



Business Continuity & Best Practices for Working Remotely

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UNITED WE WIN.

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Speakers



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Agenda

- Business Continuity – things you can do now
- Technology Choices and Strategy
- Technology case study – United Way of Southeastern Idaho
- Collaboration and online meeting platforms (for free or cheap!)
- Best practices for adjusting to working at home
- Other best practices for remote work

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Business Continuity

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Please be a
good neighbor.



Definition

- **STANDARD 5.5: BUSINESS CONTINUITY.*** United Way has a comprehensive business continuity plan to ensure appropriate and timely internal actions following major crises, disasters or loss of key staff.
- Business continuity includes succession planning, preparing for disasters (natural, man-made, economic, etc.) and elements of risk management.

* From United Way Standards of Excellence, published 2005

Normally This is the slide where we would tell you to:

- Assess risks
 - Economy
 - Natural and man-made disasters
 - Staffing
- Can you avoid/mitigate risks?
- Test your plan – review with staff, board, auditors, others

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***At the risk of stating the obvious,
things are not normal.***

But you can do the following

- Identify alternatives when/if business is interrupted
- Document processes, passwords, where to turn
 - See resources in file download pod
- Start with business critical processes
- Consider austerity measures
 - Changes will be harder in Q2/Q3/Q4
 - Redeploy assets strategically, carefully
 - Fulfill donor commitments – not negotiable
 - Engage board/finance committee

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FMI: <http://www.bethkanter.org/facilitate-virtual-meetings/>

Click here for more

Board Operations in a Virtual World

Tips for virtual facilitation include: Have a virtual meeting technology, preferably one with video capabilities. Many have the opportunity to “raise a hand” or can put in the chat box that they have a comment/question. Note: not what the comment is – avoid chat discussions.

- Send meeting information in advance (always a best practice!).
- Have clear rules for virtual meeting voting.
- Leverage your ground rules, but especially:

- One conversation, everyone speaks.
- Avoid “chat discussions”
- Be present (only the meeting is open; no email, etc.)
- Employ an issues list (or parking lot)
- Use a platform that offers screen sharing

- Use notes with action items and assigned individuals and deadlines.
- Have one “moderator” or “facilitator” (this can be the person leading the meeting)
- Have *tech support* who can resend links, help individuals troubleshoot, etc. (NOT the person leading the conversation)

Operating Reserves

- Undesignated and unrestricted reserves
- From the balance sheet
 - Unrestricted net assets less fixed assets
 - This calculation assumes no mortgage
- At a minimum, three months' expenses should be kept in reserves
- Evaluate your circumstances
- Higher level of reserves needed if
 - Prone to natural disasters
 - Weak or uncertain economy
 - Limited sources of revenue

More info on UWO:

<https://online.unitedway.org/groups/membership-accountability/operating-reserves>

Planning: Definitions

While a crisis is a potentially challenging time, it may also be a time of opportunity. Be careful about making decisions that may have a long-term impact.

Action Step:

Define short term vs long term for your organization

EXAMPLE:

- Short Term = 3 months | Long Term = greater than 3 months
e.g. Email server on site → migrate to Office365 or G Suite

Planning

Opportunity: Don't forget to record your decisions and learning to create a written business continuity plan once we are beyond the crisis.

Current State: We are in a crisis NOW!

- Has your leadership team determined what your community expects from your UW? What can your team deliver and what is not up to you? (e.g. UW does not do the work of Red Cross, but may be responsible for 211 and convening community leaders)
- What if your UW had the foresight to think ahead and plan?

It is easier to learn how to fly the plane than to learn how to build it and fly it at the same time.

Future State: Develop a business continuity plan → a roadmap

Guiding Principles and Note of Caution

Focus: Operations, your staff and community need/expectations

Choices and Advice: Do what is best for your organization

- Beware of the difference between a well-meaning company or even a volunteer vs. making the right business decision for your United Way. (e.g. if the company only recommends what they sell)
- Use caution in a crisis, short term decisions may have a high cost over time.

