

# Start somewhere

*An exploratory study into making technology  
imaginable and usable for small voluntary  
organisations*

*June 2019*



**CAST**  
Driving social change  
with digital technology



# Authorship and acknowledgments

This report has been written by Annie Caffyn and Ellie Hale, with support from Ben Cairns and Dan Sutch, based on interviews and fieldwork carried out by the authors.

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# Introduction

This is the report resulting from an exploratory study on helping to make technology imaginable and usable for small voluntary organisations, carried out by the Institute for Voluntary Action Research (IVAR) and the Centre for Acceleration of Social Technology (CAST), working in partnership with a small group of charitable funders.<sup>1</sup> In Part One we summarise our key findings; then, in Part Two, we highlight four key insights to have come out of the study before offering a set of messages for small voluntary organisations and tech support providers.

## Background

The starting point for this exploratory study was an understanding of the important potential role of engaging with, and using, technology ('tech') for small voluntary organisations<sup>2</sup> (SVOs) interested in making their services **relevant, accessible and efficient**. These organisations are currently facing particular challenges, including:

- Increased **demand** for services
- Increased **competition** for fewer resources
- **Changing patterns of service access and use** across many of their beneficiary groups, including new behaviours for searching and finding support, and growing expectations of services being available online
- **Increased competition from exclusively online providers** (despite concerns about the efficacy of much online provision)<sup>3</sup>

For many of them, there are aspects of their service delivery models (specifically, the interface with clients) that feel inefficient, frustrating or obsolete; and that don't match the digital expectations and behaviours of their client groups. Recent research and commentary<sup>4</sup> in this area has highlighted that the take-up of digital technology within the voluntary sector has been particularly slow in comparison to other sectors. However, while there is a degree of wariness and caution towards technology amongst many voluntary organisations, there are also exciting opportunities and examples of how technology can help. Against this backdrop, the primary aim of the study was to explore the extent to which SVOs are able or willing to consider if and how technology might have a positive role to play in their work.

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<sup>1</sup> Comic Relief, Esmée Fairbairn Foundation, Paul Hamlyn Foundation, Lloyds Bank Foundation for England and Wales and The Tudor Trust

<sup>2</sup> For the purposes of this study, understood as organisations with an annual turnover of less than £500,000

<sup>3</sup> [The Value of Small, IVAR, 2018](#); [Duty to Care? IVAR, 2019](#)

<sup>4</sup> *The Charity Digital Spectrum: How all Charities can go further with digital*, Tech Trust, 2019 <https://44rt9812j4v61zr1k83d0x5g-wpengine.netdna-ssl.com/wp-content/uploads/2019/02/CharityDigitalSpectrum2019-eBookv1.pdf>; 'There is no digital revolution in charities\*. And probably never will be' thought piece by Joe Saxton, February 2019 <https://nfpsynergy.net/blog/no-charity-digital-revolution>

Our partners' interest in this study largely stemmed from:

1. General interest in supporting the sustainability and resilience of smaller-sized organisations at a challenging time and in the context of digital:

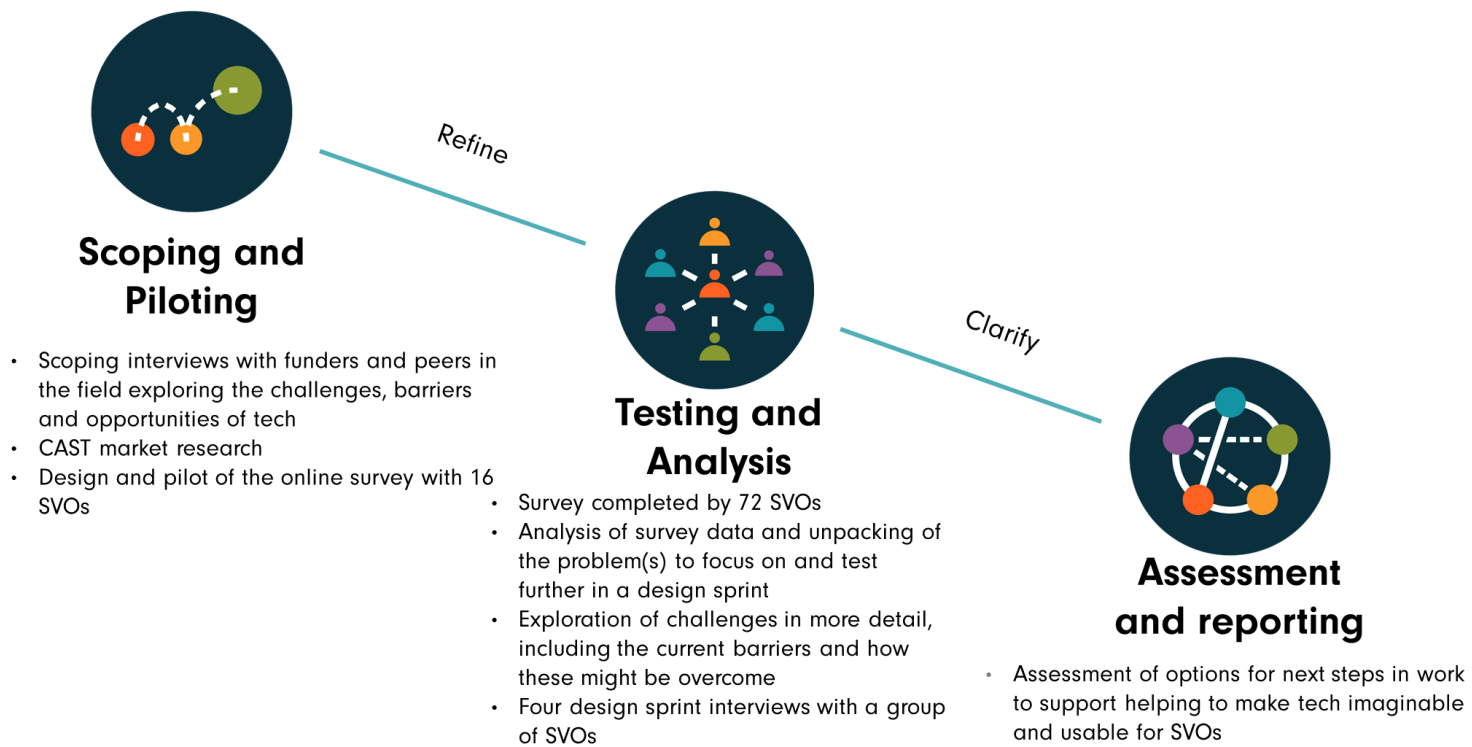
*We haven't decided how, as a foundation, we should support this area – so this report is timely for us.*

2. Specific areas of interest to make tech usable and imaginable:

*We're keen to address people's associations of tech and ask how can we make digital services helpful in simple ways for organisations who lack the capacity and resources to take perceived risks with tech.*

*Trying to strengthen and broaden the social tech ecosystem as a whole.*

## Study Process

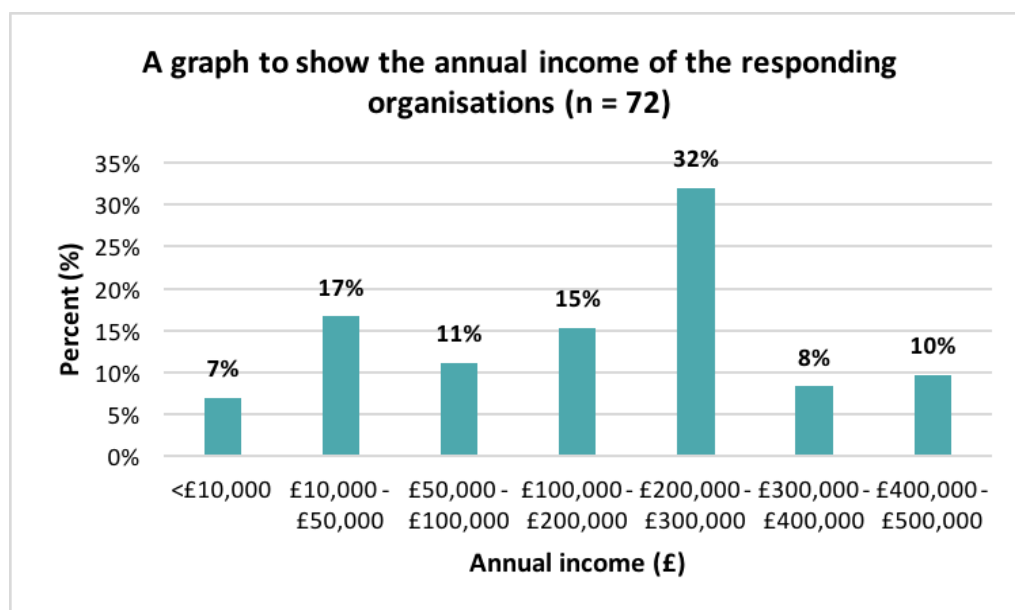


# Part One: Key Findings

Our findings are based on scoping interviews with representatives from our five funding partners (Comic Relief, Esmée Fairbairn Foundation, Paul Hamlyn Foundation, Lloyds Bank Foundation for England and Wales and Tudor Trust); the synthesis and analysis of online survey responses from 72 SVOs (see below); and a design sprint process, including user testing interviews with four representatives from four small voluntary organisations (see Appendix Three for more details). Unattributed quotations from interviews and survey responses are presented in italics.

