



12 questions about digital for trustees

Foreword

We hear from many of the charities that we work with that they would like more advice about digital. Stepping back for a moment, what are the implications of digital for the charity sector?

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.

Digital evolves so quickly that we can underrate how much we use it - and already know about it. Think about everything you may have done online before you even got to work this morning. Maybe you researched your plans for the weekend on your iPad over breakfast. Perhaps you read the news or checked your email on your smartphone on your commute. Digital really is all around us.

Every minute, **3.6 million text messages are sent and Google is used to translate 69.5 million words.** Across the globe, **3.4 billion people use the internet.** 2.3 billion people are active social media users and there are 3.8 billion mobile users. There is a drive across government to move more services online. For charities, digital represents a huge opportunity if not a necessity.

We know that digital is, however, a new area for many charities. So whether you are starting out, or are more advanced and want to review your approach, we've put together some key questions that every board needs to talk about. They cover 12 areas. Many of these are the bread and butter of board meetings, such as governance, supporting new trustees and managing reputation. Digital now cuts across everything that charities do, from fundraising to strategy to service delivery.

Our questions are by no means exhaustive, but are intended to provide a starting point for discussions and cover the essentials. We would love to hear your views so we can make this a truly sector wide debate about the exciting possibilities that digital offers charities.

1. Governance

How are we adapting our governance processes to reflect decision making in the digital age? For example:

- as a board, are we agile enough to make quick decisions?
- how can we use digital to make the functions, administration and key principles of our governance more effective?
- where we delegate to committees or executive teams, are they clear on what is expected of them, what authority they have to act and what the charity's policies and procedures relevant to digital are, such as social media, crisis response or risk management?
- in the future, what role could digital play in informing the board's decision making process (eg big data, algorithms and artificial intelligence)?

Needing to make decisions quickly doesn't remove the need for all the trustees to consider them properly.

Other useful resources:

[It's your decision: charity trustees and decision making \(CC27\)](#)

2. Induction of new trustees

Are new trustees being briefed on:

- the key digital opportunities and risks for the charity?
- any digital resources that will help them as trustees, eg following trade journalists on social media or subscribing to relevant e-newsletters?
- the charity's social media policy and how it applies to them as trustees?
- how they can promote the charity via digital channels?

3. People

Whether you have a staff team, or your charity is three volunteers who meet around a kitchen table, this section is relevant to you.

Have we got the right team in place to help us capitalise on the opportunities and manage the risks in digital? For example:

- do we need a trustee or trustees who specialise(s) in digital and how can we make the most of their expertise?
- have we included digital in our audit of trustees' skills?
- what digital skills do we have amongst our staff team?
- will these skills help us achieve our strategy and, if we don't yet have them in-house, how can we get them?
- do we need to recruit for new roles, find volunteers, work with an agency, or a combination of all these?
- as the need for digital skills grows across the sector, is digital part of new and existing job descriptions; if not, why not?
- is there relevant training available for us to upskill our trustees and staff on digital?

4. Strategy

How does digital fit into our organisational strategy? For example:

- have trustees discussed how digital can help achieve organisational objectives?
- does our board have an understanding of the key trends in digital and the opportunities and risks in this area for our charity?
- do we understand how our executive team are using digital to achieve our organisational objectives, and if not how can we develop a shared understanding of this?
- how are organisations who are working in the same field as us using digital, and how can we use digital to differentiate ourselves?
- how could our charity use digital to put ourselves in the best position for any uncertain or challenging times ahead?

Other useful resources:

[How to manage risks in your charity](#)

[Charity governance, finance and resilience: 15 questions trustees should ask](#)

5. Culture

How can the board influence the charity to create a culture in which digital can flourish? For example:

- if we are bringing in digital specialists, as trustees or staff, what do we want to achieve from their appointment, and how can we ensure buy-in for this across the organisation?
- do we have any existing trustees or staff who can help champion digital; how will this help us reinforce the culture we want to create?
- how can the board ensure that trustees or staff who are new to digital increase their skills and confidence in this area?
- how can our CEO and leadership team help develop the culture accordingly?
- what is our appetite for risk and is this consistently understood across our charity?
- how collaborative are we?

