Digital Futures
A Non-Profit Deep Dive on Digital Transformation and Change Management
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INTRODUCTION

If there’s anything to learn from the events of the last year – and of course, there is much to learn – it’s that change is inevitable, and we must embrace it and adapt.

Whether that change is forced upon us due to events out of our control or is a transformation that we choose to undertake – the ability to be flexible and move with the flow is beneficial for any organisation.

Earlier this year we asked non-profit professionals to tell us about their current working conditions, how they have changed during the pandemic, and what they thought the future of work looked like. You can read our full Future of Work report here.

A huge majority of respondents (90%) told us that they believed flexible working policies are the future, with 87% saying that technology has helped them to work more effectively during Covid-19.

64% of respondents said their organisation had intentions to invest more in tech, and 42% said they planned to begin digital transformation projects.

In this eBook, we have delved further into finding out what digital transformation means for the sector. A number of non-profit organisations have shared their stories of ‘going digital’ with us, and we have some how-to pieces of advice from industry experts.

But firstly... what is digital transformation?
What is Digital Transformation?

Digital transformation is all about making lasting change happen within an organisation and being digital by design; it’s about the use of technology throughout your non-profit, and more.

It’s about constituents, staff, processes and culture and how they all work together.

digital transformation

noun
1. The integration of digital technology into all areas of a business, fundamentally changing how you operate and deliver value to customers.
2. Using technology to solve traditional problems and enable new types of innovation – not just simply supporting current methods.
3. The radical rethinking of how an organisation uses people, process, and technology to dramatically change business performance.

It can sound like a daunting and overwhelming prospect – particularly if you don’t consider yourself particularly ‘techy’, but not being a digital expert shouldn’t stop you from undergoing a digital transformation. A great leader doesn’t have to know everything, instead they need to be able to identify key areas that can be improved and identify the resources required. Sometimes these resources may include needing to hire new talent, or to invest in the people you currently have.

There are so many elements to digital transformation, and we look to explore them in detail throughout this eBook; from the Jinja Educational Trust who share their journey to becoming digital, to Grief Encounter adopting a virtual event strategy, to Queen’s University Belfast who have embraced cloud technology in a way that enabled them to thrive even during the pandemic.

In our ‘How-to’ section, Emily Casson from Cats Protection shares her tips for managing a team remotely – an important consideration for any organisation when they adopt flexible working, Maddie Stark from SCVO gives expert advice for any non-profit beginning a digital project, and Harry Richardson from Blackbaud’s HR team discusses the important consideration of change management.

To begin, digital expert Zoe Amar gives us a round-up of the key findings from the Charity Digital Skills Report 2021.

We hope you enjoy!
Why Fundraising Software Matters for Your Nonprofit

Non-profit Digital Stories
1. How Digital Skills are Changing Across the Charity Sector

Zoe Amar, Director, Zoe Amar Digital

Zoe Amar is widely regarded as one of the charity sector’s leading digital experts. She founded digital agency and social enterprise Zoe Amar Digital in 2013 and was recently voted one of the 25 most influential charity leaders by Charity Times. Zoe and her team, in partnership with The Skills Platform, produce an annual barometer of how charities across the UK are using digital, The Charity Digital Skills Report, and here she shares a sneak preview into this year’s results.

What can you do now that you couldn’t a year ago? Whether it’s confidently juggling slide decks and online whiteboards on Zoom calls or running an online event, I bet you’ve gained tons of skills during the pandemic. And you may have been taken aback by how your colleagues are using technology, doing things they would never have done previously. I know one charity who was really nervous about digital but smashed their target for their very first online fundraising campaign. If we multiply those new skills up across the sector what do they tell us about the future?

This is the big question we’re trying to answer through The Charity Digital Skills Report, our annual barometer of skills, attitudes and support needs across the sector. Now in its fifth year, we knew there was an exciting opportunity to take a snapshot of how the sector had changed as we all came out of the last lockdown. You can read the full report by clicking here.

Below are some of the key findings and what I think they tell us about where the sector goes from here.

