Digital

In the Third Sector

Issue Two

AZETS

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"How essential the digital world has become in our everyday life"

As we journey through 2020, we are constantly reminded of how essential the digital world has become in our everyday life. It allows us to stay connected but also for many of us to keep working without leaving the house and all of us to keep moving forward regardless of the global challenges we face. As our reliance increases, the importance of digital leadership and the role a Trustee can play needs to be examined. That one Trustee or team of Trustees can lead and develop, champion, and cheerlead the board and SMT through developing and implementing a complete digital strategy.

One of the key factors may be visibility of your charity on social media, to spread your word or communicate your impact. This quarters' guide looks at the benefits of Twitter and provides 10 handy tips for creating successful content to ensure you don't waste valuable time and maximise your impact. Finding the time to juggle creating and posting content for social media can often be difficult to fit into the day job, but there are also apps that can help you plan and schedule, to make the most of content and schedule it for the maximum impact.

All of this requires a strategy; our strategy article uses comparisons to a road map to help you navigate creating and innovating your digital strategy. Finally, it is important to consider the risks associated with any plan, a digital risk assessment is crucial to any plan to ensure your organisation is adequately protected from the numerous risks and ethical issues that a digital world can bring.

At the end of the guide we have included a handy checklist to help you evaluate your progress and implement small achievable steps to help you manage your digital journey.

Sarah Case, Partner

Leadership
and the digital trustee

Sarah Case, Partner, sarah.case@azets.co.uk

If digital is going to be fundamental to the future of the third sector, then digital leadership will be essential for your organisation. Does that mean everyone needs to rush out and find themselves a digital trustee? Maybe you do need one but, where are you on your digital journey? What skills do you already have on board within the organisation? What are your goals? These questions will determine whether it's a trustee you want or if there's another way you can implement digital leadership.

It's important to remember that even if a digital trustee is recruited then it is not for them to "own" digital for the charity but to champion it, with everyone else continuing to share responsibilities just like the Treasurer does for finance. The ideal is a digitally literate board which considers the impact of digital in all aspects of its discussions, strategic plans and day-to-day operations.

In order to decide what we need, it is worth asking ourselves some questions:

1. What are our strategic plans for digital? Do we have a broad strategic plan that covers digital? Or do we have specific projects in mind that require digital expertise. If the answer is specific projects, then we may want to consider the use of a one-off consultant specialist in order to facilitate standalone projects.

If, however, we have a long-term strategic plan to embrace the digital age and the many benefits it can bring, we would want a longer-term leadership solution.

2. What skills do current trustees have? How do they compare with our strategic aspirations? A Charity at the beginning of any digital journey will need a digital trustee with fundamental skills and understanding that will allow the Charity to step into the digital arena. At the other end of the scale would be a charity with a well-developed digital offering and plans for being at the vanguard of digital innovation requiring a much higher level of skill and understanding of the digital world, knowledge of

technical jargon, experience of products, services and of best practice in implementation strategies.

Charities should conduct a skills audit and include questions surrounding relevant skills to flush out the current level of expertise and understand the skills they may be recruiting for.

3. What skills do you have within the organisation? The skills required from the Trustees can be flexed depending on the level of expertise within the organisation. A charity that has significant expertise and drive within the charity may need less technical knowledge on the board and instead require someone who is able to support and act as a critical friend. A balancing act between the team and the board will be required; again, this would be no different to the Treasurer/finance, Chair/CEO balancing act that Charites negotiate all the time.

4. What would we expect our digital Trustee to do? Any trustee that is allocated the digital trustee mantle would need to develop their leadership plan. Expert or not they would need to lead by example and commit to growing their knowledge and expertise, championing digital, invest time and effort in understanding best practice and initiatives in the marketplace. They should support and motivate those working within the organisation. In doing so they should seek to understand the existing digital position, the plans, and proposals to move forward and the strategies and actions that will take the charity there.

Conclusion

Whichever way your charity decides to balance leadership of digital, the overarching aim has to be that both the board and the senior management team feel confident and engaged in implementing digital strategies to achieve their aims and objectives and improve long term performance. Ultimately, technical skill level aside you are looking for an open minded, digitally curious, passionate individual to open the doors to your digital transformation.

Twitter -
useful tool or time vortex?

Sarah Case, Partner, sarah.case@azets.co.uk

According to the Twitter about page, Twitter is "what's happening in the world and what people are talking about right now".

So, who would not want to be part of that? But as a tool it can either be used effectively and strategically or you could find hours of the day disappear with no tangible benefit.

What is Twitter?

