# Nice to meet you.

**RoundTable** TECHNOLOGY

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RoundTable Technology is a strategic IT services partner who works with nonprofits to help them leverage technology to fulfill their mission.

We understand what it's likez working with limited resources, budget, and people. We also have a passion for nonprofits. That's why we only hire personnel that are themselves driven by serving those who serve.

We work directly with over 200 nonprofit organizations and have served thousands in service of our mission of ensuring nonprofits have the technology they need to effect change.

CF Channel Futures Leading Channel Partners Forward MSP 501 WINNER

AICPA SOC aicpa.org/soc4so

COMMUNITY FOUNDATION of TEXAS REGIONAL BE IN GOOD COMPANY 2022

# Today's journey...

**Starting with a framework**

**Technology**: What's lurking in the shadows?

**Cybersecurity**: Securing your castle in 2024

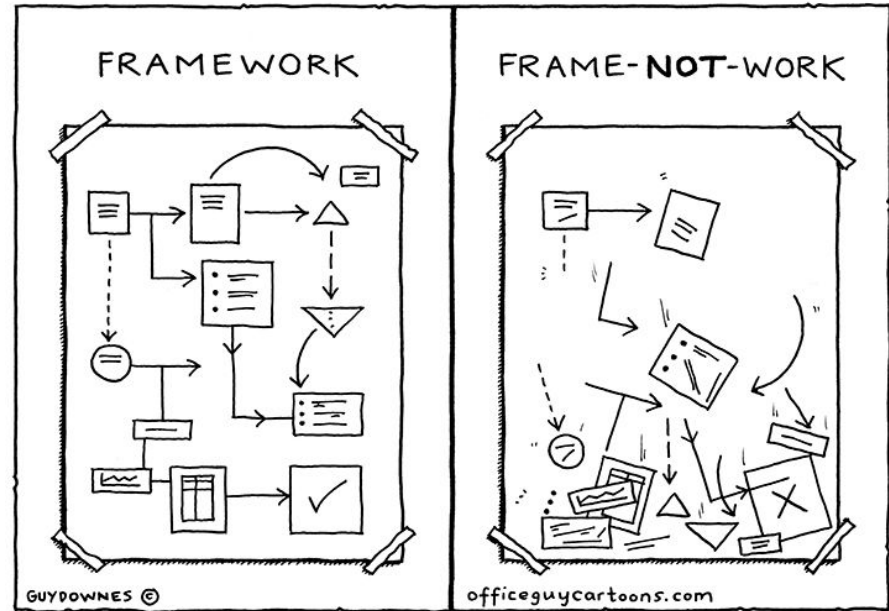**AI:** Putting AI to work in your organizations

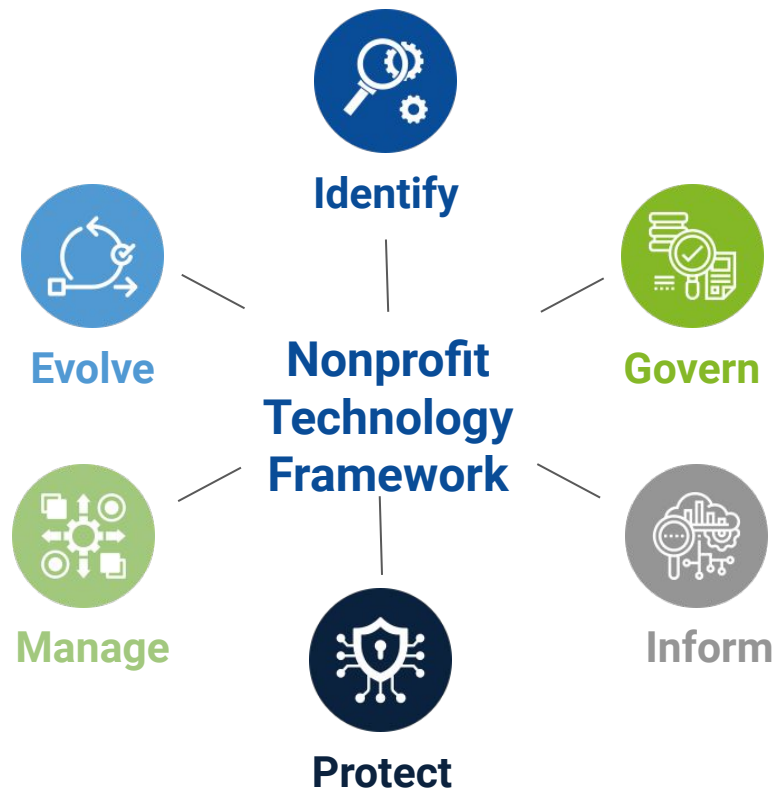Q&A

## Maximize Benefits while Minimizing Risks

Resources to go!