- Basic digital skills look to have improved this year. Only 2% have rated themselves as poor so far, compared to 18% last year. This says a lot about how everyone has had to get to grips with digital in order to do their jobs. A great question to explore with your colleagues is how they’ve learned about digital, and what kind of learning methods they have found most helpful. This will not only help you plan digital skills learning opportunities for your team but is also likely to reveal surprising ways in which people gather skills. For example, ever since we ran the report we have found that informal learning such as tips passed on by a helpful colleague in passing can be a transformational moment in building people’s knowledge and confidence. Continuous learning is powerful.
Over half (54%) so far say that they anticipate investing more in data skills and infrastructure (CRM, analytics, etc) as we emerge from the pandemic. This finding reminds me so much of Blackbaud’s own Future of Work report which revealed that 64% of decision makers were more likely to invest more in technology. In that same report 42% of charities said that they would also begin digital transformation projects. The big question to explore in your organisation is where your leadership team is going to prioritise investment, what their criteria is for the decisions they will be making about digital and what they think the impact will be on staff and the people who your organisation supports.

51% are worried about excluding some people or groups from their services in relation to digital. Digital inclusion has been a huge issue for us as a sector and also a society for years, but it wasn’t until the pandemic happened that we were forced to confront it. If you weren’t able to get online during the pandemic it was hard to access health advice, shopping and other vital information and services. So how can you help people who may not have the devices or data they need to access your support? Organisations such as The Good Things Foundation and FutureDotNow can help you. Funders need to step up and invest so that charities can continue supporting their communities with training, devices and data.

48% of the charities we have spoken to would like their CEO or board to develop, ‘A clear vision of what digital could help them achieve.’ In the report you will see that there have been some exciting and positive changes about how the sector is now using digital, yet there are still many foundations that need to be put in place. One of the most important of these is good digital leadership. The best way you can tackle this is to keep guiding and supporting your leadership team, offering to brief them on the latest digital developments and recommending how your charity can use digital to meet the needs of the people you serve more effectively.

I can’t wait for you to read this year’s Charity Digital Skills Report and I look forward to hearing what you think of it. You can read the full report by clicking here now.
Lorna Barker is the Country Manager at Jinja Educational Trust (JET), working in Jinja, Uganda, to actively increase access to quality education for all. JET is run by a strong and proactive team based in Jinja, with trustees in the UK.

The multitude of issues created by the Covid-19 pandemic on both a local and international level were seen by many as an obstacle to achieving goals. Lorna chose to see the situation as an opportunity to take stock and consider new ways of working, including how to use digital methods to increase the organisation’s service offerings. Here she explains how the charity are expanding their reach into the digital world, and what challenges they face...

Question: Tell us more about your charity and what you do

Answer: JET is focused on improving the quality of education in the schools we partner with. We do this through running an education programme, a large part of which is teacher training.

I’m responsible for the successful running of all programmes in-country, the budgets, finances, managing the team - in short, everything! I get involved in some fundraising and do a lot of networking inside and outside of Uganda and report regularly to the trustees.

Q: How ‘digital’ is your organisation?

A: To some extent, we have had to work ‘digitally’ for a while now, as I’m based in Uganda and the trustees are in the UK; we have always used basic digital tools to communicate. However, because of lockdown – much like everyone else – we were forced to turn to Zoom and Whatsapp to conduct video meetings. It can be difficult, because not everyone is digital savvy – or at least they don’t think of themselves in that way, but it’s something that we’ve working on. We also have the obstacle for the Ugandan team of the lack of access to wifi, but we are able to top up their data allowance when it’s necessary for us to connect. Although that’s less of an issue to consider in the UK, it’s always important to think of how staff can get online and any access issues they may have.

Q: What new digital ways of working have you introduced?

A: As well as using digital tools to help us connect better as a team, I have also been updating our social media channels to help promote the charity and gain more supporters. I took over our
Facebook and Instagram accounts and I’m currently looking into how I can use YouTube to our advantage.

Our trustees do a fantastic job fundraising, and we have some very, very loyal supporters that regularly donate to us in a traditional way. Of course, this is fantastic, but I want to widen our reach and begin to fundraise in ways we haven’t done before - this means communicating differently and using new channels.

We recently ran a whole session on digital fundraising for the team in Uganda, and it was great to see them get excited about some new ways of working.

We got involved with The Big Give for the first time at Christmas – it’s an online match-funding platform, and the campaign we ran gave us an online reach that we’ve not been able to explore before. We raised enough money from the campaign to fund the first stage of a new IT project in Jinja, and I am beginning to work on a plan to take part in the campaign again so we can raise even more funds.

We’ve had a JustGiving donation button on our website for a while now – and we’re trying to draw more attention to it on our homepage.

These may seem like small digital advances, but for a small team like ours, we are doing the best we can.