Policies: Check out TechSoup [Sample Remote Work Policy](#)

The Rabbit Hole: it is easy to go there, know when it happens!

Identify Essential Apps and Processes

Takeaway: Create documentation to spell out the expectations. Work with staff to hear what they need to perform the job effectively

What **APPLICATIONS** or **DATA** MUST my UW have to operate?

Example (your UW should brainstorm and rank on their own)

- Primary: 1. email 2. documents 3. financial system
- Secondary: 1. website 2. phones 3. donor database
- Tertiary: 1. volunteer system 2. fax machine

What **SERVICES** must my UW have to operate?

- Primary: Electricity, Internet access, laptops, cell phones, IT support, collaboration tools, banking tools
- Secondary: Phone system, file server, printers

Internet Access

Takeaway: Inventory Staff for connectivity to be able to make recommendations. Check cell phone fine print/cost.

- **Home Wifi** – be sure to have sufficient bandwidth and firewall/router
- **Cellular Wifi**
 - Many cell phone carriers have reduced overage fees during the Corona Virus Pandemic
- **Cellular Hotspots** – portable hotspots can be useful – did you know that most cell phones today can function as a hot spot?
 - Tip: Some cell phone carriers offer in house boosters, sometimes even free of charge
 - Tip: Upgrading Wifi plan/bandwidth or cell phone plan may be beneficial on a short term to boost productivity – beware of contracts
- Internet is as fast as the slowest part: being close to your wifi router helps, having a relatively recent fast router, adding memory to a laptop, etc.

Security Considerations

- Mantra: Don't skimp on security because we are in a crisis
- Use of home desktops/laptops
- Patching and Anti-virus
- Secure file storage (G Suite or O365)
 - Ensure diligent handling of donor/volunteer data files
 - **Always better to email a link to share sensitive/PII vs a file.** Once it is out there, you cannot remove the file. You can turn off sharing on a link
- Phishing education for staff

Use of Home Computers?

Tip: Determine whether this is permissible or not.

When possible, we recommend only using work computers.

Use of Home Computers? **Answer: It depends**

Considerations:

- Kids or spouses may have access to information they should not
- Actions by family members could infect work devices
- Activities such as credit card processing require secure independent devices
- Consider the user and their equipment. A single person in communications will have different needs than a parent of 5 using the family computer for Finance.
- Caveats: if your UW leverages cloud based applications, there may be a higher tolerance for use of other devices (home computers, tablets)

Anti-virus and OS patching

Takeaway: Check anti-virus, patching

Are all devices able to update patches for the operating system and applications?

- Do devices require central connection for updates via VPN or can users choose to update?
- Has anti-virus software been installed and configured for all devices?
 - Are updates set to automatically update at short intervals?
 - Will scans continue when devices are not connected to the office network?
 - Consider Windows Defender or BitDefender (TechSoup)
- Extra Credit: Are all devices encrypted? Do you maintain the encryption keys in a central location? Have devices been purchased that contain the capability of encryption?

Office/Collaboration Applications

Takeaway: A personal Gmail account is not the same as a G Suite or Office365 account. Best Practice: use organization wide tools and not personal accounts.

- **Microsoft Office365 vs Google G Suite**
 - Both offer similar services though the tools may look different
 - Can be used on Windows, Mac, Tablets, Phones
 - Differences
 - O365 includes desktop applications (Word, Excel, Powerpoint) G Suite = online only
 - Mail Merges may be easier with MS Word and Excel
- **Centralized web accessible file considerations**
 - Keeps organizational files within the organization.
 - What happens if an employee leaves? Did they have files on their personal Google Drive? Are those files sensitive?
 - Provides a single place to store files
 - Reduces dependency on local device storage

Phones

Takeaway: Inventory staff plans to provide guidance, reasonably meet needs and provide creative solutions

Short Term:

- Migration to cell phones
- Forward office extensions to cell phones
- Voicemail to email or txt options
- Consider other ways of communicating for staff without generous cell plans: e.g. MS Teams, Chat, Workplace by Facebook, WhatsApp, Facetime, etc.