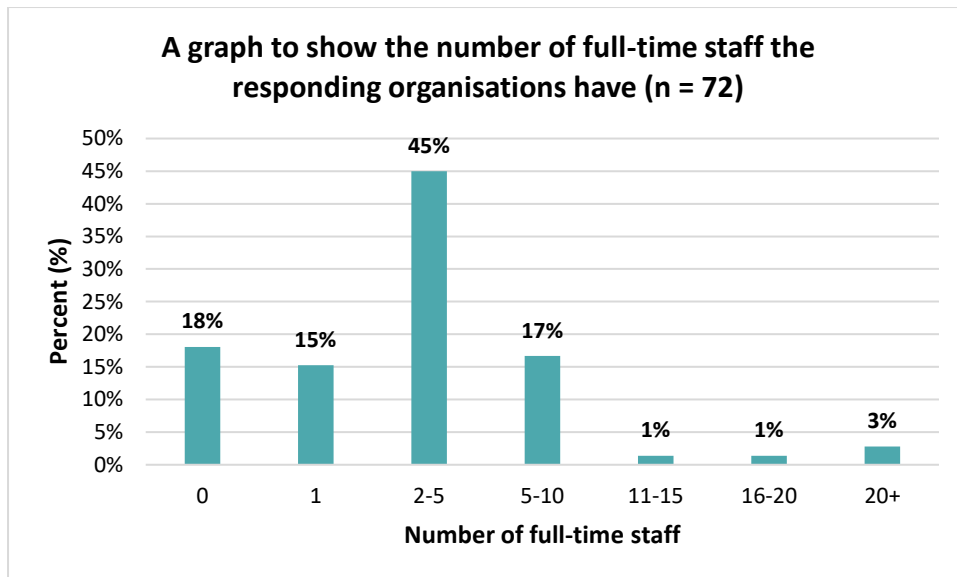
## Survey participants

The online survey was distributed to grantees of Comic Relief and Lloyds Bank Foundation for England and Wales, and promoted via CAST and IVAR newsletters and social channels, as well as through the Small Charities Coalition’s social media platforms. There were 72 survey respondents in total. The respondents represent small organisations across the UK, with none having an income of above £500,000, and 82% having an income of £300,000 or less. 18% do not have any paid staff; 60% have no more than five members of staff. The majority of respondents are in a management position (CEO/Director, Senior Operational Manager or Project Manager).



In the presentation of our study findings, we address, in turn:

- Perceptions of tech
- Potential opportunities of tech
- Barriers to using tech
- Guidance and support



## 1.1 Perceptions of Tech

### 1.1.1 What is 'tech'?

We deliberately didn't offer a definition of 'tech' as we wanted to understand what it meant to small voluntary organisations. Of our survey respondents, 75% said they had used tech in the last six months to support services, citing specific examples that fall into roughly five categories: **basic access; operational tech; flexible communications options; tech to support or evaluate service delivery; and digital services.**

- i. **Basic access to hardware and infrastructure, for example:**
  - Updating broadband and telecoms
  - Hardware devices, e.g. smartphones, laptops, tablets and iPads
- ii. **Internal systems and processes to increase organisational efficiency, for example:**
  - Accounting systems/packages, e.g. Xero
  - Document sharing, e.g. One Drive
- iii. **Provide flexible communication options for service users as well as other stakeholders, for example:**
  - Digital communication channels, e.g. email, e-newsletters, webinars
  - Social media, e.g. Facebook, Twitter
  - Video and audio conferencing, e.g. Skype, Zoom, 'internet-based telephony'
  - Online tools for design, e.g. Canva
- iv. **Tech to support service delivery, for example:**
  - Database/case management systems, e.g. Salesforce, AdvicePro
  - Digital tools for data collection/analysis, e.g. KoboToolbox, Datawinners, survey apps, web-based forms

**v. Digital products and services, for example:**

- A couple of respondents were using specific tech to deliver digital-first services, including the development of mobile apps, virtual reality apps and medical devices. However, the percentage of respondents who mentioned digital tools and approaches commonly associated with the practice of digital product/service design – such as user research, usability testing or prototyping – was very low.

Most respondents who said that they hadn't used tech in the last six months specifically to support services had still used tech in their organisation at some point. This included websites and facilities to: gather information; source legal updates; identify funders; support business activity; conduct a survey; promote services/events/activities; manage grant fundraising; design posters and leaflets; pay bills and salaries; and recruit volunteers.

It is clear from the survey responses and ongoing conversations with intermediaries that there's an unhelpful conflation of the terms 'tech' and 'digital' in the sector, and confusion over what these two terms represent. We were interested in this study to see whether small voluntary organisations' perception and use of tech showed evidence of broader 'digital' practices or a 'digital mindset'.<sup>5</sup>

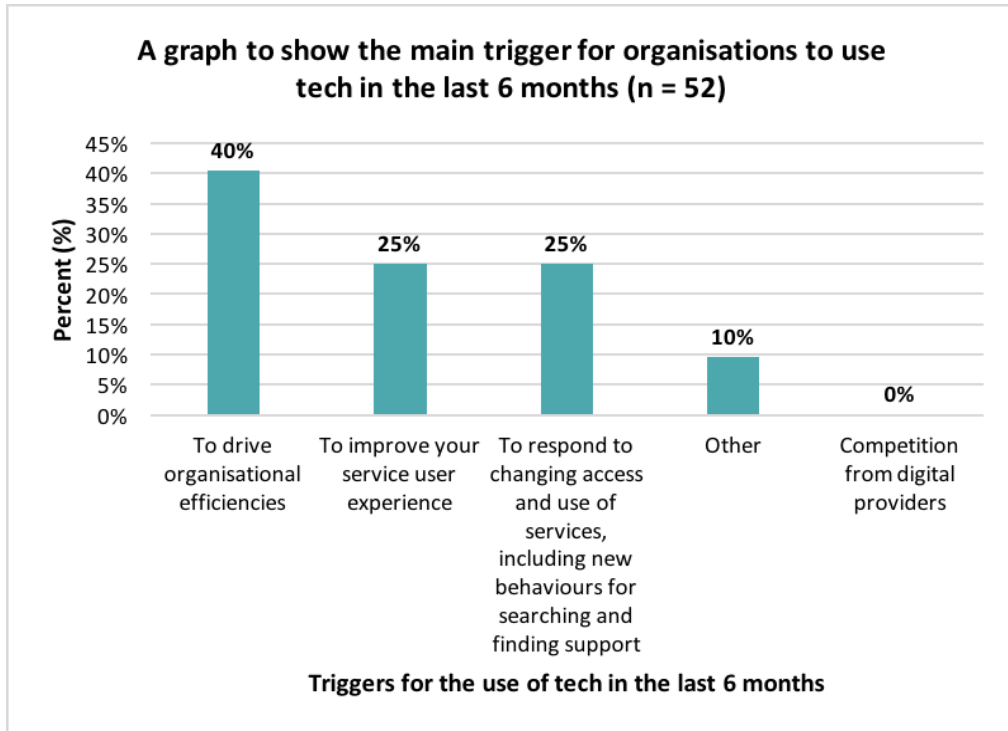
### **1.1.2 What triggered these SVOs to use tech?**

Driving organisational efficiencies was the most popular trigger for respondents' use of tech in the last six months (40%), followed by improving service user experience and responding to changing access and use of services (25% respectively). Familiarity, personal experience and recommendations were the main reasons why respondents chose a particular tech tool or approach.

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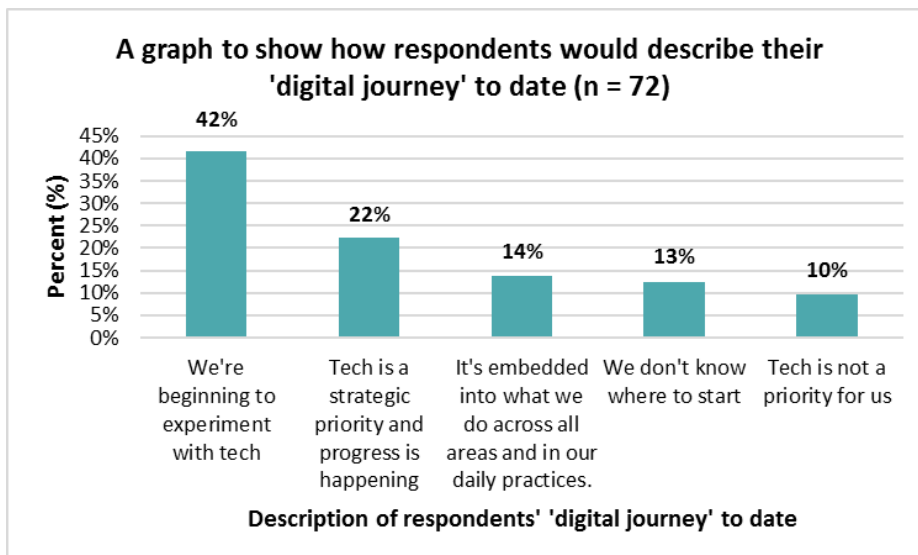
<sup>5</sup> For a deeper exploration of what these mean in practice, see [this blog](#) from Cassie Robinson of National Lottery Community Fund, and the '[How Nonprofits Of All Sizes Can Develop Digital Services](#)' slide deck by Suraj Vadgama of CAST.





