



Digital strategies and cake

17 November 2021

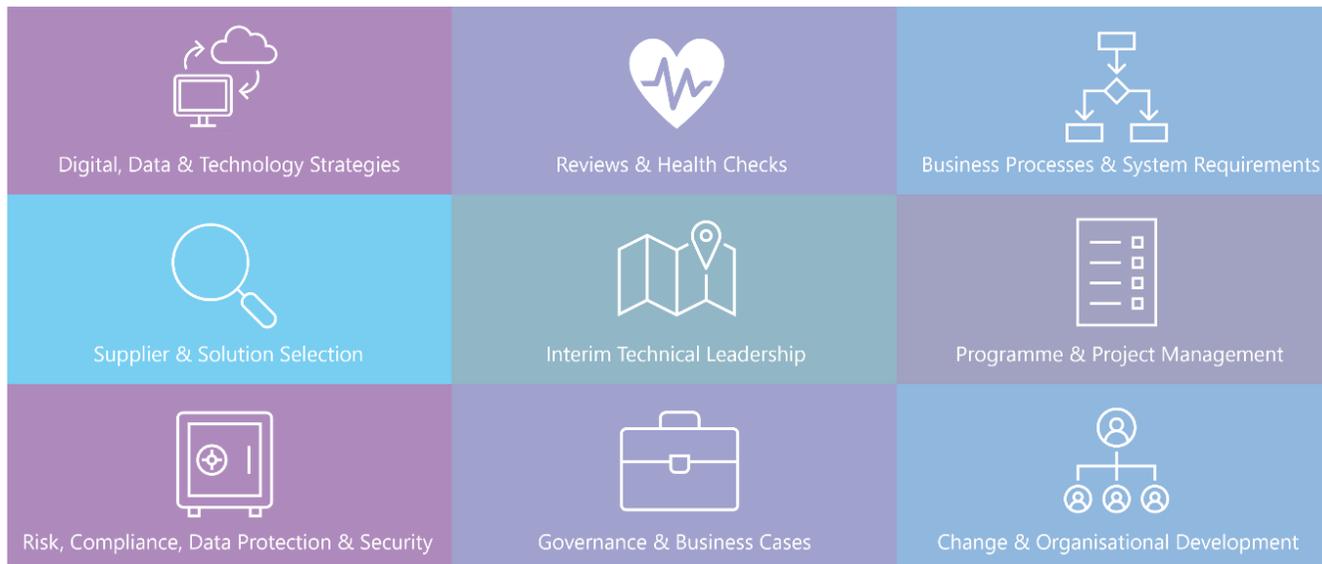


@AdaptaforNFP

About Adapta

Adapta Consulting is an independent consultancy working exclusively with organisations in the not-for-profit sector.

We specialise in information systems where our consultants have helped a broad range of charities make the right choice and go on to a successful implementation. We are completely independent, which means that we evaluate all the options for change on their merits and we have no stake in any particular outcome.



Our speakers

Keith Collins

Principal Consultant, Adapta Consulting



Jonathan Cook, Insight-ful

Fundraising innovation, Charity insight specialist



Ingrid Jack

Associate Consultant, Adapta Consulting



Today's programme

- 14.00 **Arrival and welcome**
Keith Collins – Adapta Consulting
Welcome to the event, introductions and overview of the agenda for the afternoon.
- 14:10 **The new new normal – the digital non-profit post COVID-19**
Adapta Consulting
How has improved use of digital tools helped non-profits respond to the challenges of COVID-19, which of these innovations might stick; and what might this mean in terms of our future digital strategies?
- 14:20 **The non-profit workplace**
Ingrid Jack, Associate Consultant - Adapta
Reflecting back on her work over the last 18 months, working with organisations as they have had to innovate within their workplace and fast-track new ways of working and collaboration, Ingrid will share her thoughts on how things have changed, and how non-profit organisations will continue to adjust to develop a modern, safe, productive workplace for their staff & volunteers.
- 14:50 **Supporter engagement**
Jonathan Cook, Insightful
Innovations in fundraising, marketing and campaigning have been key to how some non-profit organisations have successfully responded to the challenges thrown up by the pandemic. Events have gone virtual, supporters and charities have used tools like fitness apps and social media platforms to plug the gaps in fundraising areas such as community and events fundraising. However, what are the innovations that are likely to stick, and make an ongoing contribution to your fundraising mix, and which of them might we never see again!?.
- 15:20 **Discussion and feedback**
All
Break out room discussion and feedback.
- 15.55 - 16.00 **Review and close**
Keith Collins, Adapta Consulting