Long Term Consideration:

- *Consider* migrating office phone system to VoIP service
 - This may be done remotely without setting a foot in your office
- **Be careful of hasty decisions with long term: read the fine print**

TechSoup

Connects nonprofits with tech products, software, hardware services, and learning resources

www.techsoup.org | <https://page.techsoup.org/covid-19-resources>

1. Register with a copy of your 501c3 letter
2. Verification may take up to 7 business days
3. Purchase products – certain products requiring a download and license key may arrive within 48 hours.

- Office365 and Google G Suite
- Discounted Zoom Subscriptions
- Anti-virus
- Adobe Acrobat Pro

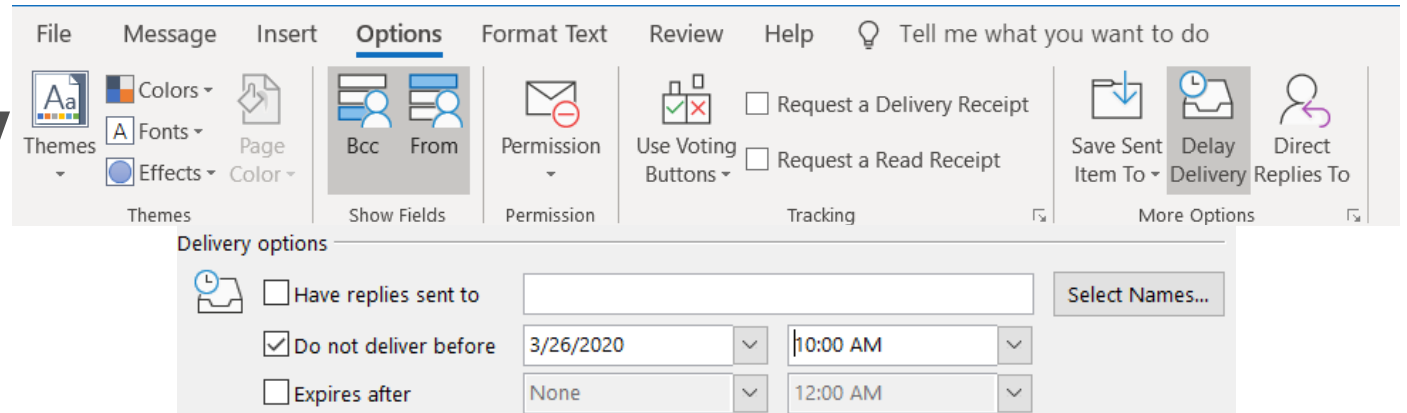
Costs and Equipment

Consider a small stipend/group purchase for staff to get equipped if they were not able to bring home office equipment:

Basics	Nice to Have	Creative Alternatives
Appropriate laptop	Latest OS, encrypted laptop	Possible Staff device
Mouse/keyboard	Wireless mouse/keyboard	\$10-15 basic wireless mouse or mouse/keyboard combo
A webcam on laptop		Cell phone with app
A good headset		Cell phone headphones/mic
Dedicated desk	A standing desk	A stack of books for the right height to stand or sit
Basic Ergonomics: Work Chair	Monitor stand, wrist rest, etc.	
Laptop as monitor	Multiple Monitors	An HD flat screen TV as second monitor (1080+)
Optional: Printer/scanner		Cell phone app for scanning; Acrobat Pro for completing forms

A Few Random Technology Tips

- Outlook: **Delayed Delivery**



- **Chat Applications:** Lets you know when colleagues are available
- **Shared Schedules:** Also lets you know when colleagues are available
- **Use Web Meetings** to share tips, check in with staff and be sure to provide more support than you think staff will need. Be prepared to answer questions multiple times as people adjust!

