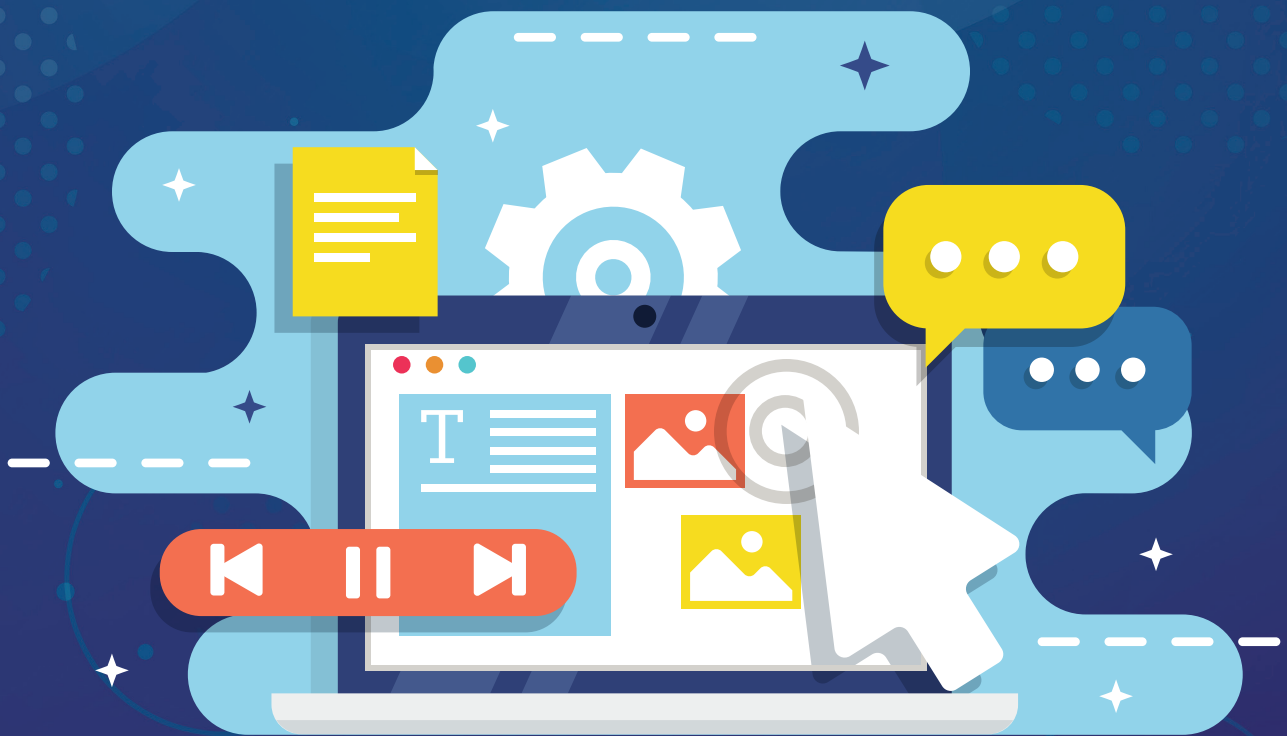


# CMS Guide For Charities

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- ◆ Content Management Systems are great tools when they are built for efficiency and usability.
- ◆ This guide aims to help digital teams improve their CMS through insights and research.

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## Summary

The less time you spend fixing errors or wrestling with a poorly designed CMS, the more chance you have of creating compelling content. Which in turn improves service quality.

- ◆ It's helpful to view the website you work on every day as also providing a service to you. If you had to rate your organisation's content management system, like you would any other product, how many stars out of five would it get?
- ◆ You might be less inclined to flag critical errors and technical issues if your hosting provider or developers are not easy to communicate with. Eventually the website becomes unusable leading inevitably to a costly upgrade.
- ◆ More significantly, a website that is difficult and unpleasant to administer and maintain will affect the service quality of your digital communications too. Whether it's broken pages or an annoying user interface, it all has a knock on affect for users, suppliers and staff.

