The David and Lucile Packard Foundation: The Connected Anywhere Operation Journey

The Connected Anywhere Operation Journey

Lessons Learned

- IT infrastructure modernization provided an opportunity to rethink potentially outdated operating models, workflows, and processes.
- SaaS-based (Software as a Service) architecture reduced backend costs and efforts while enabling IT and business teams to focus more on the front-end to accelerate the delivery of benefits.
- Interdisciplinary leadership is important in ensuring an inclusive and collaborative culture to drive toward common goals.
- Overcoming challenges to technology adoption requires building trust, showing the benefits, and lifting all boats.
- Value creation can be achieved by starting with the SaaS' baked-in best practices and iteratively expanding value through agile delivery and continuous improvement.

In the spring of 2020, the COVID-19 pandemic forced the David and Lucile Packard Foundation's workforce home. Prioritizing the safety of its workforce during the pandemic, in March 2020 the Foundation temporarily closed all its offices.

> The entire organization had to quickly shift from an in-person onsite workplace environment to a distributed remote workplace model. Facilitating this shift was crucial; at stake was not only the ability to deliver on the Foundation's mission, but the multiple unprecedented crises had intensified the Foundation's need for even more grantmaking and program-related investments. Given the role of technology in enabling a remote workforce, Foundation leadership looked to the IT department for guidance.

Fortunately, IT had already laid the groundwork for a connected enterprise infrastructure that would be necessary to make Anywhere Operation of the digital workplace possible. Foundation employees were using many SaaS-based applications to perform their job functions and to collaborate and communicate with others. They were also using the resources available in the digital workplace with high degree of interoperability. Partnerships with trusted service providers enabled IT to quickly scale to meet the increased service demands required for the pivot. Technology champions within Foundation business functions were IT workforce multipliers that helped colleagues to quickly adapt to remote working conditions using the SaaS-based applications / systems already in place. Close working collaboration with industry analysts and with similar mission-driven organizations helped the IT team better anticipate issues along with possible solutions, learn and apply best practices,

and stay a few steps ahead of the rapidly evolving situation. The Foundation's connected operations enabled its workforce to request and receive services anywhere from empowered operational teams whose service delivery processes were orchestrated through digital workflows. Furthermore, these service delivery digital workflows and the real-time information provided by the connected operations allowed the teams to detect issues, pinpoint root problems, and prioritize actions needed so they could more effectively and swiftly respond to changing circumstances.

> The journey to the Foundation's Anywhere Operation wasn't simple. Success required a methodical scrutiny of Foundation operations, building a collaborative and inclusive governance model, identifying and prioritizing strategic initiatives, future-proofing core technology selection and adoption, accelerating solution delivery, and evidence that the technology delivered the intended value. The Foundation embarked on this mission in 2017, starting with a focused effort to strengthen information security while improving business continuity, operational services, and solution delivery.

No matter the organization, modernizing infrastructure and transitioning out of legacy applications and tools is an expensive endeavor in terms of both time and resources. Compounding these challenges is the need to overcome the often deeply ingrained traditional ways of working. Modernizing requires understanding the new technologies and their potential, rethinking processes, upskilling employees, and reframing mindsets to expect an accelerated pace of technological change. Determining whether the investment is worth the effort, and balancing the potential payoff with risks involved, makes prioritizing this work difficult. Therefore, overcoming these obstacles requires listening, collaboration, and ample communication with a wide variety of stakeholders across the organization.

Facts about Packard Foundation's **Anywhere Operation**

Implemented from 2017 to 2019 and starting with Microsoft 365 and ServiceNow as the initial core technology platforms, the Packard Foundation's Anywhere Operation…

