



# Technology Committee

## Infrastructure

**Prepared for:** Technology Committee Chair

**Organization:** Piedmont (NC) Chapter

**Goal:** Digitally transform and modernize chapter operations, communication, finance, and data management.

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### Phase 1: Governance & Strategic Setup

**Objective:** Establish infrastructure ownership, protocols, and security compliance

**Key Actions:**

- Create a central chapter email (e.g., chaptername@linksinc.org) and transition all technology access under this account.
  - Current email: piedmontnclinkstechnology@gmail.com
- Establish a Technology Transition Protocol for annual officer turnover, including:
  - Password management
  - Admin access reviews
  - Training for incoming officers
- Use a password manager (such as LastPass or Bitwarden) to store your credentials securely.

**Reference:**

- Roles & responsibilities (Tech Reference Guide, Section 1)
- Password and transition guidelines

**Phase 2: Document & Cloud File Management**

**Objective:** Move to secure cloud-based storage and organization

**Tools:**

- Google Workspace (recommended)
- Dropbox (optional)

**Structure:**

- **Shared Drives:**
  - Governance (Bylaws, Minutes)
  - Finance (Budgets, Vouchers)
  - Programs & Service
  - Membership
  - Technology

**Guidelines:**

- All sensitive docs (financial reports, rosters) must be password-protected.

- Archive documents in line with retention policy (7 years for finance; lifetime for minutes, charters)

### **Phase 3: Digital Finance & Operations**

**Objective:** Implement electronic vouchers, ACH reimbursements, and QuickBooks integration

**Recommended Tools:**

- QuickBooks Online
- DocuSign or JotForm for digital voucher submissions
- Authorize.net or PayPal for digital payments
- Bank ACH setup with dual-approval

**Workflow:**

1. Member submits JotForm voucher
2. Voucher auto-routes to required approvers
3. Upon approval, the finance team processes ACH via bank or QuickBooks.
4. Receipts are uploaded to Finance Drive.

**Add fraud alerts and internal audit safeguards.**

### **Phase 4: Communications & Engagement**

**Objective:** Strengthen chapter communication and digital presence

**Channels to Set Up:**

- **Email:** Use chapter-issued email (e.g., communications@...)
- **Email Marketing Tools:** Mailchimp or Constant Contact for newsletters
- **Group Messaging:** GroupMe or WhatsApp (with opt-in)
- **Social Media Presence:**
  - Platforms: Facebook, Instagram, LinkedIn
  - Include logos, disclaimers, and official bios.
  - Create a 6-month content calendar.

#### **Best Practices:**

- Align posts with national messaging
- Ensure admin turnover annually.
- Avoid monetization or ads.

### **Phase 5: Website & Member Portal**

**Objective:** Build or modernize the chapter website

#### **Must-Haves:**

- National + Area links
- Chapter contact info + social media
- The President's welcome

- Calendar of public events
- Secure “Members Only” area (Google login-based or password)

**Member Portal Should Include:**

- Chapter meeting minutes
- Budget reports (PDFs)
- Roster (secure)

**Phase 6: Measurement & Compliance**

**Objective:** Track usage, compliance, and effectiveness

**Monthly/Quarterly Tasks:**

- Website audit (content & links)
- Access log review (Google Drive/Dropbox)
- Password update check
- Email list cleanup

**Annual Tasks:**

- Conduct a cybersecurity and tech audit
- Ensure platform renewals (domains, subscriptions)
- Present tech report at year-end transition meeting

## Committee Structure

### Recommendation:

- **Technology Chair:** Strategy + oversight
- **Digital Finance Lead:** Supports vouchers, QuickBooks, and ACH
- **Web Manager:** Updates website/portal
- **Communications Liaison:** Coordinates with social media + PR
- **IT Support Member(s):** Handles access issues and support

### Suggested Timeline

Month	Focus Area
Month 1	Email system cleanup, password manager setup
Month 2	Cloud file setup & financial system updates
Month 3	Website audit/launch, voucher system pilot
Month 4	Social media strategy deployment
Month 5	QuickBooks training, member education
Month 6	Chapter-wide technology training, annual audit checklist

# Password-Protected Tech Toolkit Setup

Here's what to include and how to organize it using **Google Drive** (recommended for ease of use, collaboration, and alignment with national tools):

## Folder Structure for Google Drive Toolkit

**Top-Level Folder:** **Piedmont (NC) Chapter Technology Toolkit – CONFIDENTIAL**

Set to "Restricted – Only people added can access"

Add: Tech Committee, President, Treasurer, Financial Secretary, Communications Chair

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## Folder Layout:

### 1. Credentials & Access Logs

- Password vault instructions
- Platform access tracker (Google Sheet)
- Officer transition checklist (editable doc)

### 2. Finance Systems

- JotForm voucher templates
- ACH/Banking workflows
- QuickBooks SOP (PDF)

### 3. Communications & Messaging

- GroupMe onboarding guide

- Social media branding toolkit
- Email templates

#### **4. Website & Digital Presence**

- Website content audit template
- National/Area logos
- Quarterly content update tracker

#### **5. Data Protection & Cybersecurity**

- Best practices guide
- PII handling policy
- Document naming & storage protocol

#### **6. Audit Tools & SOPs**

- SOP PDF (from canvas)
- Audit checklist (Google Form or Sheet)
- Quarterly self-assessment log