We are also in the process of moving many of our services online. We were fortunate to get contacted by a group of local IT specialists, with a project manager here in Uganda who had formed a group to provide not for profit advice. We worked with them to develop a project plan to network our Resource Centre in Jinja, connect it to the internet and make online teaching and learning possible. They advised us on things such as the infrastructure we needed, down to taking us through the tender process for which provider to use. We were making great headway with this until the lockdown forced us to stop, but it’s something we hope to pick back up later this year.

Q: What advice would you give other small charities taking their first steps into digital?

A: I would say stick with it and don’t be afraid to try new things. Be open and creative; be resourceful; take outside help when you can – and learn from other organisations.

Developing the digital skills of your team is necessary, and it’s something we are working on. For example, now we are back in lockdown in Uganda, we are going to test out using Slack for collaborative working. We’ve taken advice from those with the skills whenever we can. As a small charity we don’t always have the time and resource in-house, so when people with the knowledge offer to help, then we take it.

Our digital transformation is proving extremely challenging due to our current circumstances – but it is something we believe is necessary to move forward with our mission and achieve more for our service users.

As the world changes and working ‘digitally’ becomes standard practice, I want us to be leading the way and setting an example.
Like all institutions, Queens University Belfast has faced many challenges and setbacks during the last year because of the pandemic. Fortunately, after already beginning talks with Blackbaud before the first lockdown happened, QUB were already prepared to embark upon a new digital strategy which ultimately has allowed them to thrive during what has been undeniably a difficult time. Jonathan Doonan, Development Services Manager tells us how moving to the cloud could not have come at a better time...

**Question:** Tell us more about your organisation

**A:** Queens University Belfast (QUB) is a Russell Group university founded in 1845, focusing on educating world class students in the highest possibly facilities.

We have a foundation board that is responsible for all fundraising in the UK and a foundation in the USA where all our philanthropic income from the US comes from. We also have a development and alumni relations office with 36 members of staff, an alumni and supporter engagement team, a strategic engagement team that focus on key territories, and I lead the Development Services team that encompasses everything else.

**Q:** How did you begin your digital transformation?

**A:** In early 2020 we had started to discuss our plans to move our CRM system to the Cloud with the team at Blackbaud. At the time we were using The Raiser’s Edge with three servers running 24/7 which were hosted in-house. It was a very good system and had been reliable, but it was an ageing hardware and we knew that the clock was ticking. We would either have to spend the money to upgrade the hardware or explore moving to Raiser’s Edge NXT, hosted in the Cloud.

There were other contributing factors that made us realise that moving to the Cloud would be the best solution – for example, our database team was a team of just two, and the sheer amount of server maintenance was getting more and more onerous. There was also the issue of cyber security and making sure we were up to date with that – it was giving us a lot of pain points and extra work we just didn’t need.
We were having to do nightly back-ups, and should the system have gone down, we would have had to purchase new hardware which would have taken a couple of weeks to get us back up and running.

In short – we were very ready and very grateful to migrate across.

However, what we didn’t expect is that we would be undertaking this huge digital transformation project during a pandemic. When the lockdown began, staff had to start working from home – and the need for the project became even more apparent.

Q: How did you handle the process of the transformation

A: After the initial conversation with Blackbaud, we got involved with a lot of planning and working with the team to agree how and when we would move across. The great thing about the system is that the team at Blackbaud are able to do numerous test runs where you actually set up a test sand pit environment prior to going live, so we had been through the entire process twice before we actually did go live to Raiser’s Edge NXT in January 2021.

For the actual implementation, we had everyone choreographed down to the last minute, so everyone knew exactly where they should be and what they should be doing. This was a huge migration, and it wasn’t to be taken lightly – with this amount of data, you can never predict how long it will take. But – because we were so prepared and had liaised so closely with Blackbaud, going live was a great success. In fact, one of the most positive points of feedback I heard was from our Director, who said it was the least impactful migration she had ever experienced – and that was a real compliment!
Everything went so smoothly, and it was all due to the careful planning and the team at Blackbaud who had been through this many times before.

Another piece of advice I would give to other institutions considering moving their CRM to the Cloud, in addition to the careful planning involved, is to create a real training programme for your staff. We purchased Blackbaud Learn in 2020 and we've renewed again for this year, and prior to the implementation, we had everyone in training how to use the system. We created a training log for each person and at the end of the year I worked out that we had done 600 hours of training altogether – I believe it was a very good investment.

Q: What are your future digital plans?