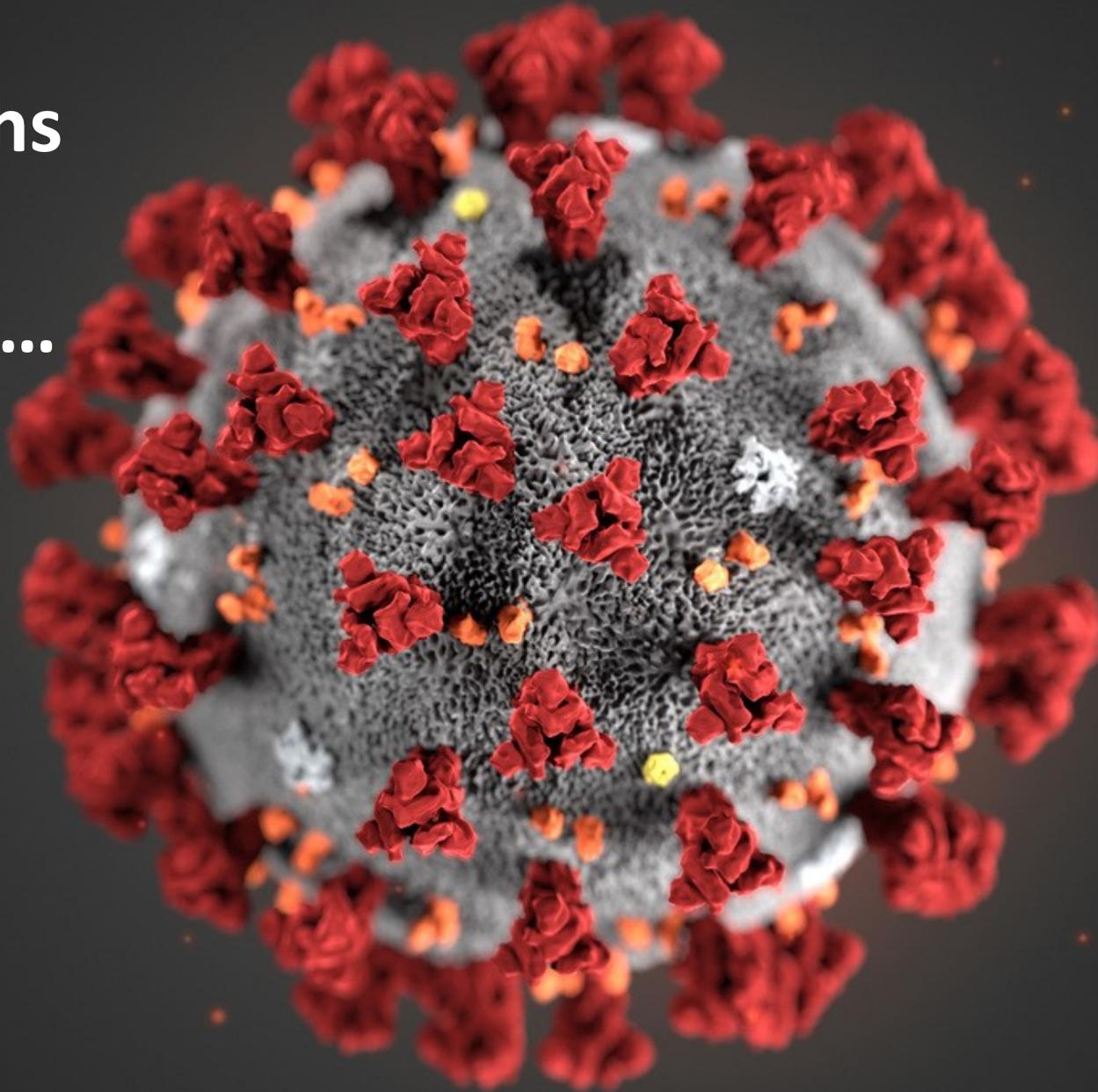
Interruptions are still very possible!!



Rules of Engagement!

