

Case Study

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Rockefeller Philanthropy Advisors

A Decade-long Partnership Between Rockefeller Philanthropy Advisors and mindSHIFT Keeps Giving and IT Systems on Track

"Our systems are up and running all the time. There's no downtime to speak of, which is pretty phenomenal for any business."

— Nick Hodges
Senior Vice President and COO
Rockefeller Philanthropy
Advisors
New York, New York



ABOUT THE CUSTOMER

Rockefeller Philanthropy Advisors (RPA) is one of the world's largest nonprofit philanthropic service organizations, facilitating more than \$3 billion in grantmaking to nearly 70 countries since its founding in 2002. Continuing the Rockefeller family's legacy of philanthropy across a wide range of issue areas, RPA provides research and counsel on charitable giving, develops philanthropic programs and offers complete program, administrative and management services for foundations and trusts worldwide. What started out as a smaller nonprofit has grown through the years into a much larger entity with 45 full-time employees in four offices in the U.S. With growth came more sophisticated information management challenges. No longer served by a simple IT framework, RPA needed to optimize its information—and its technology infrastructure—to support its long-term vision to create a new culture of great giving.

CHALLENGE

Like many nonprofits, Rockefeller Philanthropy Advisors faced a series of unique technology challenges that aren't typical in the corporate world. They lacked the technical savvy found in the for-profit sector that often has a seasoned and sizeable IT department. Many of the processes established for nonprofits are customized and don't fit into an off-the-shelf IT solution. In addition, there are legacy systems that don't talk to each other and automated processes that these systems can't support.

Most of all, budgets are tight and don't leave room for dedicated systems staff.

CHALLENGE

- Limited budget
- Limited technical expertise
- Growing complexity with more locations

SOLUTION

- mindSHIFT Managed IT Services
- Smooth rollout at new offices
- Virtually no downtime

RESULTS

- Long-range, strategic planning
- Access to IT brain trust
- Managed IT services ideal for nonprofits

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"We are in the business of helping donors make grants to good causes, so every dollar taken away from a grant has great scrutiny," said Nick Hodges, Senior Vice President and COO of RPA.

Lacking the funds and in-house expertise to support its network, nonprofits routinely turn to outsourced IT partners to keep them up and running. RPA did just that in 2001 after it separated from parent Rockefeller Family Office, where it previously shared space and a computer room. Wanting an IT network of its own, RPA turned to mindSHIFT for Managed IT Services at its headquarters in New York City.

Drawing on its prior success with law firms, associations and other nonprofits, mindSHIFT was a natural fit for RPA. mindSHIFT's sweet spot was serving organizations with 20 to 150 employees, providing full IT managed services or an a la carte menu of services. Highly flexible, mindSHIFT could host equipment at the customer's site or in its own data centers.

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In the beginning, RPA's IT needs were fairly simple. It had one office, 20 employees and servers located in a large air-conditioned room onsite. But as RPA considered relocating to a new headquarters in New York City and adding more offices—in Chicago, Los Angeles and San Francisco—the organization knew its IT needs would become more complex.

"We started to think about multiple offices that needed to connect to our headquarters and we engaged with mindSHIFT for Managed IT Services at that point," said Hodges.

SOLUTION

RPA signed on with mindSHIFT for its Total IT Management suite of services, where its entire IT infrastructure would be managed, maintained and supported. With this offering, mindSHIFT manages RPA's network and services, sets up computers and printers, oversees email and mobile phone applications and provides on-site service.

mindSHIFT also maintains back-up servers and workstations, installs and manages software updates, patches and firewalls—and provides 24/7/365 customer support via the mindSHIFT Customer Care Center in the U.S. Especially unique was mindSHIFT's expertise with applications for nonprofits—programs specifically designed to manage fundraising, accounts payable/accounts receivable and donation tracking.

Additionally, mindSHIFT provided guidance to RPA on hardware implementations and served as a single source for acquiring new PCs or laptops. The mindSHIFT team even helped RPA develop a technology roadmap and understand their options for upgrading its servers and network as it grew.

