

**Is there a silver lining in  
the cloud for the UK  
charity sector? \_\_\_\_\_**



# A look at the impact of digital marketing within the charity sector

A recent report into the state of the UK charity sector has identified some worrying statistics for the future of charities not engaging with the digital age.

**Skills Platform Digital Skills Report, published by Zoe Amar with a foreword from Martha Lane Fox CBA highlights the worrying state of the charity sector as it grapples with day-to-day operational issues whilst failing to capitalise on its digital opportunities.**

Claiming that half of all charities still do not have a digital strategy and only 9% have been through 'digital transformation', the report goes on to say that a lack of skills (57%) and funding (52%) are the two main reasons for the disappointing low levels of uptake.

"What could make the biggest difference in helping build a stronger and more sustainable charity sector? Sadly, it's an area half of charities say isn't being given enough focus: digital skills. My own charity, Doteveryone, is on a mission to help people unlock the life-changing potential of digital. So naturally, we were all interested to see charities' online skills mapped out in Skills Platform's Charity Digital Skills report," says Martha Lane Fox in her opening statement.

"Unfortunately, the report's findings are worrying. More than half of charities (57%) cite a lack of skills as the biggest barrier to getting more from digital, whilst 52% see lack of funding as a threat. Even worse, half of the charities who responded say digital is not being given as much attention as other organisational challenges. There is a terrible irony in seeing digital as a distraction rather than a potential solution to the problems our charities face."

It seems even more ironic, therefore, that the JustGiving fundraising website has recently seen its fastest ever crowdfunding campaign when the Metropolitan Police Foundation set up an appeal to raise money for PC Keith Palmer, tragically killed in the recent Westminster attacks.

The PC Keith Palmer Appeal Page passed its £100,000 target in little over six hours with donations from over 5,500 people and then passed the £200,000 mark shortly later with donations from just over 10,000 people (and subsequently closed at an incredible £700,000).

**"half of all charities do not have a digital strategy and only 9% have been through 'digital transformation'"**

Figures have yet to be collated on the breakdown on the methods of payments favoured by the generous donors, but if current trends apply then a significant percentage of the funds raised will have been processed via mobile appliances. It stands to reason therefore, that fundraising charities especially (not all charities are fundraisers), are seriously disadvantaged when it comes to not having the skills or the resources to successfully implement digital strategies.





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Our view at makepositive, is one of optimism, however, as we look to a future that enables more take up of smarter technologies through easier access provided by cloud technologies and results that can convince even the meanest of Boards. A view which is not dissimilar to that of Martha Lane Fox when she goes on to say, "Whilst the survey's results are bleak, there is one positive: a clear opportunity for charities to take on digital transformation. And that transformation must be led from the top - 8 out of 10 charities are looking to their leaders for a clear vision of where digital could take them. If boards and leadership teams don't start owning the development of their digital skills, more than half of the charities who responded are concerned their organisations will become irrelevant, fall out of touch with their audience, and lose ground to competitors."

Commenting on the report, written by Zoe Amar and David Evans, the Director of Policy and Communications at The Charity Commission, Sarah Atkinson adds, 'All trustees - no matter how large or small their charity - should consider how they can use technology to better meet the needs of their beneficiaries, and how they can apply digital tools to make their governance systems more effective. So I encourage boards to use the findings of this survey as a prompt to start the conversation about making digital work for their charities.'

Whilst the report is not a direct investigation into the use of 'cloud' technologies per se, the evidence is mounting that the transformational benefits associated with smarter use of digital and therefore cloud technologies are tragically being missed by those who, arguably, need them most.

Sources: <https://fundraising.co.uk> and <https://www.skillsplatform.org>

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### A screenshot of the justgiving campaign set up to support the family of PC Keith Palmer

**mpf**  
METROPOLITAN POLICE FEDERATION

Verified by  
**JustGiving**

**Stephen Redgewell**

**We've raised £736,093 to give to the Family of PC Keith Palmer**

📍 London, United Kingdom  
❤️ **Emergencies**  
🕒 Funded on Monday, 27th March 2017

**294%** **£736,093**  
raised of **£250,000** target by **34572** supporters



# Vignette



makepositive is working with NGOs to implement fundraising processes using functionality within the trusted Salesforce platform. We work to empower organisations to nurture and maintain relationships with funders as well manage interactions and to manage donation cycles. Our clients are managing the end to end cycle of pledge to payment within a collaborative experience; this is enabling charities to gain a true real-time single view of contacts across funders, volunteers and associating these funds to their service deliveries and activities.

Rajni Beghal, NFP Account Manager has worked with many NGOs including The Rainmaker Foundation and Virgin Unite. The following organisation are using the Salesforce platform to manage fundraising and donors as well as supporting well informed decisions in line with the charity's overall vision and impact.

**Virgin Unite are the not for profit foundation of the Virgin Group, founded by Richard Branson. They unite people and entrepreneurial ideas to reinvent how we live and work in the world to help make people's lives better. Their aim is to do their bit to revolutionize the way businesses, government and the social sector work together.**

## Virgin Unite's requirements

Virgin Unite recognised the benefits that could be achieved by moving from storing data across countries in an unstructured way to having one powerful repository which multiple business units could access. With differing business functions interacting with a shared community of stakeholders the benefits of being able to cross fertilize data were clear. They therefore sought a customer relationship management system that would enable them to manage effectively their relationships with donors, grant recipient and event contributors. Time and money could be saved by automating processed which were previously manual.

## The solution

makepositive worked closely with Virgin Unite to implement a Salesforce-based solution to ensure their exact requirements were met. This required significant customisation in a way that still allowed for future flexibility, the solution required in particular:

**Donor/Donation Management** – Enabling detailed information, relevant to the specific business role, was key to enabling Virgin Unite to manage their relationships effectively with their community members.

**Agresso Integration** – Sharing one version truth about financial information was crucial in making sure data was consistent and user adoption was strong. An integration with an existing Agresso finance system made sure that data on donations, donors, funds, grants and charities was dependable and linked to Donors, Events and Grant Recipients.

**Social Media** – To further engage with donors and stakeholders, we integrated Salesforce with Virgin Unite's Facebook fan page and Twitter account allowing Virgin Unite to monitor their brand and reactions to events and campaigns from within Facebook and link online conversations to their donors and stakeholders.

**Grant/Charity Management** – Providing visibility to the trustees over how grants are distributed and how each is performing was an essential feature of the system. Analytics on this grant data and automated reminders to collect details for the Board of Trustees streamlined the Grant Management process.

**Event Management** – An event management tool was required to manage events of varying sizes and profiles. The team track event spend, community member involvement and the impact of the event.

## The outcome

makepositive successfully rolled out Salesforce Sales Cloud at Virgin Unite. With users quickly adopting the system, Virgin Unite are realising the benefits not only in terms of the reduced time spent administering information but also through the value added by having a shared 360 degree view of their stakeholders including funders accessible from across the organisation.



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