Best Friends

Digital Fundraising Playbook Series:
Business Continuity in a Digital Program

Introduction and Program Overview

Too often, an organization's systems are set up and managed by a revolving network of people that includes anyone willing to help, such as volunteers and interns (and even someone's brother's cousin whose expertise is questionable). These well-intentioned individuals usually have a wide array of skill levels and may find themselves involved with anything from graphic design to website creation to social account or email list management.

Animal welfare organizations often gratefully accept this support, but then find themselves helpless when these scattered resources are gone. Logins, passwords, domain names and other critical pieces of a digital program have been placed in hands that are no longer available. The inability to make an urgently needed update or to access systems altogether becomes a true crisis. For organizations fortunate enough to have paid staff for their digital programs, turnover can create some of the same problems.

Business continuity means having a plan to deal with these difficult situations so your organization can continue to function with as little disruption as possible. This playbook outlines approaches to ensure that you can always do the work of your organization, regardless of the disruptions you encounter. Through business continuity, your digital programs can help you continue to save lives efficiently and smoothly.

Program Composition

Basic accounts and management processes

Authentication is simply the act of verifying an identity. It means making sure that users are who they say they are. Every time you bring a new platform onboard, you should learn what the authentication options are.

Some platforms, like Facebook, allow you to easily add users to and remove them from your administrative functions. Others, like Instagram, have only one login for the entire platform, giving ultimate power to just one account. Many platforms, like websites and email or fundraising tools, have a limited number of administrative accounts available, but more can be purchased for additional fees.

Understanding the username and password capabilities for a platform will help you know how to handle account management. Remember, your goal is to never get locked out of an account and to have access to all the files needed for a new person to carry on the work. Avoid single points of failure!

Regarding setting up accounts:

- If multiple logins are possible, you can assign them to the individual email addresses that will use the system.

- If only a single login is available, set up a group mailbox on your domain that multiple people can access. For example, create an email address like socialmedia@yourcompany.org that can

be routed to multiple folks by your internal email system.

- When setting up accounts, always use company email addresses — never the personal email addresses of staff members. It's not a good practice, and if they leave, you'll have no ability to log in to their accounts.

Getting the right support

While it can be enticing to take that offer of free help for a digital project, some projects are better suited to volunteer help than others.

Websites: Consider using paid support for website builds or redesigns (either through an agency, company or established contractor), with an ongoing support contract built in for website administration if you do not have a staff member who has the skill set and ability to log into your site to make changes.

Volunteers may be helpful with writing content, designing graphics and doing similar tasks, but your website is the front door to your organization, and you must always retain access to it. Consider the creation of a short contract or at least a memorandum of understanding (MOU) outlining the specific responsibilities of all parties and relevant deadlines. Include language regarding the following:

- Creation of a website on the XYZ platform and associated tasks (then list tasks)

- Integration of the website with existing development and communication services

- Training of ABC Humane Society's designated employees and volunteers for the purpose of maintaining the website (and associated services, if applicable)

- Creation of documentation on access and troubleshooting for the use of those to whom maintenance of the website and content updates will be transferred

- X weeks (or months) of support (define what that support looks like in terms of availability and level of assistance)

Web development can be expensive, but new web platforms make it easier than ever to set up sites and are more cost-effective, too. It is critical, though, that you are able to update your website if you need to (and you will need to).

Social media: Social media platforms vary in terms of their access requirements. If your social media platform only has one login, make that a staff-only access account and ensure that multiple people have access to the account. You don't want to get locked out, because many platforms have notoriously difficult processes to regain entry. Familiarize yourself with the processes for all your important social platforms before you need to use those processes. All of them include this information on their sites. Make this part of your process for setting up any account.

Email: The ability to send email for your organization is powerful. Also, access to your email system means access to your donor file. Anyone with access to your email account should sign a non-disclosure agreement (NDA) and any other related contracts to keep your data safe and in line with your privacy

[policies](#). Ideally, the ability to send email should be managed through a staff member, with volunteer support for things like story content, videos and imagery.

Other types of sites: You may also have accounts on other types of digital platforms and tools, like Google MyBusiness, third-party fundraising platforms or Amazon wish lists. Make sure to familiarize yourself with the administrative roles and accounts available for each platform. Use the guidance above regarding the availability of single vs. multiple accounts. Some accounts may have different levels of access (e.g., for reporting, view only or higher levels of administration). Try to use these to set the right level of permission for the individuals helping with your accounts.

Keeping source files: Whenever possible, request and store the source files for your digital assets created by anyone. This includes Photoshop files, [source](#) images and [HTML](#) files for email templates or webpages. Having access to the source files allows you to make edits after the creator has finished a project, which means you can get more mileage out of videos, images, graphics and templates.

Organizing your framework: The good news is that you don't need any special technical skills to set up this framework and to ensure that you don't lose access to your platforms. However, you'll be a step ahead if you apply some basic organizational skills in the following ways:

- Maintain a spreadsheet of the platforms on which your organization has accounts, including the type of login, who has access and what it's used for. Don't list your passwords there, though. Read the information below about password security.

- Maintain a shared folder with contracts, contact information, and source code files provided by vendors and volunteers.

Addressing security concerns: Questions around logins and access always intersect with security concerns. Remember these important practices:

- Ensure that anyone accessing your system has signed all your organization's standard contracts for non-disclosure and system access requirements.

- Follow best practices on creating strong passwords and managing them securely.

- Revoke permissions for any staff member who has left your organization. Do this immediately at the end of the staff member's last day (or immediately following the staff member's departure from the building if employment has been terminated for cause).

Conclusion

Getting locked out of one of your organization's accounts can derail your work and sometimes yield very serious consequences. Taking proactive measures to establish business continuity can help you ensure that your organization stays focused on lifesaving and is not sidelined by the inability to use the tools you have invested in. Ensuring that you have the right type of support (full-time or contract staff, agency or skilled volunteer) will help you sustain that continuity. Make the investment of time now, and the return you receive on your investment will be measured in operational efficiencies, increased donor care and peace of mind.

Resources

- If business continuity is a new concept for you, check out this [introduction](#).

- Okta provides an authentication [playbook](#).

- NOLO provides a sample of an NDA [here](#).

- Essential information for Facebook users can be found on the "Managing Roles for Facebook" [page](#).