Twitter is a type of micro blogging; with only 280 characters at your disposal you can communicate to anyone who follows you. This can be news, opinions, events, pictures and so on. How you choose to spend your time using Twitter needs to be well thought out if it is to be a useful tool for your Charity.

Tips for success on Twitter

Here are our top ten tips for a successful Twitter account

1. Be yourself (be the personality your charity would have if it were a person)
2. Decide on what your Twitter purpose is: sharing information, raising awareness, fundraising?
3. Avoid a tone that is purely marketing/promotion, there must be more substance to engage people
4. Cultivate a strong community of followers; these are your community to nurture, form relationships, engage, inform, update, thank...
5. Tweets that contain images/hashtags/URLs are more likely to get retweeted than tweets without
6. Review your stats and learn from them, evolve your strategy through trial and error
7. Remember that Twitter is a two-way conversation – so follow and be followed, post and reply – Twitter is the water cooler of the internet
8. Integrate your account with your other digital tools, website, Facebook
9. Optimise your bio to showcase your Charity
10. Utilise video for even more engagement

Strategy and Vision:
The digital map and destination

Mark Jackson, Partner, mark.jackson@azets.co.uk

Some organisations claim to be technology driven, but charities must be driven by delivering public benefit in accordance with their charitable objects – and therefore the destination of whatever 'digital' might mean, must be nothing more and nothing less than those delivering those charitable objects. However, the power of 'digital', when harnessed correctly, cannot only drive forward that public benefit but take it to another dimension.

I have recently re-opened a map of my local area and discovered and explored all sorts of pathways within walking distance of my house. So, as you consider what your digital map might look like, here are a few lessons from a map:

A viewpoint: the place to go where everything is set before you. Withdrawing from the busyness of the urgent is vital as you take in the scene around you and gaze into what the future might be. A digital map needs space to see what you do, and maybe what you previously thought impossible, and consider them through the lens of the power of technology: artificial intelligence, voice assistants, wearables, etc.

Footpaths: all your landmarks may be in the perfect place on your map, but are they linked together by a footpath? Much greater efficiencies and benefits flow from communication between teams than anything you do within a team. Does your digital map facilitate sharing of data, avoid the re-keying of information and is all the right data captured consistently throughout the whole organisation and linked together to give an accurate view of your impact?

Communication: lines of communication will form part of your digital map. It may be helpful to consider a table, with types of communication across the top (telephone, email, social media, face to face, etc.) and all stakeholders (potential donors, main funders, volunteers, trustees, employees, beneficiaries, partners, etc.) down the side.

Fill in the boxes with what you currently do and consider whether these are the most effective ways of communicating or whether some of the blank boxes should be using technology to enhance communication.

The Coronavirus lockdown highlighted the ever-growing difficulties faced by those who do not connect to technology, for example with online banking, online shopping, or video calls. Many charities will be dealing with individuals for whom technology is a barrier and therefore space is needed on your digital map to allow for that.

• Cliffs: your digital map needs to consider the cliffs and any other barriers on your digital journey.
• Funding: consider collaboration with a business or seeking specific grants for technology projects.
• Skills: our digital map must help us find people who have the right skills and an understanding of the charity's ambitions.
• Culture: for most of us, the ability to understand new and emerging technologies and adapting those to our own situation does not come easy. We often therefore lack both the confidence and the will to seeing digital as a priority. So, encouraging each team member to be on the lookout and providing an environment where the team is able to share ideas, and maybe even skills you never knew they had, is vital.

Most charities began as true examples of innovation, where the founders saw a social need and responded to it. Now, governance structures and the constant demands of working out where tomorrow's funding is coming from can easily hold charities back and a more innovative and agile response is needed to not only survive but thrive.

So, be constantly seeking out what technology can offer, but ensure that, whatever you do, it enhances rather than detracts from delivering impact to your beneficiaries.

Managing Risks
in a Digital World

Claire Thompson, Associate Director, claire.thompson@azets.co.uk

The risks and challenges facing charities are ever growing, even more so in a digital world that is constantly evolving. Embracing digital change may help to boost your charity's income, raise its profile and bring with it additional opportunities, however, it may also bring an increased level of risk which, if not managed appropriately, can cause catastrophic consequences.