Ergonomics 101

<https://www.memic.com/workplace-safety/safety-net-blog/2020/march/remote-worker-safety-and-ergonomics>

[Webinar: Ergonomics and the Mobile Worker](#)

[Assessing My Home Office](#)

MEMIC

Name:	_____
Date:	_____
Evaluator:	_____

10 Tips for a Perfect Fit Worksheet

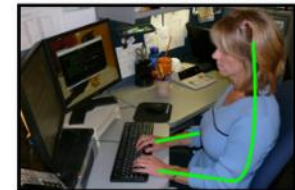
Percent Complete

1. Does the chair positively support the body?



0 = No
1 = Yes

2. Are the wrists/hands/forearms aligned?
Are the shoulders relaxed?



0 = No
1 = Yes

3. Is the mouse kept inside the "Mouse Zone"?



0 = No
1 = Yes

4. Is the mouse on the same plane as the keyboard?



0 = No
1 = Yes

5. Is the top of the screen adjusted to sitting eye height?



0 = No
1 = Yes

6. Is a document holder being used?



0 = No
1 = Yes

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Technology Case Study

Kevin Bailey, United Way of Southeastern Idaho

Cloud Migration - Shifting to Operate Remotely



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of Southeastern Idaho

Before Migration

- Shared files hosted on one on-site employee's computer
- Data backed up to an eBook once a week and physically taken home
- Text messages in a group chat for instant communication
- Email system did not support mobile access or calendaring
- Inability to collaborate effectively
- Documents not available off-site or on mobile devices
- Conferencing

Would not have been prepared for current crisis

Cloud Migration - Shifting to Operate Remotely



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After Migration

- Data migrated to O365
- All email migrated and available in Outlook (both online and local app)
- All documents available from anywhere
- Co-authoring ability
- Able to create docs on mobile device and resume on a laptop, vice versa
- Most importantly, able to utilize Microsoft charity program for licensing at a fractional cost

Collaboration and online meeting platforms (for free or cheap!)

Web Meeting Tools

Features

Online Meetings with Video

Dial In Number (Toll Free?)

Screen Sharing

Chat (for voting)

Remote Control (MS Teams)

Poll

Considerations

Audience: savvy staff or potentially older Board Members?

Cost: can your UW share a few accounts?

Ease of Use: Is it easy for people to join your meeting?

Evaluate Real Needs: what are you likely to use? E.g. Phone + Web

Free Web/Conference Calling

- **Microsoft Teams** – free with O365, great for internal use, integrated with Office365
- **Workplace** by Facebook – you already have it! Video chat, group chat, group discussions
- **Google Hangouts** – free, great but requires Google/Gmail account
- **Freeconferencecall.com** -- Includes free recordings of calls and Video conferencing
- **Uberconference.com** -- Free for up to 40-50 (during COVID) participants

Other Free Web/Conference Calls

Mantra: Sometimes it is worth paying a reasonable fee when the return is in productivity

- **Most Universal: Microsoft Teams*** – free with O365, great for internal use, integrated with Office365, remote control
- **Easiest to Use: Zoom*** – ease of use on multiple devices, remote control \$65.00 Admin Fee + \$74.95/yr = 139.95 per account via TechSoup
- **Option for Google Users: Google Hangouts*** –via TechSoup subscription. Caveat: users must have a Google Account

*Free with application via TechSoup.org | free version of Zoom is limited to a 40 minute meeting

Chat Options (all free)

- Microsoft Teams: integrated with O365 free
- Google Chat: integrated with G Suite

- Workplace by Facebook via United Way Worldwide
- Slack: Owned by Microsoft
- What's App

Note: try to pick one option as an organization – otherwise Chat groups will not be able to connect

Staff and Web Meetings

- Whatever option you choose as an organization, schedule an all staff meeting to let staff experience the solution
- This also provides staff cohesion by seeing each other's faces
- We are in the midst of a crisis and many people are eager to talk!

Trello

- Organize and collaborate
- Allows team members to view status of projects
- Create workflows
- Upload documents, add notes to tasks
- Free with limit of 10 MB
- www.trello.com

Trinity Website Replacement

☆ Personal Private ... Show Menu

To Do

- Develop list of websites to investigate
- Contact (church) and get info 📎 1
- Determine approach for migration
- Determine approach for maintenance
- Capture screen shots of each page in the current website ☰
- Log into Brick River site and look around 💬 2 MB
- Provide status to council

Add a card...