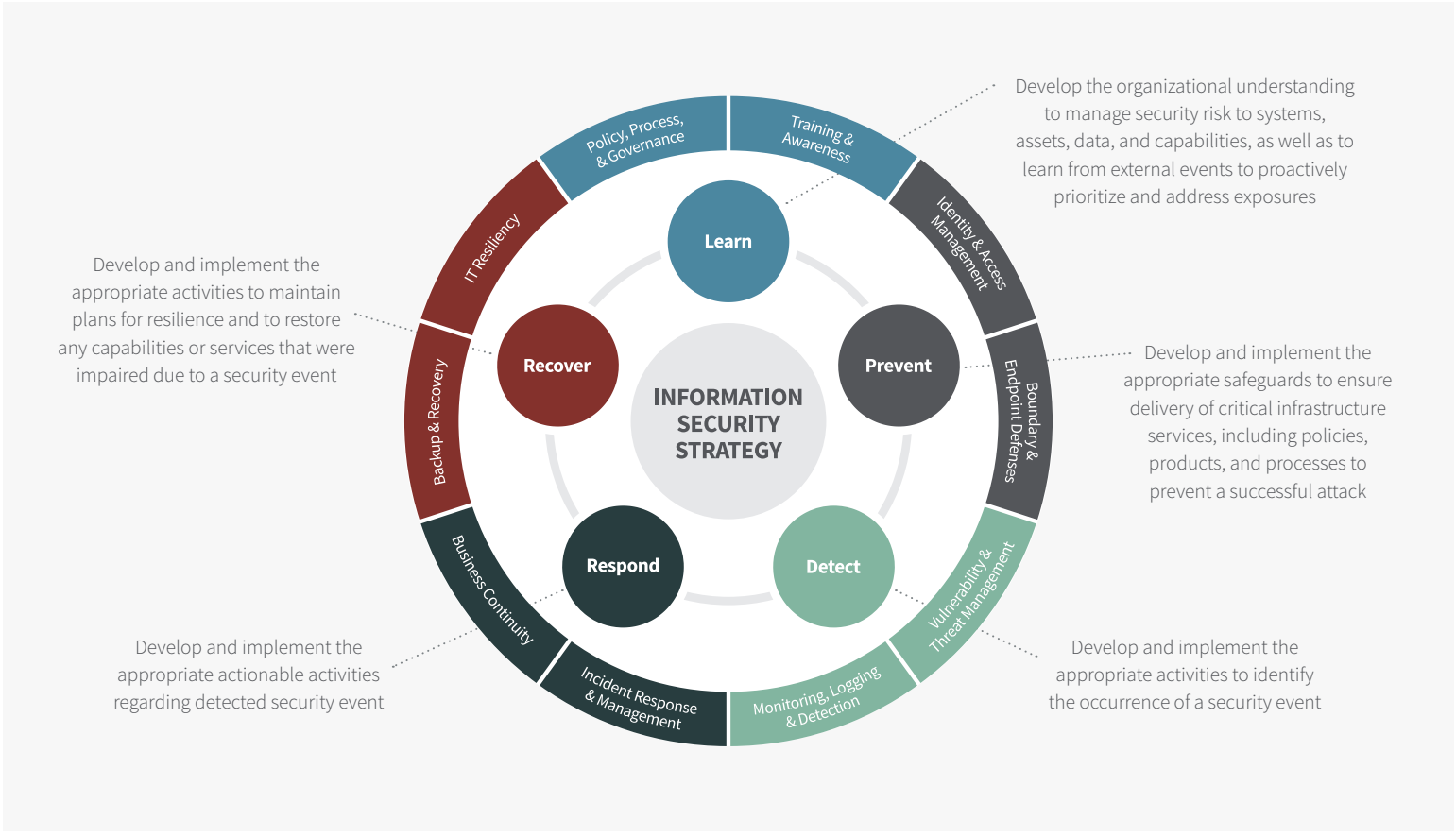
- Includes infrastructure and mobile / computing devices for both remote and in-person work.
- Secured with multi-factor authentication (MFA) and other pre-built security features accessed through devices and digital workplaces that can be managed from anywhere.
- Provides multimodal communication, collaboration, and digital workplace and office productivity applications.
- Orchestrates operational tasks and service delivery with digital workflows.
- Interfaces with SaaS-based business applications including accounting, finance, HR (talent) management, payroll, performance management, customer relationship management, agreement management, board management, intranet, analytics, and visualization systems.
- Offers applicants and partners self-service portals.

Where Do We Start?

Laying the groundwork with scenario planning

For the Packard Foundation, the journey to a modernized, Anywhere Operation technology infrastructure began in 2017. At that time, IT sought to strengthen information security while improving business continuity, operational services, and solution delivery. Beginning with a SWOT (strengths, weaknesses, opportunities, and threats) analysis and business impact analysis, IT evaluated the Foundation's operational position and assessed the resiliency of key business activities during and after different scenarios of disruptions with technology. By having a realistic understanding of the current operational state, quantifying the impacts of disruptions, and determining the recovery requirements, IT and other interdisciplinary stakeholders could see areas of strength to build on and areas requiring change. Armed with this understanding, they would identify specific strategic outcomes necessary to achieve their Anywhere Operation vision.

One area they flagged as a priority was information security. In response to a growing cybersecurity threat landscape, IT designed a comprehensive approach to addressing and managing cybersecurity risks. The approach considered the cybersecurity framework from NIST (National Institute of Standards and Technology), recommendations from Gartner analysts, and good practices from other similar organizations. It outlined the set of activities and standards needed to reach specific goals IT had set to achieve strategic information security outcomes.



Through this effort, it became clear that to improve information security while providing more robust solutions and resilient service delivery to run the Foundation, IT could not simply retrofit existing outdated technology infrastructure. Instead, IT needed to transition to next generation infrastructure and digital platforms that had built-in integrated security and privacy protections while enabling greater innovation, collaboration, and digital functionalities to modernize the core work of the Foundation.

With operational resiliency and security as a priority, IT began charting the course for transitioning out of legacy infrastructure, applications, and processes, and into SaaS-based architecture.