A: Up until now, the only areas that have had access to the CRM was finance and development services, but since we implement Raiser’s Edge NXT, we have also rolled it out to the Vice Chancellor’s Office. This is a big and positive change for us, and we have more plans to carry out an institutional rollout.

The way Raiser’s Edge NXT is set up, we are able to configure specific views, so we can provide the access each department needs, and it gives us more control.

We are now working on our five-year plan and looking at what we need in terms of technology. Having Raiser’s Edge NXT opens up a lot of options for us – to have a company come in and say ‘we’re fully integrated with your product’, we know that means no messing about with ftp files and no data loss, and that’s priceless for us.

For an organisation considering a move to the Cloud, I would say – don’t underestimate how dramatic the change will be – it will provide you with lots of opportunities, but there is a lot of work to do. With good planning and a team that knows what they’re doing, it can easily be done.

We never thought we’d be migrating in the middle of a pandemic with all our staff working from home – if we can do it, then anybody can.

"For an organisation considering a move to the Cloud, I would say - don't underestimate how dramatic the change will be."


4. Our Digital Story: Virtual Event Success

Lou Scott, Head of Fundraising, Grief Encounter

Lou Scott has been working in the fundraising sector for almost 25 years and she is currently the Head of Fundraising at Grief Encounter. Traditionally a charity with a reputation for holding large and hugely successful face-to-face events, Lou and her team were forced to think differently during lockdown. Here, she describes how the charity turned to virtual events for the first time...

Question: Tell us more about your organisation

A: Grief Encounter has been providing free, professional and specialist bereavement support services for over 15 years. Our mission is to give every child and young person access to the best possible support following the death of someone close. It’s not unusual for us to support a bereaved family for two or more years – long term care from fully qualified therapists is our focus. We set up a helpline in 2019 called grieftalk and this has enabled us to now reach every single county in the UK, ensuring our services are fully accessible regardless of where you live.

We raise funds from a wide variety of income lines, mainly Trusts and Grants, Treks and Challenges and a mixture of events to suit our broad donor base. Historically, certainly from a fundraising perspective, we have not been a digitally focused charity. The main reason for this is probably because we have a large number of major donors in our portfolio – and so a lot of what we do is relationship management through face-to-face meetings and live events.

We hold a very significant gala dinner every two years and our fundraising model has been based around this flagship event for some years. Not only does it raise essential funds, it a great way to steward existing donors and introduce new potential donors to our charity. Our last gala dinner was held in 2019 at The Roundhouse in London and raised £1.3M, so we had huge expectations for the next event in 2021. However, when the pandemic hit, we realised we needed to change our strategy. Fast!

Q: How did you begin to work more ‘digitally’?

A: When we realised that the next gala dinner wouldn’t be going ahead as normal, we began to explore ways in which we could do it online. We could see that a lot of other charities in our network were doing online events, and we attended a lot to see how they worked. We spoke a lot to many different organisations – production and event companies, who they themselves were beginning to change the way they worked and had invested in different platforms to help charities to transform their events. To be honest, it made us a little nervous that it was still at the testing stage, and we also heard about a lot of things going wrong – we didn’t want to be seen as...
amateurish. Feedback from our supporters seemed to tell us that they wanted to attend, and would still give us a donation, but would perhaps switch off after five minutes. It appeared to be a lot of work – and we are not a digitally experienced team.

After lots of meetings, we took the decision not to go ahead with the online dinner. We didn’t want to just follow the crowd and have it go wrong. We had some contingency plans for funds including the introduction of a patronage programme – we asked our supporters for their support by way of a Patronage donation without an event and the vast majority said yes.

However, we knew we had to do more. We need at least £100,000 a month to survive, and we look after families for around two years; they rely on our services and we need the funds to fulfil that commitment.

We considered a crowdfunding event – and people got very excited by this. We saw schools and other small organisations raising so much money, it seemed like something we could do. I thought about it long and hard and the conclusion I came to was that crowdfunding was a good option for an urgent crisis situation, but that wasn’t where we were at. Our way of working is to build long lasting relationships – and we needed to find that balance between digital and maintaining those relationships.

So that’s when we came up with the idea of a virtual memory walk.

"We encouraged our supporters to share, share, share."

Q: How did your digital strategy become a success?

A: It was coming up to a year of the pandemic, we talked about doing a mass participation event but we’d never done anything like that before, and we’d certainly never reached out digitally to our supporters. We decided we would organise a virtual in memory walk – named the Forget-Me-Not Walk after the packet of seeds we send out to the families we are supporting as part of our grief relief kits.