### 1.1.3 Digital journey to date

As shown in the graph below, 64% of survey respondents were either beginning to experiment with tech or saw it as a strategic priority and are making progress. Of these 64% of respondents, 42% are 'beginning to experiment with tech'. This group of organisations can therefore be described as 'early adopters' of tech. Only 10% said that tech is not a priority for them and 13% didn't know where to start.<sup>6</sup>



<sup>6</sup> NB: This bias towards the early majority is not altogether surprising since it's a self-selecting group that takes part in an online survey about tech usage.

## How best to categorise?

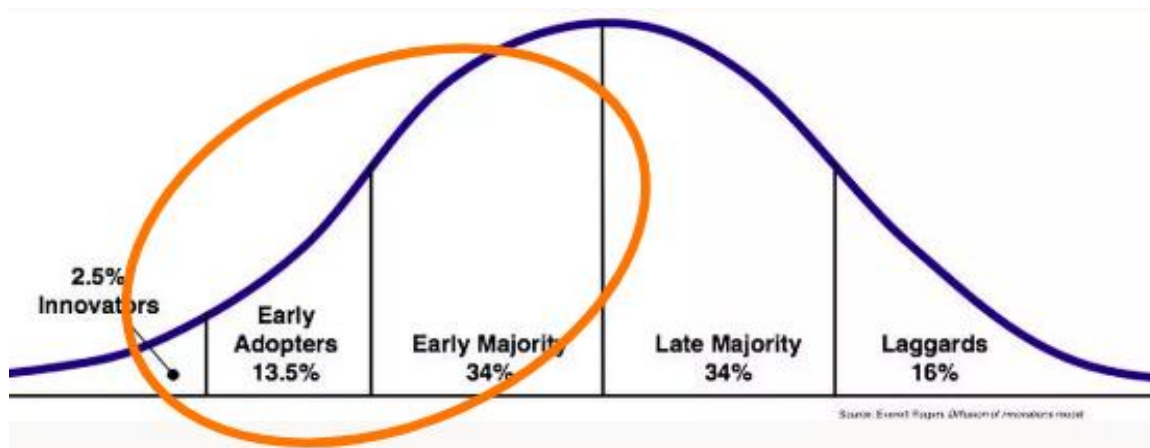
Within our cohort, there was no large difference in respondents' assessment of their 'digital journey' based on organisational income or number of staff (see table below). This echoes observations made during our scoping interviews, where all interviewees could cite examples of both small but digitally mature organisations and larger organisations still at a much earlier stage of development: *'I often say smaller charities are much more like start-ups – able to be more agile because they don't have such complex decision-making structures. They can just try it and see if it works'.*

	It's embedded into what we do across all areas and in our daily practices.	Tech is a strategic priority and progress is happening	We're beginning to experiment with tech	We don't know where to start	Tech is not a priority for us
<£50,000	12%	<b>18%</b>	<b>41%</b>	6%	24%
£50,000 - £200,000	21%	<b>16%</b>	<b>47%</b>	16%	0%
£200,000 - £300,000	13%	<b>26%</b>	<b>35%</b>	13%	13%
£300,000 - £500,000	8%	<b>31%</b>	<b>46%</b>	15%	0%

Instead of segmenting organisations into income or staff number brackets, we experimented with assessing them against the stages of the innovation diffusion curve.

The '[innovation diffusion model](#)' shows that for every new idea or practice permeating a sector or group, audiences can be categorised into five segments:

- A small percentage (2.5%) will be natural innovators (those seeking out new things and pioneering new approaches).
- A slightly larger portion (13.5%) will then adopt their innovations.
- 34% of the sector then falls into the category of 'early majority' (those who'll adopt something as they see others doing so).
- 34% into 'late majority' (those who'll only change once the majority of the sector has led the way).
- Finally, there will be a small percentage (16%) of change-resistant laggards.



### 1.1.4 Perceptions are shifting

Finally, in relation to perceptions of tech, our findings suggest that the way small charities view tech is changing, with a shift towards a more sophisticated and broad understanding of what it could mean:

*When we speak to people in small charities about tech, they aren't just asking about 'social media' and 'IT', they realise it's more than that. This is different to even two years ago.*

## 1.2 Potential Opportunities of Tech

### 1.2.1 Scoping Interviews

Initial scoping interviews and wider research highlighted a variety of opportunities that technology can offer, alongside recognition that it wasn't always the best or most appropriate solution given certain types of services, organisational capabilities and sizes – *'not everything lends itself to a technological solution'*. Opportunities of tech included:

#### 1. Improving the service user experience:

- Enhancing human interaction and connection: *'for service users to have better interactions with the services that support them'*
- Greater relevance and *'user-centred delivery'*
- *'Fitting tech around people's lives'*

#### 2. Using technology to support organisational efficiency and improvement:

- Greater efficiency: *'realising the potential of digital to ease administrative, operational and service delivery activities – this doesn't have to be drastic'*
- Working in a *'slightly smarter way'*: *'continuing to do your work, equal or better with increasingly limited resources'*
- Adopting a *'build, test, learn'* approach as an iterative cycle

## 1.2.2 Survey and Sprint Findings

We found a widespread recognition and acceptance amongst the SVOs involved in this study that digital progress is necessary and can bring beneficial opportunities. They also showed strong appetite and willingness to experiment with new tech approaches (although lack of time and funds for experimenting was identified as a significant barrier – see below):

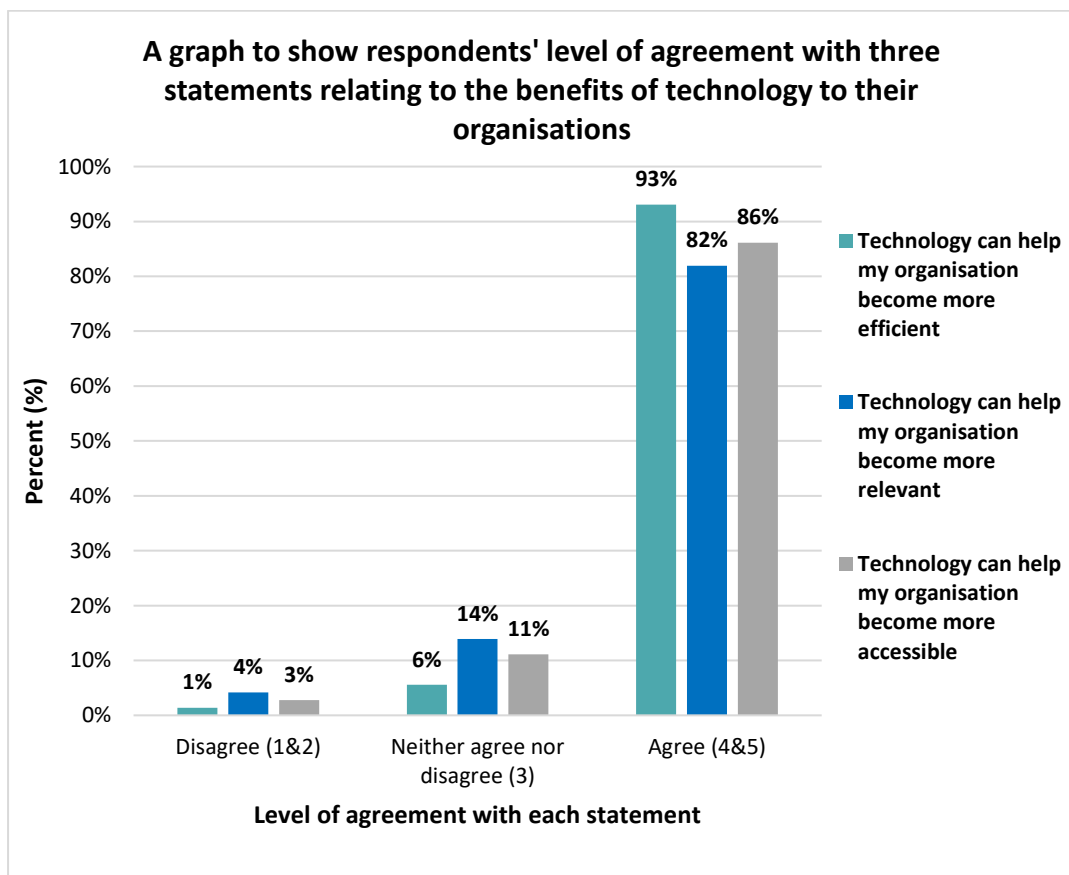
*Embrace it as much as you can with the capacity you have.*

*There is no gain without some initial pain ... but the benefits are enormous.*

Organisations from the survey and design sprint highlighted a wide array of opportunities of tech, suggesting a shift towards broader, and more strategic and culture-encompassing definitions.

Survey respondents largely agreed with statements about the role that technology can play in helping their organisation become more efficient, relevant and accessible (see graph below):

- 93% agreed or strongly agreed that technology can support organisational efficiencies.
- 82% agreed or strongly agreed that technology can support their organisation to become more relevant.
- 86% agreed or strongly agreed that technology can help their organisation become more accessible.



The benefits of tech identified by survey respondents and sprint participants are summarised below, and correspond to the organisations' current uses of tech previously outlined.

