

Making Digital Work – Scenarios and answers

Scenario 1

Managers at a care organisation are worried that the current method of recording information about the visits their workers undertake isn't working well. They currently fill in a paper form about their visits at the end of the day then at the end of the week they copy all the paper notes in to a spreadsheet.

They believe it is taking too much of the carers time and sometimes the notes don't make sense and can easily be misplaced. There are also problems with lots of people trying to open the same spreadsheet in the office.

Scenario 1 Answer

This would be a perfect situation to move to a real time, electronic reporting system.

The carers could be supplied with tablets with a mobile data connection or MiFi dongles allowing them to write their notes at the time of the visit and to submit them straight away. Systems such as Google Forms or iFormBuilder provide this functionality – searching for 'Remote Data Collection' brings back a lot of useful results.

The organisation should create a business case which shows a monetary value for the time savings made vs the cost of the kit and new software. One option is Carista which is a specialist system for care providers - <http://www.carista.co.uk/2015/>

The organisation could do some market research with other care organisations to find out what they are using and how they find it. They could also run a tendering exercise for software providers.

Another technology to consider would be digital pens which allow someone to write on paper as normal but also have a digital copy.

Thought would have to be given in to data security- making sure that the tablets were encrypted and password or PIN protected. This is part of the organisation's responsibilities under the Data Protection Act so there should be some procedures in place that could be adapted for digital devices. If confidential client information is being recorded there are further considerations relating to data security. The Information Commissioner's Office are best placed to advise on this: www.ico.gov.uk

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Scenario 2

A small charitable organisation in the Highlands is experiencing difficulty finding new sources of funding. They previously had a regular funder but they have had to pull their commitment due to tough economic times.

They pick up the phone and get busy calling other funding contacts listed in their office diary planner. They grow tired of this time intensive task and wish that there was an easy way to find opportunities in one place.

Scenario 2 Answer

In a case such as this, the organisation could use an online funding search platform to see what kinds of funding are available for them. One such platform which is free to use is www.fundingscotland.com. This would allow them to identify multiple sources of funding to apply for. The Directory of Social Change also offer online, searchable funding website, but these have a subscription charge <https://www.dsc.org.uk/funding-websites/>. The organisation could also connect with infrastructure bodies such as SCVO or the local Third Sector Interface (TSI) through Twitter or eBulletins to get notified of funding news.

Major funders such as the Big Lottery Fund, Robertson Trust, Lloyds TSB Foundation and Foundation Scotland all have excellent websites with information about their funding criteria on them.

To streamline their interactions with their current funding contacts by setting up a database of contacts or a full Customer Relationship Management (CRM) system to allow them to log their interactions with contacts and to communicate with them much more easily. There are systems out there such as Raiser's Edge, Salesforce or Microsoft Dynamics which are very powerful. SugarCRM is a good open source option. Setting up these systems can be a major investment for an organisation but can have a huge difference in working efficiently. Do lots and lots of research before making a decision like this.

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Scenario 3

An after school club has found it difficult to get information out to parents about activities and changes to the service. Letters sent home with the children often don't make it to the parents. The club can text the parents but it doesn't always work well and it is time consuming to deal with the replies which are sent to one phone.

Scenario 3 Answer

Social media would be an excellent way to address this problem. By setting up a Twitter account, Facebook page or group they would have an excellent, real time and two-way method of communicating with the parents of their children. They could also set up an eBulletin using a service such as Mailchimp or Constant Contact. This would be a great way of keeping the parents involved in the goings on at the club and to let them know of upcoming events or meetings.

Guide to social media for charities: <http://www.technology-trust.org/charity-social-media-strategy/>

Guide to email marketing for charities:
<http://www.fundraising123.org/files/Nonprofit-Email-Marketing-Guide.pdf>

Some caution has to be shown that parents who do not use social media would be excluded so this could be backed up with an online texting service. Textlocal is an online service that has very good reviews and offers a reduced rate for registered charities.

Further information on Textlocal: <http://www.textlocal.com/mobile-marketing-guides/videos>

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Scenario 4

A social enterprise that provides specialist training to support family members of people living with Alzheimer's has been struggling to fill places on training sessions, particularly those organised in rural locations where transport can be difficult. How can digital solutions help them to turn things around and increase revenue?

Scenario 4 Answer

There are two approaches to finding a solution to this problem.