We began by reaching out to our closest supporters, then we got onto social media and used our brand new website to create an online registration process. We encouraged our supporters to share, share, share. I wanted this to be a national campaign – and soon it just took off!

We also sent out a digital e-newsletter to our database and asked people to share this too but knew that a one off e-newsletter reaching out to our existing database alone would not enable us to reach the number of people we needed to. So we sent our regular comms, updated everyone and added lots of visual content and kept asking staff, volunteers, friends and family, trustees, supporters, corporate partners – everyone - to share far and wide.

That’s when I struck on the idea of building a digital community. We asked people to pay £5 to register for the walk, and in return we sent them a packet of seeds, a Grief Encounter baseball cap, and a branded doggy bandana! We asked them to take photos and videos of them getting involved and wearing the items – and they did. People began to share and get involved and it just worked.
We worked with JustGiving to build a campaign which really helped because it meant that all the fundraisers involved could see each other’s pages and view the overall fundraising target. I really felt it was important to inspire them and make them feel like they were part of something bigger.

It was an overwhelming success. I thought we would make around £10,000 and in the end we raised a staggering £200,000.

Q: What advice would you give other organisations looking to introduce digital ways of working?

A: Don’t lose the roots and core of who you are as an organisation and why you’ve been successful to date. Relationships are the key to our success, and we work hard to build relationships with those supporters who want to be with us on a journey so this remained our focus, even with a digital campaign. Our strategy is to engage with people on a long-term basis. Ironically, as a fundraiser, it’s not just about the money, it’s about the people. People always come first. Do your job well and the donations will follow.

We had to be digital in a way that worked for us, and we had to find the right balance. It has huge benefits and cost efficiencies – but not everything can be digital, and we have to be selective.

We also know we have a lot of upskilling to do and much more we can learn. It’s tough when you are a small team, and many of our fundraising staff have been furloughed throughout the pandemic – so adding in acquiring more digital skills is just beyond our capability at the moment.

Overall, this past year has shown us some very different ways of working. It’s been great for us to try new things. Sometimes charities get stuck and very used to doing things a certain way. This has really pushed people’s comfort zones.
Expert How-To Tips
5. How to: Get Your Organisation’s Transformation Right

Maddie Stark, Digital Development Worker, Scottish Council for Voluntary Organisations (SCVO)

A specialist in charity digital evolution and co-facilitator of SCVO’s ground-breaking Digital Senior Leaders Programme. Maddie has a strong background in supporting voluntary organisations in Scotland to embrace digital to manage and influence organisational change and culture. Here she gives us her top six tips on leading your organisation through a digital transformation... or is it an evolution?

Transformation of any kind can be difficult, daunting and painful. However, at the simplest level, transformation is about doing things differently. It is not rocket science. Digital transformation is about understanding how technology might contribute to a solution and has people at its centre.

As co-facilitator of SCVO’s ground breaking Digital Senior Leader programme, and mentoring over 200 Scottish Charity leaders on their digital journey, I have identified six top tips to support you and your organisation to do things differently as you embark on your digital transformation journey.

Tip 1: Evolution not Transformation

‘Transformation’ suggests that we will go to bed one thing and wake up the next day as something completely different. This idea can fill even the most hardened hearts with fear. I prefer to use the word ‘evolution’ – as by definition, it is the gradual development of something. As a concept it has more positive connotations i.e., continuous, incremental changes that happen over time.

‘Digital Evolution’ allows us to introduce the concept of iterative working. Taking small steps and making changes as we go along; as opposed to ‘Digital Transformation’, making a big dramatic change all at once. Working iteratively allows for greater teamwork; the right people, at the right time doing the right things, collaboration, and flexibility.

Tip 2: Change the Plan but never the Goal

Five-year strategies are no longer fit for purpose in this constantly changing environment, with new expectations, processes, and ways of working. A clear attainable goal helps focus attention and reduces project creep, gives a clear sense of what people can say ‘yes’ and by default ‘no’ to, and allows for progress to be measured. A clear goal allows us to understand what it is we want to achieve, even when our route to achieving the goal changes.
Tip 3: Staff Skills: Know how Digitally Skilled your Workforce is

One of the biggest causes of failure in any digital evolution project is fear. Fear that as a member of staff I will be asked to do something I do not know how to do.

By carrying out a simple staff Digital Skills audit, we can quickly identify where the gaps in skills are and where people with extra skills and confidence can support their colleagues.