# Frameworks really help

The term "Framework" refers to a system of rules and/or guidelines that are used to govern a process.

# A technology framework for nonprofits



Nonprofit Technology Framework

Identify

Govern

Inform

Protect

Manage

Evolve

# Nonprofit Technology Framework

| Identify | Govern | Inform | Protect | Manage | Evolve |
|----------|--------|--------|---------|--------|--------|
| • Mission alignment<br>• Current state assessment<br>• Root cause analysis<br>• Goal articulation<br>• Prioritized planning | • Cultural Alignment<br>• IT Governance Components<br>  • Infrastructure<br>  • Data<br>  • Cybersecurity<br>  • Project & Change Management<br>• Assessment | • Data-Informed Culture<br>• Data governance<br>• Data lifecycle management<br>• Policies and process<br>• Privacy Imperative<br>• Data risk | • Defense in depth<br>• Securing the hybrid workplace<br>• Three things you MUST do<br>• Threat modeling<br>• CIA<br>• Risk assessment | • Project identification<br>• Planning principles<br>• Understanding the problem<br>• Benefit and complexity<br>• Change strategy | • Agile processes<br>• Stakeholder engagement<br>• Progressive planning<br>• Information radiator<br>• Rich communications<br>• Retrospective |

# Technology
## What's lurking in the shadows?

Do you use any tools or applications at work that were not provided or approved by your organization?

