

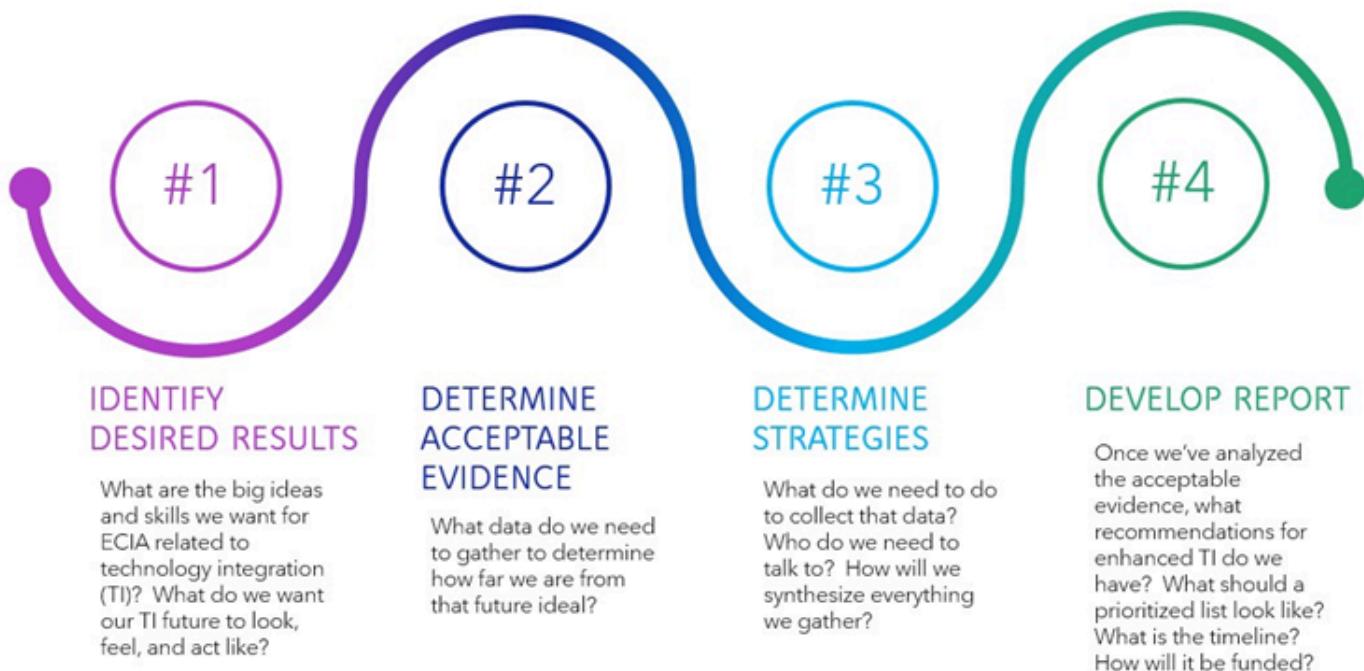


ECIA TECHNOLOGY INTEGRATIONS EVALUATION 2025

CONTEXT

In today's fast-paced digital landscape, it is imperative for organizations to routinely evaluate their technology integrations to ensure alignment with operational goals and industry standards. When existing systems are outdated, they often lack compatibility with modern tools, leading to redundancies that create unnecessary complexity. These inefficiencies not only inflate operational costs but also consume valuable time that could be better spent on strategic initiatives. A thorough evaluation of current technology infrastructures can reveal critical gaps and streamline processes, ultimately enhancing productivity, reducing expenditures, and positioning the organization for sustainable growth and innovation. ECIA is embarking on an evaluative process to review current systems and ultimately recommend enhancements to the organization's technology resources and practices. Together, we can build a stronger ECIA through strategic, thoughtful, and inclusive technology integrations.