Tip 4: Understand the Problem, Design the Solution

Spend the most time possible discovering and defining the problem. Be clear where digital will bring benefits and to whom. If digital allows staff to increase their capacity to get on and do more of the work they were employed to do, providing a better service for the people they serve, then do it! If not, do not do it. Sometimes digital is not always the answer.

Challenge and test assumptions, ask:
- What do you know about the problem (backed up by evidence)?
- What do you think you know (gut feel, hunches – does this need to be checked and validated)?
- What do you not know (but wish you did)?

Tip 5: Adapt Agile Methodologies

Always be data driven, test with intent to challenge assumptions and perceptions. Carry out small tests with small groups regularly and share the data. Don’t be afraid to learn from mistakes and find out what is working- carry out retrospectives regularly and ask:
- What’s working?
- What’s kind of working?
- What’s not working?

Celebrate the work that is ‘working’, focus on the work that is ‘kind of working’ and ditch the work that is ‘not working’. Celebrate success, however small.

Tip 6: Keep it Simple: Keep it Low Cost and just Start

Try things that can be introduced now, that require no additional budget, and only a small amount of time. Funding and time are two of the most common reasons used to stave off any digital evolution project.

Not knowing where to start is the third most cited reason, SCVO’s Digital Checkup tool can help identify the strengths and the gaps an organisation is facing with digital technology and to start the conversation.

As non-profits, we operate in a constantly changing environment. Organisations that truly understand the problems people face, put user needs first and look at how technology might contribute to a solution are the ones that will adapt and thrive in this changing environment.
6. How to: Manage a Team Remotely
Emily Casson, Digital Marketing Manager, Cats Protection

Emily Casson is a multi-award winning fundraiser, digital expert and speaker. She is currently Digital Marketing Manager at Cats Protection and has been named one of Fundraising Magazine’s Top 25 fundraisers under 35 and Best Digital Leader at SocialCEOs. Described by colleagues as the ‘Queen of Flexible Working’, Emily shares her top five tips of how to manage a remote team....

As many organisations discover, with digital transformation comes the ability to work remotely. Using digital communication tools and having cloud technology allows people to effectively work from anywhere. As a manager, this can be a huge shift in the way you have previously worked. You are no longer in the same room as your team so don’t have the same visibility of their working as you once did. Here are my top tips on how to manage your remote team with success:

Tip 1: Understand your Team Members’ Love Languages

I’ve worked remotely for many years, way before the pandemic hit and my team is remote by design. We picked the best people from around the country, regardless of where they live and out of the 12 people working for me, I haven’t actually met 10 of them face to face yet!

But we have really managed to create a sense of ‘team’, despite our distance. One way we do this is to get to really understand how we all prefer to work, so we can get along in the best way possible. We create a ‘user manual’ for each member of the team that includes information about how we prefer to work such as communicating via a quick instant message, or a longer email, preferring spontaneous catch ups or being given a heads up before meetings.

It’s important to ask what stresses your employees out – I found that asking someone for a quick chat often left them worrying about what was about to be said, so that was one thing I could change.

What remote working looks like for one person might be difference for someone else, so it’s crucial to get to know everyone’s individual needs.
Tip 2: Trust is Essential

For me, it doesn’t matter where you are physically doing your work – as long as the work is getting done. I am well known for having an inability to sit in one place all day – I might even get work done while going for a walk or sitting outside. It’s just very important that you trust your team to do their work and allow them the freedom to get on with it.

Encourage them to keep their calendars up to date so you can see where people are and what they’re doing. My team work core hours, but how they do that depends on them – some of them are morning people so start early, some of them like to do yoga first thing, so might start a little later. As long as they keep everyone else updated then it doesn’t matter. And you can soon tell if people are not doing the work.

We have a giant project planning spreadsheet so everyone has a good handle on what’s happening, and as a manager, I have oversight of that and I’m not left wondering what everyone is doing.

In my experience, people really repay the trust you put into them and it makes them feel very valued.

Tip 3: Over communicate

There is great value in checking in on your team regularly to ask how they are. You have to be more proactive about this than if you were sitting opposite to them at a desk. You should always have time for them to come to you with any needs.

There is nothing wrong with over communication – as much as you think you are telling your staff – double it. While everyone is remote, there could always be someone who is feeling isolated. Some will struggle and won’t let you know, so you should communicate throughout the business as often as possible. Even if there is no update, you can update by just letting them know when there will be an update.

