

# Digital

## In the Third Sector



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# Key Competencies of a Digital Trustee



# Digital In the Third Sector

“There are only two certainties in life...”

Whatever you want to add onto the end of that famous quote, digital would either be one of the two certainties or at least the essential third. There is no escape, not personally, not in the workplace and certainly not in the Third Sector if you or your organisation wishes to stay current and relevant in today's digitally enhanced world.

Digital needs to be a force for good within your organisation, it should be of benefit to you internally and externally, this means making sure you prioritise the right amount of care and attention, develop a formal strategy and aim to receive the maximum benefit.

But where should a Charity begin? Who should take responsibility? Where do you go for advice, what are your risks, what skills do you need...

In our first guide which will be part of a series of digital documents we hope to pull together the main considerations for your Charity, the guidance already available to you, and explain some of the more common social media platforms that you can use on your digital journey.

**Sarah Case**

Partner





# Charity Digital Code of Practice

Joanne Taylor, Associate Director, joanne.taylor@azets.co.uk

As the world develops it is important that governance keeps the pace to protect Charities and their beneficiaries. As the use and scope of digital has grown so has the need for a consistent framework for the sector to work towards. The Charity Digital Code of Practice has been developed by a steering group of organisations from across the sector, and has been designed to help charities tap into the potential offered by digital to increase impact, efficiency and sustainability.

The Code notes that digital moves fast and is constantly evolving, and those organisations that use digital successfully constantly test, learn from and improve their strategies, tactics and technologies.

The code has been set up as a practical tool to identify what charities are doing well in digital and identify any gaps they need to address. It is envisaged that the code will be used as part of how charities benchmark their digital progress and to inform key decisions in this area.

The code is broken down into seven key principles which have been summarised below:

**Leadership** – Charity leaders must lead on digital as a way of helping their charity be relevant and sustainable; it is no longer an option for leaders to say they don't do digital – it has to start from the top and infiltrate the whole organisation.

**User Led** – the needs and behaviours of beneficiaries and other stakeholders should be the starting point of everything the charity does digitally; the majority of the population now has access to internet, these people are your stakeholders, supporters, service users and funders, and they can all be “reached” using digital.

**Culture** – values, behaviours and ways of working should create the right environment for digital success, any elements of your organisation that embrace digital should ensure that they strive to replicate your unique feel and culture.

**Strategy** – use digital to achieve vision and mission and think creatively about how digital can increase impact and sustainability; whilst this is only one element of any strategy it can be woven into all aspects of what you hope to achieve.

**Skills** – digital skills need to be represented at all levels of the organisation, education of the aim, adequate training and implementation, and understanding monitoring and evaluation will be key to success.

**Managing risk and ethics involved in digital** – consider how digital issues fit with organisational values and ethics, adapt risk registers for new and evolving risks and ensure any new strategies harmonise with your organisation.

**Adaptability** – history informs us that those who don't change don't succeed; charities will need to adapt to survive and thrive as digital changes how everyone lives and works.

The code has been published in two formats, for smaller charities (income below £1m) and larger charities (income over £1m) and should be read in conjunction with other codes and best practices for the sector.

## Conclusion

The third sector is renowned for its adaptability, digital is another area to learn and grow with. The opportunities for the sector are numerous including expanding reach, increasing income, adapting services... whatever the impact, good governance, achieved by working through codes such as this will be of paramount importance.



# Digital Considerations for Trustees

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

For some, the word digital brings a feeling of dread and for others it inspires innovation, but what do we mean by digital? At its most basic, digital encompasses all aspects of technology whether that is software, hardware, communication platforms or the World Wide Web. The aim of any digital strategy has to be to generate improvement, for example to create new ways of working, more efficient means of communication, increase reach, reduce costs or mitigate risks.

Digital has infiltrated our lives both personally and in our working environments to the extent that changes occur and we assimilate them without really knowing the changes that occur, the benefits they bring or the risks that they create. Digital is all around us and growing daily.

## So what does this mean for Trustees of charities?

The Charity Commission has created a document that covers the key questions Trustees should be considering in strategy and board meetings. Digital cuts across everything charities do and it is therefore important to ensure the understanding and controls are in place from the top down and embedded throughout charities. Many of these questions we will cover in more detail in later sections. Boards should consider the 12 areas suggested by the Charity Commission and add their own detail to each area for regular discussion and evaluation.