The Charity Digital Code of Practice lists 'Managing Risk and Ethics; weighing up possible hazards' as one of its principles. Within the code it notes the following as best practice for all charities, regardless of their size:

1. Charity trustees and the senior management team should possess the necessary skills and oversight of the charity's digital activities to enable them to determine the risks posed. This should be aligned with the charity's risk management policy. From this any risks should be identified and assessed.
2. When procuring electronically, necessary due diligence should take place on potential suppliers and, where contracts are drawn, legal advice sought.
3. Any existing processes, procedures and systems should be reviewed periodically to ensure they provide value for money, are fit for purpose, are secure and are working correctly. The need for these in future periods should also be considered.
4. To enable such risks to be assessed and evaluated charities may need support from someone who possesses the necessary technical skills; this could be a current member of staff, trustee, volunteer, or an outside source. Where potential significant risks are identified a plan should be compiled which details all possible actions and scenarios should the risk come to fruition.
5. All digital risks should be reviewed, monitored and assessed continuously and, where relevant, recorded on the charity's risk register.

A digital risk assessment should not be viewed as a tick box exercise and one which is to be filed away after completion. Charities need to ensure they are continually assessing and managing the risks involved with using digital technology; this is vital to ensure they maintain public trust and confidence as well as ensuring their reputation is upheld. The digital world is fast-paced, developments in technology move quickly but equally with each development comes new risks.

Managing Digital Ethics

As well as identifying and evaluating the risks faced by using digital tools, charities will also need to consider the ethical issues and risks. It is vital that your charity's digital strategy aligns with its objectives, values, mission and aims. Ethical risks are broad and varied and can encompass risks such as partnership working to how digital platforms use the charity's data.

Digital ethics can also include considering the environmental impact of your digital footprint and how employee wellbeing can be affected.

DataKind UK have developed a digital ethics framework which considers the following:

• Identify the ethics of your organisation – what is ethical for you?
• Identify how you plan on using data and how to align this with your ethics
• Identify a plan based on existing ethical practice – how are others doing it?

To ensure the charity's beneficiaries, staff, volunteers and trustees are protected it is vital digital ethics is embedded throughout the organisation and is something that drives the charity's digital strategy.

Key issues to consider include:

- Ensuring GDPR continues to be complied with.
- Ensuring a robust social media policy is compiled and is adhered by all.
- Ensuring adequate security systems are in place to ensure data is secure and cannot be compromised.

The Charity Digital Code of Practice as well as CC26 Charities and Risk Management from the Charity Commission provide sound guidance on digital ethics, assessing risks and implementing a risk management policy and plan.

The benefits that digital platforms and technology solutions can bring to your charity are numerous and continually evolving, it is crucial that charities embrace these changes. However, it is crucial to ensure that charities recognise that these developments should fit with their core ethics and that risks are robustly and continuously addressed.

Juggling content
on social media platforms

Sarah Case, Partner, sarah.case@azets.co.uk

Small and large charities are finding that using social media is crucial to connecting with wider audiences, publicising fundraising campaigns, educating the public and communicating with a potential global audience.

But with limited resources how can time-short organisations successfully manage content across numerous platforms? It is important that social media is integrated into a digital strategy and applied consistently. Here are some helpful platforms to allow you to create content across multiple sites and monitor effectiveness, and reach your campaigns and messages:

Buffer – can help you save time by working across social media platforms to plan, schedule and coordinate content.

Tweetdeck – a specialised service that offers Twitter users a comprehensive and completely free way to manage multiple Twitter accounts, useful for managing different aspects of your organisation and monitoring the statistics.

Hootsuite – helps you enhance your social media management. A tool that allows you to analyse audiences, discover, track, and manage many social media platforms, schedule posts, monitor your brand and provides analytics on reach and impact.

Social Pilot - is a comprehensive social media marketing tool which helps professionals, teams and businesses automate their social media management. Helping users every step of the way - from publishing posts on their profiles, to analysing their posts' performance.

Lightful – with a strapline of "we help people like you change the world through the power of technology", Lightful is designed specifically for charities. Its products help charities upskill and save time with the provision of a simple interface to manage your social media presence and measure your results.

Quarter 2
Checklist

Leadership and the digital Trustee	Yes/No	Action to be taken
Do you have strategic plans for digital?		
What skills do current trustees have?		
What skills do you have within the organisation?		

Twitter – useful tool or time vortex?		
Are you on Twitter? If not, is it appropriate? Who could take this on and champion it?		
Do you review your stats and learn from them?		
Do you utilise video for even more engagement?		

Strategy and Vision – the digital map and destination		
Do you have a digital map? If not, consider what your digital map might look like		
Does your charity have effective ways of communicating?		
Consider the barriers to your digital journey, plotting them now will help you plan to overcome them		

Managing risks in a digital world		
Do you identify and evaluate the risks faced by using digital tools?		
Does your charity's digital strategy align with its objectives, values, mission and aims?		
Do you have a robust social media policy?		

Juggling content on social media platforms		
Does your Charity struggle juggling content?		
How do you manage your content? Are there tools that could help?		
Do you use a content platform?		