Case Study: Community Technology Assessment

Urban Indianapolis human-services nonprofit · UWCI Technology Fund Assessment Grant

THE SITUATION

A community-based nonprofit serving families in an urban Indianapolis neighborhood had grown its programs faster than its technology. Case managers worked in the field, but the tools did not follow them. Leadership suspected the problems were costing staff time and putting client information at risk, but had no independent view of what to fix first, and relied on a single incumbent IT vendor for advice.

WHAT THE ASSESSMENT FOUND

- **Client data on personal devices.** Staff were using personal cell phones to communicate with clients, outside any organizational control or retention.
- **No mobility tools.** Case managers had no sanctioned way to capture or retrieve information in the field.
- **Paper workflows.** Documents were scanned and emailed by hand, creating rework, delay and version confusion.
- **Vendor dependence.** The incumbent vendor's scope, pricing and performance had never been independently reviewed, and the findings raised questions that leadership could now put to the vendor directly.

APPROACH

Stakeholder interviews across leadership and program staff; review of contracts, vendor invoices and support-ticket data; analysis of how technology supports mission delivery, daily operations and the protection of client information; and an independent vendor evaluation. The work was funded by a UWCI Technology Fund Assessment Grant, so the cost to the organization was minimal.

RECOMMENDATIONS: STABILIZE · IMPROVE · ADVANCE

Phase	Focus
Stabilize	Move client communication onto managed, organization-controlled tools; close the most urgent security and support gaps.
Improve	Replace paper handoffs with digital workflows; give field staff secure mobile access; renegotiate or re-scope vendor terms.
Advance	Use cleaner data and stronger systems to support outcomes reporting and future grant-funded technology projects.

OUTCOME

Leadership received a prioritized, plain-language roadmap with costs and sequencing, an independent basis for vendor conversations, and a documented need that supports a follow-on Technology Fund Project Grant request.