### Benefits of tech to the organisation

- Better data collection and faster information gathering, in terms of accuracy as well as security (e.g. through use of databases, survey apps, customer relationship management systems).
- Supporting accounting processes.
- Evidencing and measuring outcomes and impact.
- Increased promotion of services: *'better booking system for clients'*.
- Increased engagement and flexible communication with service users, staff and other stakeholders (e.g. through use of e-newsletters, video and audio conferencing webinars)
- Alternative referral routes (*'19% of referrals come through online options'*).
- Ability to network and share ideas across a knowledge community/between service users: *'it allows [our service users] to share ideas with people all over the world'*.
- Creating flexibility: *'being more modern and engaging'*.
- Saving time: *'frees up admin and management time'; 'demand was outstripping our ability to meet [requests] within the budgeted working hours'*.

## 1.3 Barriers to using tech

### 1.3.1 Scoping Interviews

Analysis of scoping interviews with our partners and members of CAST and SCVO<sup>7</sup>, combined with CAST's market research, **identified three key barriers** that SVOs face in relation to their engagement with tech. This acted as a starting point to test further through the survey and sprint.

#### The challenge of doing things differently:

- Risk aversion
- Fear of change
- Lack of confidence to start using a 'test and learn' approach
- Limited funding for digitally-focused projects

#### Negative perceptions and experiences of tech:

- 'Tech-burnt' organisations
- Overwhelming to consider the scale, time and cost: *'Don't have the head space'*
- *'This isn't for us'*
- *'We don't have capacity'*

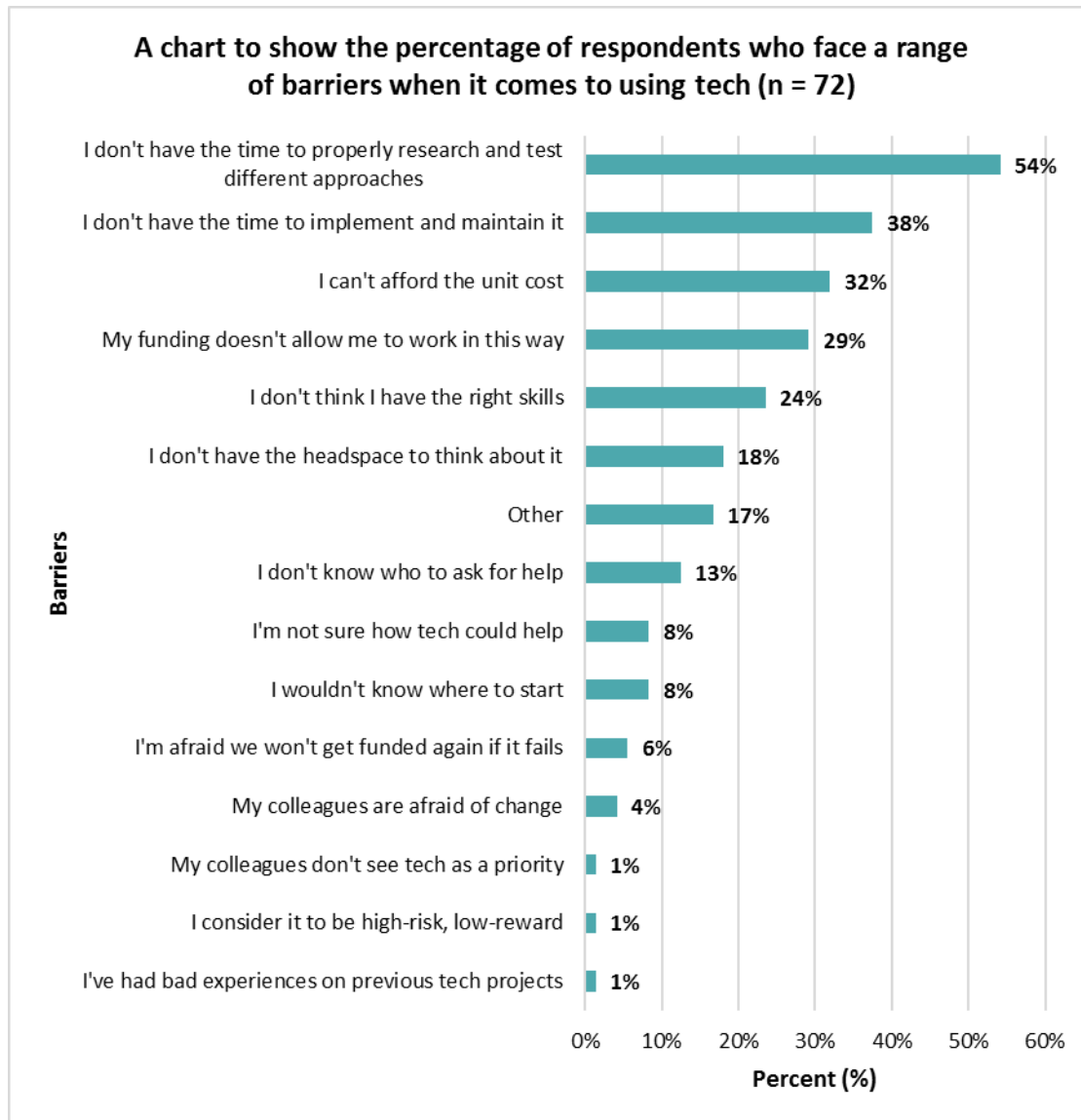
#### Not knowing where or how to start:

- 'Access points' to trusted digital support, advice and opportunities
- How do we embed tech in daily practices?
- Inconsistencies in an organisation's digital mind-set can lead to *'internal cultural friction'*
- Locating tech internally or externally?
- The speed of change of tech

<sup>7</sup> The Scottish Council for Voluntary Organisations (SCVO) provided additional insights from their direct work with hundreds of small charities in Scotland, including through their Senior Leaders Programme and Digital Checkup diagnostic tool.

### 1.3.2 Survey and Sprint Findings

Despite the wide-ranging opportunities of tech recognised by this group of SVOs, significant barriers emerged – some of which risk undermining the enthusiasm and willingness to use tech in their work. The chart below illustrates our survey findings, with the most significant response being, ‘I don’t have the time to properly research and test different approaches’, followed by ‘I don’t have the time to implement and maintain it’.



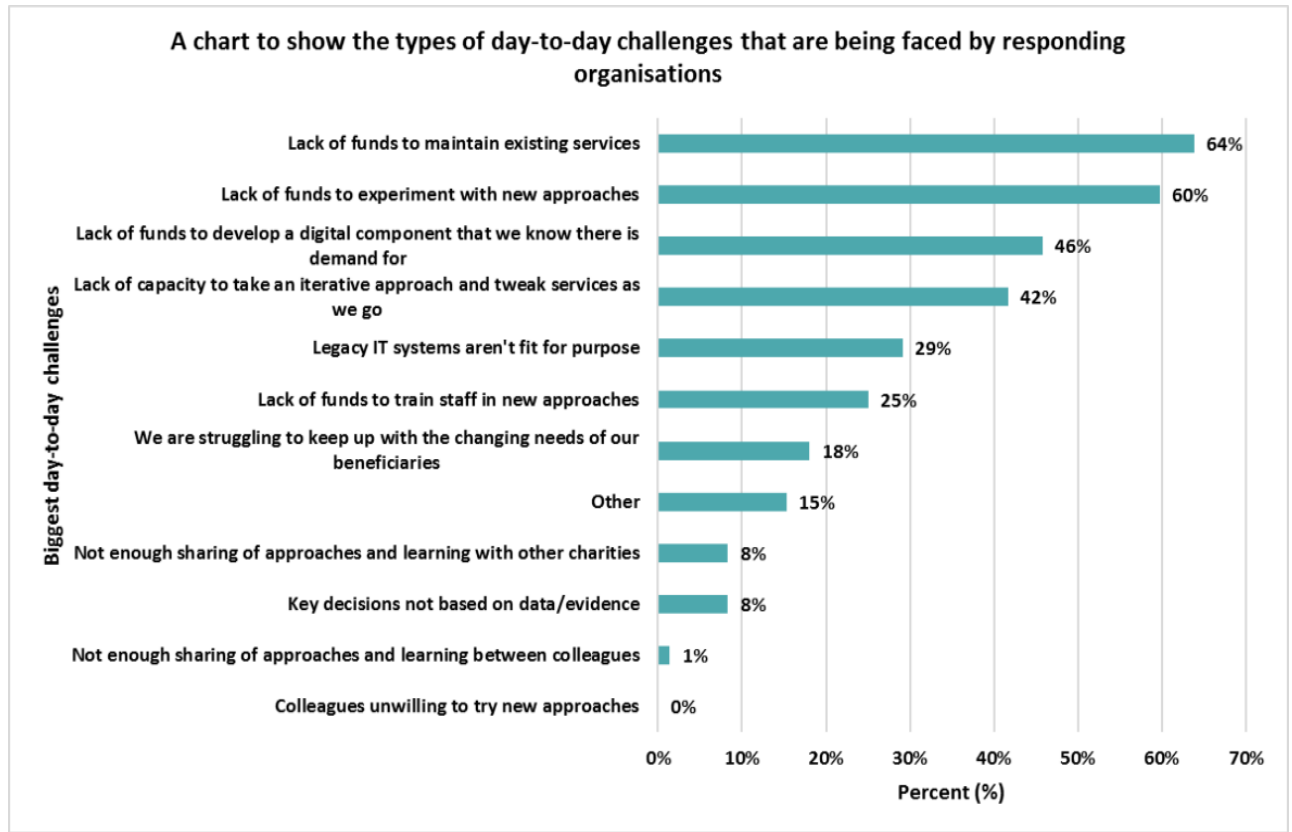
Whilst we can see that tech, for this group of organisations, is ‘imaginable’, questions remain around the extent to which it is ‘usable’:

*It’s time consuming always having to work it out for yourself and learn from trial and error.*

*It’s hard to find right people who understand your own needs.*

Almost a third of the barriers selected relate to funding not allowing organisations to work in a way that is compatible with a tech approach: ‘My funding doesn’t allow me to work in this way’.