## Areas to regularly consider

**Governance** – this should cover how governance processes are adapting and changing to reflect the impact of digital changes across the organisation, how technology can enhance governance and what are the opportunities and risks.

**Induction** – this is a perfect place for technology to play a part in improving the process for any new trustee but also for providing continuing education opportunities for existing trustees.

**People** – from top to bottom, who are our key people in leading digital transformation in the charity, what skills do we have and what skills do we need?

**Strategy** – where does technology and digital fit into our strategy? How can it enhance our work, what are the opportunities and threats for our organisation?

**Culture** – what steps can the board take to create a culture where digital can flourish, and how can leadership play its part in that?

**Service delivery** – boards should consider how digital can help to improve service delivery and how online content can help with transparency, spreading the word, and dissemination of advice.



**Brand** - there are thousands of social networks out there to choose from, providing so many ways to reach the outside world. Choosing the right social media platform is so important. There are way too many social networking sites out there to ever have a presence on them all, and your time would be better spent focusing on the sites that get the most traffic. Focus on understanding which ones will work hard for your brand, enabling you to reach out to new audiences and strengthen relationships.

**Reputation** – as the use of digital infiltrates your day to day work, managing the reputation of your organisation is crucial. Understanding the risks and creating plans for successfully dealing with a crisis will be necessary.

**Fundraising** – both an opportunity and a risk. It is important to understand the use of digital for fundraising to ensure the organisation is both ahead of the fundraising curve but also in compliance with regulations.

**Cyber security** – is everything secure? Do we have protocols and are they embedded?

**Evaluation and success** – when considering the aspects listed above, what will success look like for the organisation? How will we monitor our progress and success?

**Resources** – what do we need? Will we need to invest in capital or resource in order to achieve our objectives? What savings could digital bring in other areas?

## Conclusion

Creating your own checklist of digital questions to inspire discussion at board meetings is an excellent way to ensure digital remains firmly on the table and part of the strategy for the future for your organisation. It also helps to prevent risks from creeping in as digital increasingly infiltrates the work place and control environments struggle to keep up.





# Are you on the world's third-most visited website?

Sarah Price, Regional Marketing Manager, [sarah.price@azets.co.uk](mailto:sarah.price@azets.co.uk)

In 2020 Facebook turns 16, with over 2.45 billion monthly active users and continues to grow year on year.

Facebook has become part of our daily lives, for most people it's the first and last thing we check every day.

## What is Facebook?

Did you know Facebook is the fifth most-downloaded free app in the App Store?

Facebook officially started to make the world a more open and connected place, which allows users to access everything in one place, news, products and businesses. Communicating with donors and beneficiaries, whilst sharing thoughts and opinions, campaigns and impact stories means that Facebook can be an extremely useful tool for charities.

## Tips for success on Facebook

Here are our top ten tips for a successful Facebook account:

1. Define your goals. What do you want to achieve from your Facebook page? Fundraising, grow followers or simply raise awareness?
2. Ensure your "about" section is positive, showcasing what you do. Campaigns, information about the charity and don't forget a link to your website. It's all about raising awareness and meeting your goals and objectives.
3. Post regular content - at least three times a week.
4. Select a well designed cover photo which illustrates what you do – with a call to action.
5. It's important to post the right content at the right time. This is where a content strategy can really help.
6. Facebook has a great built-in scheduling tool which enables you to schedule your content in advance, which saves you time and ensures there is a constant flow of interactive, engaging content at all times.
7. Always use images! Posts with images get 2.3 times more engagement than those without.
8. Jump on the Facebook's #GivingTuesday campaign.
9. Add a donate button to your profile.
10. Don't just post – remember to interact with your audience. Share other people's content, for example, fundraising successes.





# Quarter 1 Checklist

The Charity Digital Code of Practice	Yes/No	Action to be taken
Have you read the Digital Code of Practice?		
Do you supply all trustees a copy of the Digital Code of Practice?		
Consider where you are on your digital journey for each of the seven principles		
<b>Digital Considerations for Trustees</b>		
Where are you on your digital journey? <ul style="list-style-type: none"> <li>• The beginning</li> <li>• Moving along but by no means an expert</li> <li>• Flying, we have completely embraced it</li> </ul>		
Does your organisation think about digital potential in all its discussions?		
Do you have a digital trustee?		
<b>Are you on the world's third-most visited website?</b>		
Are you on Facebook? If not, is it appropriate? Who could take this on and champion it?		
Do you have defined goals? What do you want to achieve from your Facebook page?		
Do you interact with your audience?		



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