Internal communications are very important. This doesn’t mean you have to set up an all-staff newsletter, it can be something more informal, but it’s really worth putting in the time and effort.

Tip 4: Encourage Switching Off

It is much harder to create boundaries when you are working at home, and it can be difficult to switch off at the end of the day. I’ve got a big box, and when I’ve finished working, the laptop goes in – and then I don’t feel like I need to work in the evening. As a manager you have to model that. If I was working every evening and sending emails to my team, they would feel the expectation to copy that and do the same.
7. How to: Guide your Organisation Through a Culture Change

Harry Richardson, HR Business Partner, Blackbaud

Harry Richardson has worked in HR for a decade and has been a senior member of the People Team here at Blackbaud since 2019. As a natural evolution in workforce strategy following the lessons of the pandemic, Blackbaud has now adopted a hybrid model of working - taking ‘Together Anywhere’ as it’s guiding principle. Empowering employees to find a workstyle and schedule that best optimises for productivity, life balance, happiness and business outcomes, hybrid working marks a paradigm shift for Blackbaud and the many like-minded companies who see hybrid as the future of thriving work culture. Such a big transition calls for considered change management, and here Harry describes how Blackbaud are doing this while giving his tips on how any organisation can best navigate a culture change...

1. Communication is Key

It’s really important that employees are brought along on the journey for such a big company change, so creating interactive forums to share honest messages is vital. Much of the video meeting software available allows you to run polls and for those watching to ask questions and share comments, so it can be more about everyone interacting rather than just one person speaking.

Good leadership is about being honest and sharing that you haven’t always got everything figured out even if you have the direction of travel decided, so asking for feedback and ideas on any change journey is imperative. Our new workforce strategy is actually based on a digital poll with our global workforce, to find out how people wanted to work going forward.

We’ve found that being creative with our communications has really worked; for example, we often send out video messages because we’ve found they are more interesting for people to engage with than lots of emails.

You can also test the amount of communication that works best for your organisation and team. Often there will be a very regular cadence of communication at the beginning of any transition or project, and then this will settle as time goes on.
In the local team I work in at Blackbaud, we still hold 15 minute ‘stand-up’ meetings every morning because we found that really works for us. However, getting ‘Zoomed out’ with too many video meetings in a day is an issue companies need to be mindful of.

You need to strike that balance – keeping people informed, but also giving them the space and grace to do their job and support their individual wellbeing.

2. Create Space for Human Connection in a Digital Space

When more people are working remotely and are no longer gathered all together in one physical space, you have to be very intentional about connecting. When everyone worked in an office, there were plenty of opportunities to socialise and get together off the cuff – you could suggest going for lunch together or heading to the local coffee shop. However, when everyone is remote, it is much more isolating, so you must be intentional when facilitating time for collaboration, socialising and unwinding.

We have introduced an initiative called ‘Coffee Roulette’ – employees sign up and they get matched with someone different every week. They meet via a Microsoft Teams video call to chat for around 15-20 mins about anything they want to. It doesn’t have to be about work; it’s just a way to connect and chat with someone you wouldn’t normally get the chance to. It’s worked really well, and we even rolled it out globally for Blackbaud’s 40th anniversary – I’ve had the opportunity to chat to colleagues in New Zealand, Australia Canada and the United States through this, making connections I would never have previously.

On a smaller scale, it’s also about allowing time at the beginning of a meeting for people to engage in a little small talk, and ask how each other is, before getting down to the nitty gritty of the meeting. Taking a few minutes to have that social interaction is so important.

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3. Focus on Wellbeing

When you’re going through a digital transformation, this becomes so much more important because your employees are experiencing a huge change but you can’t actually see them in person. Unfortunately, it can be a lot easier for wellbeing to slip – so many of us have struggled with boundaries working from home during the pandemic, and falling into the trap of working through to burn out.

Although we are leaving lockdown behind, remote working is here to stay and it’s important to encourage a focus on wellbeing. This could be keeping up with the exercise habits we’ve developed – going for a daily walk at lunchtime for example. Even just getting up from your desk or sofa regularly for a screen break can make such a difference to how well you feel at the end of the day.
We are currently running a programme called ‘Balance’ and we’ve dived deep into all sorts of things related to wellbeing. For example, we’ve had sleep and nutrition experts deliver webinars for staff, rolled out journaling classes, and had our first two annual Step Challenges!

4. Allow for Flexibility that can really Help

By going through this change and allowing people to work from home using digital tools, a rethink of the hours we work is also important. There is no longer a need for all employees to sit at their computer from 9am to 5pm in the traditional manner of working.

