

IT Assessment at Scale for a Complex Organization



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info@andersontech.com | andersontech.com | 314.394.3001 | © 2026 Anderson Technologies



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Turning a Leadership Transition Into a Governance Opportunity

Background

A large nonprofit organization with approximately 700 employees operates across a wide range of functions, including scientific research, philanthropy, public engagement, and events. That breadth gave the organization a technology footprint far more complex than a typical operation of similar size, spanning research systems, public-facing infrastructure, and everything in between.

For nearly three decades, one person had led the organization's technology department. He had built the team, the systems, and the vendor relationships that kept the department running, largely through personal knowledge rather than documented process. When he announced his retirement with limited notice, a non-technical CEO who had only recently stepped into the role was left without a reliable way to understand what she was inheriting.

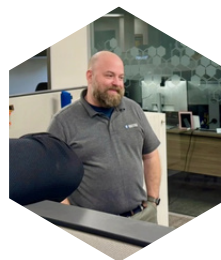
Challenge

Institutional Knowledge at Risk: Nearly thirty years of context, covering systems, vendor relationships, and team responsibilities, existed almost entirely in one person's head. Very little of it had been documented in a form the organization could rely on once he left.

No Baseline for Leadership: The incoming CEO had no technical background and no existing way to judge whether the technology department was overstaffed, understaffed, or simply misunderstood. They needed a clear, credible answer before making any confident decision about its future.

A Team Without a Map: The department itself spanned several distinct disciplines, including AV support, infrastructure, servers, and cybersecurity, with a team of 10 to 15 people. No one outside the departing leader fully understood how those pieces connected, where responsibilities overlapped, or where meaningful gaps existed.

The organization needed a partner who could reconstruct that missing context before it disappeared for good, then translate it into something a non-technical leader could act on immediately.





Our Approach

Anderson Technologies was brought in to conduct a comprehensive technology assessment across the organization. From the outset, the engagement was framed as a current-state capture rather than an audit looking for fault. The objective was to understand what existed and why, rather than to assign blame for how it got that way.

1. Direct Engagement Across the Organization

Rather than relying only on system documentation and the departing leader's account, we spoke directly with staff and departmental leaders across the organization. These conversations surfaced the operational knowledge that would otherwise have left with one retiring employee, including how systems were actually used day to day, not simply how they were configured on paper.

2. Assessment Across Two Layers

The review examined both the technical environment (infrastructure, tooling, cybersecurity posture) and the organizational layer sitting above it, including staffing levels, role clarity, and whether the department's structure matched what the organization genuinely needed going forward.

Presenting Findings at the Executive Level

The assessment's value depended on how well its findings were communicated. From a single body of work, we produced two outputs: a detailed technical view for operational use and a plain-language summary for executive and board-level decision-making.

The executive view went beyond technical findings, with recommendations on the organization's future leadership structure, including whether it needed a director-level leader or a CIO-level role. It also highlighted priority areas such as cybersecurity, showing where targeted investment would reduce risk most effectively.

This gave the CEO a clear, credible, and current picture of the technology department that they could act on immediately, without needing a technical background to interpret it.

Outcome

The assessment gave the CEO a defensible, current-state view of her technology department within a short and clearly defined timeframe, replacing what had been institutional guesswork with documented fact. That clarity directly informed the organization's next leadership decision. It has since brought on a new technology leader, guided in part by the structural recommendations Anderson Technologies provided.

The relationship remains active as we continue to work with the organization while its priorities develop, with further engagement expected as the new technology leadership settles in and begins acting on the assessment's findings.