

# Global Endowment – Preparedness and Activation During Crises

## About Global Endowment

Global Endowment Management (GEM) is dedicated to protecting and building the endowed assets of national and international charitable foundations, universities and secondary schools, renowned research institutions and nonpartisan policy organizations. GEM offers Outsourced Chief Investment Office

(OCIO) services, functioning as a branch of their clients' investment offices, assuming responsibility for asset allocation, manager selection, risk management, and investment reporting. GEM provides a holistic approach to endowment management, including the facilitation of investment management transitions, structuring customized portfolios, and delivering consolidated performance and tax reporting.

Charlie Weeks, Director of Systems and Technology, is the head of GEM's IT department and has been with the company full-time since 2017 after previously working with GEM through a managed IT services provider. He is a Certified Information Systems Security Professional (ISC2), Certified Ethical Hacker (EC-Council), and a member of the Charlotte ISSA chapter.

Over the last few years, Weeks has seen the organization's employee base grow significantly and supported GEM as they implemented a number of strategic IT initiatives, including virtualizing the company's servers and workstations, moving core IT infrastructure from the company's headquarters to commercial data center facilities, and establishing and thoroughly testing robust business continuity policies and procedures.

## IT Challenge

In late 2018, GEM decided to put out an RFP for managed IT services for **two key reasons:**

1. They are fiduciaries and have a corresponding internal policy to underwrite all major vendors every 3-5 years to ensure they are effectively addressing the firm's needs at a reasonable cost.
2. The firm's previous MSP struggled to scale and adapt their managed services offerings to match GEM's rate of employee growth and IT support needs (GEM's employees travel globally and demand prompt IT support services at all hours).

Of the providers GEM evaluated, Logically was hired in April, 2019 because of the company's ability to provide a 24/7/365 internal IT helpdesk, larger staff of IT support engineers, separate internal divisions for Managed Services and Professional Services, and a competitive pricing structure.

*"I looked at a number of national service providers and Logically checked all the boxes. I needed a 24/7 help desk, and the care and feeding of a high-touch organization. Logically is able to deliver this and is less expensive than many of the national firms."*

CHARLIE WEEKS | Director of Systems & Technology