

Disaster Planning and Recovery Resources for Nonprofit Organizations

A Report from TechSoup Global to Cisco Systems, Inc.
October 2009

Project Description

In February 2009, wildfires devastated parts of Australia, killing 131 people, destroying more than 750 homes, and leaving many local nonprofit organizations with reduced or eradicated technical infrastructure. In response, TechSoup Global (TSG) sought to update and expand its disaster planning and recovery resources, updating the pre-existing manual *Restoring IT Infrastructure: A Manual for Disaster Recovery*, and creating new content aimed at assisting organizations in times of crisis and deepening their impact during times of health.

The following activities were planned for the project, as stated in a proposal letter to Cisco in March 2009¹:

- Update content in the disaster recovery manual
- Create new content on disaster planning
- Complete and document interviews with organizations that have been affected by a disaster to inform the content development
- Complete and document feedback from the interviewees on how the new content impacted their organization
- Explore the possibility of conducting a webinar based on best practices gleaned from the manual

Accomplishments during the Project Period

Changes from the Project Proposal

Unexpected challenges during the project period, including the hospitalization of the lead staff member, required modification of the activities originally proposed and an extension of the project period from the end of June to the end of August 2009.

Originally, TSG proposed to conduct interviews with organizations affected by the Australian wildfires. However, an ongoing criminal investigation by the Australian government into the cause of the wildfires and increased scrutiny of nonprofit organizations throughout the country made many of the organizations contacted reluctant to disclose too many details of their experience on the record. In addition, we found that disaster planning can be a sensitive issue. Many organizations were reluctant to disclose on record that they did not have a disaster plan in place. In response to this situation, TSG decided to conduct anonymous surveys with the organizations, which allowed for more candid responses than the interviews were generating. In June 2009, Cisco approved this change to the proposed activities along with the extension of the project period.

We were also able to add project activities that were not part of the original project scope. We were fortunate to have our Taiwanese partner, TechSoup Taiwan, organize a volunteer project to translate and localize the disaster recovery manual into Chinese to help with outreach into the Chinese speaking community. In addition, the Cazenovia (NY) Area Community Development Association (CACDA) has adapted content from the manual to create their own disaster preparedness manual customized for local organizations. We continue to encourage organizations to edit the content of the manual and redistribute the materials as they see fit, in compliance with the manual's Creative Commons license.

¹ The funds used for this project were reallocated from the now completed 2006 Cisco Technical Volunteers Pilot Project, as outlined in the March 2009 proposal letter.

Project Activities

The following activities were accomplished during the project period:

Publication of *The Resilient Organization: A Guide to Disaster Planning*

www.techsoup.org/toolkits/disasterplan/links/techsoup-disaster-recovery-guide.pdf

The pre-existing disaster recovery manual, *Restoring IT Infrastructure: A Manual for Disaster Recovery*, was updated. The new manual, titled, *The Resilient Organization: A Guide to Disaster Planning* was informed by survey responses and interviews with organizations that have struggled with the issues discussed in the manual. Including real-life examples from organizations that have had direct experience dealing with disasters strengthened the content and made it a more compelling read. The practice is also in line with our goal of providing peer-to-peer learning experiences, which we have found to be effective in past technical support projects.

As mentioned previously, we encourage organizations to repurpose and redistribute material in the manual for localized needs. One exciting project was the translation of the manual into Chinese by our Taiwanese partner:

http://techsoup-taiwan.ning.com/group/ITdisaster_recovery_manual

Creation of the Disaster Planning Toolkit

www.techsoup.org/toolkits/disasterplan/index.cfm

A new toolkit was created on the TechSoup.org site to house all content related to disaster planning and recovery. This page serves as a convenient hub for organizations interested in accessing the full suite of resources TSG provides on the subject, including the disaster recovery manual, post-impact operations analysis worksheets, links to archived webinar content, and links to software products that assist with data backup, recovery and security.

Survey of and interviews with organizations affected by disasters

TSG conducted an anonymous survey of 349 organizations to gain a better understanding of their experience dealing with a disaster or emergency situation that damaged their computer equipment or electronic data. The survey covered topics including the extent of data loss experienced, the time it took and methods used for recovery, backup procedures used, and IT documentation efforts undertaken. The open-ended nature of the questions allowed us to gather valuable anecdotal evidence that informed the creation of the disaster planning manual, including advice for other organizations based on their experience.

A number of respondents also shared their contact information and agreed to answer further questions as we developed the new material for the manual and the webinar series. One organization agreed to be interviewed anonymously, and provide particularly valuable insight on the importance of backing up and storing essential contact information (see page 18 of the manual):

Essential Contact Information: Are You Ready?

We spoke with the director of development and operations at a human services organization in California. She said that her organization was ready for a hardware failure, with a combination of local and remote backups, with the most critical data being backed up multiple times every day. She admitted, though, that the organization's communications were considerably less prepared.

With a staff of eleven, "Everyone has everyone else's phone numbers programmed into their personal mobile phones. But we also have a youth program for about 25 students and there is only one staff member who knows how to contact their parents. If that staff member were unavailable during a disaster, it could take the rest of us a few hours to find everyone's contact information."

After our interview, she set a meeting with her staff to identify critical information and make sure everyone has appropriate access to it in case of an emergency.

