



Technology Guidelines & Tips for Military Spouse Clubs

Technology is both a blessing and a challenge for military spouse clubs. It helps us organize files and events, keep continuity, manage finances, and stay connected—but it can also feel overwhelming, especially for volunteers who may not have prior experience with certain platforms. In many clubs, the person with “the most tech knowledge” ends up becoming the go-to troubleshooter, regardless of their actual board role. While this works in the short term, long-term success comes from setting clear technology guidelines and assigning responsibilities thoughtfully.

Why Technology Feels Tricky for Clubs

Technology responsibilities are different from other board duties. They often require a specific hard skill set—like website management experience, membership database management, or Google/Microsoft admin experience—which can feel intimidating for someone without prior experience. Because of this, clubs sometimes fall to who “knows the most” rather than what a position description states. This can create burnout, confusion, and even security issues if not handled carefully.

Role-Based Access: Who Should Have What

A strong starting point is to align technology access with your club’s bylaws and board position descriptions. If a role is responsible for a task, they should have the level of access necessary to complete it—no more, no less. For example:

- **President:** Typically has full administrative access across platforms, since they are ultimately responsible for the overall functioning of the club.
- **Treasurer:** Should have access to the financial systems (e.g., QuickBooks or PayPal) but not necessarily to areas unrelated to finances.
- **Event or Luncheon Chair:** Should be able to create and edit events in your membership platform but doesn’t need access to financial reports or membership databases.
- **Membership Chair:** Should have access to member management tools but not editing rights for website design.
- **Publicity or Marketing Chair:** Should have access to edit the website, send newsletters, manage social media platforms but not access financial systems.

This principle of “minimum necessary access” helps protect sensitive data while making sure each board member can fulfill their responsibilities.

Example: Setting Permissions on your Website

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Wix and Wild Apricot, both popular club sites and membership management systems, allow clubs to assign role-based administrative permissions. For instance:

- Luncheon Chair → Access to create and edit events only
- Treasurer → Access to financial and reporting functions
- Membership Chair → Access to member records
- President → Full administrative access

By tailoring permissions, you not only reduce confusion but also limit the risk of accidental changes to sensitive areas of your system.

Password Security: When to Update

One of the most overlooked areas of nonprofit technology management is password control. To keep your club's platforms secure, build in regular password updates as part of your processes:

- **When a board member leaves:** Immediately change any login credentials they had access to, even if they left on good terms.
- **At the start of a new board year:** Update all shared logins to ensure only current board members have access.
- **After a security incident or suspected breach:** Change affected passwords right away and notify the board.
- **Annually, as a good habit:** Even if there hasn't been a leadership change, updating critical passwords (like email, banking, and membership systems) adds an extra layer of protection.

Where possible, use a password manager to share credentials securely, rather than passing them around in emails or spreadsheets. This helps new leaders onboard smoothly while keeping past members from retaining unnecessary access.

Shared Google Drive Etiquette

Many clubs use Google Drive or another cloud platform to store documents and collaborate. While shared drives are convenient, they require clear guidelines:

- **Respect folder boundaries:** Only access the folders that apply to your board role. For example, the Treasurer should not be digging into Membership folders unless asked.
- **Do not delete or move files without permission:** Changes can affect other officers' work and may create confusion.



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- Keep drafts and finals organized: Use agreed-upon naming conventions (e.g., “DRAFT,” “FINAL,” “ARCHIVE”) so the team knows which version is current.
 - Confirm before sharing externally: Files in a shared drive should only be shared outside the board with approval from the President or relevant chair.

Clear expectations around shared Drive etiquette helps prevent accidental data loss and keep everyone on the same page.

Tips for Setting Up Your Club’s Tech

1. Document Logins Securely

Use a password manager (like LastPass or 1Password) to store all login details. Avoid spreadsheets or email chains that can get lost or exposed.

2. Create a Technology Guide

Maintain a simple handbook that lists:

- a. What platforms the club uses
- b. Who has access and at what level
- c. How to transfer access during board transitions

3. Plan for Transitions

Technology access should be part of your annual turnover process. When a new board takes office, access must be updated promptly to prevent confusion or lingering permissions for past board members.

4. Offer Training & Support

Don’t assume every volunteer knows how to use QuickBooks, Mailchimp, or Wild Apricot. Schedule short walk-throughs or create screen-recorded tutorials to help ease the learning curve. Even better, keep an Onboarding & Training folder with training videos in your drive for easy access by board members.

5. Centralize Troubleshooting

Instead of relying on one person for all tech problems, encourage each chair to become comfortable with their own area of responsibility. For advanced troubleshooting, consider appointing a dedicated “Technology Coordinator” position if your bylaws allow.

Final Thoughts

Military spouse clubs thrive when leadership responsibilities are shared fairly and clearly. Technology doesn’t need to be intimidating—by setting access levels according to roles, documenting processes, updating passwords regularly, and supporting each other with training, your club can use technology as a tool to strengthen, not strain, your mission.



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