# What is shadow IT?

# Why is shadow IT so prevalent?

**Ease of Access**
Free or low-cost tools and cloud services

**Lack of Awareness**
Employees unaware of risks, no clear IT policies

**Speed and Convenience**
Quick solutions bypass slow IT approval

**Remote Work and BYOD**
Increased remote work, lack of BYOD policies

# Shadow IT creates organizational risk

## Data Risks

✓ Bypasses security
✓ Breach risks
✓ Compliance

## Cybersecurity Risks
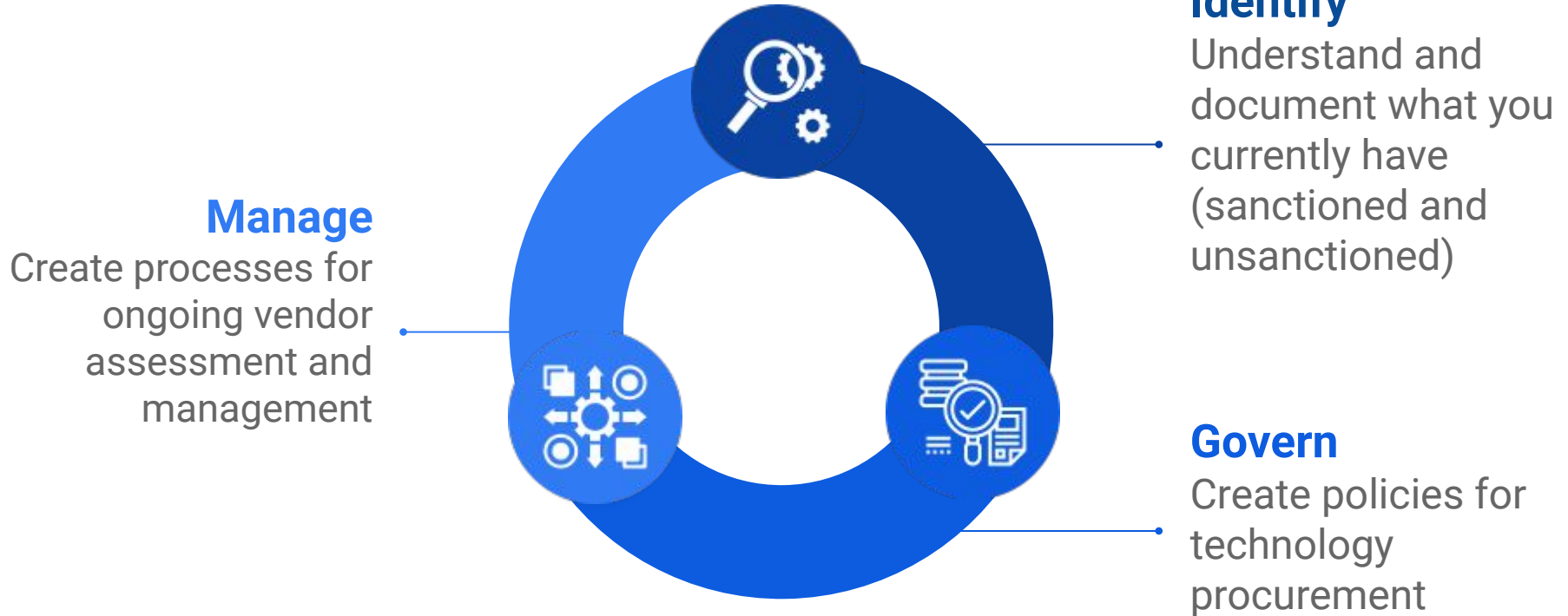
✓ Creates gaps
✓ Harder detection

## Inconsistency

✓ Creates silos
✓ Duplicates efforts
✓ Support difficulties
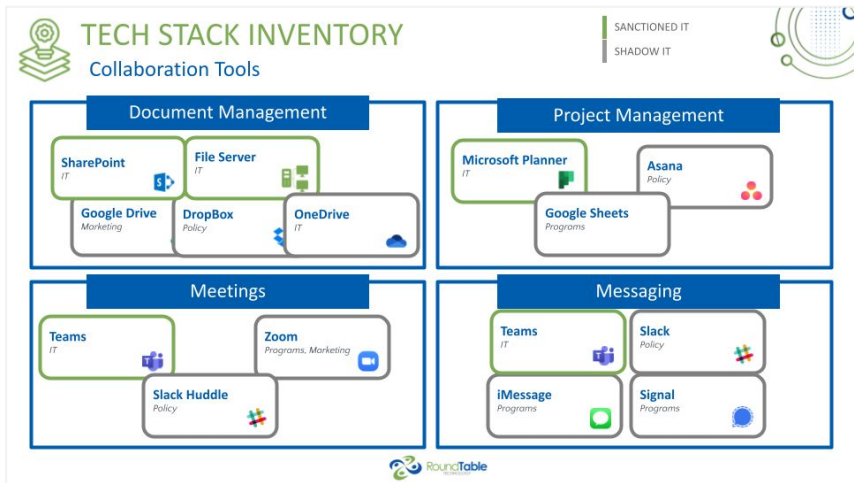
## Costs

✓ Licensing fees
✓ Duplication of costs

# How do we deal with shadow IT?

**Identify**
Understand and document what you currently have (sanctioned and unsanctioned)

**Manage**
Create processes for ongoing vendor assessment and management

**Govern**
Create policies for technology procurement

# But it's everywhere...

## Manual

Tech Stack Inventory



[Click here for a template](#)

## Automated

SaaS Management Tools
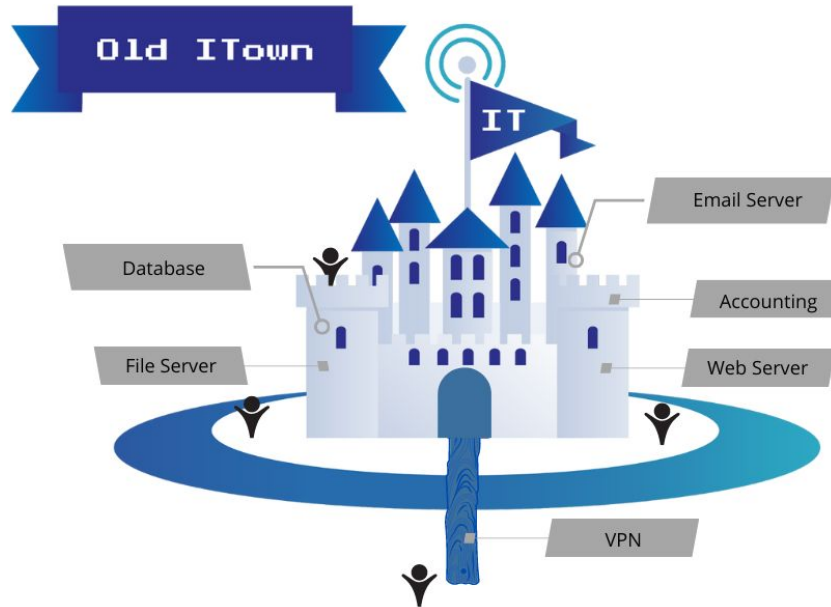
✓ Monitor applications
✓ Keep track of costs

