



**DOT PROJECT**  
Tools for Charity Leaders

## Introduction

This toolkit summarises a suite of resources and tools developed by DOT PROJECT in partnership with key experts as part of the Charity Digital Leaders programme.

These tools are:

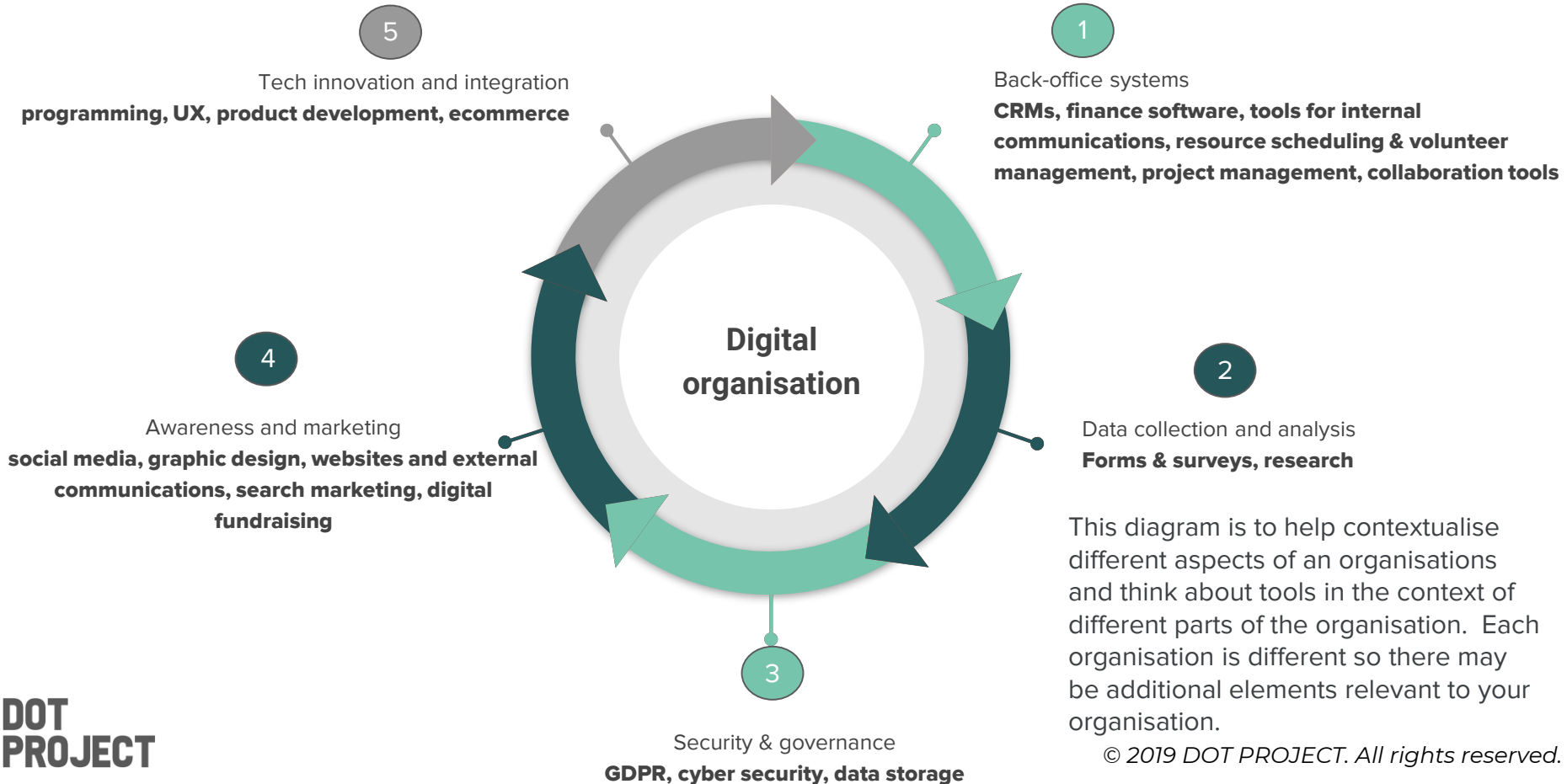
- Tool 1 Digital tool assessment
- Tool 2 Digital Skills Assessment
- Tool 3 Checklist for expanding skills
- Tool 4 Data Mapping Tool
- Tool 5 Data collection for impact measurement
- Tool 6: 6 simple steps to becoming cyber secure
- Tool 7: Checklist for data security
- Tool 8: Digital fundraising checklist

The purpose of the toolkit is to provide organisations with a starting point to assess their digital approach. More comprehensive support and guidance can be found in the presentations from the training sessions, to request a copy of these please email: [info@voscur.org](mailto:info@voscur.org)

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# Components of a digital organisation



## Section 2: Understanding your digital approach

To create strong digital foundations it is important to understand the existing tools you are using, who is using them and why you are using them.