- 'Share screen' should only be used for speaker presentations.
- Please **remain in mute mode** unless you wish to participate in the Breakout Room discussions.
- Your profile name should be your name and organisation – Hover over your name in Participants and select Rename.
- **If you have a question relating to the speaker presentations, please submit these at any time using the Chat feature**. Questions will be picked up once each presentation has ended.
- If we do not have time to cover questions/all questions, we hope to open a private discussion space following this event.
- We'll be sharing the Adapta slides after the event.
- **If you have a technical question** please use the Chat facility, and select **Paul Stirrat**, who will be able to help.

**20 months
and
counting...**



Impacting how and where we work



Impacting how and where we raise funds

MAKE A CHANGE

Impacting everything....even grassroots football!



2004 to early 2020. Very traditional!

Player communications – all done by email

Pitch payments – invoice received in the post,
payment made at reception by cheque

Match subs – everyone brings £5 in cash to
the game

Cash storage – in a Tupperware box in my loft

Banking – cash paid into the Lloyds bank
account every six weeks

Bibs brought and handed out every game

Normal throw ins



November 2021 – digital/mobile first

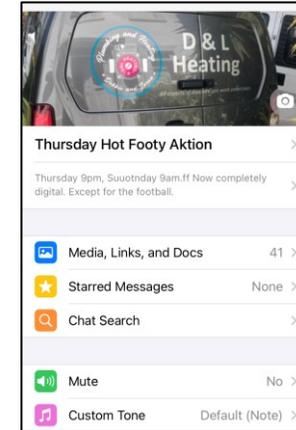
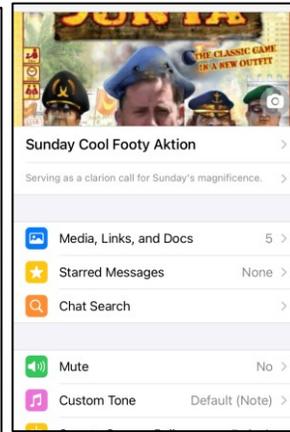
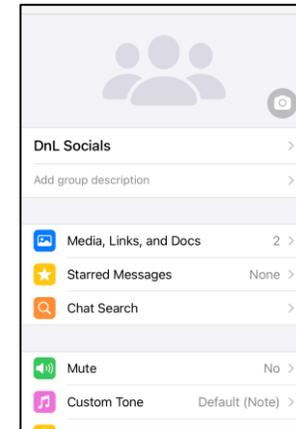
Player communications

Pitch payments

Match subs

Cash storage

Banking



Month	June	July
30 Jun 21		£1,286.31
DENTON UA&U		+ £20.00
28 Jun 21		£1,266.31
BARWICK T1S		+ £10.00
28 Jun 21		£1,256.31
NEIL ROBERTSON		+ £5.00
28 Jun 21		£1,251.31

November 2021 – digital/mobile first

Player communications

Pitch payments

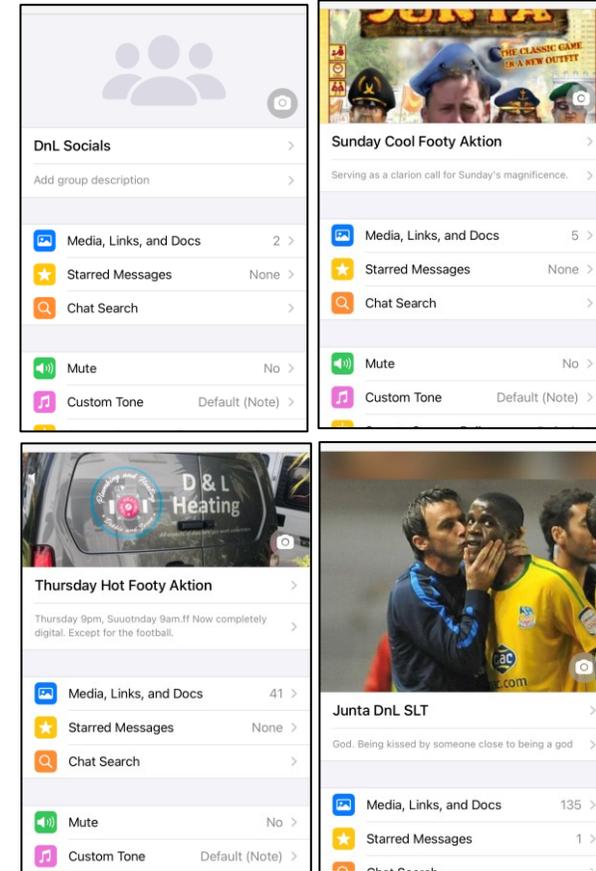
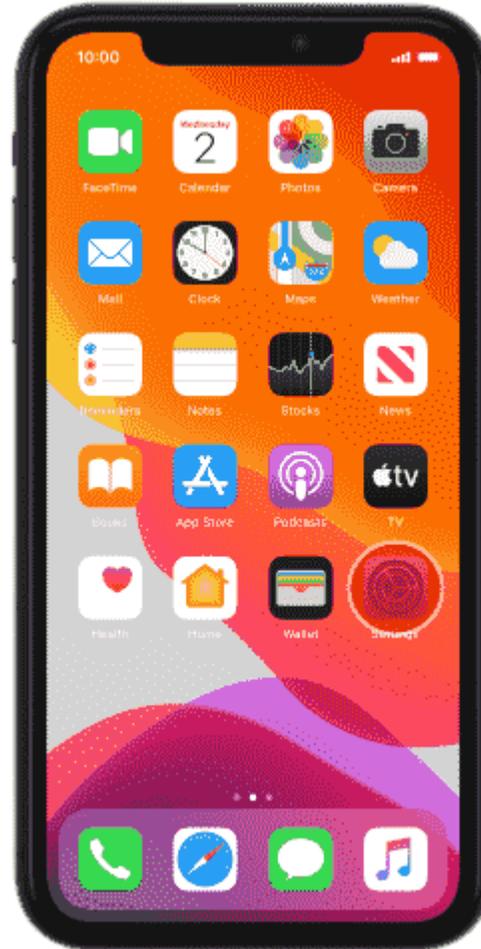
Match subs