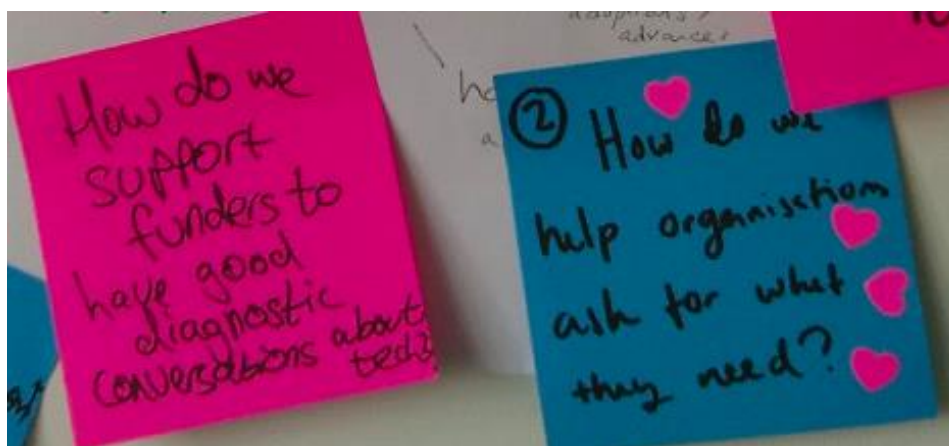
This finding, combined with the top three day-to-day challenges outlined in the chart below (all of which relate to funding), suggests there is a lack of alignment between many SVOs and their funders – consistent with the challenge of ‘limited funding for digitally-focused projects’ highlighted in 1.3.1 above.



## 1.4 Guidance and support

### 1.4.1 Scoping Interviews

Several scoping interviewees mentioned that a lot of resources and research in the sector – and especially exemplars – focus on larger charities, despite the fact that small organisations make up the majority of charities: *‘there is a lack of relatable stories to inspire smaller charities’*. In addition, funders expressed a clear desire to help organisations better articulate the right questions for the support they need. Supporting SVOs to ask the right questions to funders and tech support organisations could be a helpful step forward, as well as identifying more SVO exemplars and telling their stories in a way that enables others to follow their example.



### 1.4.2 Survey and Sprint Findings

#### Introduction

There is still some confusion around what level of tech understanding is needed or desirable for organisations to take advantage of the opportunities outlined on page 12 – this was revealed through our survey by the wide range of skills organisations said they thought they might need, ranging from ‘using social media more effectively’ to ‘a qualification in IT’ (for a breakdown of the ‘skills’ considered important, see Appendix One). Of the organisations that cited ‘lack of skills’ as the biggest barrier, 41% had <£10,000 annual income: very small organisations face the largest capacity challenges.



However, our survey findings confirm that organisations across the board need more help to identify what tech knowledge they need in-house, what can be outsourced, and where best to find that support:

*Is it a question of knowledge rather than skills? There are plenty of people out there with technical skills; perhaps it's a matter of bringing in the right people as one person can't do everything. But can I afford them? The whole area of tech is a real conundrum and challenge for small nonprofits.*

*We do not have an IT department, only one member of staff.*

*It's great that two new volunteers are helping with this, but it really needs a committed full time staff member, which means finding the money to pay someone.*

Smaller, largely volunteer-run organisations are, unsurprisingly, more likely to reach for and use consumer-targeted tech such as Facebook or WhatsApp for their charity than business-focused platforms like Slack, Trello or large databases.

*A lot of tiny community groups come to us wringing their hands because they think they need a website. But for their needs and audience, often a Facebook page would suffice.*

*We used Facebook to organise and mobilise local volunteers. The Facebook page has engaged the community and now has over 1,800 members, who use it to organise the evening meals [for the charity's service delivery], to share different ideas and socialise.*

## Sources of support

To understand which sources of support provide the most relevant and accessible help, and where they would turn first, we asked SVOs to think about a time in the last six months they'd sought information/guidance around tech to improve their work. Google was reported as their first port of call by 42% of respondents, followed by colleagues (21%) and, at a much lower level, national umbrella organisations and tech partners (8% respectively), and local voluntary sector infrastructure bodies (7%). None of the respondents first went to a funder, an online forum or sector media to access information and advice.

When asked what the most useful source of advice was that helped them move forwards, the order was reversed slightly, with 26% citing colleagues as the top source, followed by 24% Google and 13% tech partners. Interestingly, although funders and online forums were not turned to first, a few people said that this is where they found the most useful information/advice.

	Where did respondents go to first?	Where did respondents find the most useful information/advice?
Google	30	17
Local CVS	4	3
Funder	0	3
Tech partner	6	9
Colleague	15	19
An umbrella organisation (e.g. NCVO/SCVO/WCVA)	6	5
Twitter	0	0
Online forums/communities	0	2
Meetups	0	1
Sector media	0	0
Newsletters	0	0
Conferences/Events	2	4

Additional examples of valuable advice included:

*Seek advice from other organisations who are further down the road than you are.*

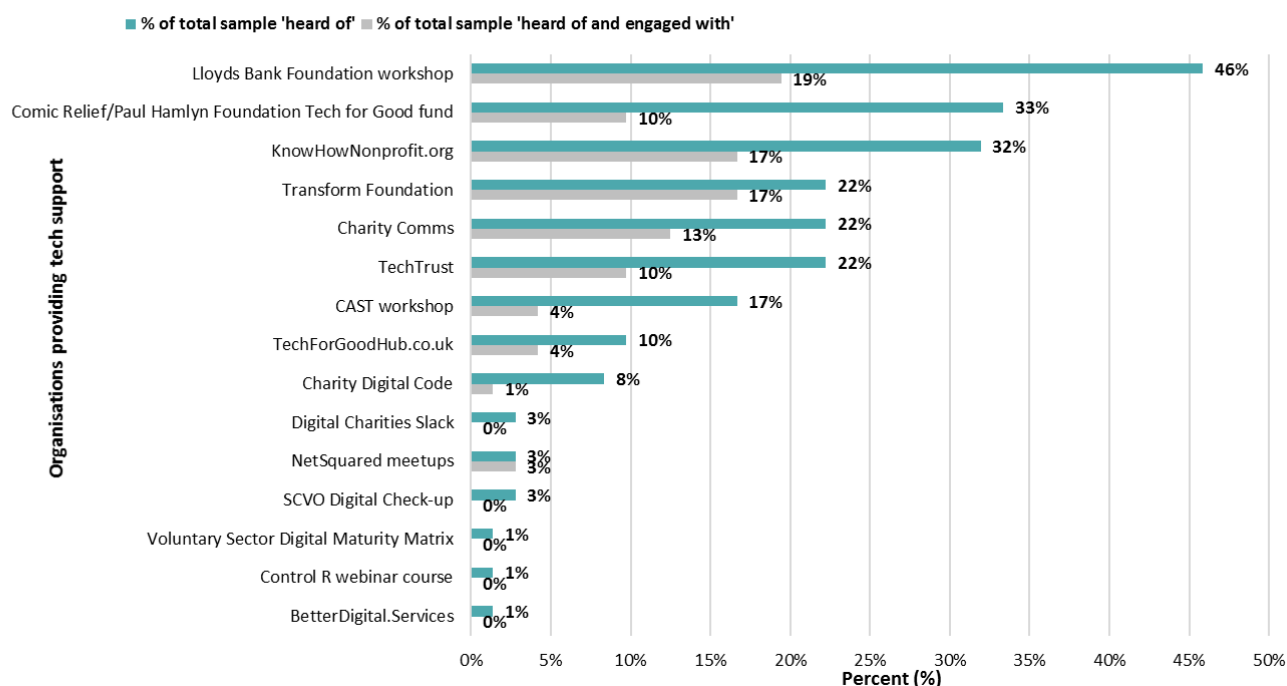
*Try to get specialists to volunteer with you.*

### **Awareness and use of support**

We found low awareness of many of the existing tech support initiatives (nearly one in five respondents hadn't heard of any of the options listed), and even lower direct engagement with them (accounting for over a third of respondents):

*We haven't engaged with any of these. We relied on one of our trustees and a website designer he knew.*

**A chart to show the percentage of total respondents who have 'heard of', and have 'heard of and engaged with', the following organisations who provide tech support (n = 72)**



