

# Proactive Approach to Technology Empowers California Nonprofit

## When an existing managed IT services provider wasn't able to scale with this nonprofit, leadership sought out a proactive new partner to guide its tech roadmap

As is the case with many nonprofits, the staff at the California Association of Professional Employees (CAPE) wear multiple hats. For Carmen Lopez, Administrative Supervisor at CAPE, that involves everything from accounting to member services to board relations to—you guessed it—technology. When she assumed her role with CAPE in 2019, the nonprofit was heading right into the COVID pandemic. With IT needs shifting, it quickly became apparent that the IT services provider that had long supported CAPE was not able to scale with the organization.

“Through the years, we had been with the same IT support company, but our needs were evolving and that partner wasn't growing with us,” explained Lopez, who kicked off a search for a new partner after discovering that the organization's board of directors shared her concerns. “We had some hiccups, and knew it was time to start looking for a replacement.”

The nonprofit launched a request for proposal (RFP) effort and welcomed several managed services providers (MSPs) to present their capabilities to the board, including Rudy Ordaz, VP of Business Development for Exigent Technologies.

“Rudy felt confident he and his team understood our situation, which ranges from users who are hunting and pecking when they use technology to more tech-savvy users, plus our board members, who we also support when they use our Microsoft 365,” said Lopez. “Additionally, we have a diverse environment and some different challenges because of our organization. We needed to be able to share a clear plan with our board of directors to secure approval and funding.”

“Nonprofits are in a unique situation because decisions such as a new MSP or a large technology investment are often evaluated and finalized at the board of directors' level, not necessarily by the person our team works most closely with,” explained Ordaz, who serves as Exigent's account manager for CAPE. “A nonprofit board typically requires clarity from the hiring stage through to planning for upcoming investments and a full roadmap—and that is what we worked with Carmen to provide from the start.”

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## Balancing Day-to-day Support with Long-term Planning

After formalizing its partnership with Exigent in early 2021, CAPE enjoys the functional daily support it needs, working with the MSP's helpdesk on support tickets and resolution of a handful of larger issues. Now, the plan has turned toward exploring the next steps and developing a thoughtful, right-sized IT strategy that will keep CAPE's technology running smoothly and securely.

“We've pounded out the kinks, so now we are looking at the bigger picture,” she said. “We are looking forward to building out a full timeline on hardware, software, and other pieces that we will need to explore down the line. We have been operating on the “have to do” approach, but I much prefer the path where we have a plan. That gives us

time to discuss and review with the board rather than going to them with an emergency.” For example, as a nonprofit, the organization has a high demand for cybersecurity, and Lopez understands that investments will be necessary over time to ensure member information is safeguarded.

“Having a client so willing to discuss options and work collaboratively to build the right solutions roadmap is a huge win for everyone. It allows Exigent to guide the organization proactively and prioritize activities and investments,” added Ordaz. “This way, we all avoid that painful conversation about a solution that has broken down and needs a significant investment to be right set. No one likes to reach that point—the client or us. We’d rather plan for hurdles, such as end-of-life hardware, so we have a budget and clear plan to work through those challenges.”

With a schedule consumed by customer service, accounting, and operational responsibilities, Lopez doesn’t have time for deep dives into technology planning—she depends on Exigent for guidance. That effort started when the partnership launched and Exigent took a proactive approach to supporting the nonprofit. “They aren’t waiting until there is an issue; we have examples such as the call from them about a laptop our communications person uses—telling us that storage was running low. Before, our IT management and maintenance were reactive, and we don’t have the resources for emergencies like that. Now our tech team is taking care of us, and we needed that.”

## Cybersecurity Review and Resolution is Next-Step Priority

Among the items Lopez is looking forward to improving is the nonprofit’s security. When the organization’s insurance carrier asked for a detailed update on CAPE’s cybersecurity tools and policies, Lopez worked through the questionnaire with an Exigent engineer, and together, they uncovered several needs.

“It took nearly an hour for us to work through the lengthy inquiry from our cyber insurance provider, and I feel like that area needs some attention,” said Lopez. “I’d like a program where we review and evaluate our services each year, maybe every other year, and we look at everything from firewalls to email filtering and have a roadmap in place. We do have a lot of data from our members, and we want to safeguard that.”

## Advice for Nonprofits Seeking an MSP Partner

As a nonprofit, CAPE depends on expert business partners such as Exigent to guide the organization’s operations. For Lopez, proactive, friendly support has been a pleasant surprise and a value-add.

“The customer service is really what makes the difference,” she explained, citing follow-up calls from the support team to ensure an issue is truly resolved and responsiveness that sometimes catches her off guard. “When I put in a ticket asking to discuss the cyber insurance questionnaire from our insurance carrier, Bob was right there—even before I was ready. It’s a good problem to have.”

She added that service and a willingness to talk through issues takes the relationship between CAPE and Exigent well beyond transactional. “It’s very much an engaged partnership between us. My tip for other nonprofits is to be completely transparent about what you need and know, and what you don’t, and then both sides can work together to build trust and that partnership will grow.”

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