# Cybersecurity

**Securing your castle with a moat doesn't work if your castle is everywhere**

When was the last time you logged into a work system from a personal computer outside of your office?

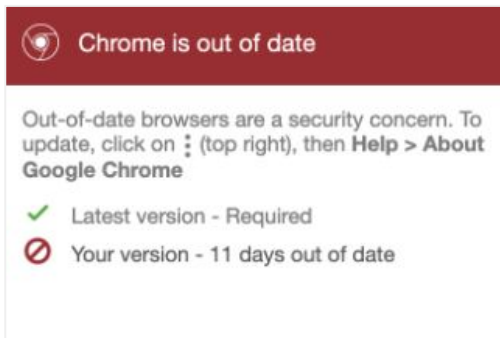# For many, many decades...

# Today...

1. Assess the device
2. Authenticate the person
3. Provide the **appropriate** level of access (conditional access)

# Assess the device

Rejected - out of date browser


**Chrome is out of date**

Out-of-date browsers are a security concern. To update, click on ⋮ (top right), then **Help > About Google Chrome**

✓ Latest version - Required
🚫 Your version - 11 days out of date

Rejected - end-of-life operating system


**Windows is out of date**

Out-of-date operating systems are a security concern.

✓ Windows 10 - Recommended
✓ Windows 8.1 or newer - Required
🚫 Windows 7 - Your version

See how to update Windows ↗
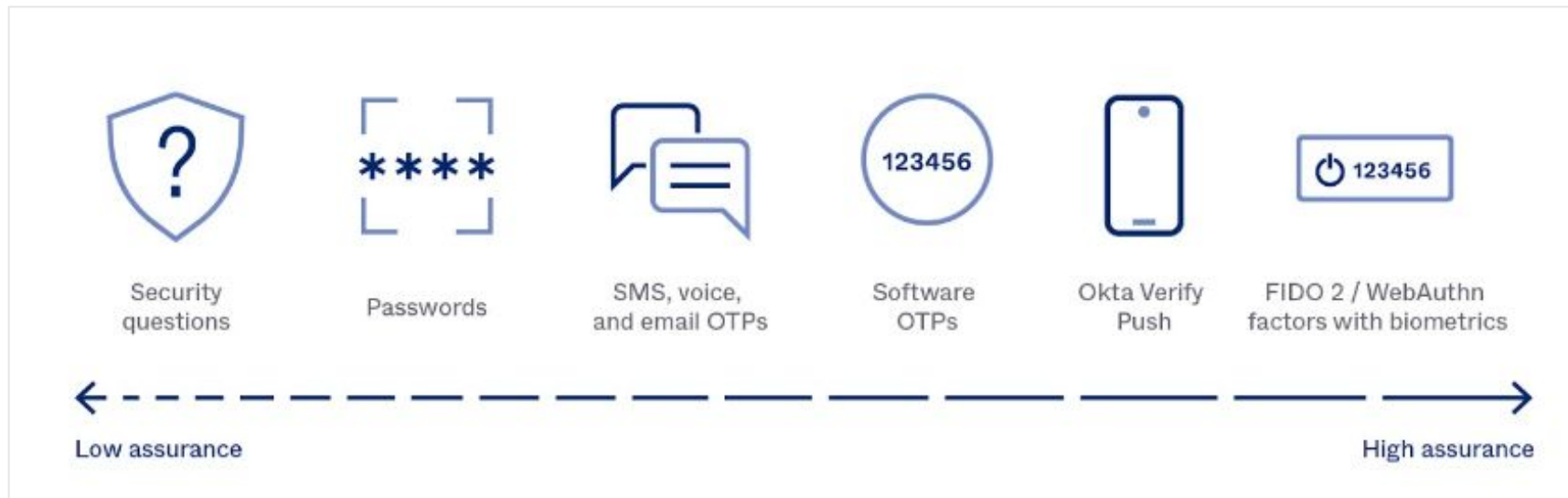
Rejected - Only org-approved devices