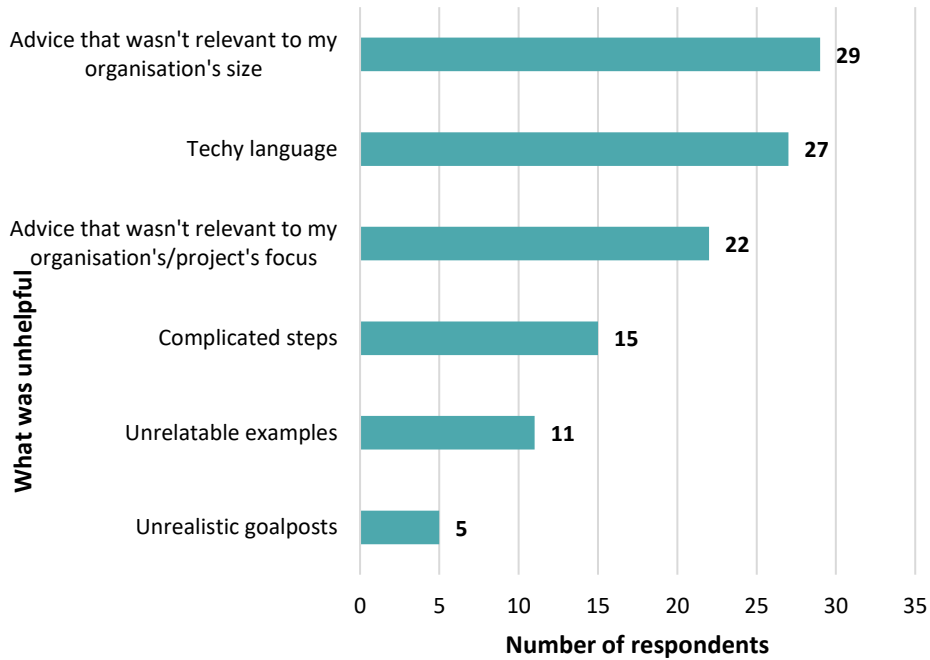
On average, a quarter of respondents said that they had engaged with an organisation if they had heard of them. Lloyds Bank Foundation workshop had the highest rate of respondents who had both heard of them and engaged with them. Charity Comms, Transform Foundation and KnowHowNonprofit.org also had fairly high conversion rates. These results are likely partly due to the source of the survey respondents (largely comprised of two funders’ grantee networks). Further conversations suggest the effectiveness of Transform Foundation could be due to its thorough advertising strategy across sector media, direct mail and Google AdWords, as well as the positioning of ‘free’ support via a grant. (NB the benefits and drawbacks of this particular offer are the subject of multiple discussion threads on sector community boards.<sup>8</sup>)

### Unhelpful features of support

Information and advice that was not felt to be relevant, or wasn’t easy to engage with due to things such as ‘techy language’ and ‘complicated steps’, were found to be unhelpful. An organisation’s size was the highest determining factor for relevance followed by its current level of digital understanding.

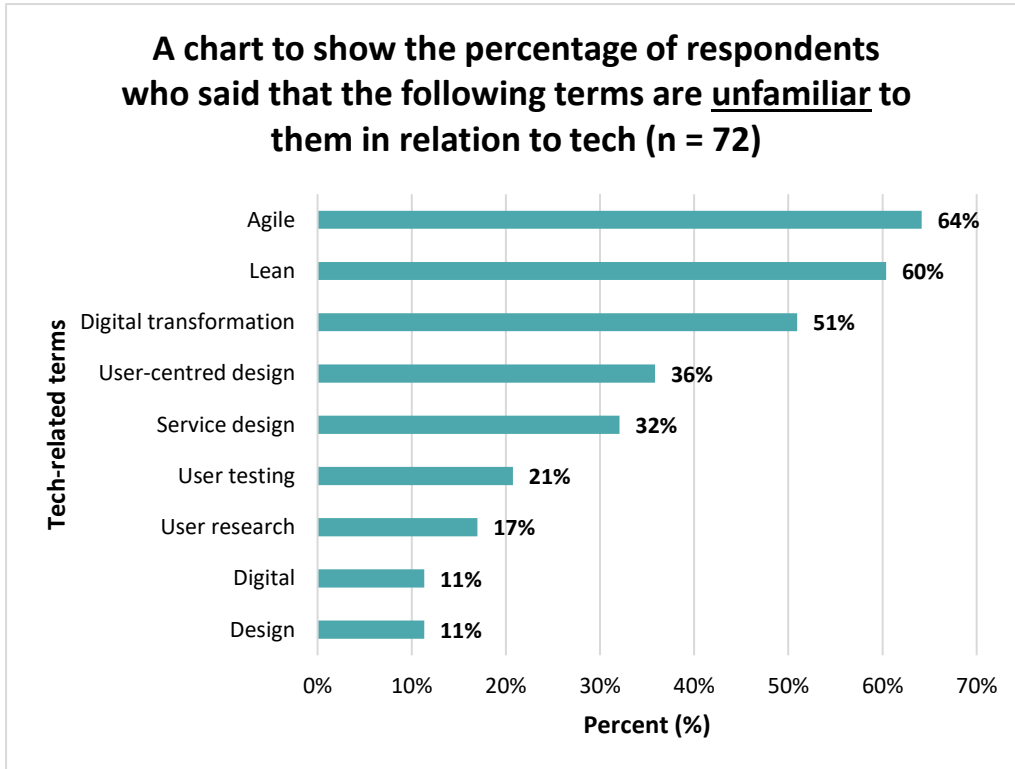
<sup>8</sup> [Digital Charities Slack](#) and the [ECF newsletter list](#).

### A chart to show what respondents found unhelpful regarding the information/advice they sought (n = 60)



'Techy language' was cited by 45% of survey respondents as unhelpful in a piece of information or guidance they'd read in the last six months. We wanted to dig into this further, in order to understand what words are the most alienating or confusing. We found 'agile', 'lean' and 'digital transformation' in particular do not resonate.

**A chart to show the percentage of respondents who said that the following terms are unfamiliar to them in relation to tech (n = 72)**



Other things that respondents said were unhelpful included: the limited number of practical examples; being advised to use technology that is then difficult to use and/or costly to maintain; information and advice that is not easy to follow; and advice from individuals that don't understand the sector or a specific organisation or their current ability level:

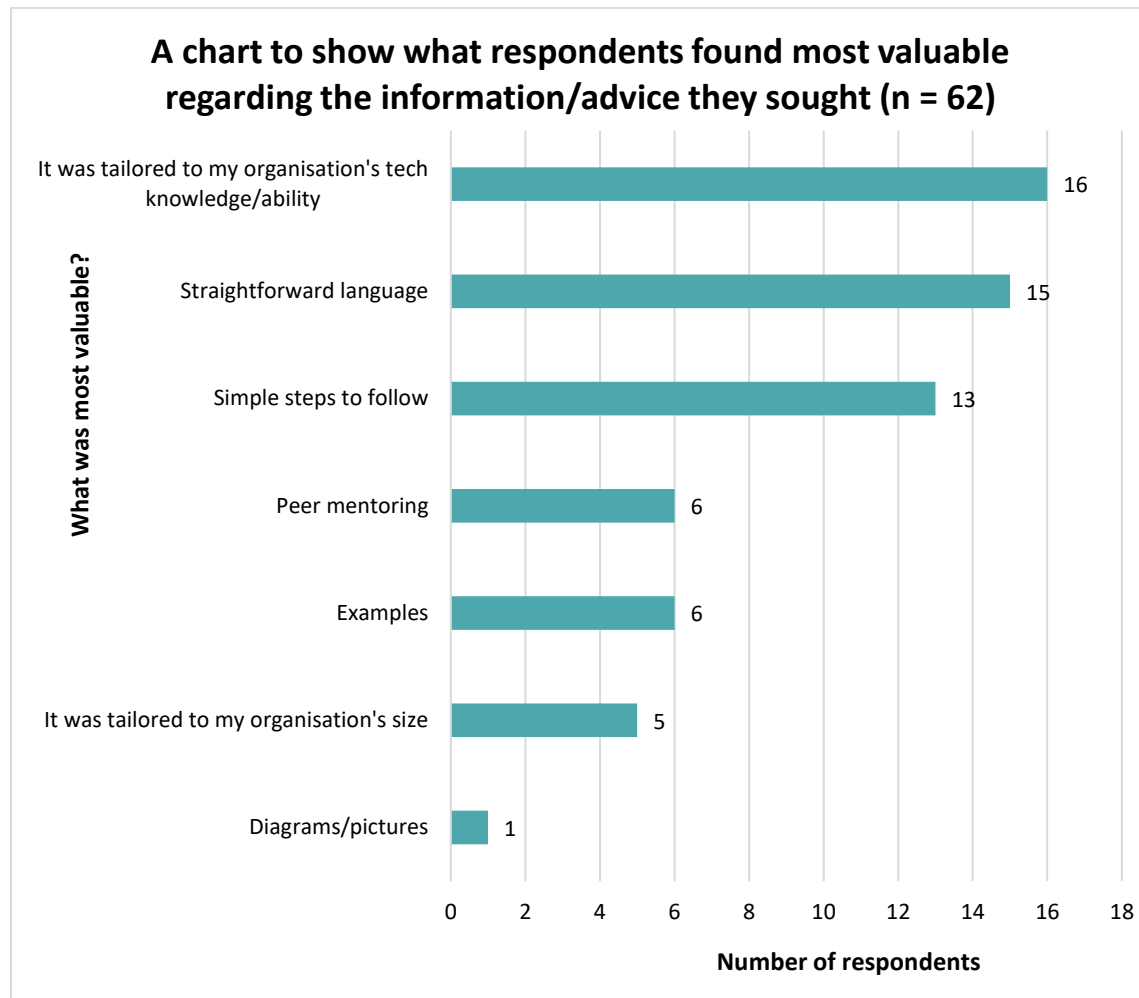
*Lots of training talks about big picture and strategy, but very few resources have very practical information, or case studies. i.e. working examples from other charities on data management/donor journeys etc.*

*We found the money to have our website redesigned three years ago. Before that I knew everything about the website and could do everything on it. Now I don't, and can't, and we have to rely on the designer for some of it. For a tiny organisation with no funds that's a problem.*

*Hard to find right people who understand your own needs.*

## Helpful features of support

The relevance of information and advice, as well as how easy it is to understand and engage with, were the things that respondents found most valuable. An organisation's tech knowledge/ability ranked more highly than size as a determining factor for relevance.