Cash storage

Banking

Pre-picked teams – notified by WhatsApp –
dark shirts v light shirts

Kick-ins, not throw-ins



Dads n Lads Treasurers Account		
		£1,213.31
	Available:	£1,213.31
	Overdraft limit:	£0.00
May	June	July
30 Jun 21		£1,286.31
	DENTON UA&U	+ £20.00
28 Jun 21		£1,266.31
	BARWICK T15	+ £10.00
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How has improved use of digital tools helped non-profits respond to the challenges of COVID-19, which of these innovations might stick; and what might this mean in terms of our future digital strategies?

Some questions we asked in advance...

How has technology changed your working environment since the start of the pandemic?

How has technology changed your fundraising since the start of the pandemic?

Some questions we asked in advance...

How has technology changed your working environment since the start of the pandemic?

"we now operate 50% remotely as a team using Teams predominantly"

"we are now working through a process of streamlining newly-acquired systems to ensure we move forward with the best suite of platforms for us (and that everyone is using the same ones!)"

"Use of technology to work from home – whole team has a laptop, installed a cloud based telephone system so core office activities can be done from home, move to new ways of engaging across the organisation – Microsoft Teams etc"

"All Staff have laptops and have a "home office" set up including large display screens. No desk PCs. All staff have mobile phones. Storage on "Cloud" – no local servers. Use of Teams, Zoom, SharePoint."

"Move towards full cashless operation"

How has technology changed your fundraising since the start of the pandemic?

"Greater use generally of video conferencing platforms including Slack, Zoom and GotoMeetings. Better equipped rooms within HQ to enable improved video conferencing"

"It's also helped us to question our beneficiary needs, for example with the introduction of online service delivery and sessions. Some people have engaged better without having to travel to physical locations, so this is something we are currently learning from"

"we've been forced to find alternatives ways to reach the children and young people that we work with"

"Staff meetings have moved to entirely online to now a hybrid online and in the office. New office we have never worked in before (now 2 days a week) is now kitted out with video equipment in 2 rooms and a portable conferencing device"

"Everyone working more flexibly then ever before. We have invested more into making sure systems can be integrated and accessed from anywhere (So moving more to Cloud based solutions). This has lead to savings in travel costs and office rent."

Some questions we asked in advance...

How has technology changed your working environment since the start of the pandemic?

How has technology changed your fundraising since the start of the pandemic?

"There is the obvious move to a focus of online campaigns, social media fundraising etc. Although it has been around for a while, it became a huge focus during the pandemic. We saw big success in January with a Facebook fundraiser which totalled £6m in one month"

"Ultimately, we are trying to balance our learning and successes from the past 18 months with ensuring that tech-shy people are not left behind and our offer remains accessible for people with different needs."