Doing

- Contact Covenant and get info 📎 1 M
- Contact Aldersgate and get info 📎 1 M
- Contact Open Doors and get info 📎 1 M

Add a card...

In Progress

- Contact UMCChurches ☰ 💬 4 📎 1

Add a card...

Done

- Develop questionnaire for UMCChurches 💬 1 📎 1
- Identify Web Site Designers 💬 1
- Test out access to current website 💬 1
- Provide update to selected council members 💬 1
- Determine if Mary can get admin access to current website 💬 1
- Sign up for free trial at Brick River for

Add a card...

Add a list...

Asana Project Management

- asana.com (For larger organizations -- TechSoup \$73 admin fee + 50% discount)
- Set due dates, deliverables
- Free basic version for up to 15 users

Best practices for adjusting to working at home

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The Real on Working from Home

- Anticipate distraction and disruption
- Take a lunch break
- Block off “uninterrupted” work time
- Identify a dedicated “work space” where you can go and switch change mindset
- Establish indicator for family members to show you are in work mode (e.g. a post it note on the back of your chair or “office” door)
- Engage with colleagues on non-work-related discussions



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Social Distancing ≠ Social Isolation

- **Call friends and family**
- **Offer help where you can**
- **Go outdoors**



How to Keep Calm During the Coronavirus Pandemic, 8ight Lessons Learned in Solitary Confinement

1. Meditate
2. Write letters
3. Write a book
4. Journal
5. Create a vision board
6. Learn a craft
7. Go back to school
8. Exercise



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Other Best Practices for Working Remote

Telework Tips for United Way Staff

- UWW has curated an ongoing list of tips focused on helping you adjust to teleworking
- The list includes categories such as:
 - Children
 - Mental/Physical Health
 - Technology & Workspace
 - and more!

Telework Tips for Your Staff

Children

- [amazingeducationalresources.com](https://www.amazingeducationalresources.com) – free online classes for kids
- Schedule blocks of time for ‘parenting duty’, if needed

Mental/Physical Health

- Create a new ‘routine’
- Take advantage of your organization’s Family & Sick Leave

Technology & Workspace

- Make your Workspace as comfortable and functional as possible
- Schedule 45 minute-meetings as opposed to 60 minutes

[Link to full list](#)

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Resources

Crisis Funds

- Tell us if/how your United Way is responding
- Be clear about intent of fund
 - “Charitable class”
 - Short/Mid/Long-term recovery (how long-term?)
- This isn’t forever; be adaptable
- Webinar recording: [Covid 19 Crisis Funds – Management & Communication](#)

Vendors

Through UWW's Vendor Resource Center:

- [ADP](#) – wholesale pricing for United Ways with fewer than 49 employees
- [DocuSign](#) – digital signature platform, 30% discount
- [Unity Tek](#) – IT services
- [Sterling Volunteers](#) – volunteer background screening services
- Several board engagement platforms
 - [Boardable](#)
 - [BoardEffect](#)
- For full listing of vendors, [click here](#).
- [Tech Soup](#) – host of technology solutions at deep discounts for tax-exempt organizations.

United Way Online Resources

Business Continuity

- Organizational Inventory Checklist
- Guide to Operating Reserves
- Samples and templates from United Ways and other organizations
- Succession Planning Guide
- Crisis Communications Guidance

COVID-19

- [COVID-19 Updates](#)
- [COVID-19 Social Media Toolkit](#)
- Webinar recording: [COVID-19 Crisis Funds – Management & Communication](#)

Other Resources

- TechSoup Covid Page: <https://page.techsoup.org/covid-19-resources>
- [Covid-19 Non Profit Resources Document :](https://docs.google.com/document/d/1k5pC-R1V4SK4bRPN7cqh9WpIsubXP5tt8qpF5hinMoQ/edit?pli=1)
<https://docs.google.com/document/d/1k5pC-R1V4SK4bRPN7cqh9WpIsubXP5tt8qpF5hinMoQ/edit?pli=1>
- <http://www.bethkanter.org/facilitate-virtual-meetings/>