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When RPA relocated to its new headquarters, mindSHIFT and RPA jointly decided that a hybrid infrastructure model was the best approach. Various services were moved to the cloud, one server was maintained at the new location and two servers were installed at mindSHIFT's data center to serve remote users at the new locations.

"This was a huge project for us. We had to update all the server technology and move to our own partitioned piece of the cloud," said Hodges. "It was a very successful project that really increased our storage capacity compared to our old New York facility."

The upgrade also helped RPA move to the Office 365 platform that enables users to work anywhere, anytime, on any device. With this true business-class platform, RPA was able to take advantage of many new Office 365 tools including advanced video conferencing to stay connected with colleagues in all four U.S. offices—and anywhere they traveled across the globe.

"Being able to support Office 365 brought a level of sophistication to our office that we didn't have before," said Hodges.

"When we migrated to our new server environment, the mindSHIFT team worked the entire weekend and had all four of our offices up and running by Sunday afternoon. I'm not sure if other IT vendors even work on weekends or evenings."

The mindSHIFT team was also integral in helping RPA set up and support employees remotely at the new office locations. With these users accessing the network—and all the sensitive financial and donor information contained on it—security is always a concern. But in the end, RPA was assured that mindSHIFT had all the tools in place to protect the network and end-user devices from external threats and internal viruses.

"Our systems are up and running all the time. There's no downtime to speak of, which is pretty phenomenal for any business," said Hodges. "When we migrated to our new server environment, the mindSHIFT team worked the entire weekend and had all four of our offices up and running by Sunday afternoon. I'm not sure if other IT vendors even work on weekends or evenings."

RESULTS

Eight years into the relationship with mindSHIFT, RPA decided to evaluate its options in an increasingly crowded field of IT service providers. After all, RPA was mindSHIFT's long-standing client in New York, though many more have come aboard since.

RPA wanted to make sure it was getting the level of service it needed—at the best price. They issued an RFP and invited mindSHIFT as well as other providers to respond. In the end, mindSHIFT once again stood out as the right partner to continue with RPA.

"What I like about mindSHIFT is when something goes awry, they are very open to feedback and will course correct based on that feedback," said Hodges. "What makes a really great partner is not perfection, but the ability to respond and adapt."

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Attentive Service, Strategic Partnership

mindSHIFT's service model also impressed RPA. Each customer has an account manager who is responsible for coordinating the relationship as a strategic partnership. The mindSHIFT account manager is available to RPA for planning future applications and other IT initiatives.

"I wanted a thought partner, not just an IT services provider, and mindSHIFT delivers on that," said Hodges.

Future Focused, Long-range Planning

Now running strong for more than a decade, RPA and mindSHIFT are focused on the future. They are jointly beginning to draft a five-year strategic plan for IT services and looking at systems to support RPA's growth. As usual, mindSHIFT will come to the table with ideas, cost analysis and expertise to help RPA understand what would be the best course to carry out their mission.

"We can amplify our mission by optimizing our systems even further and becoming even more efficient," said Hodges.

Leveraging a Brain Trust

For nonprofits, Hodges believes managed IT services are the only way to go. Working with mindSHIFT provides a level of expertise that RPA can't get with a dedicated IT person on the payroll.

"Single IT individuals usually underperform in technology," said Hodges. "They might use the right techno speak, but others in your organization don't have the technical prowess to unpack that information and understand it. Managed IT services is ideal for nonprofits."

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ABOUT mindSHIFT

mindSHIFT, a Ricoh company, is one of the largest IT outsourcing and cloud services providers, serving small and mid-size businesses for 16 years. At mindSHIFT, we're about keeping your IT systems up and running, providing personal attention and making you more productive. We're big enough to offer the facilities, services and expertise you expect, but small enough to provide the support and attention you demand. Learn more at www.mindSHIFT.com.

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