The beauty of this change means that people can be flexible in their working days – if they have a call with a different timezone they can start early and finish early, for example. If someone needs to take a break at 3pm to pick the kids up from school, then this can also work. If running really helps your health and wellbeing, a slightly longer lunch break to allow for this is fine as long as contracted hours are accounted for over the course of the week. We need to focus on managing the output of someone rather than monitoring that they are online every minute from 9-5. Of course, if we have meetings that need to be attended, business needs must be met, but greater flexibility and empowerment for employees shows trust and focus on the right things – output over controlling the input.

5. Tackle Resistance with Evidence

Going through any change will always be met with some resistance or opposition and it’s important to understand the reason why someone may not be so keen for the change. If the reason is that ‘we’ve always done it this way’, then I don’t think that’s a good enough reason not to do things differently.

The last year has actually given us a great opportunity to test if flexible working can be a success – because many of us were forced to work at home during the lockdown. We, like many other organisations, have found that productivity was up – which is a great piece of evidence to convince that this can work. If there is an issue with productivity, then you should look at how you are supporting your people and if they are clear on what the expectations are, rather than just reverting back to the old model.

Another reason to give this a go, is that flexible and remote working opens up a much wider talent pool for your organisation. The world is changing, and new recruits are looking for a greater degree of flexibility and trust from a company. You can also recruit from anywhere in the country if your workforce is remote – geography is no longer a barrier to talent.
SECTION 03

Resources and Research
Resources
A round-up of our favourite digital tools to help with your digital transformation:

Video conferencing software:
• Zoom
  https://zoom.us/
• Microsoft Teams
  https://www.microsoft.com/en-gb/microsoft-teams/group-chat-software
• Webex
  http://www.webex.com/

Project management software:
• Trello
  https://trello.com/en
  A collaboration tool that organises your projects into boards that you can share with other members of your team. It’s free to sign up to.
• Microsoft OneNote
  A digital notepad that saves and syncs your notes as you work. Notes can be shared with other users.
• Microsoft To Do
  https://todo.microsoft.com/tasks/
  Digital to-do list which helps you track your outstanding tasks and tick them off as you complete them.

Collaboration software
• Slack
  A messaging app for business.
• Mural
  https://www.mural.co/
  A virtual tool that enables teams to collaborate visually and brainstorm solutions to their problems or challenges.
• Miro
  https://miro.com/
  An online collaborative whiteboard.

Presentation software
• Mentimeter
  https://www.mentimeter.com/
  For interactive presentations.

Fundraising software
• JustGiving
  https://www.justgiving.com/
  The world’s leading online fundraising platform.
• Blackbaud Raiser’s Edge NXT
  https://www.blackbaud.co.uk/products/blackbaud-raisers-edge-nxt
  Cloud-based fundraising and donor management software solution built specifically for non-profits and the entire social good community.
Research

• **Future of Work Report 2021**
  https://www.blackbaud.co.uk/industry-insights/resources/the-future-of-work-2021
  Discover the changes that charity professionals are planning to implement over the next 12 months. Find out if flexible working is here to stay and how the non-profit sector responded to COVID-19. Over 800 people from across the third-sector told us their ideal long-term work practices and what they really feel about their organisations’ response to COVID-19.

• **The Status of UK Fundraising Benchmark Report 2020**
  We surveyed 2,000 fundraising professionals in partnership with the Chartered Institute of Fundraising to understand how the UK’s not-for-profit sector responded to COVID-19 in 2020, and uncover how they adapted their fundraising practices. Get the comprehensive view on how your response to Coronavirus compares to the sector, and measure your organisation across areas such as income, strategy and digital innovation. The 2021 Report will publish in September.

• **The Charity Digital Skills Report 2021**
  The definitive survey of the digital skills landscape across the third sector produced by Zoe Amar Digital and the Skills Platform, Now in its fifth year, the Report provides an annual barometer of the state of digital skills within the charity sector.

• **The Digital Maturity Framework**
  https://digitalmaturity.org/digital-maturity-framework/
  The framework identifies 15 competencies which are the key aspects of digital maturity, and describes five levels for each of these competencies. You can use the framework to recognise where you are as an organisation.

• **NCVO’s Digital Maturity Matrix**
  http://tools.ncvo.org.uk/digitalmaturitymatrix
  An online tool to help you explore how well your charity is taking advantage of all things digital.