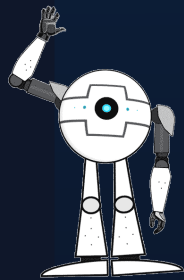


THE ISLAND PITCH FIELD MANUAL

The Right-Way Tech Guide

Get out of Business World. Reach your Pitch. A plain-English guide for any team — choosing tools, protecting your data, accessibility, and using AI the right way.



Do Cool Things the Right Way!®

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Two villains, one journey

Every team starts in **Business World** — a gray place where good missions get stuck, drowning in tools and busywork. Two villains keep them there.

Chaos is the loud one: breaches, ransomware, phishing, the deleted database, the disaster that strikes on your busiest day. **The Mundane** is the quiet one: busywork, shiny-but-shallow demos, “we’ll deal with it later,” untested backups, no policy. Chaos wins when the doors are left open. The Mundane wins by lulling you to sleep.

You don’t have to face them alone. **Masked Crewsader** floats above Business World as the champion of good process and mindful design — the **why**, and the courage to do it right. **IP Bot** was built by the Crew to combat The Mundane — the **how**: the checklists, the locks, the automation. This guide is your map. Each chapter is a villain to face and a playbook to beat it.

What's inside

- **Chapter 1 · The Bazaar of Shiny Things** — Choosing technology without getting locked in
- **Chapter 2 · The Open Gates** — Security for small teams
- **Chapter 3 · The Vault of Trust** — Data privacy & protecting the people you serve
- **Chapter 4 · The Bridge for Everyone** — Accessibility & inclusive design (US, Canada & Europe)
- **Chapter 5 · When Chaos Strikes** — Disaster recovery & business continuity
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- **Reach Your Pitch** — How a Fractional CTO helps

Choosing Technology Without Getting Locked In

The platform you buy on a dazzling demo is the one you learn the truth about two years later — chained to a contract you can't read your way out of. Buy on purpose instead.

Masked Crewsader: A demo is a magic trick. Don't ask "is it shiny?" Ask "will this still serve my mission in three years, and can I walk away if it doesn't?"

IP Bot: Export your data and time it. Map every integration. Total the 3-year cost. If a vendor won't let you leave cleanly, that's a cage, not a feature.

7 questions before you buy

- 1. **What problem are we actually solving?** Name the specific pain, not “we need a new CRM.”
- 2. **Who maintains this after the consultant leaves?** Every tool needs an owner on your team.
- 3. **Can we export our data, ourselves, in a usable format?** Try it before you buy.
- 4. **What's the real 3-year cost?** Licenses + setup + staff time + integrations + upgrades.
- 5. **Does it talk to what we already use?** CRM, finance, email should connect.
- 6. **What's the exit path?** Know how to leave before you arrive.
- 7. **Is there a nonprofit discount?** TechSoup, Google for Nonprofits, Microsoft, and more.

Total Cost of Ownership worksheet

A platform at “\$99/month” is rarely a \$3,564 decision. Fill in your real numbers:

Cost	Example (3 yr)	Yours
Subscription (\$99/mo × 36)	\$3,564	_____
Implementation / data migration	\$2,500	_____
Staff time (3 hr/wk × \$30 × 156)	\$14,040	_____
Integration / middleware	\$1,800	_____
Mid-contract upgrades	\$1,200	_____
True 3-year total	~\$23,104	_____

How Chaos & The Mundane win

- Buying for the org you wish you were instead of the one you are.
- “Free” tools that quietly cost dozens of staff hours a month.
- No integration plan, so the same data gets typed into four systems by hand.
- One person holds all the admin logins — and takes them when they leave.

Security for Small Teams

Chaos doesn't pick the fortress — it tries every door and slips through the one left unlocked. You don't need an enterprise security team. You need a few locks, kept locked.

Masked Crewsader: Security isn't a fortress you build once — it's a habit you keep. A few small locks stop almost every break-in.

IP Bot: Priority order: MFA on email and money first, password manager second, kill ex-staff accounts third, verify every payment by a second channel.