Many organisations cited in-person, tailored support from experts who understood the sector as the most effective source of help:

*Tutorials are very helpful, but more so when someone is available to help take you through examples.*

*Understanding of my sector and needs, knowledge of what has worked elsewhere for other similar projects.*

In addition to experts, SVOs found colleagues and other small charities hugely valuable as sources of advice:

*With funds and time tight, don't reinvent the wheel, use the experiment of other small charities and experts to guide decisions and involve service users in testing.*

## Funders' support

'Providing funding as part of all grants that covers core tech costs (IT infrastructure maintenance, user research)' was selected by 57% of respondents as something that could assist them. Respondents also recognised that funders could play a role in:

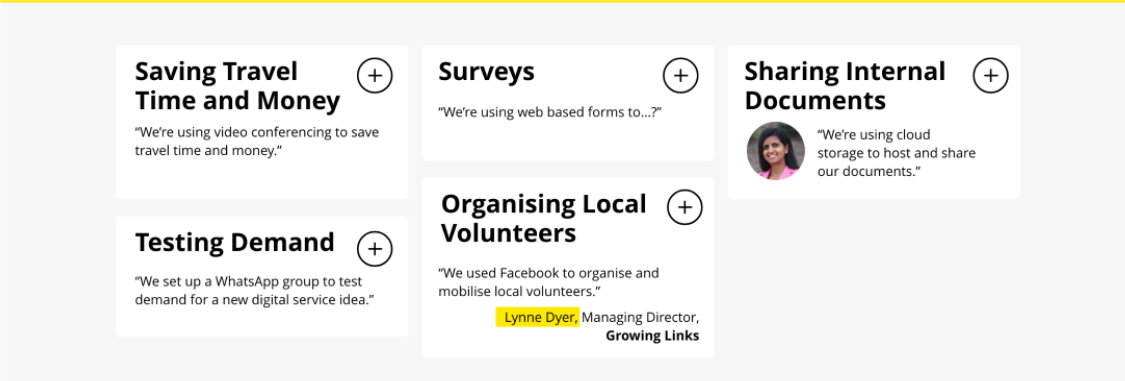
- Core funding to support change management as they build a digital culture
- Funding to support tech innovation and development that benefits SVOs
- Providing examples of how other SVOs have used tech/what they have achieved with tech
- Connecting SVOs with other SVOs who are solving similar problems so they can create solutions collaboratively
- Funding for testing, developing and scaling of existing tech services
- Signposting to trusted tech support

## Testing a prototype

To further develop our understanding of effective support for SVOs interested in the adoption and use of technology, we created a prototype tool: 'The gift of time'. It showed five common areas that SVOs had reported finding difficult or time-consuming, together with a mix of advice from experts and charities themselves on how to address them, using comments from our survey respondents and adding pros and cons from experts about each approach. Building on the insight that peer examples would be a helpful source of information for SVOs, we hoped it might shed some light on what might help make tech 'usable' for these organisations. We then tested the tool with five separate users from a range of small charities.

## The gift of time

Great time saving tips and practical ways of implementing them from **over 100 charities across the UK.**



The screenshot displays a grid of five interactive cards, each with a title, a quote, and a plus icon in a circle. The cards are:

- Saving Travel Time and Money**: "We're using video conferencing to save travel time and money."
- Surveys**: "We're using web based forms to...?"
- Sharing Internal Documents**: "We're using cloud storage to host and share our documents." (Includes a small profile picture of a woman)
- Testing Demand**: "We set up a WhatsApp group to test demand for a new digital service idea."
- Organising Local Volunteers**: "We used Facebook to organise and mobilise local volunteers." (Attributed to Lynne Dyer, Managing Director, Growing Links)

This is a very rough prototype created by CAST & IVAR. In our survey,

## Organising Local Volunteers

"We used Facebook to organise and mobilise local volunteers"

### What problem did it solve?

It helps volunteers co-ordinate cooking hot meals for those vulnerably housed in the local community. It also helps raise awareness of our projects and keep people updated

### What are the advantages?

It's popular with volunteers

### What has been challenging?

The general public can be a challenge!

#### Pros

- Creating a forum or group on an existing social network that your community already uses will make them more likely to engage with it
- Social media enables a two-way conversation between staff, volunteers, beneficiaries and supporters

#### Cons

- You'll need a content policy and plan to guide what you will and won't post and how often
- Open public engagement can be time-consuming and in the worst cases can open your staff up to abuse



### What happened next?

The Facebook page has engaged the community and now has over 1,800 members, who use it to organise the evening meals, share different ideas and socialise

### Org description

Growing Links is a small CIC based in Penzance, which works to generate a more sustainable, resilient & stable food system through organic horticulture, permaculture, education & connection.

<http://www.growinglinks.org.uk>



### Advice they'd give to others:

"Social media is an amazing communication tool and for raising awareness to the wider community and in turn gives us more volunteers on the ground."

- Lynne Dyer, Managing Director, Growing Links

The comments from our user testers further reinforced a picture of time-strapped organisations needing concise, clear and practical support, as well as plain-language content:

*I'm reading this through a lens of hassle – 'how much hassle is this going to create for me?'*

*I'm not sure what's meant by 'data security' – it'd be useful to have a short explanation here otherwise it's just jargon.*

We also heard about the critical importance of users being able to relate to the advice on offer:

*The one with the picture makes it seem more relatable for small charities. I like learning about other charities – you feel a sense of solidarity to hear others' solutions that are in a similar position.*

*It's really useful to know they have one member of staff – sometimes tech can be a challenge if you're small. I would choose a smaller charity's example over a larger one as I can relate to this more and it's within my budget.*



Several testers also noted the lack of obvious branding as a barrier to them ascertaining that the information was trustworthy, suggesting the importance of emphasising that any 'expert' support comes from a recognised, non-commercial source:

*It's unclear who's done this and why. I'd always want to know why there's a nice thing that appears to be for free. Is someone selling me something?*

See Appendix Three for further details of responses to the prototype.

# Part Two: Reflections and Messages

In Part Two of this report, we begin by highlighting four key insights to have come out of the study. We then offer a set of messages for SVOs and tech support providers.

## 2.1 Key Insights

The primary aim of the study was to explore the extent to which SVOs are able or willing to consider if and how technology might have a positive role to play in their work. The study has highlighted that size alone is not the best predictor of digital maturity or capacity. Many SVOs have a genuine appetite to engage with tech and – despite a relatively low recognition of the ‘digital transformation’ terminology now common in other sectors and of digital support offers – many are already proactively searching for, selecting and implementing tech-based solutions to their organisational and service challenges. Furthermore, there is broadly a strong recognition of the need for a strategic, needs-driven approach to using tech, albeit a frustration that having space to properly ‘test and learn’ can seem like a luxury in a resource-poor environment.

Building on the key findings summarised in Part One, four things stand out.

### 2.1.1 Tech is imaginable for the SVOs in our study – but not as usable as it could be

Although this was a self-selecting group of SVOs, it represented a diverse mixture of tech usage and support needs. We found high levels of willingness and enthusiasm to engage with tech and adapt to changes in the tech landscape. Indeed, we might describe our respondents as a ‘willing workforce’. Gaining buy-in from sometimes resistant colleagues and users was far less of a barrier than anticipated; there was a strong desire to experiment with different approaches – ‘tech burnt’ (highlighted in the scoping research) was not as much of an issue as we had anticipated.

However, survey respondents also reported two significant barriers: a lack of knowledge about where to access support; and the lack of time to learn how to practically implement and use tech. This echoes our initial finding from the scoping stage – many SVOs are unsure how to embed tech into their daily practices. Thus we can see that, while tech is imaginable for this group of SVOs, it is not as usable as it could be or, perhaps, needs to be in order to respond to changing patterns of user behaviour and expectation.

### 2.1.2 The barriers to use are practical, not psychological

Linked to our key insight about use, the challenges cited by our survey respondents were broadly practical rather than psychological, and centred around the cost (in both time and

money) of resourcing development and change, including new skills training for staff and capital costs associated with implementing and maintaining new tech, often in areas with problematic broadband access. Challenges stemming from lack of expertise – such as identifying the right tech for the right cost and functionality, and understanding the relative benefits of free software vs paid versions – were also major challenges.

### **2.1.3 Guidance around use – more stories about the lived experience of tech are needed to help inspire organisations and map out learning and adoption journeys**

Support received from colleagues and fellow charities was identified as the most useful source of advice and information, and each of the SVOs we tested the prototype with were immediately attracted to advice that appeared to be given by ‘an organisation like me’. The advice many of the SVO survey respondents gave (for other SVOs) was in line with that most widely championed by expert intermediary and support organisations – e.g. be strategic with your use of tech and ensure it solves a problem, dedicate time to making it work, and ask for help (see Appendix Two for more detail). This shows a higher-than-expected level of digital understanding and recognition of key principles, such as those outlined in the [Charity Digital Code](#) and [BetterDigital.Services](#). It also suggests that peer-to-peer support and sharing across the sector could be an effective, as well as popular, means of scaling good practice.