This evaluation is based on a Backwards Design model:



STEP 1 – OUTCOME IDENTIFICATION

Within this process, the first step was to identify the outcomes that ECIA would like for improved technology integration. The following themes and outcomes were developed by the Steering Committee:

System Integration & Operational Efficiency

System Cohesion & Efficiency

- ECIA operates a cohesive, integrated technology environment where all systems work efficiently together to support agency-wide operations and communication.

Operational Time Savings

- Integrated technology solutions streamline internal systems and processes – resulting in measurable time savings and improved productivity.

Comprehensive Tools & File Sharing

- ECIA provides a comprehensive digital environment, including seamless file sharing and a universal platform that supports collaborative, cross-departmental work.

Security & Safety

- Technology systems are designed to protect ECIA, its employees, and the public, maintaining high standards of data security and operational safety.

Organizational Culture, Usability, Empowerment, & Staff Engagement

Organizational Commitment

- All ECIA staff demonstrate commitment to continuous improvement in technology integration, recognizing its role in achieving the organization's mission.

Responsive Leadership

- ECIA leadership ensures technology decisions are informed by the diverse and evolving needs of its employees, ensuring that systems align with user needs, learning styles, and expectations.

Ease of Use & Staff Awareness

- All ECIA employees can confidently access and utilize available technology tools and systems, supported by clear communication and user-friendly platforms.

Employee Empowerment

- ECIA employees feel empowered and equipped to use technology effectively, provide feedback, and recommend future improvements to enhance organizational workflow.

Innovation & Future Readiness

Innovation & Leadership

- ECIA is recognized as a regional leader in technology innovation and integration, serving as a model for other organizations in the public and nonprofit sectors.

Future Readiness

- ECIA proactively monitors, tracks, and evaluates emerging technologies that align with its mission and needs.

Cost Efficiency & Sustainability

- ECIA implements cost-effective, environmentally sustainable solutions by maximizing paperless processes and minimizing redundant systems.

Sustainability, Cost Control, & Strategic Focus

Adaptability & Control

- ECIA focuses resources on systems it can control while strategically integrating with third-party tools that cannot be changed, ensuring overall operational efficiency.

STEP 2 – DETERMINING ACCEPTABLE EVIDENCE

The next step was to determine the acceptable evidence to evaluate whether ECIA meets those outcomes now and in the future. The Steering Committee developed essential questions for each outcome and determined the audience for each question. Some questions were relevant for all departments and others for select staff.

STEP 3 – GATHERING THE DATA

Dylan Michels and Mae Hingtgen met with each department to ask them questions identified by the Technology Integration Evaluation Steering Committee. These questions were intended to gather a baseline of how ECIA meets or does not meet each of the Outcomes identified by the committee.

Systems that departments use:

Issues

ECIA staff use many of the same systems across departments. For programs that are department specific, staff feel comfortable using them but perhaps are not taking full advantage of the program's capacity. Many staff are unfamiliar with the full Microsoft Office Suite and its benefits. One issue of redundancy was identified by some staff who use Google docs because the system doesn't allow them to be in the same document as other staff, which could be solved by Microsoft 365. Google docs are also used because of capacity issues with external organizations.

Potential Solutions

- Purchase Microsoft 365 Business Premium suite.
- Develop a plan for staff training to enhance their ability to take advantage of the Office programs.
- Ensure each department is using and taking advantage of program capabilities.
- Complete a cost-benefit analysis for new technology implementations.

Obstacles for Sharing Files:

Issues

Without the full functionality of Microsoft Office, more than one staff cannot be in a document and editing it at the same time. This causes a significant amount of frustration in several departments, especially within Excel spreadsheets.

Staff also have challenges sharing documents with external partners if they do not have Microsoft products. There are also instances where the files are too large and not accepted by our partners' email programs.

ECIA does not have a standardized encryption program or policy. This is a concern for most departments who deal with private information whether it be PHI or financial.

ECIA staff have accessibility issues due to our current structure. Some users are locked out due to active directory issues. Many staff report that the use of the VPN is an obstacle as it is prone to disconnecting when they are away from the office. In addition, CDED and Housing staff often need to upload photos from their phones to files and reporting systems. Currently this process is cumbersome and difficult.