> IT outlined two categories of strategic objectives. The first was **Core Technology Priorities,** centered on shifting the technology to cloud and SaaS-based architecture. The other was **IT Strategic Priorities,** centered on enhancing capabilities with technology to advance the Foundation's mission.

Core Technology Priorities:

- **Cloud and SaaS-based:** Migrating infrastructure / applications to cloud-based platforms and pursuing SaaS-based innovative solutions that can optimize the whole enterprise and are connected, interoperable, extensible, and reliable.
- **Data & Analytics:** Delivering data with intuitive analytical tools to accelerate time to insight and drive decisions.
- **Collaboration:** Delivering unified communication, collaboration, and digital workplace tools centered around people and teams, both in-person and remotely, internally and externally, and in support of different meeting types.
- **Mobile and Computing Devices:** Improving experiences, effectiveness, mobility, and engagement through a connected device ecosystem.
- **Cybersecurity:** Ensuring availability, integrity, confidentiality, use control, and accountability for systems / infrastructure owned by or available at the Foundation.

The Core Technology Priorities focused on implementing, expanding, and delivering modern technology and innovation to improve productivity, strengthen security and make Anywhere Operation possible. While the IT Strategic Priorities focused on actions that enhance business capabilities and build organizational muscle to sustainably and nimbly adopt and master new technologies.

IT Strategic Priorities:

IT STRATEGIC PRIORITIES	FROM	TO
Strengthen Operations and Security By modernizing IT infrastructure, security, and capabilities	» Physical on-premises IT infrastructure » Traditional IT hosting and security » Manual service management workflows	» SaaS-based architecture » SaaS providers hosting » SaaS capable security » Digital workflows to orchestrate IT service management and automations
Accelerate Solution Delivery By shifting from waterfall processes to continuous integration and continuous delivery	» Waterfall software delivery processes » Development, maintenance, and enhancements of monolithic and tightly interconnected application systems » Cross-applications integrations	» Continuous integration and continuous SaaS delivery processes » Re-composition, configuration, and implementation of SaaS-based applications » Cross-cloud / SaaS integrations
Execute with Discipline By hardwiring industry best practices to achieve execution success on projects, process improvements, service management, and cybersecurity	» Outcomes highly dependent on individual heroics with some repeatable practices and defined processes » No industry best practices adoption or benchmarking	» Outcomes reliably and sustainably delivered through teams with managed processes that are continually optimized » Adoption of industry best practices and benchmarking: ITIL for service management, NIST for cybersecurity, Lean / Kaizen for process improvements, and Agile for project execution
Upskill the Workforce By investing in people development, upskilling, and a digital ready workforce	» In-house workforce with use of partners and contractors to augment workforce. » “Bricks and mortar” operating model » Generalists and specialists	» Digital ready in-house workforce with IT workforce multipliers in business functions and strategic use of service partners / providers to augment workforce. » Agile is the principal design element for operating model » More “versatilists”
Expand Impact with Technology By pursuing capabilities and technology innovations to advance interoperability across the ecosystem and throughout the Foundation value chain	» Independent and fragmented work / functional processes and value chain reinforced by incompatible technology systems » Independent and fragmented ecosystem to achieve social impact	» Integrated and coordinated work / functional processes and value chain reinforced by interoperable technology systems » Enabling coordinating mechanism to advance coordination of networks / ecosystems to achieve social impact

The IT strategy outlined in the two categories of priorities allowed the organization to be agile, adapting to gain advantages and to iteratively realize benefits from technology. Overall, the IT strategy improved the security and resiliency, and prepared the Foundation for unexpected disruptions and the shift to SaaS-based architecture. The priorities were not intended to be prescriptive plans, but were to be explored, assessed, and tested over time to determine when and whether the organization would have the capacity to support, implement, and adopt. **Ultimately, the IT strategy expanded the boundaries beyond what the legacy infrastructure and standards allowed, widening the Foundation’s horizon of possibilities.**

How Do We Move Forward Without the Politics?

Building an Inclusive and Collaborative IT Governance Practice

> A common challenge organizations face is that there are many more good ideas and urgent needs brought to IT's attention than there is capacity to execute with limited resources available.

Therefore, the success of IT governance depends on its ability to prioritize initiatives in a fair and consistent manner. But collectively deciding between one project over another can easily descend into politics and a "whoever shouts the loudest" scenario as stakeholders compete for resources to meet their own needs over others, and / or have their own preferences on decision making. For example, some of those decision making challenges can include:

- Preferences on **decision driver for operating model, financial, and risk,** such as: autonomy versus centralization; reducing cost versus investing to grow; risk aversion versus risk tolerance.
- Preferences on **decision making approaches,** such as: consensus versus autocratic; process orientation versus ad-hoc; empirical versus instinctual.
- Preferences on **personal decision styles,** such as: analytical, conceptual, directive, and relationship-based.

