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YOUR NONPROFIT/CDFI WEBSITE REDESIGN

A CHECKLIST TO PREPARE YOUR WEBSITE AND DO THE SOCIAL GOOD

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We believe that redesigning your nonprofit/CDFI website should be purposeful.

Everything from distinctive imagery and simplified UX (user experience), and from updated security to hosting can help your nonprofit and/or CDFI website function as flawlessly as it should.

However, the initial meeting with an agency or website designer can sometimes be overwhelming. They often have lots of questions and suggestions to help you make the best decisions.

This checklist will help you prepare for that first meeting with tasks to complete beforehand as well as some important things to discuss with your agency or website designer throughout the process. We use these terms interchangeably and sometimes refer to one or both as a “resource.”

For the purpose of our checklist, the term “resource” refers to any one of the following: public relations firm, website design firm, an advertising or digital agency, and/or website designer. We also note that in the case of some nonprofits, an in-house marketing specialist may be tasked with the job of redesigning and developing the organization’s website as opposed to an agency or freelance designer. If you’re such an individual, we hope that you find our checklist helpful too.

Preparation

A new website is a major undertaking. Give it the attention it deserves by doing a little preparation before you meet with your resource. Consider the items on the list below before you head to your first meeting.

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- 1. Define your personas.** Every organization markets to specific stakeholders. Most nonprofits and CDFIs communicate with a variety of potential clients, donors and government agencies. Your agency or designer should be able to help you define these target groups if you need assistance.



- 2. Review and reevaluate your branding.** Is your current branding working for your organization? Consider consulting your resource about refreshing your logo, tagline, messaging, and imagery, including photography and video, to maintain a relevant and impactful presence.



- 3. Take stock of your current SEO efforts** and plan for the future. Optimizing your website for Google, Bing and other search engines is important for every organization. A few simple content changes and proper installation of the Yoast plugin can make your website much easier to find and facilitate increased user interaction, fundraising and grants. Your resource can help you get started if you don't have a program in place, or they can help you understand and interpret any data you have. Note: not every web designer is conversant with the latest SEO trends so find a consultant who can provide reliable information on this vital lead-generating subject.



- 4. Reevaluate your blogging or news strategy.** Are you blogging or posting news on and off-site? This is a major way to increase site traffic, maintain social relevance, and illustrate your impact with a personal touch. How can you be using this section of your site to attract users and funding? Be sure to ask an expert!



5. **Collect your current assets.** In order for your resource to better assist you, it is important that you gather all of your current and most impactful marketing communications assets.

- Gather vector format logos. The easiest way for an agency or designer to help you put your best face forward is with great assets. You can facilitate that by supplying them with a vector format (.ai or .eps) logo file to be featured on your site.
- Supply visual and tone of voice guidelines for your brand if you have them. Knowing where you sit stylistically allows the resource to help you make decisions moving forward. If you don't have these guidelines, speak with your designer about developing a document that can unify all your communications.

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Think ahead

There are few things as important to nonprofits and CDFIs as the form and functionality that attracts users, donors, and state and local officials to your cause. Consider these features with a little help from your resources.

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- 1. Be open to reformatting your content.** Frequently nonprofits and CDFIs have either too much content or unclear user directions. There are several ways to improve content.
 - Reduce it! We recommend limited but apt amounts of copy and simple designs and iconography, especially on the homepage.
 - Create clear calls-to-action (CTAs). Work closely with your resource to determine what areas of the site would benefit most from CTAs.
 - Speak directly to your audience. Include pages for each user type. In marketing jargon we call that a persona.
 - Be clear about your content. Consider bumper warnings that alert people that they are leaving your site and going to a third-party link.



- 2. Content management system (CMS) and third-party integrations.** Many agencies build websites on content management systems that make it easy for their clients to edit or add pages, news releases, team members, etc., as their organization grows. In the past, CMS-based websites built on platforms like WordPress have had security issues. However, this is often a function of employing a third-party plugin and not maintaining it, rather than a problem with the WordPress platform itself, which is highly regarded by even the largest enterprise firms.

In many cases nonprofit oriented advertising agencies and freelance designers will create websites using an extensive list of both free and paid-for plugins, extensions, and components. These apps, which make calls to the web, can cause security issues if they're not properly maintained. Frequently, they result in slower site loading times, poor UX, and console errors when it comes time for you to administer the site.

Ask your website designer, agency or other resource how they intend to resolve these potential challenges.

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3. **Add an SSL certificate.** An SSL certificate is an effective way to add trust certification to your website. This seal of Certificate Authority (CA) approval indicates that your site is encrypting data between the user and the server upon which your website is hosted. Without this certification, information could be intercepted and used maliciously. While this is not a mandatory provision, it is absolutely recommended. Speak with your resource or website hosting firm about the SSL certificate that best suits your needs. And just do it!