☹
**We're sorry. Access is not allowed.**

- If you are using a personal or public device, try again with a company-approved device.
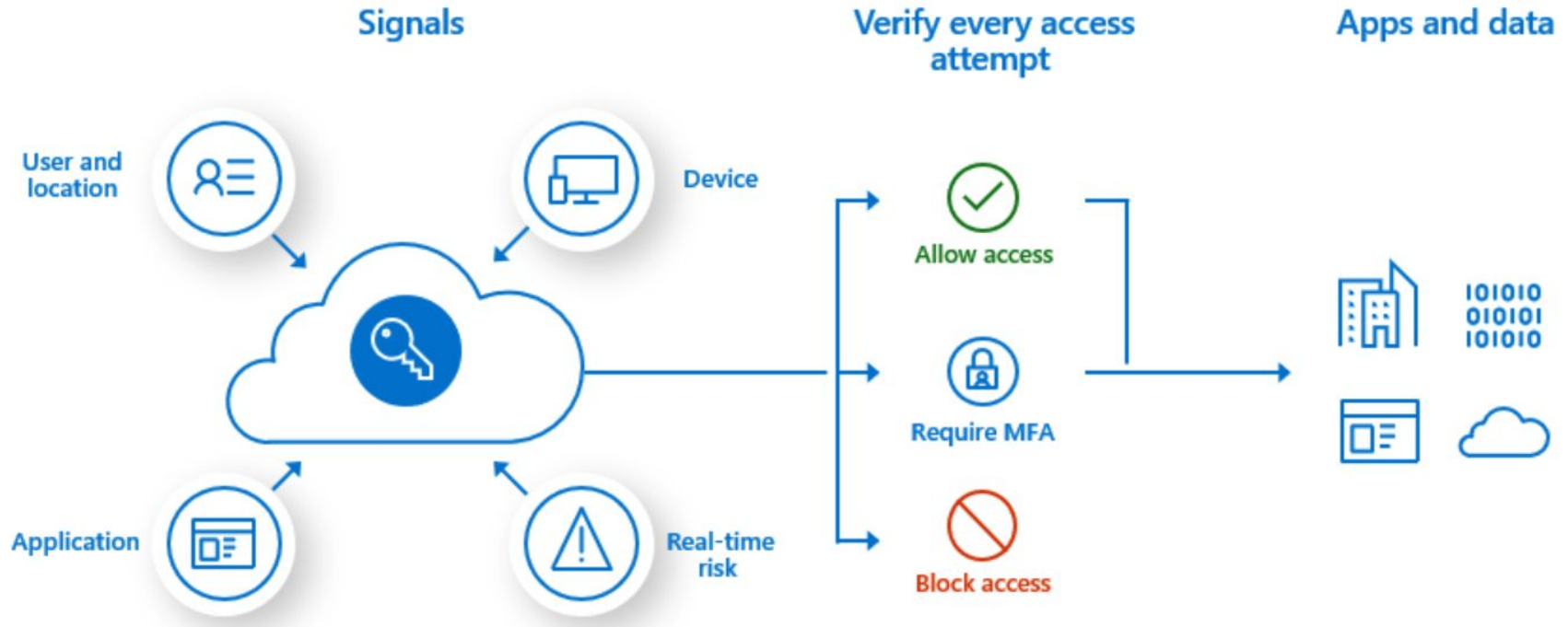- If you are using the device you normally log in with, further help may be required.