IT should recognize the decision making challenges of their stakeholders and should lead the organization away from political or "gut" feel decision making, toward ensuring well-informed decision making.

Packard Foundation IT addressed this challenge through an interdisciplinary IT governance model. The model strived to maintain governance practices that are both inclusive and collaborative when guiding stakeholders in decision making. This ensured all functional groups have the requisite technology to accomplish their own business outcomes and established the manner for which those goals and objectives are accomplished. To that end, Packard Foundation IT created two governing bodies: the IT Oversight Council and the Directors Advisory Board, whose purpose was to determine how to prioritize the large technology projects proposed to them. Both councils were chaired by the IT Director and were comprised of interdisciplinary leadership from across all key functions. They acted as the crucial leadership linkage between IT initiatives and the Foundation's needs, mission, and operating plans.

To be effective, the interdisciplinary IT governance utilized an agreed-upon decision framework for objectively prioritizing initiatives. This framework provided a way to consistently evaluate each proposal in the context of the current situation, how it might serve to meet critical business needs, and how to balance the many aspirations of the IT strategy with daily operational urgencies. After each full investment cycle, IT continually strived to make the framework easier to use while maintaining the objectivity with enough nuance to frame the broad range of IT initiatives.

The IT evaluation framework for prioritizing technology investments was based on Gartner recommended practices.

IT CONSISTED OF THE FOLLOWING FIVE CRITERIA:

Strategic Alignment: The alignment of the project with the investment strategy and guiding principles, and the organization's strategic goals and objectives.

Process Impact: The impact on the requirement for the organization to redesign / improve Foundation processes and more effectively enable improvements.

Risk Avoidance: The identification of the proposed investment's exposure to failure or underachievement.

Payback: The conventionally understood financial benefits that a project can deliver, such as cost savings, productivity, innovation, growth, and better information.

Architecture Supportability: The integration, scalability, supportability and resilience of the databases, operating systems, applications, networks, and platforms that the Foundation has or plans to implement.

Although no evaluation framework can serve every purpose, this framework provided IT governance an approach to prioritize initiatives in a fair and consistent manner.

> Ensuring IT Governance was well-informed in the decision making, all members sought out diverse and contrasting stakeholder inputs along with representation from all impacted functional groups to proactively diffuse potential tension and address decision blind spots.

In addition to the framework, IT also utilized business architecture tools to further build confidence with all parties when evaluating technology project proposals. For example, IT mapped the business capabilities for all the departments in the Foundation, and associated the business capabilities with the technology needed to execute their functions and goals effectively. This mapping provided stakeholders with a more complete picture of how the Foundation achieves desired outcomes, with a common vocabulary to express baseline activities. The mapping and evaluation framework enabled more grounded deliberations on business value / benefits of proposed technology solutions and changes with all the stakeholders.

Striving for an inclusive and collaborative IT governance practice encouraged ongoing, open two-way communication and partnerships between IT and stakeholders, and strengthened relationships and deepened the cross-functional understanding of IT. This practice, along with utilizing business architecture tools and an objective evaluation framework for prioritizing technology investments, ensured confidence in IT governance decision making, delivery of suitable solutions, and support for each other when embracing the changes.

How Do We Choose Our Technology Stack?

Prioritizing the Core with Cloud Technologies

With a clear vision for comprehensive technology modernization, Packard Foundation IT was in the thick of urgent operational needs and had limited capacity to execute.

> To plot the path towards Anywhere Operation strategic outcome, IT needed to sequence an achievable subset of the highest impact goals for each budget year. These goals would allow the team to meet the Foundation's needs while making progress at an acceptable pace to start realizing the benefits of technology modernization quickly.

After evaluating a variety of business-innovation cases, IT determined the initial focus should be on modernizing the Foundation's infrastructure and core technology systems to better support innovation, collaboration, and security. By modernizing these systems, IT could provide new digital functionalities anywhere, with integrated security and privacy protections pre-built within the solutions rather than retrofitting them on legacy systems. The frequent automated upgrades would provide continuous feature and security enhancements and operational benefits that future-proofed the infrastructure and foundation components of the core technology systems. Additionally, the modernization focus provided the underpinnings to enable IT to shift toward more agile solution delivery and to enable the Foundation to technologically connect at-scale with other external organizations.

In accordance with the Foundation's IT governance model, the Foundation employees and teams' needs for a digital workplace experience were at the forefront of the cloud / SaaS-based platform selection process. The selected platforms would need to:

- Unify communication, collaboration, and digital workplace tools centered around people and teams.
- Enable effective work from anywhere, unbound by geography.
- Make it easier to adopt other innovative SaaS-based solutions to optimize / improve the enterprise as a whole.
- Provide digital workflows to improve operations and deliver better service outcomes.
- Leverage a connected device ecosystem to improve mobility and user experiences.
- Strengthen the Foundation's security and privacy posture.
- Allow the organization to be agile, flexible, and more easily interoperate with other external organizations in the future.