4. **Use firewalls.** Firewalls are filters that can prevent distributed denial of service (DDoS) and forced entry attacks on your site from all over the world. This is a defensive measure that should be taken to protect your site. Typically, it is provided by your website host but you can certainly discuss with your website designer as well if they're in a position to arrange site hosting on your behalf.



5. **Back up everything.** Backing up work can save your organization from a potential disaster. In fact, MVP entered the law firm market when an agency forgot to do this and lost the client's website. Really! There are several different ways you can solve this problem. Check with your agency or website host about the solutions they offer to protect website data from malicious or inadvertent loss.



6. **Consider WCAG 2.0 Compliance.** Web Content Accessibility Guidelines (WCAG) 2.0 is developed through the W3C process in cooperation with individuals and organizations around the world, with a goal of providing a shared standard for Web content accessibility that meets the needs of individuals, organizations, and governments internationally. The bottom line is that your website is likely required to be accessible. Most accessibility standards are moving toward WCAG 2.0 compliance to best meet the needs of people with disabilities. Regardless of whether or not federal regulations apply, designing your site for all users is a best practice, and will help your organization more effectively meet the needs of everyone visiting your site.

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7. **Identify who will host your client portal.** If you are a larger nonprofit or CDFI, you may want to consider a client portal that can be used to house a variety of support information such as video, disclosure forms, and PDF reports that are unavailable on your public website. Typically, portals have different hosting requirements than your website. In general, these need to be very secure, so we suggest you explore externally hosted client portals, which often include user reports and messaging, though more rudimentary ones can be considered for basic reporting requirements. A few external portal applications, especially if you are a CDFI, include:

- Intralinks
- Merrill Datasite
- Sharefile
- eFront



8. **Decide on a maintenance and support plan.** Most often if the agency creates the site on a user-friendly content management system such as WordPress, you can rest assured that this popular CMS will push core version upgrades to your site so you need not be concerned. However, if your site contains many external plugins for specialized functionality such as dropdown menus, filters, home page sliders, etc., a maintenance plan may need to be considered to avoid issues. Talk to your resource to determine the advisability of signing up for maintenance and support prior to website launch.



9. **Consider print functionality.** Many organizations need to incorporate some form of print functionality on their website. Discuss which pages would benefit most from print style sheets that remove extraneous HTML page information vs. defaulting to basic print-page functionality. You may want to consider a hybrid approach in which only key pages such as the organization overview, “why we’re unique,” contact info, case studies, news, and bios are based on style sheets while all others are not. Ask the agency for their recommendations at project inception as this does add additional cost to the project.

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- 10. Mobile responsiveness is a given but what about Browser Compatibility?** Today, mobile responsiveness is not optional. Any good agency or designer will automatically make your website responsive. But in many cases browser compatibility is not so clear. To avoid complications, be sure to ask your designer/developer to mirror Google's policy for browser compatibility at the time of site launch. For more detail, please visit the following [Google Browser Support Web page](#).



- 11. Template or custom?** Due to cost considerations, we've observed that many nonprofits and CDFIs are drawn to the idea of using either a WordPress theme or SaaS (Software as a Service) programs like Wix, Weebly and SquareSpace to create their new website. However, budget permitting, and especially in the case of more complex undertakings, we discourage the use of WordPress templates and SaaS-based themes because often they appear generic and have less functionality than a custom-tailored website. And, once you ask your designer to modify, or shall we say "break," a template to accommodate a design improvement, its security becomes problematic. In the end, a distinctive custom-designed site is going to offer the most creative freedom, tailored user paths and functional features. At MVP, we get it and while we can offer clients both WordPress themes and SaaS solutions, our long and distinguished track record of [award-winning](#) private capital, financial services and nonprofit/CDFI websites is testimony to our understanding and appreciation of the success factors that not only determine the website's "look and feel" but visitor satisfaction. As we're fond of saying, "we look good when you look great."

Our award-winning designs for sites such as CRF USA and First Children's Finance make MVP the ideal partner for nonprofit and CDFI branding, website and digital marketing success. Email info@mvpdesign.com to learn more or discuss your project requirements. Thanks!

We hope this checklist will help you prepare for your first meeting with your website designer or agency. Based on our more than 37 years of award-winning creative experience in meeting the marketing and communications needs of corporate and nonprofit clients alike (branding, print and web), we would love the opportunity to help you achieve the distinctive website and post-launch ease-of-use you're seeking. If you need assistance with any stage of your website revitalization, please reach out to us.

Thank you for your time and consideration of MVP Marketing + Design.

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