6. Service delivery

As more people seek help and information online, how could our charity support them? For example:

- can beneficiaries find information easily online about how they can access our services, whether via search engines, our website or our social media presences?
- which of our services could we deliver online and which are more appropriate to deliver offline?
- have we tested our assumptions with our audience?
- how can we deliver online services as effectively as possible?
- have we researched the options with service users and how will we test and review our findings?
- can beneficiaries access our services across a range of devices, from laptops to mobiles and tablets?
- are we providing beneficiaries with self-help content online?
- how could we use digital to scale up our service delivery?
- where we develop new digital products and services, have we considered how we can help them reach our audience, and how we can maintain their quality?
- have colleagues analysed who else is providing similar products and services digitally and can we partner with them if appropriate?
- how will we deal with any questions or complaints that beneficiaries and supporters might have about our services on social media?
- has our executive team considered our audiences' expectations around use of digital, eg processing of payments?

7. Brand

Is our charity using digital to build its brand? For example:

- do we have a website that is easy to navigate and optimised for all devices?
- are we using social media and other channels to communicate with our audience?
- do we understand how our audience is using digital channels and how our charity could engage with them on there, for example by sharing useful content?
- do our beneficiaries want to offer each other peer support, and how could our charity facilitate that online?
- how can our charity use digital to reach new audiences and strengthen relationships with existing supporters?
- are we creating the community that digital offers, and making the most of the value in connections between the charity, donors and beneficiaries, where appropriate?

8. Reputation

Is our charity equipped to manage reputational risk online? For example:

- how will our charity respond if we are criticised on digital channels, eg social media or online forums?
- what role should the board play in the event of a crisis situation online?
- how can our charity rebuild trust via digital channels in the wake of a crisis?
- how can our charity use digital to demonstrate our impact and transparency?
- what is our safeguarding policy and what are the implications for the board, for example if a vulnerable beneficiary tries to contact a trustee online?

These questions should be considered alongside a media crisis strategy or policy, which should be readily available to all staff so they are aware of the process they must follow to implement it when needed.

9. Fundraising

How will our charity use digital to fundraise, and how will this be aligned to our ethics and values? For example:

- do we have an understanding of the opportunities and risks for us in online fundraising?
- do we have a compelling fundraising proposition and how can we communicate that online?
- who are we trying to reach and what are the best platforms we could use to do so?
- how will using digital channels add value to our fundraising?
- what is our aftercare programme for donors we have recruited online?
- how secure is our donors' data?
- how can we use digital to build relationships with other organisations who can support our work, eg grant funders or corporates?
- are we considering the digital trends, for example the rise of crowdfunding?

10. Cyber security

Are our IT systems and data secure? For example:

- do we have technical support to ensure this?
- are our applications, software and anti-virus protection up to date?
- has our board been briefed on the relevant legislation and compliance eg the Data Protection Act?
- are our database and any other information about beneficiaries and supporters safe and secure and are they encrypted, where appropriate?
- who has access to this information?
- are staff aware of the importance of securing information?
- what will our staff do in the event that the charity's data or other digital assets are hacked?
- who has access to passwords, including social media?

Other useful resources:

Protecting your charity from fraud and financial crime

Useful advice on online safety

11. Evaluation and success

Do we understand what success looks like on digital? For example:

- how do our digital goals support the wider organisational strategic objectives?
- what are the key metrics that the board would like to see in its report from the executive?
- do we understand how to interpret these metrics, and if not how can the board be trained to do so?
- do we feel comfortable challenging our executive team on what it is achieving on digital?
- do we require additional support, whether in the form of a trustee, volunteer or consultant with digital expertise?
- how do we benchmark against other charities working in the same space?

12. Resources

What are the resource implications of digital? For example:

- what level of investment is required to achieve our objectives in digital, and what will this help us deliver?
- are there any additional sources of support which could help develop our digital resources and skills such as advice from infrastructure or membership organisations, or grant funders?
- how can we evaluate the current level of investment that our executive team are making in digital and how will we know if it represents value for money?
- does our charity have any back office functions which can be automated?