Mindful of the requirements, Packard Foundation IT chose Microsoft 365 and ServiceNow as the initial two core technology platforms.

The legacy Microsoft suite of products was already in wide use at the Foundation. As the leading enterprise technology platform with robust security, Microsoft 365 was the natural starting point for the Foundation's transition to the cloud and SaaS. Additionally, for the Foundation to realize Anywhere Operation, the operational teams needed to support remote employees from anywhere. By implementing ServiceNow, the Foundation would be able to provide the digital workflows based on industry best practices (ITIL) to achieve Anywhere Operation that can improve operations, enhance employee experiences, and deliver better service outcomes. With these two core pillars, they could then layer on SaaS-based business applications to meet function needs, including accounting, finance, HR (talent) management, payroll, performance management, customer relationship management, agreement management, board management, intranet, analytics, and visualization systems.

How Do We Put Change Into Action?

Implementing an Evidence-based Technology Adoption Strategy

> For most changes involving technology, overcoming challenges to technology adoption is critical to achieving successful outcomes. At the heart of the matter, implementing the technology can change the status quo. When changing the status quo, there are cultural challenges driven by people's risk tolerance and their comfort level on the pace of change.

There are process and workflow challenges that lead people to question whether the project is worth the effort or whether the project will make their job more difficult. Compounding the challenges are individual perceptions (or misperceptions) that add barriers to adoption, such as the perception of a loss of control, fear of being automated out of a job, or concern that the new technology would be too complicated to learn and use.

Overcoming challenges to technology adoption requires building trust, showing the benefits, and a "lifting all boats" mentality. These should be continuous management practices for any organization and designed from the conception of the project rather than after the implementation or tail end of the project when it would be much more costly and potentially less effective. From the very beginning, there should be a deliberate effort to understand the full spectrum of perspectives from diverse groups of technology adopters with differing risk tolerances and / or comfort level about the change or pace. For example, applying the "technology adoption lifecycle" concept, perspectives can be synthesized through the lens of early adopters, pragmatic adopters, cautious adopters, and risk-adverse adopters, or whatever the segments that are appropriate for the organization.

General Groupings of Technology Adopters at the Packard Foundation

- **Early adopters:** Individuals who are willing to try new ideas, new technology, and new ways of working. They have a high tolerance for risk and are willing to take chances because they enjoy trying new things or have a pressing need to change.
- **Pragmatic adopters:** Individuals who watch the early adopters and are practical when trying new ways of working. They are willing to accept some risk and will be more comfortable when some of their colleagues have already tried the new way of working.
- **Cautious adopters:** Individuals who are cautious when trying a new way of working. They want to "wait and see" how the situations develop and until others go along, requiring more information and evidence before adopting the change.
- **Risk-averse adopters:** Individuals who are risk-averse and likely see only the negative impact of the new idea, technology, or way of working. They might be too attached to the status quo to want to make the effort to change and may only choose to change with help from others.

The groupings attempt to classify the change readiness, risk appetite, trust in the change initiator, the change's level of impact on the adopters, and other factors. They help facilitate generative team conversations to identify and discuss adopter differences, to analyze whether the project considered the full spectrum of the organization's perspectives and representative of all the disciplines, and to use that insight to appropriately develop adoption plans, actionable leading measures, and adjust the course with minimal blind spots. Furthermore, the broad insight gained from diverse adoption perspectives enable IT and all involved to be more effective in communicating targeted messages to each of the intended audiences and in facilitating a common understanding of the change.

Building trust is at the root of an effective change management approach. In an environment where there is a lack of trust, fear of failure, and / or risk aversion, trust building is even more crucial. Having a common understanding of both needs and direction is foundational to instilling the notion of teamwork and that the outcome will be positive. There must be a nurturing team atmosphere where everyone feels comfortable with expressing new ideas and differing views without repercussion. A regular meeting cadence should be established with the wide spectrum of adopter perspectives to listen and to validate concerns, and to let everyone knows someone has their back and they are not left behind. This also means investing in training, development, and upskilling the technology adopters to make the adjustments more seamless.

Ultimately, the key to achieving successful outcomes is to show how everyone comes out ahead. When there is a convincing reason for change and an attractive outcome, and stakeholders know and agree on the magnitude of the problem to be solved and the business case to affect the desired change, they will see that change is worthwhile.

An Adoption Strategy Example: Going Live with ServiceNow

Prior to implementing ServiceNow, the Foundation's operational functions heavily relied on Foundation staff to know who was the 'right' support person in the 'right' group to address their incident or operational service needs. This process was problematic for Foundation staff, as in many cases it resulted in delays due to service hand-offs and wasted time among employees. With technology modernization and transition to Microsoft 365, the Packard Foundation IT team knew they also needed a modern, cloud-based service management system to support their users.

