

## Digital Resource Guide (Part 2)

### Digital Foundations for Small Charities

According to Zoe Amar, founder of *Zoe Amar Digital*:

*“At its simplest, digital means using technology, covering everything from software to hardware to communications. Many charities are also exploring the opportunities that digital presents for creating value, (whether that’s generating income or strengthening key relationships), or enhancing their services. In short, it’s about new ways of working, using digital to deliver your charity’s vision, mission and strategy.”*

Though the opportunities provided by digital are undoubtedly very exciting, sometimes it can be hard to pare back all that’s out there to what really counts for your organisation. This guide aims to take a look at some of the most basic means of embedding digital within your small charity. According to experts, the primary uses of digital for any charity should be email, social media, a website, remote working, internal communications, cybersecurity and the appropriate tech and hardware.



### Hybrid working

**The Cloud** – according to Azure, “*The Cloud is not a physical entity, but a vast network of remote servers around the globe which are hooked together and meant to operate as a single ecosystem*”. Your organisation may well already be using cloud services provided by one of the big names such as Microsoft, Google or Amazon. Many CRMs will also offer cloud-based solutions, which is great for access, hybrid working and can also be far more cost efficient versus housing information in an old-school server.

**Dot Project** offer a very easy read on [Moving to The Cloud - A guide for non-profits](#).



**Google Workspace Learning Centre** have, amongst others, this helpful segment on [‘How to thrive in a hybrid working environment’](#).

**Microsoft Office 365** – is an example of a cloud-based storage system. Set up for collaboration, you can add a multitude of different applications to your Microsoft system. These applications are designed

to allow you to collaborate, edit in real time and integrate different elements of programmes that previously may have remained distinct. [Microsoft’s training support can be accessed here](#), whilst partner company [m-hance](#) offer free training webinars.

**Google** offer their own equivalent suite of programmes called **G Suite**, and their own free online training platform: [Google Digital Garage](#).

## Customer Relationship Management (CRM) Systems

Customer Relationship Management (CRM) systems provide organisations with a central digital database in which to record, organise, manage, and store all their interactions with service users, business partners and suppliers. With so many options out there, it is well worth taking the time to really assess exactly what it is you want your CRM to do when choosing which platform is right for your organisation. See Datawise London’s handy walk-through guide on [Choosing a database for your small charity](#).



## Communication

**Teams** – mostly used internally for communication between colleagues although can also be used externally for service provision.

**Zoom** – used both internally and externally for meetings and service provision.

**Website** – the ‘face’ of your organisation. Content needs to be recent, relevant and engaging whilst the site should be well-organised and easy to use. [WordPress](#) is one of the most popular website building platforms. Though many organisations see their website as something worth splashing out on, it’s important to make sure the platform is one that can be easily maintained and updated by staff or volunteers.

**Emails** – used internally, externally and for marketing. **Outlook** is a popular email inbox from Microsoft. All members of the team should have a ‘work’ email for best cybersecurity practice.

**Communication Management Platforms** – are available to allow you to pull different forms of communication into one central ‘hub’. This could include emails, text messages or WhatsApp messages. A Communication Management Platform could be a useful product to have if you don’t have a CRM or one with capabilities of integrating all forms of communication. See the SCVO’s advice on [Communications Platforms](#).

## **Email Marketing**

Email marketing is the act of sending emails to users with a specific purpose, whether that’s to sell products, raise awareness, fundraise or promote an event.

[Mailchimp](#) is one of the leading competitors in email marketing. Accounts are free for a limited number of emails. [Dot Digital](#) offer a similar product and have a partnership with [Charity Digital](#) to offer discounted non-profit pricing.



## **Social Media**

Social Media offers a wide range of opportunities for charities from marketing and communications, storytelling and engagement, to digital fundraising. It is important to choose the right platform for your charity, whether that be Facebook, Instagram, Twitter or another.

**Social Media Management Platforms**, such as [Hootsuite](#), [Lightful](#), [Buffer](#) and [Tweetdeck](#), can be used to schedule social media posts and integrate your use across platforms.

[The Charity Social Media Toolkit \(NCVO Skills Platform\)](#) is an excellent resource which can help charities to ramp up their social media and maximise the results from these channels. It covers everything from the basics of how to develop a strategy, manage social media day to day and measure success. It also includes tactics such as fundraising on social media, storytelling and crisis comms.

[The .Org Learning Centre](#) offers advice on how to connect through social media.

[Hootsuite](#) gives practical advice on social media strategy, including ‘How to set up...’ guides for different platforms: [Hootsuite Social Media Strategy](#).

[The Charities Aid Foundation \(CAF\)](#) have a YouTube channel full of handy tips and tutorials, including this one: [How to be Awesome on Instagram](#).

[Nonprofit Tech for Good's](#) blog is useful collection of reports, research, webinars, Twitter chats and handy guides with a focus on making the most of online trends and social media to fundraise and get your charity heard.

**Sage Foundation** have created an interactive guide to social media, which tells you exactly how to optimise your platforms for maximum reach. If you answer the questions as you go you can print an actionable workbook at the end of the guide: [Social Media for Non-Profits](#).



## Survey Tools

Survey tools can play a key part in data analysis and are vital in helping charities measure and improve their performance and marketing and communications.

Some popular survey tools include: [Survey Monkey](#), [Microsoft Forms](#), [Google Forms](#) and [JotForm](#).

For further reading, see the Superhighways blog on survey tools: [Superhighways on How to Choose which Survey Tool](#).

## Data Insight

Data insight can be used by charities in areas including understanding supporters, reaching supporters, impact measurement and transparency. Charity Digital advise that, “survey tools like SurveyMonkey, website data from Google Analytics, or even a simple spreadsheet of donor data are free places to start collecting and playing around with data. Organisations can look to existing data sets to enhance their analysis.”

[Data Orchard](#) offers a free tool to assess data maturity.

[NPC](#) is a social impact think tank and consultancy. Their [Local Needs Databank](#) is a valuable tool for understanding charity and need in the UK.

[Data Kind](#) - help social organisations apply their data to predictive analytics, machine learning algorithms and AI needs.

[Datawise London](#) is a partnership programme of training, advice and support to help small charities and community organisations in London better use data to meet the needs of Londoners. For further reading: [Datawise London on Choosing a Database](#).



[Pro Bono Data Economics](#) can provide charities with pro bono support from a dedicated volunteer economist to help them with their ad hoc data needs. That might include data analysis or visualisation, spreadsheet tasks or short pieces of research.



## Design Tools

[Canva](#) is a graphic design platform. Canva can be used to create social media graphics, presentations, posters, documents, infographics, one-page websites and other visual content. Canva run free online classes to teach you how to make the most of the platform, check out their Eventbrite page: [Canva Design School Eventbrite Page](#).

[Adobe Express](#) is a free design tool. It is very easy to use with lots of templates available to help you produce the most eye-catching content.

[Miro](#) is a collaborative tool that allows you to create whiteboards across members of your team. Many templates are available, including risk matrixes, mind maps and user story maps. A limited free version is available as well as a 30% [discount for non-profit organisations](#).

[Pexels](#) is a site that allows you to download images for your own use free of charge. (pexels.com).

[Jamboard](#) is a digital interactive whiteboard developed by Google.

[Splice](#) is a free yet powerful mobile app-based video editing tool.

[Quik](#) is a similar product but perhaps a better place to start to experiment with video for complete beginners.

[Piktochart](#) is a design platform on which you can create flyers, infographics and social media graphics.



## Event Management Tools

[Eventbrite](#) is an event management and ticketing website. The service allows users to browse, create, and promote local events.

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