# Methodology

The aim of this guide is to encourage a conversation within your product team, about ways to improve daily content management. I also provide helpful suggestions for simple improvements to your existing website.

## Research and Suggested Solutions Are Based On:

- ◆ A web survey I conducted among employees of non-profit organisations in the UK.
- ◆ Key research and findings based on current trends in the digital workplace
- ◆ Experience of working as a developer on CMS websites over many years.
- ◆ Free, open source content management systems that can be customised.

# 1. Improving CMS Efficiency

Open source content management systems work very well out of the box, with little or no need for customisations.

- ◆ There is often the temptation to get carried away with installing lots of resource hungry plugins and scripts that you hardly or ever use.
- ◆ Free open source frameworks offer limitless scalability but this can also bloat your website.
- ◆ How you build and maintain your CMS should be driven by immediate content needs. Then you must consider the people who actually need to administer the website on a daily basis.
- ◆ Avoid requesting rarely accessed features – the ones that feel like a nice-to-have. It just means unnecessary work and the potential for future issues that are hard to trace.

## Award Winning Charities using CMS

Charity	Award Category	CMS Platform
<b>SeeAbility</b>	Award for Excellence	<b>Drupal</b>
<b>LOOSE</b>	Arts, Culture & Heritage	<b>WordPress</b>
<b>Trees For Cities</b>	Environment & Conservation	<b>Craft CMS</b>

Data sourced on 24/09/2021 from: UK Charity Awards 2021 (<https://charityawards.co.uk/>)

## Reviewing Your Website

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### Remove Rarely Accessed Plugins and Settings

- ◆ Many performance issues or bugs can be quickly resolved by removing plugins and settings that are very rarely accessed or are perhaps outdated. Remember to back-up your website first or make the changes via a staging site before fully committing to deleting content.

### Review User Access, Website Roles and Privileges

- ◆ It's easy to build-up a very large database of dormant user accounts. It's particularly important for security reasons to audit those accounts with content editing privileges or data access. There will be staff who have left the organisation or freelance bloggers writing the odd post.

### Getting More Mileage from your Website

- ◆ Can a new micro-site you are planning for a specific campaign be created with existing templates on your website? Perhaps you don't need a custom plugin and the CMS has all the tools to assemble new functionality. As a developer I would always check if a new feature is possible without having to code a new template or module.

### Grow Your Website in a Modular Way

- ◆ Future proofing when embarking on a major upgrade is certainly a good idea. However, resist major feature requests that won't be included in the first phase of launch.
- ◆ Instead, just outline the core features you need right now. A modern CMS is highly scalable so it's better over the longer term to have periodic reviews with your team.



## 2. Design and Documentation

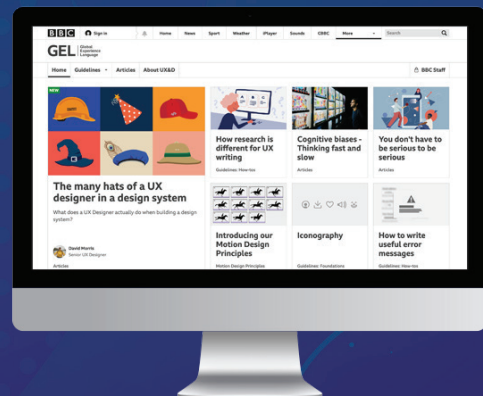
Everyone enjoys the design process. But you need design guidance when publishing pages. This ensures consistent branding and frees up your time to write compelling content.

- ◆ Website editors all have the same goal, to create great content that engages the reader and adheres to their organisation's brand guidelines.
- ◆ You will be distracted when CMS editing tools are clunky or even broken.
- ◆ There is little guidance on branding. You then find yourself having to create web pages based more on personal judgement.
- ◆ Avoid design ambiguity by creating a section on your website that provides visual guidance for digital branding.