Creation of the disaster planning webinar series

<https://cc.readytalk.com/cc/schedule/display.do?udc=3w9tivithdkt>

We conducted two free webinars on disaster planning. The first, held August 20, 2009, was titled Disaster Planning: What Organizations Need to Know to Protect Their Tech. It was presented by TSG's Becky Wiegand, who interviewed subject matter experts including Elliot Harmon, also from TSG and editor of the disaster planning manual; Chris Shipley from Nutmeg Consulting, which provides IT consulting services to nonprofits and businesses in Connecticut, Massachusetts, and Rhode Island; and Michelle Baldwin, Executive Director of Volunteers in Service to Others (VISTO), which runs the Cooke County (Texas) emergency food bank. VISTO experienced a flood two years ago, and Michelle shared her experience and offered advice for other organizations trying to plan ahead.

The second webinar, titled Backup Backup Backup!, was held on August 27, 2009, and provided an in-depth discussion of backup systems. It was presented by TSG's Becky Wiegand, who interviewed Nutmeg Consulting's Chris Shipley and Sarai's (a technology support service for nonprofits) Zac Mutrux about the different types of backup options available, including hardware, portable devices, and hosted services. She also interviewed Ana-Marie Jones from Collaborating Agencies Responding to Disasters (CARD) who shared insight from her experiences training nonprofits to be prepared in the event of a disaster. Both webinars have been archived and the presentations are available to the public at no cost through Ready Talk.

Blog posts on disaster planning

<http://blog.techsoup.org/node/987>

We created a number of blog posts to publicize the content and events created for the series and to provide additional information on disaster preparedness for our users. Topics discussed on the blog include a new disaster relief software application called ReliefPoint; the use of smartphones in a disaster situation; and backup procedures for Macs.

Outreach to community partners

In addition to promoting the content created through the TechSoup.org site and community, TSG worked with a number of local and international partners, including members of the TechSoup Global Partner Network, on outreach efforts. Locally, Collaborating Agencies Responding to Disasters (CARD) has been publicizing the manual and using it in their workshops.

Project Outcomes

The overall goal of the project is the increased ability of organizations to withstand a disaster with minimal impact on their technical infrastructure. The content created for this series is available for re-use through a Creative Commons Attribution-Share Alike 3.0 license, and TSG encourages organizations, volunteers, and technical assistance providers to adapt the content to suit various organization, types, or disasters.

Disaster Manual

TSG aimed to increase downloads of the disaster recovery manual by at least 25%. From the launch of the new manual on August 18 to September 29, 2009, the updated manual was downloaded 1,308 times, for an overall all increase of over 1000% from the previous version of the manual, which was downloaded 67 times from July 7 to August 15, 2009. Data from the launch of the previous disaster relief manual was unavailable because the download numbers were too low to register on our metric reporting system.

Webinars

The two webinars were a great success:

- 153 people registered for the Disaster Planning: What Organizations Need to Know to Protect their Tech event, and 98% of the attendees stated that they learned new skills and ideas.

- 246 people registered for the Disaster Planning: Backup Backup Backup! event, with 91% of the attendees stating that they learned new skills and ideas.

Feedback comments also were very positive:

“The webinar was impeccably targeted and provided just what I needed to think about initially.”

-Marilyn Wacks, California Housing Partnership Corporation

“Our agency is located in south Louisiana and we do have a basic plan but this information will allow us to be much better prepared in case the unthinkable happens.”

- Kerry Stutes, ASSIST Agency

“This was so helpful - I look forward to implementing and streamlining my organization’s practices!”

- Marisa Louie, Urban Solutions

Blog Posts

The blog also proved to be a popular content delivery method. As of September 25, 2009, they have generated the following metrics:

- Free Webinars: National Preparedness Month: 333 reads
- Pangea Foundation Spotlight: Disaster Relief Communications Hub: 346 reads
- Mobile Phones and Disaster Planning: 646 reads
- Freestore Foodbank: Standardized Practices and Disaster Planning: 580 reads
- Back That Mac Up: 728 reads

Lessons Learned

The work undertaken for this project has provided valuable lessons learned that will impact our future work. For example, we did not expect the level of resistance we encountered when we began outreach to conduct the interviews with organizations that experienced a disaster. Initially, we did not appreciate the degree of sensitivity there is around disaster planning or the lack thereof. Many organizations did not want to admit that they did not have a disaster plan or that their data was or is vulnerable in the event of a disaster. Once we switched to anonymous surveys, we were surprised and pleased with the level of candor with which the organizations wrote of their experiences. We found a strong desire within the nonprofit community to share stories and advice, and we were fortunate to be able to tap into it.

On a related note, we found that being able to include stories from the field really made the manual come to life. The quotes from the survey and interviews that we included gave the material a relevancy that we could not have achieved on our own. We plan to continue to include real-life examples and lessons learned from the organizations we serve in future content we produce.

Finally, the combination of the manual, which people could read at their own pace, and the real-time, interactive webinars, made for a very effective content delivery method—as reflected by comments in the webinar follow-up surveys:

“Great content, helpful ppt slides, enjoyed hearing real life examples, chat support very timely and helpful. Overall, really good information that we all need to know...”

-Michele Mitsumori, Emmanuel Gospel Center, Inc.

“Very informative, easy to understand and most important provided the links to the information so we can find them at our own convenience. Thanks.”

- Susan Ortiz, Conservation Districts Foundation