With ServiceNow, Foundation staff would no longer need to rely on tacit knowledge for reporting issues or requesting service. When Foundation employees needed to report issues or make service requests to the Foundation's operational teams, they would use ServiceNow to submit the issue or request. The ServiceNow platform automatically routes the issue or request through digital workflows and assigns required tasks to the appropriate operational team(s) and individual(s). The result is that Foundation staff would have a one-stop, simple and transparent support experience for reporting their issues, requesting service, or mitigating issues on their own when desired, and fulfillers would have more visibility and control over requests and actions.

Leading Measures for Modernizing Service Management	Goals & Success Measures	
» Number of incidents / requests » Percentage of incidents / requests with reassignments » Percentage of operational workflows orchestrated through ServiceNow » User adoption rate and total number of ServiceNow users » Number of manually submitted (legacy method) incidents / requests	**Service**	Responsive resolution / fulfillment of incidents and service requests, as measured by 100% of high priority incidents / requests closed on same day opened.
		One stop and anywhere access for reporting issues or making service requests, as measured by greater than 80% incidents / requests submitted to IT originated through ServiceNow.
	Quality	Effective resolution / fulfillment of incidents and service requests, as measured by 85% of incidents / requests resolved on first contact.
	Efficiency	Streamlined operational and administrative processes, as measured by 80% of IT support services and interdisciplinary service delivery are orchestrated through ServiceNow.
		Service productivity benchmarked against industry standard practices with other organizations comparable in size.

The Packard Foundation IT team partnered with Crossfuze™, a third-party consultant specializing in ServiceNow implementations, to transform their operations with digital workflows on ServiceNow. With Crossfuze advising on deployment strategies and best practices, the initial project focused on redesigning Incident Management and adopting ITIL Service Management best practices. The implementation team would systematically achieve service improvements by applying Kaizen / Lean thinking concepts and methods and working in phases to configure the ServiceNow functionalities needed to reinforce service improvements over time.

But while the digital workflows were built, they would have no impact if the employees didn't use them. By design, the project started with a pilot in the IT function supported by eager early adopters. These employees modeled the way forward and set the pace for change. The implementation team was supported by a cross-functional advisory group of stakeholders with adoption perspectives representing the full spectrum of the organization. Collectively, they focused on improving user experience and "first contact resolution" lead measures. Each iteration triggered a new cycle of knowledge sharing and team learning. This, in turn, helped them further refine ServiceNow configurations and digital workflows, resulting in an optimized IT incident management process, minimized service fulfillment hand-offs, improved effectiveness, and a shortened incident resolution time.

As IT continued to make process improvements within their department, they also expanded the service improvements with ServiceNow to other operational departments in the Foundation. These included Facilities, Workplace Services, HR, Communications, and Accounting, giving the Foundation staff one portal for reporting problems and requesting service. Partnering with Crossfuze enabled the IT team to easily scale to meet the service improvement project demands. The teams were able to create new digital workflows to coordinate and automate cross-functional processes like employee onboarding and off-boarding, and event planning. Each new workflow was launched as a 'minimum viable product' pilot with a cross-functional

group of users. Then it underwent a series of iterative improvement cycles before rolling it out to the rest of the organization.

This pilot method allowed the Foundation to broaden participation from workflow end-users while making it easier to use. The team was able to determine the impact of the change, more rapidly adapt to the changing needs based on empirical learning and manage the unintended risks. As a result, Foundation employees now have an intuitive, interactive experience for reporting issues and making requests, and they receive better quality, more responsive service. The Foundation's operational functions fulfill requests in a coordinated, transparent manner while departments continue to optimize their service delivery processes using insight derived from ServiceNow.

IT PERFORMANCE MEASURES	FROM	TO
Responsive resolution / fulfillment of incidents / requests, as measured by 100% of high priority incidents / requests closed on same day opened.	20%	**100%**
One stop and anywhere access for reporting issues or making service requests, as measured by greater than 80% incidents / requests submitted to IT originated through ServiceNow.	0%	**>90%**
Effective resolution / fulfillment of incidents and service requests, as measured by 85% of incidents / requests resolved on first contact.	40%	**95%**
Streamlined operational and administrative processes, as measured by 80% of IT support services and interdisciplinary service delivery are orchestrated through ServiceNow	0%	**90%**
Service productivity benchmarked against industry standard practices with other organizations comparable in size.	Unknown	**Industry Average**

Conclusion

> By 2019, Packard Foundation IT achieved the technology vision of modernizing their infrastructure to support Anywhere Operations.

Foundation employees are now using industry leading SaaS-based applications with high degree of interoperability to perform their job functions and to collaborate and communicate with others. These SaaS-based applications, along with other work-related apps, sites, services, documents, data, and technology resources, are accessible anywhere by Foundation employees using their secured digital workplace from their mobile and computing devices. Because all the Foundation's operational teams are integrated on a common ServiceNow platform, they are equipped to leverage the data and insights from a single source to continually optimize the whole enterprise and processes, as well as proactively identify problems, prevent issues, and make more informed decisions.