Potential Solutions

- Microsoft Office Business Premium ensures user-friendly encryption for confidentiality in emails.
- Confidentiality can be further enhanced with permission levels in Microsoft Business Premium.
- Active Directory, VPN and file uploading issues can be addressed by the use of Microsoft OneDrive, SharePoint, and Entra ID.

Ideas for Using Technology to Make ECIA Jobs Easier:

Issues

As previously mentioned, not being able to simultaneously edit files makes staff's jobs more difficult.

ECIA uses an HR/payroll system that is outdated and cumbersome for Finance staff to process. By using spreadsheets, it creates more opportunity for user error.

ECIA uses 4 primary systems to track accounting procedures – Great Plains software, Quick Books, Laserfiche, and Microsoft Teams. This is inefficient due to the time it takes to track entries, cross-train, and the cumbersome process of reconciling across the domains. In addition, the lack of a centralized AR/AP system results in added time on activities such as claims processing and utility management for EIRUSS. One staff in the Community and Economic Development department estimates that she spends approximately 50 hours/month with an additional 7 hours quarterly and 18 hours annually on utility billings and adjustments. It is anticipated that a more comprehensive accounting system could reduce the hours from that baseline.

ECIA's primary source of revenue is federal and state grants. Each department uses an unusually high number of spreadsheets to track grant activities. This can create difficulties because of the inability to edit as well as staff being aware of which programs are in which spreadsheets and the activities that need addressing. Additional obstacles arise when more than one department is involved in a program or grant.

In an era of increased functionality of electronic files, ECIA's reliance on paper is outdated and inefficient. Including the Housing Department's usage, an estimated \$25,738 will be spent in FY26 for paper and toner.

ECIA's phone system, 3CX, is inefficient and ineffective. The system is not currently utilized for call groups, or automatic answering and transferring outside of select departments. Nearly all staff have frustrations with 3CX and use their cell phones as an alternative.

Staff primarily use email to communicate with one another, which creates more volume in their Inboxes than necessary.

ECIA vehicle maintenance is inefficient. There is a notebook in each vehicle where staff enter the starting and ending mileage for each trip. The office receptionist is then responsible for checking the math and deciding which program or grant to charge the mileage. She also manually keeps track of when the vehicles need maintenance.

There has never been a comprehensive plan to train ECIA staff on technology use.

Potential Solutions

- Utilizing Teams for phones and discontinue 3CX.
- Develop a training plan that includes content, schedule, expectations, and consistency.
- Implement Microsoft Teams for internal chat.
- Research, purchase and implement a project tracking system. This may be accomplished by Microsoft Planner.
- Research, purchase and implement a GPS monitoring system for ECIA vehicles that addresses programmatic use and maintenance.
- Implement a plan for the reduction of paper and toner use.

File Saving/Governance

Issues

Staff report there is no clear governance for saving or storing files. Each department does it differently, and that can make it difficult to find documents. In addition to that, each federal program/grant is also organized differently. The 'common' drive is a mess with a significant amount of duplication and organizational challenges. The duplication often results in staff being unclear which is the most recent or accurate document to use.

One staff said saving files at ECIA is like the "wild, wild west because people save things however they want."

Potential Solutions

- ECIA Should create standard governance for how files are organized and saved agency-wide as well as departmental.
- There should be paid AI accounts for certain staff though Microsoft CoPilot to anonymize confidential data.

Amount of Spreadsheets

Issues

Every department at ECIA reported that they have "too many" spreadsheets used to track their work.

Potential Solutions

- Establishing governance for saving/storing
- Implementing Microsoft Planner for project management
- Implementing enhanced HR as well as Accounts Payable/Receivable software
- Establishing Microsoft 365 Business Premium to allow simultaneous editing
- All staff should be supported to move saved files to One Drive or SharePoint, as appropriate

Cross Departmental Sharing

Issues

The issue of simultaneous editing of documents and spreadsheets continued to arise when discussing cross-departmental collaboration.

