

# Operations & Administration

Systems inventory, security controls, HR and personnel management.

- [Systems Inventory](#)
- [Controls & Security](#)
- [HR & Personnel Management](#)

# Systems Inventory

This page lists the technology systems SHHA uses. For each system, we document what it does, who administers it, and how it is accessed.

Items marked **TODO** need information filled in by someone with direct knowledge of that system.

## 1. Microsoft 365

Microsoft 365 is SHHA's primary platform for email, mailing lists (Microsoft Groups), shared role mailboxes, and file storage (SharePoint).

<b>Type</b>	Cloud-based (Microsoft-hosted)
<b>Primary admin</b>	Anna (office staff) handles day-to-day membership changes; IT admin handles mailbox permissions and configuration
<b>Backup admin</b>	<b>TODO:</b> Identify and document a backup administrator
<b>Login</b>	<a href="https://admin.microsoft.com">admin.microsoft.com</a> (admin), <a href="https://outlook.com">outlook.com</a> (email), SharePoint links (files)
<b>Licensing</b>	Only office staff and IT admin need paid licenses; volunteers are free external guests

## 2. QuickBooks

Used for SHHA financial accounting.

<b>Type</b>	Cloud-based
<b>Primary admin / user</b>	<b>TODO:</b> Who is the primary user? (Treasurer? Office staff?)
<b>Backup</b>	<b>TODO:</b> Is there a backup user with access?
<b>Login</b>	<b>TODO:</b> URL and login method
<b>Notes</b>	<b>TODO:</b> Version (Online vs Desktop), billing, who pays for the subscription

## 3. Membership Database

**TODO:** Document the membership database system.

<b>System name</b>	<b>TODO:</b> What system/software is used?
<b>Type</b>	<b>TODO:</b> Cloud-based or local?
<b>Primary admin</b>	<b>TODO:</b> Is Ryan the primary outside admin?
<b>Backup admin</b>	<b>TODO:</b> Is there a backup?
<b>Data stored</b>	<b>TODO:</b> What member data is in this system? (names, addresses, dues status, etc.)

## 4. Gusto

Used for payroll and employee benefits administration.

<b>Type</b>	Cloud-based
<b>Primary admin</b>	<b>TODO:</b> Who manages Gusto? (Office manager? Treasurer?)
<b>Backup</b>	<b>TODO:</b> Is there a backup admin?
<b>Login</b>	<a href="https://app.gusto.com">app.gusto.com</a>
<b>Notes</b>	<b>TODO:</b> How many employees are on payroll? Billing responsibility?

## 5. SHHA Website

The public-facing website at [sandiahomeowners.org](https://sandiahomeowners.org).

<b>Type</b>	<b>TODO:</b> What platform/CMS runs the website? (WordPress, Squarespace, custom?)
<b>Hosting</b>	<b>TODO:</b> Where is it hosted? Cloud-based?
<b>Primary owner</b>	<b>TODO:</b> Who manages content updates?
<b>Backup owner</b>	<b>TODO:</b> Is there a backup person?
<b>Outside consultant</b>	<b>TODO:</b> Is there a web consultant? If so, who? How are they paid?
<b>Login</b>	<b>TODO:</b> Admin URL and login method

## 6. GRIT Newsletter

The GRIT is SHHA's community newsletter, currently produced monthly.

<b>Production tool</b>	<b>TODO:</b> What software is used for layout? (InDesign, Canva, Google Docs, etc.)
<b>Distribution method</b>	<b>TODO:</b> Print, email, or both?
<b>Editor / layout person</b>	<b>TODO:</b> Who currently does layout and editing?
<b>Gmail account</b>	shhagrit@gmail.com — <b>TODO:</b> document what this Gmail is used for (submissions? Google Drive access? legacy?)
<b>Related page</b>	See the <i>GRIT Layout Monthly Guide</i> in the Specialty Topics chapter for the step-by-step production process

## 7. Square

Used for Sandia Tram ticket sales and advertising payments.

<b>Type</b>	Cloud-based
<b>Primary user</b>	<b>TODO:</b> Who manages Square transactions?
<b>Backup</b>	<b>TODO:</b> Is there a backup?
<b>Login</b>	<a href="https://squareup.com">squareup.com</a>
<b>Notes</b>	<b>TODO:</b> What specific transactions go through Square? Revenue amounts?

## 8. Other Systems

**TODO:** Are there additional systems not listed above? Examples might include:

- Bulk email / email blast service (Mailchimp, Constant Contact, etc.)
- Google Workspace (shared Google Calendar for Board reminders uses Gmail — is there a full Google account?)
- Domain registrar for sandiahomeowners.org — **TODO:** who manages DNS and domain renewal?
- Any other SaaS tools or vendor portals

# Controls & Security

This page documents access controls, cybersecurity practices, and data backup procedures for SHHA systems.

Items marked **TODO** need information filled in. These questions originated from Andrea's controls review.

## Access Controls — Who Has Access to What?

### Microsoft 365 Admin Access

<b>Global Administrator</b>	<b>TODO:</b> Who currently has Global Admin access? (There should be a primary and a backup.)
<b>User / Group management</b>	Anna (office staff) manages day-to-day membership. IT admin handles mailbox permissions.
<b>Who manages access?</b>	<b>TODO:</b> Is there a documented process for granting/revoking admin access? Who approves changes?