To fix this problem, please reach out to your administrator or IT Helpdesk

# Assess the person



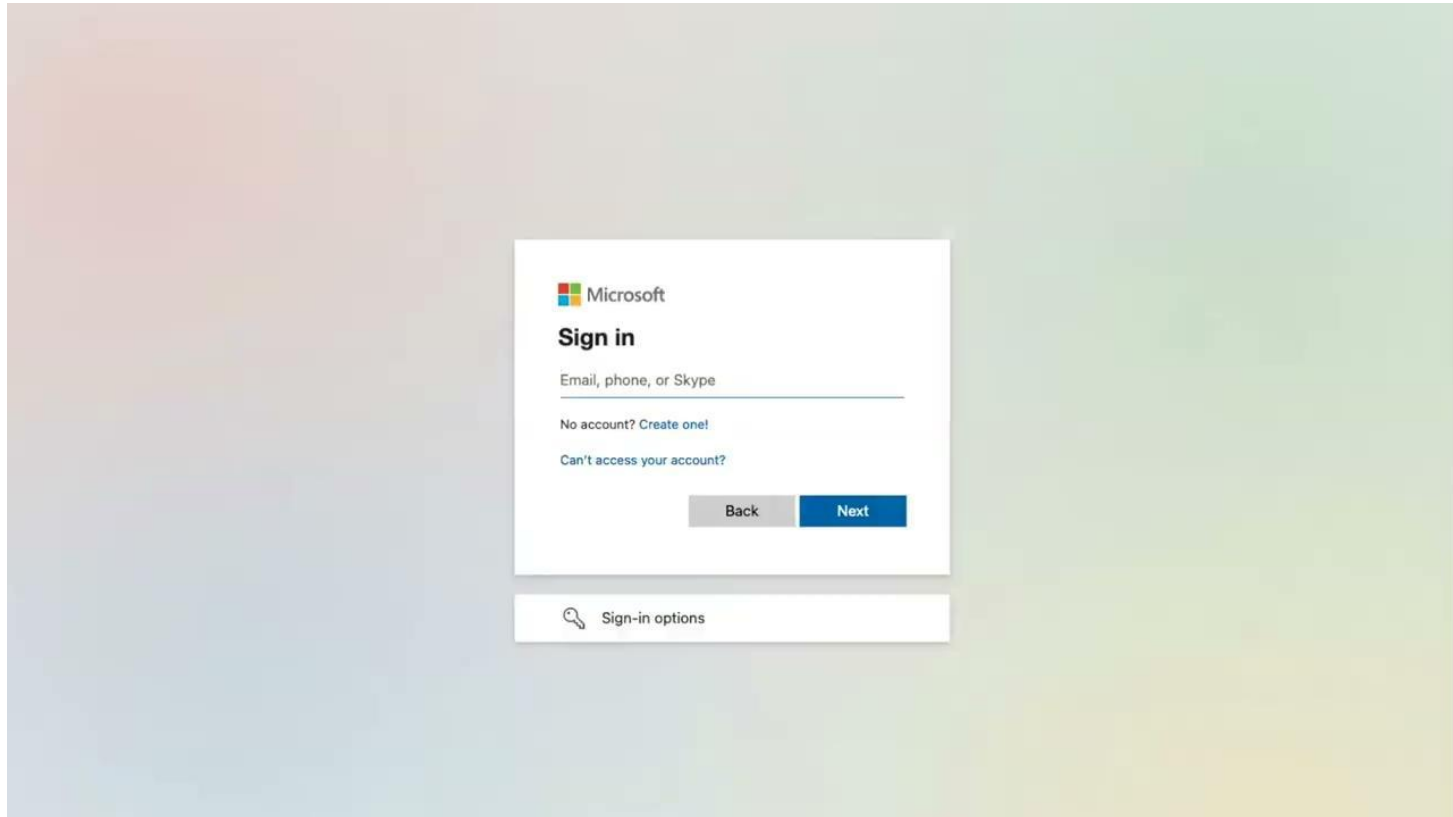Source: Factor Assurance | Okta

# Assess the context

Signals

User and location

Device

Application

Real-time risk

Verify every access attempt

Allow access

Require MFA

Block access

Apps and data

101010
010101
101010

# Phish Resistant MFA

# Zero Trust is a Federal Mandate

January 26, 2022

M-22-09

MEMORANDUM FOR THE HEADS OF EXECUTIVE DEPARTMENTS AND AGENCIES

FROM:      Shalanda D. Young
               Acting Director

SUBJECT:   Moving the U.S. Government Toward Zero Trust Cybersecurity Principles

This memorandum sets forth a Federal zero trust architecture (ZTA) strategy, requiring agencies to meet specific cybersecurity standards and objectives by the end of Fiscal Year (FY) 2024 in order to reinforce the Government's defenses against increasingly sophisticated and persistent threat campaigns. Those campaigns target Federal technology infrastructure, threatening public safety and privacy, damaging the American economy, and weakening trust in Government.