Finance staff identified that for AR/AP, putting receipts in manila folders is outdated and can easily lead to something being missed. Departments also have a difficult time tracking whether invoices they've submitted have been paid.

ECIA does not have clear and efficient credit card processing procedures. Most of the staff have credit cards and processing the checks/balances and payment is time-consuming for Finance staff.

We have 3 staff processing payroll. Each pay period, 2 of them spend 6 hours processing payroll. This does not include an annual responsibility for tracking and notifying staff of vacation time that needs to be used before it expires. Finance staff spend approximately 3 hours/week providing internal Technical Assistance. They also spend 7 hours/month on cost allocation reporting.

Potential Solutions

- Implementing Microsoft 365 Business Premium
- Implementing enhanced HR as well as Accounts Payable/Receivable software

Potential Solutions

Identified Inefficiencies

Issues

As previously reported and because ECIA functions under several different local, state and federal programs, there are inefficiencies with tracking and managing projects. This can lead to missed deadlines and penalties.

The staff from CSEI also noted that they do not have a good donor tracking program for accounts, amounts, and history of donations. This is a department that relies heavily on local donations and could be strengthened with a tracking program.

Email marketing and mass emailing programs are cumbersome and inconsistent. As soon as 1/1/26, all mass emailing will be done through Constant Contact. This program is still time-consuming, so an evaluation of other programs should be completed.

Staff occasionally encounter challenges accessing files due to sonic wall net extender issues.

Potential Solutions

- Pursue the implementation of a project tracking software such as Microsoft Planner
- Research and determine cost/benefit of implementing a donor tracking system like Give Butter, Raiser's Edge, or Donor Perfect
- Research the most effective and efficient mass emailing programs. Implement new, if necessary or warranted
- Move files to One Drive to eliminate the sonic wall net extender issue

Cyber Security and Training

Issues

Staff's knowledge of cyber security is adequate to protect the agency (especially Finance) but staff admit that they would like more formal training to stay on top of current and evolving threats. The Finance department feels like they have sound internal controls for financial security, for example, they require authentication for major financial transactions, and phone calls are completed to confirm any new or updated information from an invoice request. Finance staff also share responsibility for multiple check points for accounts payable.

Community partners have requested and received cyber security training from ECIA, but it is limited and inconsistent. ECIA has not formally advertised ability and availability of cyber security training. Training is offered occasionally for clerks but has primarily been handled on a 1:1 basis.

Potential Solutions

- Implement a system and schedule for cyber security training. For new staff and on an ongoing basis such as KnowBe4.
- Develop and implement an incident response plan for cyber-security
- Ensure that appropriate cyber-security measures are stacked for maximum data and financial security

Technology Training

Issues

There is an absence of a training plan for new staff or for new implementations for existing staff. ECIA staff feel like their technology training is situational and at times, independent or "by trial and error." Most staff report they figure it out on their own or call Dylan. Dylan is viewed as a patient and kind resource for staff's technology questions.

As one staff stated: "My skills have not advanced since I've worked here unless I've accidentally figured it out. That's a 16-year stall."

Potential Solutions

- ECIA should identify and implement a staff training plan. This plan should include the identification of standardized training and a timeline for onboarding new staff as well as expectations for ongoing staff. The plan should also include intentional roll-out/training of new technology improvements that address various learning styles.

There is also confusion about when staff contact Dylan or Denise for technical support.

For training, Denise attends an accounting technology conference annually, and Dylan's training has been primarily defined through seeking outside opportunities on his own via mailings, webinars, colleague interactions, and new releases.

- ECIA should define roles and expectations for IT staff.
- Technology is and needs to continue being a bigger priority for Dylan's work. He has a strong desire to learn and grow in technology innovation and implementation.

Policy Changes

Issues

When a technology policy is changed or adopted, staff consistently identify that they get an email from IT staff or the Executive Director.