"The emphasis on technology and the need for remote fundraising (particularly to subsidise the shortfalls in face to face activity and events) has led to a real focus on innovation and an aim to fail fast. That's positive in many ways but innovation places a larger burden on operational teams than replicating established activity so it's had quite an impact"

"We have been unable to run any face to face fundraisers, so we have had to innovate and move to digital fundraising e.g. challenges, zoom quizzes and events e.g. online wine tasting fundraiser."

"Re-emergence of the QR code! Increased shift to digital giving."

"Drive to online digital.... very successful zoom meetings for donors to see programme work in the relevant countries. Events: obviously cancelled. Otherwise, income OK"

"We have shifted decisively from paper / mail-based and in person fundraising to online fundraising. We have accelerated focus on short and easy journeys / decision paths to donating online. We have had to tolerate increasing levels of charges and fees from online service providers, but have found that the access to donations which technology solutions has provided justifies accepting the increased financial charges incurred, overall."

Over to Ingrid

Ingrid Jack

Associate Consultant, Adapta
Consulting



THE NEW NON-PROFIT WORKPLACE



Some orgs have fared better than others



Successful orgs

Strong continuity of service and have maintained or improved team engagement



Embraced remote & hybrid working

Staff & volunteers
Recipients & clients



Technology as a strategic enabler

Strategic platform / suite decisions = integration
Shift from on-premise / datacentre to cloud solutions



Security as business risk

IT Security as a priority
Technical controls
User guidance & training



Digital Empathy

Technology change as a way to deliver better services and improve staff engagement



Ground-up approach

Involved staff in creating new ways of working
Involved service recipients in service updates

Struggling orgs

Struggled to provide continuity of service and have less engaged teams



Seen shift to remote work as temporary

Retained old ways of working
Not updated policies and processes



Technology as a short-term fix

More tactical decision-making = multiple discrete solution
Digital transformation seen as an unnecessary cost



Security as IT cost

IT security not prioritised
Much more susceptible to cyber-attack



Digital Indifference

Technology change is a necessity to be endured
Little focus on aligning technology to need



Top-down approach

Minimal staff & volunteer engagement
Results in reduced staff and client / recipient engagement

18 months ago....

Keeping your organisation secure and productive



SECURE YOUR ORGANISATION



SUPPORT YOUR PEOPLE



ONLINE MEETINGS & EVENTS



NOTES FROM PRE-SESSION
QUESTIONNAIRE

18 months ago.....

Secure your organisation



Identity is your new perimeter

Use MFA if not already

ALL your people should use org identities not personal ones (inc. key volunteers and trustees)



Consolidate your IT to smallest possible number of integrated cloud-based solutions

Reduces potential attack surface

Reduces tech costs

Reduces complexity to manage



Be aware of Shadow IT & integrate

Increased risk

Increased cost



Update your policies and approaches

BYOD

Use of personal devices

Data Protection



Train your people

Safe access to organisation data and systems

Data protection when working on personal devices

What to do if there is a breach / they have concerns



If you're not sure how secure you are?
.....don't find yourself on the front page

Cyber Essentials Certification

<https://www.ncsc.gov.uk/cyberessentials/overview>

Call in an expert

18 months ago....

Support Your People



Engage:

Understand where the problems and challenges lie

Identify the best solutions

Communicate regularly to keep your people connected and engaged



Provide:

Provide the tools people need to keep them productive and engaged

Software

Laptops

Headsets

Broadband / Mobile data allowance

Chairs, desks & monitors for longer-term hybrid or home workers



Educate:

Find and share good online training resources – lots available, many free or low-cost

Create simple training paths to make it easy

Create how-to guides for the areas most people need help with

Identify and enable Champions – to share the load



Connect:

Any staff who aren't digitally connected today

Key volunteers

Trustees

Train & support them as staff

White-glove approach for trustees and VIPs

Communicate regularly to keep all your people connected and engaged

Create a successful new non-profit workplace

Embrace Hybrid Working

- Combine the best of remote and on-site working
- More productive people
- More engaged people
- Increased hiring pool
- Increased client base
- Reduce or change use of physical buildings

Continue Digital Transformation

- See IT security as a business risk
- Move to the cloud
- Consolidate your platforms
- Make the most of the solutions you have
- Provide great training and support

Involve Your People

- New new normal working practices
- New new normal service delivery
- Align technology to business need
- Update onboarding approach for new staff and volunteers
- Communicate, communicate, communicate

Embrace Change

- This is the next step on the journey, not a destination
- Adopt a growth mindset and grasp the opportunities / learn from your mistakes

How has technology changed your working environment since the start of the pandemic?