Achieving the technology vision requires the execution of new ideas and changes that create business value. Success needs to be measured in terms of business value and adoption of the technology, rather than just based on implementation and deployment. There are challenges to a successful execution, such as the massive amount of effort necessary to keep daily IT urgencies and normal business operations going, as well as potential inertia resulting from "that's how it's always been done" attitudes. Successful execution depends on prioritizing the most important goals and aligning resources accordingly to deliver on the achievable set of initiatives and measures to realize the vision.

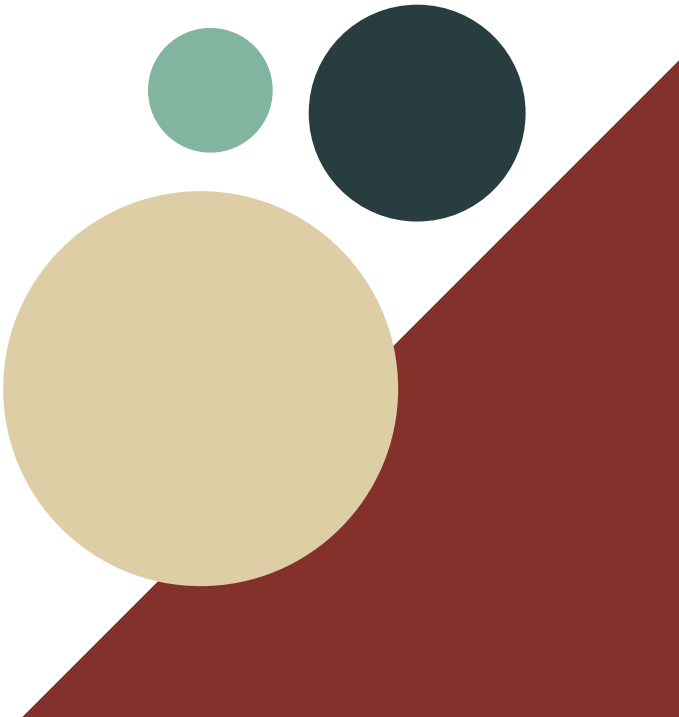
Technology champions within the Foundation business functions can be workforce multipliers that help colleagues to quickly adapt to change and support the transition to the new SaaS-based systems.

> For achieving sustainable change and adoption, the execution practices need to be both inclusive and collaborative, articulating the clear business value of the change while guiding stakeholders to ensure all functional groups can accomplish their desired business outcomes with technology, and in determining the manner in which those goals are accomplished.

Achieving execution success also required collaboration and partnerships outside the Foundation. Partnerships with trusted service providers, such as with Crossfuze for implementing ServiceNow in the earlier example, can augment the team's ability to quickly scale and to get expertise needed to support project execution and / or handle service demands so that employees can better focus on project work. Close collaboration with industry analyst partners, such as Gartner, and a cohort of non-profits and peer Foundation partners provide great insight into a wide variety of topics, technology, and lessons learned to help the IT team better anticipate issues and stay a few steps ahead of rapidly changing technology landscape.

Packard Foundation IT, in partnership with stakeholders, was able to successfully achieve their vision for Anywhere Operations that involved a reimagination of how work gets done and the implementation, deployment, and adoption of industry leading SaaS-based systems. By centering strategic actions on ensuring that all functional groups could accomplish their desired business outcomes with the new technology, that the technology would be widely adopted, and that outcomes would have measurable and significant business value, they laid the crucial foundation to ensuring long-term business continuity.

When the COVID-19 pandemic forced the David and Lucile Packard Foundation's workforce home in the spring of 2020, the Foundation was forced to rethink their processes for supporting a virtual workforce. Fortunately, the work they had done to achieve Anywhere Operations allowed the Packard Foundation's IT team to facilitate a rapid shift in the way employees worked. IT was able to operate remotely without designating "essential workers" to maintain an on-premise IT infrastructure; IT also shifted their service delivery model from an onsite operation to a distributed, remote working model while continuing to support the larger organization as they rapidly shifted to remote work. The connected Anywhere Operations allowed the Foundation to navigate and prioritize the actions they need to take based on near real-time, relevant information and provided them with the agility to respond and adapt to changing circumstances throughout the pandemic.