Potential Solutions

- Future policy changes can still be communicated via email but also need to be embedded into ongoing training.

Staff Feedback on Technology Issues

Issues

Staff report that ideas for new technology have been discouraged due to the financial impact, so they have mostly given up on suggesting new implementations. In addition, ideas for innovation are constricted by contracts with outside vendors or expectations of federal programs.

Historically it's been 'do, do, do', so the agency has not prioritized learning and implementing something new.

Some staff report that their director encourages them to research new solutions and discuss at monthly meetings, but many staff reported being unaware of new solutions.

As a whole, ECIA staff expressed an enthusiastic willingness to implement new technology solutions as long as appropriate training and time for implementation is given.

Potential Solutions

- The ECIA technology steering committee should prioritize new learning and ensure that the time for learning and implementation are built in.
- To encourage innovation and growth, ECIA should implement a program in which new technology implementations are tested with a pilot group. This group should include those familiar and comfortable with technology as well as those for whom technological change is a challenge. This will inform the steering committee of the needs associated with the roll out and implementation that will be equitably addressed for all staff.

Relation to Other COGs for Technology

Some staff think ECIA's technology is further ahead than other COGs. Staff report little interaction with other COG staff regarding technology innovation and implementation.

Technical Assistance for Member Communities

Staff report that there are occasional requests from our city, county and private partners for assistance. These requests have included: cyber security training (group and 1:1), contractors receiving certifications, clerks requesting information about AI and other programs, and Microsoft Office program trainings. Dylan has provided some cybersecurity, and AI trainings. Dylan has provided drone work on a frequent basis to showcase new developments for reporting and marketing purposes.

Requests to Share Technology Adaptations/Solutions

ECIA is not seen by others nor see themselves as a resource for technology innovation. This can be due to lack of priority, time, motivation, comfort, or resources.

One staff remarked: "we need to improve our own practices before we can train and support others."

Compatibility with Federal Programs

ECIA staff did not report a lot of concern with federal programs. Staff indicated that federal staff don't necessarily provide training and our staff have either figured federal requirements out themselves or been trained by internal and external peers.

Due to federal requirements, our staff do not feel like they can control federal programs or have the flexibility to make changes to reporting programs. This is not seen as problem as ECIA staff are appropriately accustomed to their federal programs.

STEP 4 – RECOMMENDATIONS FOR UPDATED TECHNOLOGY INTEGRATIONS

Highest Priority Recommendations

Continue collaborative work with Information Technology Systems (ITS)

- Ensure proper support for ECIA's new ongoing technology integrations.
- Identify Storage needs, costs, and opportunities for cost savings.
- Work with ITS to implement cyber security training for staff.
- Determine ongoing need for antivirus software and measures ECIA can take to ensure cyber security.

Implement Microsoft Business Premium

- Transition email accounts from Intermedia to Microsoft to reduce redundancy and compatibility issues. By [3/1/26](#).
- Immediately begin working with ITS to transition and migrate data to new email accounts. By [3/1/26](#).
- Support all staff to reduce email volume to 50 GB or less to eliminate the need for additional mailbox expenses. [By 2/28/26](#).
- The TI Evaluation Steering Committee will develop governance expectations for pilot group implementation by [3/31/26](#) for the following programs:
 - a. One Drive
 - b. SharePoint
 - c. Teams
- Implement a pilot group of ECIA staff that is representative of each department and learning styles to identify implementation and training opportunities and obstacles. [By 4/1/26](#).
- Implement Microsoft Planner and CoPilot with a small group of staff to determine necessity for wider application. [By 5/1/26](#).
- The TI Evaluation Steering Committee will clean up ECIA's file servers or back up according to newly established governance (considering the example set by RTA). [By 4/30/26](#).
- The TI Evaluation Steering Committee, with input from Department Directors, will develop a training plan for all staff that includes initial and ongoing training for technology implementation, advancement, and security. [By 5/30/26](#).
- ECIA will transition from the 3CX phone system to Microsoft Teams Phone to increase efficiencies with call groups and cueing as well as reduce expenditures. [By 7/1/26](#).