**GOV.UK Styles**

<https://design-system.service.gov.uk/>



**BBC Gel**

<https://www.bbc.co.uk/gel>

# Types of Website Documentation

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## Design Guidelines as Working Web Pages

- ◆ Whilst you are very likely to have a full brand guide book in PDF form it's also a great idea to include real working web pages on your site that depict, for example, typographic styles.
- ◆ Include guidance for image resolution and file size or even how to crop images correctly in PhotoShop. A database of stock images should be readily available too.

## Developers Provide Help Text for all Customisations

- ◆ Developers should ensure they build a great user experience for content editors and admins. The interface should be intuitive and fields clearly labelled with help text.
- ◆ For simpler websites it's enough to include on-screen descriptions and tool-tips. For complex websites with many different content types further PDF or Word documentation may be needed.

## Check Design Consistency and Search Quality

- ◆ Designate a team member as proofer to check new pages for grammar and spelling, just before they're published. CMS spellcheckers can be unreliable or non-existent.
- ◆ You should also be considering SEO matters such as paragraph lengths, keyword research and use of images. Good SEO practices can also solve many design and layout issues because you are forced to make your page readable.

## Developers Also Need to Document Their Code

- ◆ Big websites can pass through the hands of countless developers over a long period of time. It's important to maintain coding consistency throughout the life of a website.
- ◆ Whilst code should be kept lean for performance it also needs to be documented. Even better is for developers to have access to an on-line resource with visual examples of style-sheets. Which may also be a big help for website editors when needing to use CSS class names.



## 3. Deeper CMS Administration

It can take time for people to adjust to unfamiliar website tasks, features and applications, which might also be totally unique to your organisation.

- ◆ Team members will be equipped with a few core digital skills. Skills or awareness of design, writing, marketing, SEO or project management.
- ◆ However, today there is an ocean of competing tools available to speed up the digital workflow, all providing a means to the same end but with varying degrees of usability.
- ◆ A content management system is often customised beyond recognition.
- ◆ Assuming you have eradicated any major CMS technical issues, people need a period of discovery with systems and tools they are unfamiliar with.

### How People in Charities Learn Digital Skills

Learning Source	% of charities (UK)
<b>Webinar</b>	<b>53%</b>
<b>Online Resources</b>	<b>46%</b>
<b>Google Search</b>	<b>39%</b>
<b>Training Sessions</b>	<b>33%</b>
<b>Colleagues</b>	<b>31%</b>

Data sourced on 24/09/2021 from:  
**Charity Digital Skills Report 2021** (<https://report.skillsplatform.org/charity-digital-report-2021/>)

## Managing More Complex Data

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### Content Moderation and Limiting Spammers

- ◆ Moderation of comments and guest bloggers can become unwieldy so it's important to have prevention tools installed to reduce the workload. Restrict as much as possible what people can submit via comment forms and block IP addresses.
- ◆ Developers should make the life of moderators much easier by ensuring robust measures are taken during the development process to prevent unwanted content getting through.

### Accessibility Standards and SEO

- ◆ Websites should comply as fully as possible, or where relevant, with [accessibility standards](#). It is the role of a developer to implement the necessary code.
- ◆ Appropriate SEO research combined with good accessibility standards will greatly help content marketing and increase website engagement.

### Mailing Lists, Email Templates and Webforms

- ◆ Integrating webforms and email subscriptions into your website seamlessly is now very easy. Data capture can be managed locally for specific events or internal needs. While email marketing should be hosted with a dedicated service such as [MailChimp](#) or [ConvertKit](#).

### E-Commerce Stores and Payment Gateways

- ◆ Popular open source content management systems have extensive modules or plugins to build digital stores for reports, books or merchandise. This keeps e-commerce administration all in one place and easier to manage user data.
- ◆ You will need an externally hosted payment gateway to process secure credit card transactions and direct debits, particular when accepting donations.

## 4. Errors, Alerts and Security

Warning messages will pop-up everyday when you log in to your CMS. These can be distracting and so often they become abstract, part of the quirks of your organisation's website.