Firstly it may be possible to provide the training remotely using webinars or video conferencing such as Skype or Google Hangouts. Here is a good guide on hosting a webinar (web based seminar) using Google Hangouts:

<http://computers.tutsplus.com/tutorials/create-and-host-a-webinar-for-free-using-google-hangouts--cms-21805>

A second approach would be to look online for funding to help with transport costs in rural areas. They could use an online funding search platform to see what kinds of funding are available for them. One such platform is www.fundingscotland.com This would allow them to identify multiple sources of funding to apply for. They can also connect with infrastructure bodies such as SCVO or the local TSI's through Twitter or eBulletins to get notified of funding news.

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Scenario 5

A mental health charity has had some of its funding cut. They are a very hands on organisation and have focused on their relationships with the clients more than their digital skills. But now they have to find funding from other places to continue their work but have no idea where to look for it.

Scenario 5 Answer

In a case such as this, the organisation could use an online funding search platform to see what kinds of funding are available for them. One such platform is www.fundingscotland.com. This would allow them to identify multiple sources of funding to apply for. They can also connect with infrastructure bodies such as SCVO or the local TSI's through Twitter or eBulletins to get notified of funding news.

Having a Twitter account would also let them stay in touch with other similar organisations with whom they could share advice and information, including funding opportunities

They can also register on the public sector procurement portal Public Contracts Scotland. This is the major method of finding out and applying for government and local authority grants and tenders. More information on Public Contracts Scotland can be found on their website:

http://www.publiccontractsscotland.gov.uk/sitehelp/help_faq.aspx

Digital also makes it very easy to get donations from individuals. By setting up text donations or an online donation function on their website and/or running JustGiving or crowdfunding campaigns they can diversify and increase their income. The social media channels mentioned earlier would allow them to promote these campaigns and fundraising drives.

This guide covers using third party fundraising platforms: <http://www.institute-of-fundraising.org.uk/library/onlinegiving/>

Information on taking donations through your website:

<http://www.smallcharities.org.uk/resources-online-donation/>

Setting up text donations: <https://www.markeluk.com/articles/how-to-set-up-a-text-donation-service-for-your-charity>

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Scenario 6

The chair of a board of trustees for a village hall has the job of collecting incoming finances. Payments come in the form of cash and cheques which he spends endless amounts of his time counting and recording and taking to the bank as payment runs. His stress levels increase as he is unable to complete all of his tasks within the working week.

Scenario 6 Answer

There are a number of ways that he could work more efficiently by using digital methods. They could set up internet banking which would let him monitor and work on the banking at any time. Most online banking now comes with apps which will let you deposit a cheque by scanning it in the app without the need to take the cheque in to the branch. Once online banking was set up he could move to dealing with remittances through online transfers negating the need for cheques and cash. Banks all have their own guides to safe online banking, whether using smartphones, tablets or PCs.

The chairperson could also look at using cloud based accounting software allowing them to manage the finances from anywhere, whenever they have time. There is a guide to charity accounting software here:

[http://www.adaptaconsulting.co.uk/downloads/Guide to Accounting Software for Not-for-Profit-Organisations.pdf](http://www.adaptaconsulting.co.uk/downloads/Guide%20to%20Accounting%20Software%20for%20Not-for-Profit-Organisations.pdf)

Get Safe Online has a basic guide to safe banking, as well as links to further guides. This can be accessed at: <https://www.getsafeonline.org/shopping-banking/banking/>.

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Scenario 7

An animal shelter have had some high profile coverage in the local press about the work they do to help children with learning needs to improve their confidence and socialise through a 'pet buddy' scheme. As a result they have received lots of drop ins of cash donations and phone calls on how to donate money from the public. The shelter are finding a lot of their time is being spent dealing with donation enquiries rather than the buddy scheme and are losing track of donations handed in so are unable to claim back Gift Aid. What could they do to help them manage this situation?

Scenario 7 Answer

The shelter could set up an online donation platform through something like [Justgiving](#), [Virgin Money Giving](#) or [Local Giving](#) to make the most of the exposure and make the management of donations less time intensive.

This is a good article about different fundraising platforms:
www.moneysavingexpert.com/family/charity-fundraising-sites

They could set up Facebook and Twitter to capitalise on the new coverage and to share details about their online donations that could easily be shared online.

Another good idea would be to set up an online newsletter to send to all donors telling them of all the work they do in the future and to secure repeat donations and publicise new campaigns

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Scenario 8

An organisation that provides information on sexual health issues has set up a website. While they know from verbal feedback that people are using it, they are unsure how much staff time to put towards developing it against their usual outreach work. How can they make this decision?