To assess your existing approach consider the following questions:

- What digital tools are you currently using?
- What is the purpose for using each tool?
- How much does each tool cost, and how much is your digital approach costing overall?
- What are the challenges of each tool?
- What are your experiences of using these tools? What would you seek to improve?

You can use **Tool 1 Digital tool assessment** (on the next page) to capture your findings.

## Tool 1: Digital Tool Assessment

Name of digital tool	Why do we need this tool? What is the added value?	How much does this tool cost?	Who uses this tool?	What are the challenges of this tool?	What would you like to improve?

## Section 3: Understanding the digital skills you have within your organisation

Assessing your digital approach and the digital tools you use regularly within your organisation may lead you to uncover a skills gap within your organisation. Staff or volunteers may feel they are unprepared or under equipped to use digital tools required in their role.

You can assess the digital skills and confidence within your organisation using Tool 2 Digital Skills assessment (on the next page). This tool helps you to:

- Identify, for each staff member and/or volunteer, the digital tools they are using regularly and where they may need support
- Identify the necessary digital skills an individual needs to fulfill their responsibilities
- Define learning focus to respond to gaps in knowledge or skills
- Develop specific learning outcomes which staff and volunteers can work towards

### Section 3: Tool 2 Digital Skills Assessment

Name of Staff member or volunteer	Tools in use regularly by staff member	Digital skills required for job role	Learning focus	Specific learning outcomes



### Tool 3: Checklist for expanding skills



	Identify priority learning gap
	Identify peer support networks
	Where to seek external skills
	Assess skills you have internally
	Assess your volunteer, trustee digital skills
	Identify where and when to seek external skills
	Digital / skills development plans for staff

## Section 4: Data collection and management

Most organisations need to collect data to carry out their routine activities, and many organisations will need to use data to report on progress.

It is essential that data is collected, stored and managed in compliance with the General Data Protection Regulation. Furthermore knowing how to access data which will enable you to report on progress will make measuring impact easier in the long run.

The following tools have been provided to ensure you have the basic information in place to support your data collection and management approach:

**Tool 4 Data Mapping Tool** - this simple tool keeps a record of the data you hold and why. It is an essential part of GDPR compliance.

**Tool 5 Data Collection for Impact Measurement** - this tool enables you to assess how you are collecting data which supports your impact measurement approach

## Section 4: Tool 4 Data Mapping

What data do you collect?	Where is it stored?	Is this data sensitive?	Who has access to this data?	Why do you need this data?

## Section 4: Tool 5 Data collection for impact measurement

Indicators/What do you need to measure to track progress?	What data do you need to measure these indicators?	Where will you find this data?	How often do you need to review this data?

## Section 5: Keeping information secure

Having a robust approach to cyber security is essential for any organisation, particularly if you are dealing with sensitive information and vulnerable individuals. What a robust approach looks like is relative to the size of your organisation and the type of information you manage.

This section provides guidance to put in place the foundations for your cyber security approach and ensure you have basic approaches in place.