# Artificial Intelligence (AI)

## Putting AI to work in your organizations

2024 Work Trend Index Annual Report
from Microsoft and LinkedIn

# AI at Work Is Here. Now Comes the Hard Part

ChatGPT

Copilot

Gemini

Claude 3

# AI is here and employees know it



2024 Work Trend Index Annual Report from Microsoft and LinkedIn

**Finding 1**
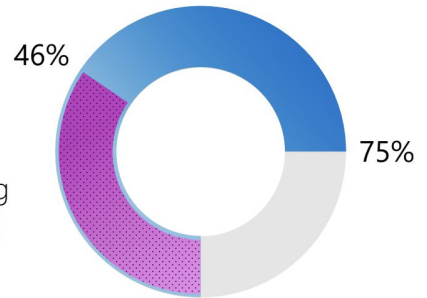
75% of knowledge workers use AI at work

Employees want AI at work—and they won't wait for companies to catch up.

Three Out of Four People Use AI at Work
Usage nearly doubled in the last six months.

75% of people are already using AI at work

46% of them started using it less than 6 months ago

46%
75%

2024 Work Trends Annual Report from Microsoft and LinkedIn - survey of 31,000 people across 31 countries (March 2024)

# Are you using AI to assist with work-related tasks?

# AI policy and strategy

Establishing an organizational AI strategy and policy can:

✓ Provide guidelines for the use of AI

✓ Align the use of AI with organizational goals

✓ Reduce risks associated with AI use

Here is a link to the AI Policy template

# Understanding AI risk

**HIGH**

Complexity

**Automation**

Communications
Copyediting
Image generation
Grant writing

**Analysis**

**Generative**

Agents performing actions
Application processing
Automated decision-making

Document summary
Data analysis
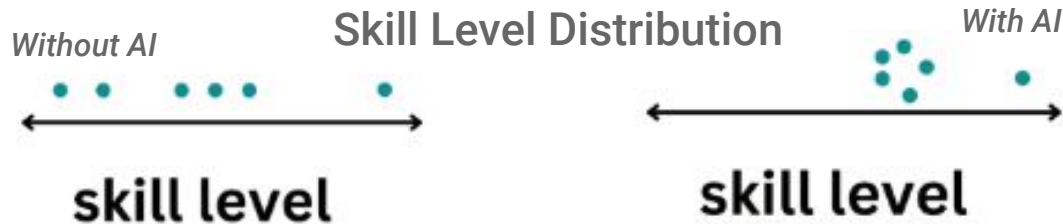Text/sentiment analysis

**LOW**

**Risk**

**HIGH**

# Why AI, Why Now? - Ethan Mollick

## How to rebuild organizations

AI is impacting organizations right now, and leaders who do not take an active role in shaping what that looks like risk falling behind at a rapid pace. No one can tell you the best ways to use AI - every organization will need to figure it out for themselves.

- Let teams develop their own methods. Given that AIs perform more like people than software (even though they are software), they are often best managed as additional team members, rather than external IT solutions imposed by management.
- Build for the future. Organizational change takes time and AI is changing fast, so those adapting processes to AI should be considering future versions of AI, rather than just building for the models of today.
- You don't have time. If the sort of efficiency gains we are seeing from early AI experiments continue, organizations that wait to experiment will fall behind very quickly."

*Without AI*   Skill Level Distribution   *With AI*

skill level   skill level

Source: Reshaping the tree: rebuilding organizations for AI

# AI and employee experience

- Copilot tools can significantly increase task execution speed by 26% to 73%.
- Copilot users felt that the tool saved them an average of 36 minutes, while actual time savings were 12 minutes.
- 73% of employees surveyed agreed that Copilot helped them complete tasks faster.
- 85% of users said Copilot would help them get to a good first draft faster.
- 68% of users agreed that Copilot improved the quality of their work.
- Copilot users found tasks to be 58% less draining than non-users.
- 70% of respondents believed that Copilot increased their productivity.
- 77% of respondents would choose Copilot over a weekly free lunch worth $40/month.
- Willingness-to-pay for Copilot was 35% higher among those who had used it.

**Source**: Early LLM-based Tools for Enterprise Information Workers Likely Provide Meaningful Boosts to Productivity | Microsoft Research

# Thank You!

**Stay Connected**

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