Highest Priority Recommendations Continued

Explore a more effective Accounting and Human Resources software program

- By [7/1/26](#), the TI Evaluation Steering Committee will consult with other applicable staff to research and vet a new system to reduce or consolidate the number of systems and contracts currently in place such as:
 - Great Plains - \$6,603
 - Quick Books - \$3,729
 - Laserfiche - \$1,911

\$12,243

Implementation planned for [1/1/27](#)

Lower Priority Recommendations

- Clearly define roles of IT staff and communicate the expectations to all staff.
- To reduce costs and cybersecurity threats, reduce support of staff's second computers by [6/3027](#).
- Research, purchase, and implement GPS tracking software for fleet management and maintenance
- Research, vet, purchase, and implement a donor tracking management software for nonprofit fundraising
- Pursue a more efficient mass email program

FY26 Budgeted and FY27 Proposed Technology Expenses

	#	Cost/License	Monthly Expense	Annual Expense	Maintain	Adjust	Add
ITS							
ITS Support Contract				\$1,215.0	\$14,580.0		
Backup (GBs)				\$1,058.0	\$12,696.0		\$4,232.0
Exchange Mailboxes	9.69	\$63.0	\$610.5	\$7,325.6		\$0.0	
Microsoft Apps	44	\$8.7	\$382.8	\$4,593.6		\$0.0	
Resource Mailboxes with Entra ID	15	\$5.0	\$75.0	\$900.0		\$648.0	
Microsoft Office Business Premium	48	\$264.0	\$1,248.0				\$12,672.0
Microsoft Teams phone service (up to 3,000 minutes/month)	10			\$204.0			\$2,040.0
Microsoft Teams phone service (charge/minute)	40			\$124.8			\$6,492.0
<i>BitTitan Migration Software</i>	1						\$2,565.0
Backup for Microsoft 365 and One Drive	48	\$2.8					\$1,584.0
Sonic Wall	1	\$385.0	\$385.0	\$4,620.0	\$4,620.0		
Acronis	74	\$2.5	\$185.0	\$2,220.0	\$2,220.0		
Cyber Security testing/training	48	\$3.0	\$144.0	\$1,728.0			\$1,728.0
GP*				\$2,312.8	\$2,313.0		
Walter Consulting*				\$4,290.0	\$4,290.0		
Quickbooks*				\$3,729.0	\$3,729.0		
Laserfiche*				\$1,910.6	\$1,911.0		

Adobe						
Creative Cloud	4	\$1,199.9		\$4,799.6		\$3,599.7
InDesign	4	\$455.9		\$1,823.5	\$1,823.5	
Acrobat	40	\$287.9		\$11,515.2	\$11,515.0	
Microsoft CoPilot (per year)	4	\$360.0				\$1,440.0
Microsoft Planner (per year)	7	\$360.0				\$2,520.0
Website						
Net-Smart			\$440.0	\$5,280.0		\$2,000.0
Revise				\$1,000.0	\$1,000.0	
Revise				\$1,000.0	\$1,000.0	
Revise				\$1,000.0	\$1,000.0	
Revise				\$1,000.0	\$1,000.0	
Phone						
3CX				\$1,095.0	\$0.0	
CSTech			\$549.5	\$6,594.1	\$0.0	
Verizen	51	\$38.5	\$1,962.5	\$23,549.8	\$23,550.0	
Meraki (Security)				\$1,045.0	\$1,045.0	
Internet			\$867.0	\$10,404.0		\$5,400.0
ESRI (Transportation)				\$1,960.0	\$1,960.0	
Hardware				\$6,000.0	\$6,000.0	
			Current Total:	\$139,300.6	\$83,556.5	\$15,879.7
					Total Proposed:	\$31,041.0
						\$130,477
						8,823.44

* Recommendation to research, vet, purchase and implement a new Accounting and Payroll system. If we transfer these costs for current systems, \$12,243 would be available