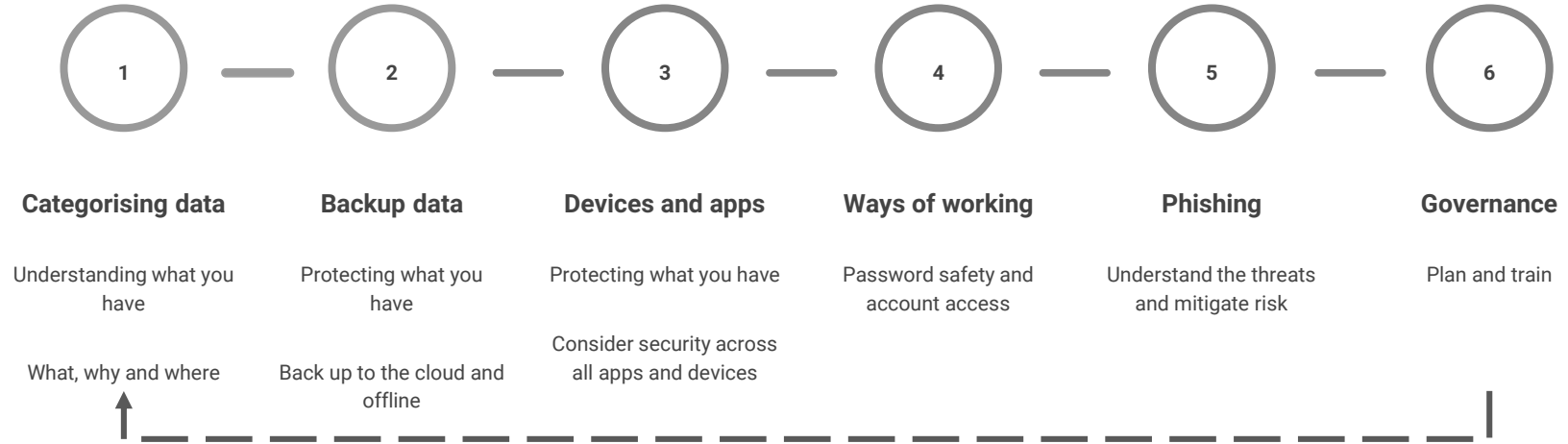
We have developed the following tools in consultation with Red Goat Cyber. You can use these as starting point to developing your cyber security approach:

**Tool 6: 6 simple steps to becoming cyber secure**

**Tool 7: Checklist for data security**

## Tool 6: 6 simple steps to becoming cyber secure

### Understanding what you have



REPEAT!

## Tool 6: Checklist for data security

	We know what sensitive data we collect within our organisation and where it is held
	We have guidelines in place about how sensitive data should be shared
	We understand our contractual and legal responsibilities about collecting and storing data
	We backup our data to the cloud and on a hard drive
	We know what antivirus and firewall programmes we have on our computers and they are regularly updated
	We know what to do in the event of a data breach
	We have assessed whether we need cyber coverage in our Insurance
	We have clear guidelines in place about how staff should set passwords
	We have cyber security awareness training for staff and volunteers
	We know where we can seek help and how to report and respond to a cyber threat to our organisation
	We know what the risks are to our organisation if we are subject to a cyber attack

## Section 6: Choosing the right tool for your digital fundraising approach

In collaboration with BANES 3SG we have developed a checklist to help you take a step by step approach to choosing the right tool for your digital fundraising approach.

A key starting point is understanding your audience and their behaviours, to determine whether a digital fundraising approach will be relevant for your organisation. It is also important to ensure you have the time and resources to maintain a digital fundraising approach as it requires regular communication and storytelling to keep audiences engaged.

To find out more about Local Giving, one of the digital fundraising tools introduced during the training, visit: <http://join.localgiving.org/>



## Tool 7: Digital Fundraising Checklist and key considerations

	<b>COST</b>
	Do they take a commission but justify it by providing an easy to use tool?
	Is the platform commission free but only offers limited functionality?
	Do they charge annual or monthly fees and what services do you get in return? E.g.campaigns, grants, other perks
	Do you want imbedded donations payment option and do you have the budget to pay for it?
	<b>SET UP &amp; SUPPORT</b>
	Is it easy for your fundraisers to set up a page and share with their network?
	Are you likely to want to call a real person about a technical issue?
	Do you think your fundraisers will ever need to call someone with technical issues?

	<b>DATA</b>
	Does it provide useful finance reports that you can download in Excel?
	Is it secure?
	<b>PAYMENTS</b>
	Do they provide monthly bank transfers on regular dates?
	Will the platform automatically process Gift Aid for you?
	Can they process monthly direct debits on your behalf?
	<b>REPUTATION</b>
	What is the reputation of the platform amongst your fundraisers?
	Is it owned by an ethical company?

	<b>PRACTICAL</b>
	Have you always used a particular platform in the past and business processes are already well embedded?
	Is it easy to share appeals and fundraising pages via social media?
	Does an event organiser recommend a platform (e.g. Virgin Money Giving for London Marathon)?
	Do you need to take international payments?
	Do you anticipate that most of your fundraising will be generated via mobile?