Now operating 50% remotely using Teams

Using Skype / Teams / Slack / GoToMeeting
Now need to consolidate down to the best set of tools – having scrambled to get them up and running

Increase cyber security – both applying controls and increased staff and volunteer awareness

Move from on prem file storage to SharePoint & others

Move to more online interaction has increased client and beneficiary engagement and staff involvement in some activities

Mis-match between exec wanting people back in office and staff who would prefer hybrid

Remember to manage the security of your mobiles

Productivity is up but we've had to build in those 'watercooler' moments virtually.

Onboarding staff and getting them up to speed

Providing home-working kit so people can work productively

Capitalise on the willingness and openness to change – combine the gives and gets of hybrid working

Our team have been agile and open to change in many ways because of tech but not realised it!

We used to do a lot of face to face training but now run a **Webinar Wednesday** every week at lunchtime for training instead.

Since moving back to the office we have **gotten out the habit of printing** and can now work better without paper in some cases.

By partnering with another organisation, we were **able to produce high quality digital resources that we were never able to do before.**

We are **accelerating migration of on-prem servers**. It is becoming increasingly inconvenient to have some data which is hard to access.





Over to Jonathan

Jonathan Cook, Insight-ful

Fundraising innovation, Charity insight specialist





INSIGHT-FUL

INSIGHT-INNOVATION-IMPACT



Fundraising as per normal

All fundraising running as per normal



All in person fundraising cancelled

Community, challenge, & high value events cancelled, street fundraising, D2D, furloughed fundraisers - social groups and communities appear



Replicated in person fundraising

Runs, walks, legacy events via Zoom



Identified digital only fundraising

Game-a-thons, quizzes, escape rooms, streaming



Hybrid fundraising

Marathons, walks, cycle rides

The Journey We've Been On

Could We
Have Coped
Five Years
Ago?

Technical
innovations
have made
things
possible



Mobile



STRAVA



Social



givepanel

Online
Promotion



eCommerce

eventbrite

Streaming **zoom** **fundraising**
everywhere

TILTIFY

PATREON

Ko-fi

What innovative
fundraising ideas
have we developed
with these tools?



Murder mysteries



Live Streaming



Escape rooms

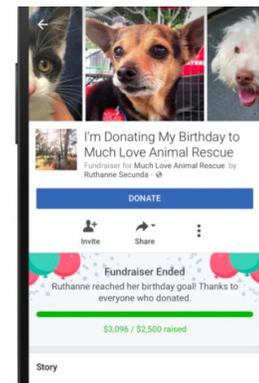


Online legacy events

givepanel



Facebook Challenge Events



Birthday fundraisers



Make a Snowman



Hybrid Marathons



Quizzes



Wine tasting



Game-a-thons



Live Shows

What do these
ideas have to do
to continue into
the future?

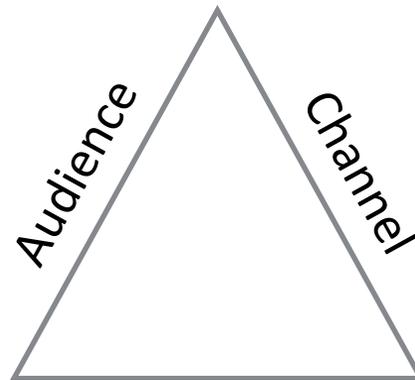
Who are the audience this product is targeted at?



Game-a-thons



Murder mysteries



Product

Does it fit with the audience?

Is it promoted via a channel that audience use?



Online legacy events

Mobile mobile mobile

They need to be free or
very cheap to use

Do we have to replicate offline
events online?

Must fit in with
people's lives

QUESTIONS



Breakout Room Discussions



What do you think are the top 3 ways that your organisation is adapting/will adapt as regards new ways of working and your working environment, as we (eventually) emerge from COVID-19?

What new approaches to fundraising and income generation have you adopted and innovated with that you think will stick, as we (eventually) emerge from COVID-19?

Poll, Thanks & Goodbye!

Upcoming events...

2 February 2022 – Data Strategies and Cake

www.adaptaconsulting.co.uk/adapta-events

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