The small-team checklist

1. **Turn on MFA everywhere** — especially email and anything that touches money.
2. **Use a password manager** — one strong, unique password per account.
3. **Give the least access that works** — not everyone needs to be an admin.
4. **Keep software updated** — turn on automatic updates.
5. **Back up and test the restore** — an untested backup is a guess.
6. **Offboard the same day** — disable accounts when someone leaves.
7. **Verify money movement by a second channel** — call a known number before any wire or payment-detail change.

Phishing & wire fraud — Chaos in a familiar mask

The #1 real threat is an email that looks like it's from your director or a vendor, asking you to move money. The defense is a rule, not a tool: **verify any money movement by a second channel before you act** — and make it apply to everyone, including the boss.

How Chaos & The Mundane win

- Shared logins nobody can trace to a person.
- Ex-staff and volunteers with accounts still active.
- No MFA on the email that resets every other password.
- Treating security as a one-time project, not a standing habit.

Data Privacy & Protecting the People You Serve

The people you serve hand you their secrets because they trust you. For a nonprofit, a privacy breach can endanger the very people you exist to help. Collect less; guard what's left.

Masked Crewsader: People trusted you with their story. Protecting their privacy isn't paperwork — it's keeping a promise.

IP Bot: The safest data is the data you never collected. Minimize every form, set a deletion schedule, map where everything lives.

A practical privacy checklist

1. **Collect only what you need** — if you can't name why, don't collect it.
2. **Write a plain-language privacy notice** — what, why, and who you share with.
3. **Get real consent** — clear, not buried in fine print.
4. **Set retention and deletion rules** — delete on schedule.
5. **Control third-party sharing** — don't export everything into every tool.
6. **Map where data lives** — you can't protect what you can't find.
7. **Honor data-subject requests** — have a process for CCPA/GDPR asks.

Data minimization in practice

- Do you need a date of birth, or just “over 18?”
- Do you need a full address, or just a ZIP code for the grant report?
- Can you summarize and delete raw intake notes after a case closes?
- Does a volunteer signup really need a Social Security number? (Almost never.)

How Chaos & The Mundane win

- Spreadsheets of personal information in a shared drive anyone can open.
- No retention policy, so data piles up forever — and a bigger breach when it comes.
- Consent buried where nobody could find it.
- Exporting your entire contact list into every new tool “just in case.”

Accessibility & Inclusive Design

The path out of Business World is a bridge — and a bridge is only as good as who can cross it. Around 1 in 4 adults lives with a disability; an inaccessible site turns away the very people you serve.

Masked Crewsader: Accessibility isn't a feature for "them." It's how you build for everyone — including future-you, squinting at a phone in the sun.

IP Bot: Most of it is free if you do it right: semantic HTML, labels, alt text, keyboard support, contrast. Aim for WCAG 2.2 AA — the standard the US, Canada, and the EU all point to.

Start with WCAG & the POUR principles

The Web Content Accessibility Guidelines (WCAG 2.2) are the global technical standard. Aim for Level **AA**. Content should be:

- **Perceivable** — alt text, captions, strong contrast, never color alone.
- **Operable** — everything works with a keyboard; nothing flashes dangerously.
- **Understandable** — plain language, predictable navigation, clear errors.
- **Robust** — semantic HTML and labels so assistive tech can read it.

Accessibility checklist

1. **Add meaningful alt text** (and mark decorative images as decorative).
2. **Make everything keyboard-operable** — tab through your whole site.
3. **Hit contrast targets** — 4.5:1 for normal text; don't rely on color alone.
4. **Caption video, transcribe audio.**
5. **Use semantic HTML and label every form field.**
6. **Show visible focus and clear, helpful error messages.**
7. **Make documents, PDFs, and social posts accessible too.**

The laws — US-first, but the bridge reaches farther

Where	What
Global baseline	WCAG 2.2 — the standard nearly every law points to. Aim for AA.
United States	ADA (public accommodation; 2024 DOJ rule sets WCAG 2.1 AA for state/local gov), Section 508 & 504 (federal / federally funded).
Canada	Accessible Canada Act (barrier-free by 2040) and Ontario's AODA (WCAG 2.0 AA).
Europe	European Accessibility Act (enforceable 28 Jun 2025) and EN 301 549 — both built on WCAG.

