	12/12/18
Design Meeting 2	12/19/18
Design Synthesis	12/19/18 – 1/5/19
Design Review	1/7/19
Final Design Readout	1/14/19
SP/One Drive Pilot Migration	1/15/19
File Migration	1/15/19 – 1/17/19
Sharepoint Migration 1	1/30/19
Sharepoint Migration 2	2/06/19
One Drive Migration	2/13/19
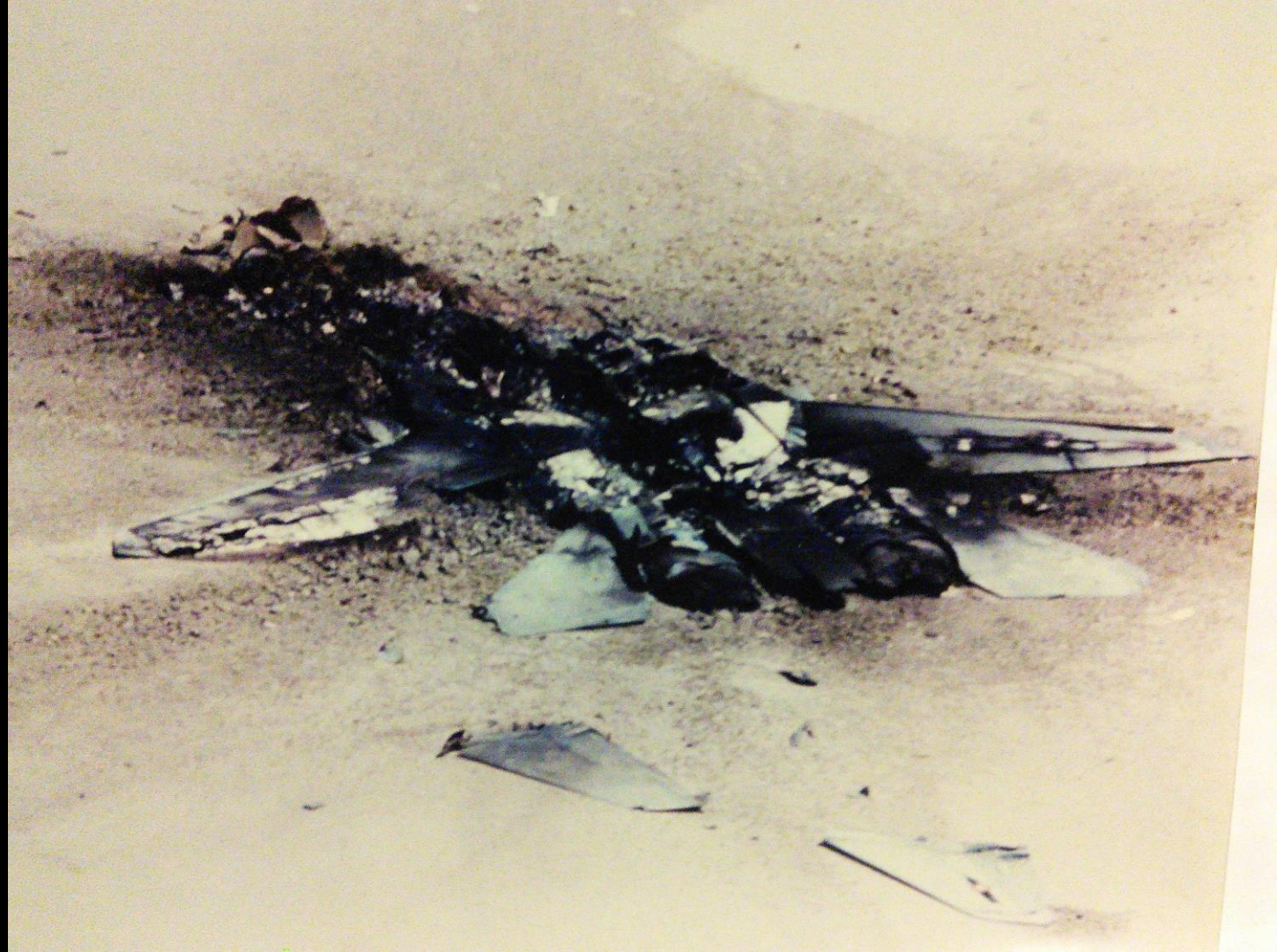
WE HELP NONPROFITS AND COMMUNITIES THRIVE

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

@Kato_delaCruz

@Art_kato_delacruz

Linkedin.com/in/ArtdelaCruz

delacruz@TeamRubiconusa.org

TeamRubiconUSA.org