- ◆ Some alert messages will worry you slightly because, naturally, you will often have no idea what the errors mean. Is it to do with the server or is there a problem with a setting I change the other day?
- ◆ If you have a maintenance and support contract with your website hosting provider then you should alert them straight away and they should either fix it quickly or flag up and plan an extensive security review for the more critical issues that can't be solved in a day.
- ◆ Most of the warning messages on your website are not serious though. But there are occasions when there are more serious problems that need help from your web host or developer.

### Paul's Recommended Hosting Providers in 2021

- ◆ The following hosting providers are perfect solutions for charities on smaller budgets. You may need to hire a freelance developer to set it up for you and provide technical support.

Hosting Provider	Economy Package	Annual Cost (Approx.)
<b>FastHosts</b>	<b>Momentum</b>	<b>£60</b>
<b>OVH Cloud</b>	<b>Professional</b>	<b>£68</b>
<b>Blue Host</b>	<b>Basic</b>	<b>£100</b>
<b>Wix</b>	<b>Unlimited</b>	<b>£120</b>

All prices are subject to change and include VAT. Please check relevant websites for more information.

## Common Causes of CMS Errors

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### Latest Critical Security Patch Becomes Available

- ◆ Open source content management systems are continually being updated with new features and improved security.
- ◆ In most situations an update to your software is not necessary. However, major security patches must be actioned immediately by your hosting provider to avoid potential hacking incidents.

### Hosting Server Has Limited Memory or Storage Capacity

- ◆ A CMS can be very resource hungry and relies on the memory and storage limits set by the server. You might need to ask your hosting provider to increase these settings.
- ◆ You might struggle to upload large files or download large amounts of data. Ask your developer to enable aggregation of data downloads, to ease pressure on the server.

### CMS Software Version is Outdated and No Longer Supported

- ◆ A particular version of a CMS may have reached the end of its life. The website will continue to function of course but will eventually become unusable and impossible to maintain.
- ◆ This situation justifies a major upgrade to the next version or an opportunity to build a completely new website, perhaps even changing to a different CMS.

### Your Organisation's Website Has Been Hacked

- ◆ From the perspective of a team, working with the website on a daily basis, you might see unusual content or comments appearing in the blog.
- ◆ Protect the login page and also ensure hosting providers protects files on the server.



## 5. External Web Services

Organisations will often outsource product services to a paid, cloud-based subscription platform. Commonly this might be for a digital store or donations service.

- ◆ E-commerce transactions require secure payments so there is more peace of mind in hiring a dedicated service to handle the payment gateway and security aspects.
- ◆ This poses a challenge to user experience. You need to design a seamless journey when moving between websites hosted on completely different servers.
- ◆ Third-party services do not always provide adequate templates and often no access to code.
- ◆ There isn't an easy solution because each of the external services are different companies built on different frameworks with varying degrees of build quality.
- ◆ You can reduce the need of running too many third-party services by seeing what you could build into your local site.

### Popular Open Source (FREE) E-Commerce Plug-ins

Plugin Name	Link to Plugin page	CMS Platform
<b>WooCommerce</b>	<a href="https://bit.ly/2W8i41Z">https://bit.ly/2W8i41Z</a>	<b>WordPress</b>
<b>Commerce</b>	<a href="https://bit.ly/2XLsvsl">https://bit.ly/2XLsvsl</a>	<b>Drupal</b>
<b>Ubercart</b>	<a href="https://bit.ly/2XNeNpu">https://bit.ly/2XNeNpu</a>	<b>Drupal</b>
<b>J2 Store</b>	<a href="https://bit.ly/3o8GDaG">https://bit.ly/3o8GDaG</a>	<b>Joomla</b>

Based on widespread use by many charities and businesses. Ask your developer for guidance before installing.

## Localisation and Outsourcing

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### With E-Commerce Keep the Store Local and Outsource Payments

- ◆ There is never any need to host your own payment processing system, which should always be outsourced to a secure, encrypted payment gateway.
- ◆ However, hosting the shopping or donation experience locally provides a more seamless user experience. Many popular CMS frameworks provide robust e-commerce plugins that are easy to configure.