Accessibility law follows your **audience**, not just your address. The relief: meet WCAG 2.2 AA and you satisfy the substance of all of them at once.

How Chaos & The Mundane win

- Bolting on an “accessibility overlay” widget — it doesn't fix things and can make them worse.
- Trusting an automated checker alone (it misses ~two-thirds of barriers).
- Retrofitting accessibility at the very end instead of designing for it.
- Forgetting PDFs, flyers, and social media.

Disaster Recovery & Business Continuity

One day Chaos stops knocking and kicks the door in. It isn't **if** — it's **when**. Continuity planning is how your mission survives a bad day.

Masked Crewsader: Disaster doesn't ask permission. But a team that's ready bends — it doesn't break.

IP Bot: Two numbers run this chapter: how long you can be down (RTO) and how much data you can afford to lose (RPO). Then test the restore.

Know your two numbers

RTO (Recovery Time Objective) — how long can you be down before you **must** be back? **RPO (Recovery Point Objective)** — how much data can you afford to lose? Your RPO sets your backup frequency; your RTO sets how much you invest in fast recovery.

The continuity checklist

1. **Follow the 3-2-1 rule** — 3 copies, 2 kinds of storage, 1 off-site/offline.
2. **Test restores quarterly** — actually pull data back, four times a year.
3. **Document critical systems and owners.**
4. **Keep an emergency contact tree** — reachable when systems are down.
5. **Keep offline copies of key documents** — insurance, bylaws, contracts, recovery info.
6. **Write an “if X goes down” runbook.**
7. **Cross-train** so no single person is the only one who can run a critical system.

“If X goes down” runbook template

System: _____ Owner: _____

First 3 steps if it fails:

Who to call: _____ Backup location: _____

How Chaos & The Mundane win

- Backups set up once and never restored — empty when you need them.
- Single points of failure: one admin, one laptop, one keeper of passwords.
- No plan for staff turnover.
- Assuming your SaaS vendor backs you up. (Many don't cover your own deletions.)

AI Training & Governance

AI grants wishes — and that's the danger. Staff feed it the org's secrets, and now and then it lies confidently in your name. Take the wishes without getting cursed: one short pact, a human hand on the wheel.

Masked Crewsader: AI is a tool, not an oracle. Use it boldly — but keep a human hand on the wheel and your values in the driver's seat.

IP Bot: Never feed me secrets you wouldn't post publicly, and never ship my output unread. One page of rules, an approved-tools list, training-data settings off.

Your one-page AI use policy

1. Never paste donor records, client PII, health info, or anything confidential into consumer AI tools.
2. A human reviews anything AI-written before it goes public.
3. Approved tools (and settings): _____
4. Disclose AI-generated content where it matters — especially imagery and anything attributed to a person.
5. Turn off training/data-retention where the vendor allows; prefer a business tier with a data processing agreement.

Approved by: _____ Date: _____

Avoiding embarrassment

- **Hallucinations** — it invents facts and citations. Verify anything public.
- **Bias** — read with a critical eye and a diversity lens.
- **Voice drift** — edit generic text back into your org's voice.
- **Speaking for others** — never put words in beneficiaries' mouths without consent.

Train your team: an hour of AI literacy goes a long way. Start free at islandpitch.com/learn-ai.

How Chaos & The Mundane win

- No policy at all — everyone improvising their own rules.
- Banning AI outright, driving it into the shadows on personal accounts.
- Pasting donor or client data into free public chatbots.
- Publishing AI output nobody fact-checked.

You don't have to do this alone

Sometimes you need more than a guide — you need a navigator who already knows these waters.

A **Fractional CTO** is senior technology leadership without the full-time salary: we help you choose platforms, shore up security, plan for the bad day, and write the AI policy — at a nonprofit's budget. Whether you want a second opinion on a big purchase or a partner for the whole journey, the Crew is ready.

Get in touch

- Read the full guides: islandpitch.in/guides
- Book a Fractional CTO consult: jda@islandpitch.com
- Free AI literacy course: islandpitch.com/learn-ai

Ask **Captain Marisol** — our navigator and IP Bot's mechanic — anything on the site. She'll help you chart the course.

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