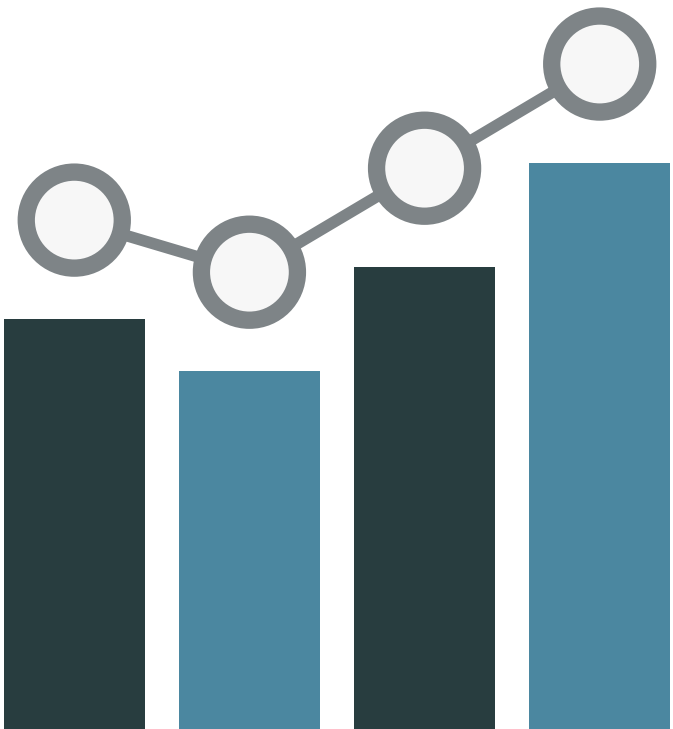
The Takeaway

For the David and Lucile Packard Foundation, the journey to modernizing their IT infrastructure was a complex effort, but it gave the entire Foundation the gift of learning and the ability to operate anywhere. It enabled the entire organization to agilely shift from a predominately in-person workplace to an entirely remote workplace, which became crucial throughout the pandemic crisis.

Leadership across the Foundation was critical to the project's success. Leaders from the Board, Programs, Cross-Programs, Operations, and IT drove the cultural shift necessary to embrace and adopt new SaaS-based systems to change how they would do their work. By building on a SaaS-based architecture, the Foundation would realize cost savings in the form of reduced backend costs and efforts for maintenance, upgrades, and provisioning with the flexibility to scale up and down based on needs. Having the SaaS provider perform the frequent automated upgrades would provide continuous delivery of new features and security enhancements that would be completed with minimal disruption to service.

Modernizing a major IT system also served as a magnifier of broken processes. Over time, established workflows are at risk of becoming obsolete, and a demanding environment may provoke workaround fixes rather than sustainable solutions. Modernizing and transitioning to SaaS-based applications provided an opportunity to revisit old processes and forced the creation of more efficient / effective workflows optimized with the modern systems. Starting with the SaaS' baked-in best practices at the outset was preferable, and iteratively expanded the value and usage through agile delivery and continuous improvement.

Managing the change required recognizing that stakeholder needs would differ, and respecting differing priorities and variations in work processes, each SaaS application implementation approach was tailored to address different needs and adoption pace. The modern infrastructure and SaaS-based applications can only succeed when they are fully integrated into everyday operations that are best determined by the people that use it to do their jobs. It is not just which technology and how best to use the technology, but also ensuring the organization is transforming nimbly and building the organizational muscle to sustainably adopt future new technologies.



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To Tsang is Director of Information Technology for The David and Lucile Packard Foundation. He oversees all aspects of the Foundation's information technology, and played a pivotal role, along with his teams and partners, in the Foundation's digital transformation story. He is passionate about using technology for social good, and hopes that the strategies and lessons shared in this article will help to guide and inspire other non-profit organizations as they work toward their missions.

Prior to joining the Packard Foundation in September 2016, To Tsang served as Area Chief Information Officer for Kaiser Permanente, where he worked for over 10 years. While at Kaiser Permanente, To Tsang led overall strategic positioning, solution services and operations of information technology to support hospitals, medical centers, and corporate functions in Northern California. He also served as Kaiser Permanente's Executive Director of HealthConnect®, an Electronic Health Record (Epic) system used by over 70,000 clinicians / employees, in 100+ facilities serving 3.8M+ patients in Northern California.

To Tsang holds a Bachelor of Science in Mechanical Engineering from University of California at Santa Barbara.

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After nearly five years of creating thought-leadership content on Digital Transformation topics for Crossfuze, Kaitlyn has developed a deep understanding and appreciation for the role technology plays in a company's culture and operational outcomes. By weaving in academic concepts from her University of Minnesota MBA coursework with real-world insights gleaned from Crossfuze's customers, Kaitlyn aims to provide her readers with clear context and perspectives as well as specific actions and outcomes that organizations may consider as they build their roadmaps to the future.

Crossfuze is a global professional services partner with over 20 years of experience delivering superior and long-lasting business outcomes for their clients through innovative workflow design and technology that accelerates clients' ability to continuously improve and adapt to change. They are an industry-recognized ServiceNow Elite Partner with expertise across the entire ServiceNow platform.

Crossfuze is proud to partner with the David and Lucile Packard Foundation on their digital transformation and this article. We are committed to sharing best practices for technology transformation, ensuring non-profits can continue their efforts to make the world a better place no matter where they are. It was a joy and an honor to partner with the Foundation on this article, and we hope the content shared here helps others achieve their goals for the future as well.

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