### Keep Micro-sites, Landing Pages and Webforms Local

- ◆ In most situations for new campaign launches you can utilise features on your main website to build micro-sites, landing pages and subscription webforms.
- ◆ It really helps SEO too, keeping all pages hosted on your main domain name or creating a sub-domain.

### Limit Embedded Content to only Resource Hungry Services

- ◆ I can think of only very few situations where embedded content is appropriate.
- ◆ Certainly video and social media content should be hosted by a third-party service who has the server bandwidth to cope with streaming content.
- ◆ You will also need to embed tracking codes for analytics and optimisation tools.

### Use CMS Plugins to Integrate More Seamlessly With Your Branding

- ◆ It's much easier for staff to become more comfortable and familiar with daily website tasks when all the tools are in one place.
- ◆ There is often no need to develop something completely from scratch either. A plugin will provide the foundation and integrate with your existing branding and templates.



## 6. CMS Reviews in 2021

As the data here shows, there are now, in 2021, many popular paid services such as Wix, Squarespace and Shopify that require an account.

- ◆ Premium, paid website builders such as Wix will not be ideal for non-profit organisations who need extensive customisations or if you are hosting a large database of sensitive information.
- ◆ To keep costs down you will need to invest in an open source platform where most of the core code and framework is already set-up. You can then configure it to your needs.
- ◆ An open source CMS such as WordPress or Drupal also allows you to scale the website up at a later date when you have more funding.

### Global CMS Market Share in 2021

Rank	Brand Name	Market Share %	Open Source?
<b>1</b>	<b>WordPress</b>	<b>65.2%</b>	✓
2	Shopify	6.1%	
<b>3</b>	<b>Joomla!</b>	<b>2.9%</b>	✓
4	Wix	2.7%	
5	Squarespace	2.6%	

Data sourced on 20/09/2021 from: W3Techs (<https://w3techs.com/>)

## Best CMS Picks for Charities

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Here are my recommendations that are all open source without needing to pay a subscription fee.

### WordPress

- ◆ As of writing it is safe to say that [WordPress](#) is the most popular content management system throughout the world. However, this popularity also presents more security issues plus many plugins now require payment or subscriptions to get access to advance features.

### Joomla!

- ◆ I've selected what I consider the top five most reliable and best supported CMS frameworks and [Joomla](#) fits the bill here perfectly. It's an excellent alternative to WordPress, is very popular and has been around since 2005.

### Drupal

- ◆ The [Drupal](#) developer community is much more robust in its policing of contributed extensions and modules. Of course, like WordPress, Drupal is an open source framework. Drupal has the same potential vulnerabilities and relies on a developer community to maintain them for free.

### Expression Engine

- ◆ [Expression Engine](#) has been steadily growing in popularity and is continuing to offer more add-ons and extensions. Of course it is intended as a more niche alternative to the main players such as WordPress. Generally speaking it is a very user friendly CMS for administrators.

### CiviCRM

- ◆ Used by **11,000+** non-profit organisations, [CiviCRM](#) is ideal for network management, particularly if you run lots of events or need to communicate more directly with your customers or members. You can co-ordinate everyone in one place with notifications, forums and email newsletters. The platform can also be fully integrated with WordPress, Drupal and Joomla.

## About the Author



I have been building websites since 2000, when I first taught myself how to code HTML pages on my custom built PC. I then worked in the advertising industry as a print designer, programmer and eventually a studio manager.

In 2008 I decided to make a break and set up my own web design business. For a short while I freelanced for the B2B advertising sector, working on website projects and interactive content. Eventually I won contracts from a few big clients and then focused on client work full time.

Over the last 10 years I have been lucky to have been the lead developer for **Time to Change**, a £multi-million mental health campaign. I've also worked with **Breast Cancer Care**, **Mind**, **Rethink Mental Illness** and EU based trade union federation **EFFAT**.

I currently live and work in Eastbourne, East Sussex, UK.

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Design, Build and Improve