### Other System Access

System	Primary Access	Backup Access
QuickBooks	<b>TODO</b>	<b>TODO</b>
Membership Database	<b>TODO</b>	<b>TODO</b>
Gusto (Payroll)	<b>TODO</b>	<b>TODO</b>
SHHA Website (admin)	<b>TODO</b>	<b>TODO</b>
Square	<b>TODO</b>	<b>TODO</b>
Domain registrar	<b>TODO</b>	<b>TODO</b>
Google accounts	<b>TODO</b>	<b>TODO</b>

## Cybersecurity

# Current Practices

- **TODO:** Do we enforce multi-factor authentication (MFA) for Microsoft 365 admin accounts?
- **TODO:** Do we enforce MFA for all licensed users?
- **TODO:** How do we handle password policies? (complexity requirements, rotation schedule)
- **TODO:** Is there an incident response plan if an account is compromised?
- **TODO:** Do we have phishing awareness guidelines for staff and volunteers?

# Data Access

- **TODO:** How do we manage overall data access security? (e.g., conditional access policies, device restrictions)
- **TODO:** Are there any data classification policies (confidential vs. public)?
- **TODO:** How is sensitive financial data protected? (QuickBooks access, payroll data in Gusto)

# Data Backup

## Cloud-Based Systems

Most SHHA data resides in cloud services. Each provider has its own backup/redundancy:

System	Backup Approach
Microsoft 365 (email, SharePoint)	Microsoft provides built-in redundancy and retention policies. <b>TODO:</b> Do we have a separate backup solution (e.g., third-party M365 backup)? What are our retention policy settings?
QuickBooks Online	Intuit maintains backups. <b>TODO:</b> Do we also export periodic backups locally?
Gusto	Gusto maintains payroll records. <b>TODO:</b> Do we keep local copies of payroll reports?
SHHA Website	<b>TODO:</b> Who backs up the website? How often? Where are backups stored?
Membership Database	<b>TODO:</b> How is the membership database backed up?

# Local Data

- **TODO:** Is any critical data stored only on local computers (office PCs) and not in the cloud?
- **TODO:** If so, how is that data backed up?

## Other Security Considerations

- **TODO:** Do we have cyber liability insurance?
- **TODO:** When was the last security review or audit of our systems?
- **TODO:** Are there any compliance requirements (e.g., state HOA data retention laws)?

# HR & Personnel Management

This page covers staff management, outside consultants, and volunteer administration. Much of this is non-IT operational information.

Items marked **TODO** need information from someone with direct knowledge (e.g., Jim Stewart, current President, or office manager).

## Staff Management

### Current Staff

**TODO:** List current office staff positions and names (e.g., Office Manager, Administrative Assistant).

### Evaluation & Compensation

<b>Who gives yearly evaluations?</b>	<b>TODO:</b> (President? Executive Committee? Office manager for junior staff?)
<b>Who sets salaries?</b>	<b>TODO:</b> (Board approval required? Budget process?)
<b>Where are salary and benefits records?</b>	<b>TODO:</b> (Gusto? QuickBooks? Paper files?)

### Hiring

<b>Who hires new staff?</b>	<b>TODO:</b> (President? Executive Committee? Board vote?)
<b>What is the hiring process?</b>	<b>TODO:</b> (Job posting, interviews, background check, Board approval?)

### Work Priorities & Training

<b>Who assigns work priorities?</b>	<b>TODO:</b> (President? Office manager self-directs?)
<b>Who trains new staff?</b>	<b>TODO:</b> (Outgoing staff? Office manager? Written procedures?)
<b>President's specific role</b>	<b>TODO:</b> Does the President have a defined role in day-to-day staff management, or is it delegated?

# Outside Consultants

**TODO:** Document each outside consultant or contracted service provider.

## Legal Counsel

<b>Firm / attorney name</b>	<b>TODO</b>
<b>Compensation</b>	<b>TODO:</b> Hourly, per project, or retainer?
<b>Who oversees / approves work?</b>	<b>TODO:</b> (President? Board?)
<b>Who manages expenditure rate?</b>	<b>TODO</b>

## Web Consultant

<b>Consultant name / firm</b>	<b>TODO</b>
<b>Compensation</b>	<b>TODO:</b> Hourly, per project, or retainer?
<b>Who oversees / approves work?</b>	<b>TODO</b>
<b>Scope of work</b>	<b>TODO:</b> Website maintenance? Design? Both?

## Other Consultants

**TODO:** Are there other outside consultants (accounting/audit, landscaping, etc.)? List them here.

# Volunteer Management

## Adding Volunteers to Committees

<b>Who appoints committee members?</b>	<b>TODO:</b> President? Committee chair? Both? (Refer to <a href="#">SHHA Bylaws</a> for the formal process.)
<b>Process</b>	<b>TODO:</b> Document the step-by-step process for adding a new volunteer (nomination → approval → IT setup)
<b>IT setup when adding</b>	Committee chair notifies office staff → staff sends Microsoft invitation → volunteer accepts → staff adds to mailing list. See the <i>Quick Start for New Volunteers</i> page.

## Removing Volunteers from Committees

<b>Process</b>	<b>TODO:</b> Who initiates removal? (Chair? Volunteer self-removal? Board?)
<b>IT cleanup</b>	Office staff removes from mailing list; IT removes SharePoint and mailbox access if applicable.

## Replacing a Committee Chair

<b>Process</b>	<b>TODO:</b> (Refer to Bylaws — link needed.) Who nominates the new chair? Board approval required?
<b>IT transition</b>	Shared role mailbox access is transferred (revoke outgoing, grant incoming). See the FAQ section on email transitions.

## Insurance

<b>E&amp;O (Errors &amp; Omissions) insurance</b>	<b>TODO:</b> Do we have E&O coverage? What does it cover? Policy details?
<b>General liability insurance</b>	<b>TODO:</b> Coverage details? Does it extend to volunteers?
<b>D&amp;O (Directors &amp; Officers)</b>	<b>TODO:</b> Do we have D&O insurance?
<b>Cyber liability</b>	<b>TODO:</b> Do we have cyber liability coverage?
<b>Insurance broker / carrier</b>	<b>TODO:</b> Company name and contact