Scenario 8 Answer

By using an analytics platform such as Google Analytics they can get hard data on the numbers of people using their website and make decisions from that. They can also use this information to make changes to their site and test their effectiveness.

Google Analytics is a very powerful tool. This guide is well written and covers the principles and steps to set it up in detail but written for beginners:

<https://moz.com/blog/absolute-beginners-guide-to-google-analytics>

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Scenario 9

A wildlife trust feels that their IT systems are clunky and problematic, giving frequent errors due to using dated versions of Microsoft Office and a customer relationship management tools. They want to renew and revamp their systems but don't know where to start as they lack knowledge or an IT team.

Scenario 9 Answer

The organisation should take a look at Google for Non Profits or Outlook 365 for Charities which will give them free access to always up to date software and cloud computing capabilities.

Info on Google for Non-Profits: <https://www.google.co.uk/nonprofits/join/>

Info on Outlook 365 for Non-Profits: <https://products.office.com/en-gb/nonprofit/office-365-nonprofit>

TT-Exchange is another organisation which can offer cheap software licences for charities.

<https://www.tt-exchange.org/>

SCVO's new Digital Participation Charter platform would also let them look for some support or advice from organisations to help them get started. More information: <http://digital.scvo.org.uk/charter/>

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Scenario 10

A team of drug counsellors working across a large geographical area are struggling to find time to meet to discuss cases and have 1-2-1's with their line manager as they are out and about daily and all operate remotely from each other. They would like to find a solution to allow them to have regular contact without needing to all be there in person which eats into their time and travel budget for case work. What could they do?

Scenario 10 Answer

The team could consider video conferencing through mobile phones or tablets via Skype (<http://www.skype.com/en/business/>) or Google Hangouts (<https://apps.google.com/products/hangouts/>). They could also look at online collaboration and messaging tools such as Slack (<https://slack.com/>) or Yammer (<https://www.yammer.com/>) to let staff talk to each other remotely.

When using video conferencing or Skype-style chat, it is important to ensure that the physical space in which conversations are taking place is secure and private, especially when confidential information about vulnerable people is being discussed.

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Scenario 11

A befriending organisation needs to recruit more volunteers than are being referred to them through their Third Sector Interface (TSI), and then maintain the volunteers after their initial induction session. What can they do?

Scenario 11 Answer

By setting up social media platforms such as Facebook or Instagram they can showcase their work and actively search for new volunteers by showing examples of the good they could do through case studies and inspiring photographs of their work. It would also allow them to set up a closed Facebook group to communicate with the volunteers. With social media they can actively encourage their current volunteers to contribute their own experiences.

They could add and actively manage their organisation's profile on Good HQ – a new platform being developed where volunteers, staff and end users can rate their experiences with different third sector organisations in Scotland.
<https://goodhq.org/>

Scenario 12

An environmental charity is launching new national campaign to raise awareness of a carbon offsetting scheme that they run, and to try to encourage people to take a personal action to reduce their carbon footprint. How could digital help them?

Scenario 12 Answer

The charity would be best served by setting up a co-ordinated digital marketing strategy that dovetails with their current marketing and communications plan. Choosing the right mix of social media channels, website content, blogs, Pay Per Click advertising and email newsletters to send targeted communications saying the right things to the right people the right way would help them in a huge way.

This is a very broad topic and there is lots of information online about it. This in-depth guide is well-written and worth a long read:
<https://www.quicksprout.com/the-beginners-guide-to-online-marketing/>

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Scenario 13

A care home for adults with complex disabilities is planning to run a singing group, and as part of that will be making videos which they hope to post to YouTube, and share via social media such as Twitter and Facebook. They don't currently have YouTube, Twitter or Facebook, and nobody in the team who has any expertise in that area, or has made videos before.

Scenario 13 Answer

By incorporating this into part of someone's job description then training needs can be identified and acted on. Training can be found through organisations such as their TSI or SCVO as well as online. They may wish to consider using volunteers or interns (such as SCVO's digital interns) although this is not a magic bullet and requires a staff member to manage them. Volunteer Edinburgh have a number of good practice guides for involving volunteers on their website:

http://www.volunteeredinburgh.org.uk/organise/good_practice_guides

You can also contact your local Third Sector Interface (TSI) for guidance.

By registering for Google's Grants for Non Profits they can also get a highly customisable and advanced youtube channel for free.