The production and sharing of relatable examples could help demonstrate how key principles are borne out in practice, enabling SVOs to map out a process with practical steps that are right for them. These exemplars could also be used by funders to encourage and support similar behaviours and milestones among their grantees.

### **2.1.4 Funders can play more of a role in supporting the introduction of tech into SVOs**

A number of respondents agreed with statements about the varied roles that funders can play in relation to tech. Responses included: providing core funding to cover tech infrastructure and experimentation costs as organisations build a digital culture; building links between SVOs working on similar problems to encourage collaboration; and signposting to trusted support. On average, respondents ticked four to five options for the question on funders’ role with tech support – this suggests that a fairly large proportion of respondents believe that funders could provide help in many forms, in relation to the adoption and maintenance of tech.

## 2.2 Key Messages

In this final section of our report, we propose a set of messages arising from this study for SVOs, support organisations and funders. As we have noted above, the challenges of tech use in SVOs are not so much due to organisations' lack of tech enthusiasm or willingness, but rather the lack of time and funding to invest in tech so that it can be meaningfully and purposefully embedded. For these organisations, modest shifts in practice, coupled with encouragement, coaching and bespoke practical support from both volunteer experts and peers, could help them flourish.

### 2.2.1 Five suggestions for SVOs from SVOs

- **Start somewhere and don't be disheartened if it goes wrong:** Yes, you're right that this stuff IS important. Not only that, it's essential. You don't have to be an expert and can start small. Getting things wrong is part of the process – that's OK and it's expected. Everyone's learning. Breaking down big projects into manageable, incremental steps will help you stay focused while minimising the resources required.
- **Focus on the problem you're trying to solve:** Understand your context and the needs of whoever you're aiming to help first and foremost. Sure, get inspiration from elsewhere, but that's no substitute for really deeply understanding the specific behaviours and expectations that you need to respond to in order for any tech to be used and useful.
- **Time-bound tests:** Test a new piece of tech or a new digital approach for a time-bound period, e.g. two weeks, after which review usage as a team and make a decision about whether to continue or change direction. This can combat the paralysis that comes with putting off a big decision, and deal with internal scepticism of new ways of working.
- **Don't reinvent the wheel:** Speak to other small charities about what they've done to solve a particular problem, and what they learned from the process. Most importantly, speak to the end users of the service themselves (be it an internal or external service) about what tech they are using in their day-to-day. It might reveal some previously unknown or unexpected avenues for improvements that build on existing habits.
- **Learning lunches:** The pace of change is always increasing. Create a culture of learning to ensure your organisation stays up to date with new developments in technology and their applications/implications. Embed reflection and knowledge sharing into the day-to-day through bringing colleagues together over food (a great motivator!).

### 2.2.2 Five pointers for support organisations aiming to help SVOs

- Better alignment and signposting: Build SVOs' awareness of the range of existing support offers that can help them and offer coaching to identify key needs so that they can confidently navigate the available support.
- Advice/guidance given should be **realistic** and **relevant**: It should take into account an organisation's current understanding, available resources and existing behaviours – including the digital access, habits and preferences of the people running the organisation, and the beneficiaries it supports.

- Examples cited should be relatable: An organisation should be able to see itself in the case study before them.
- Strive for clearer, more consistent and accessible messaging around the terms 'tech', 'digital', 'design' and other technical terminology within each of these fields.
- Be more transparent about whether support is connected to commercial objectives, and be upfront about current and future costs if it is. Provide more tangible and honest examples of what knowledge or understanding is helpful to have in-house and what to recruit experts to do.

### 2.2.3 Things for funders to think about

- If you want to be an effective funder of small organisations, you need to develop your digital literacy or partner with organisations that can provide this expertise.
- Ensure assessment processes do not disadvantage the iterative nature of digital development, and work to ensure that assessment structures and decisions reward recognised best practice (such as [BetterDigital.Services](#) and the [Charity Digital Code](#)). That means treating digital confidence and competence as a 'must have' rather than a 'nice to have'.
- Become familiar and confident in processes that manage risk and minimise waste in digital projects. This confidence includes accepting learning and change as a necessary part of developing services in a digital context – build flexibility and support into your processes, systems and reporting. Failure as part of learning is a positive – as long as it is in pursuit of charitable goals.
- Think seriously about how you might support the infrastructure, training and experimentation costs associated with 'digital transformation' in small organisations, in order for them to be resilient and fully able to respond to the changing needs of their communities. Small organisations cannot be expected to take a leap forward without proper, flexible support.

We will be further exploring how funders can play more of a role in supporting small voluntary organisations to introduce and embed technology in a follow-up study.

# Appendix One: What 'tech skills' do SVOs think they need?

Some of the specific tech skills that respondents said they need were:

- Data security
- Databases
- Website design
- Digital product development
- Digital project management
- Running webinars/developing online training
- Using and editing video
- App design
- Twitter and Facebook

In the open comment boxes, skills to develop and use tech was mentioned most, including the need to have skills to use tech most effectively. For example, one respondent said that they needed '*greater understanding of how to create a user-friendly system*'; while another said that they feel they need to be more '*consistent about use of the tools*'.

Confidence in exploring tech was apparent in some of the comments, while others referred to the need for a specific skill or knowledge base. For example:

*I need more training in tech language and not being afraid to push wrong buttons.*

*I am not very savvy in this field and I worry about putting out the wrong message.*

# Appendix Two: Advice from SVOs to other SVOs

## Definite encouragement to embrace tech as much as possible

- *'Just go for it and try it out'*
- *'Embrace the tech available at the level you want it'*
- *'Embrace it as much as you can with the capacity you have'*
- *'Go for it'*
- *'Don't fear tech ...'*

## The importance of being strategic, starting with a purpose, and actively managing the introduction of tech

- *'Think about its purpose before implementing something that looks good'.*
- *'Have a good project manager and have a good understanding of full costs'.*
- *'Just because it's popular, doesn't mean it's right for your service'.*
- *'Don't do too much at once'.*
- *'If it doesn't help the service user access help or use your help, or make services more efficient, what is its purpose?'*
- *'Spend a lot of time trying to find the right solutions'.*
- *'Never become wedded to a current process or way of working'.*

## The importance of allocating resources

- *'It's important not to underestimate the time and financial implications researching, purchasing and implementing can take'.*
- *'There is no gain without some initial pain... but the benefits are enormous'.*
- *'Budget but be prepared for delays and additional costs'.*
- *'Give it enough time – tweaking and improving it takes time'.*
- *'Investing in the time to learn and use is key'.*
- *'Allocate resources to training staff and implement tech'.*

## Seek advice and support

- *'Be open to asking for help and advice'.*
- *'Get help!'*
- *'Get the right advice for your particular service as "one size fits all" does not work'.*
- *'It's important to speak to other, similar organisations to obtain help and advice'.*

# Appendix Three: Testing 'The Gift of Time' prototype – rationale and learning

## Problem

SVOs frequently cite common pain points in their operations and service delivery. They need support to identify and take the practical steps to solve them, but are often unaware of potential digital solutions or how these could be implemented.

## Solution prototype

An online tool containing crowdsourced content and advice from other SVOs (taken from our survey) for time-saving techniques and hacks, where the hack is a tech system/process.

The key assumptions we were looking to test were:

- If SVOs respond positively to the idea that tech can be time-saving
- Peer advice is the most useful source

We were keen to understand:

- What are the most common time sinks and therefore most useful areas we could advise around?
- What advice is the most needed/valuable – the advice/hacks or the specific tool recommendations?
- What level of detail is most useful?
- How do people like to segment/filter? Size, maturity, time available to spend on this?



# Things that people responded positively to in the user testing

## Advice 'from people like me'

- Seeing a charity workers' face next to the advice drew several testers to click on it first.
- 'Conversational' tone of the advice given.
- Seeing real, first-person quotes from a fellow charity worker: *'I'd like more first-person quotes with perspectives from a couple of different charities, and perhaps people who've used the service like the volunteers, about how it benefited them'.*
- *'The organisation description is a nice feature. It gives it personality'.*

## Clear, concise content

- *'I like the pros and cons, seems digestible and I can quickly gauge whether this is relevant or not to us as an organisation'.*
- *'I'm expecting clear, concise information with people who have tried and tested things'.*
- *'Wouldn't want it to be any more text heavy'.*
- *'Tools is a useful section, I'd move this further up. You don't want to have too many options – small charities only want key resources'.*

## Clarity for communication to other stakeholders

- *'If you are a staff member trying to present an idea to the team for buy-in – the pros and cons are useful'.*

# Suggestions of improvements

## Explicitly state the time-saving potential of a new tool/approach

- *'I wouldn't implement it if I didn't fully appreciate the time saved. E.g. time saved could be x amount per week – this would create impetus to do it'.*
- *'What's missing is a 3-bullet implementation plan. The reason I haven't done these things isn't because I don't think they're a good idea but because I'm not sure practically how, or how long they'll take. A step-by-step walkthrough would be helpful'.*