

CHARITY DIGITAL SKILLS REPORT 2021



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#CharityDigiReport



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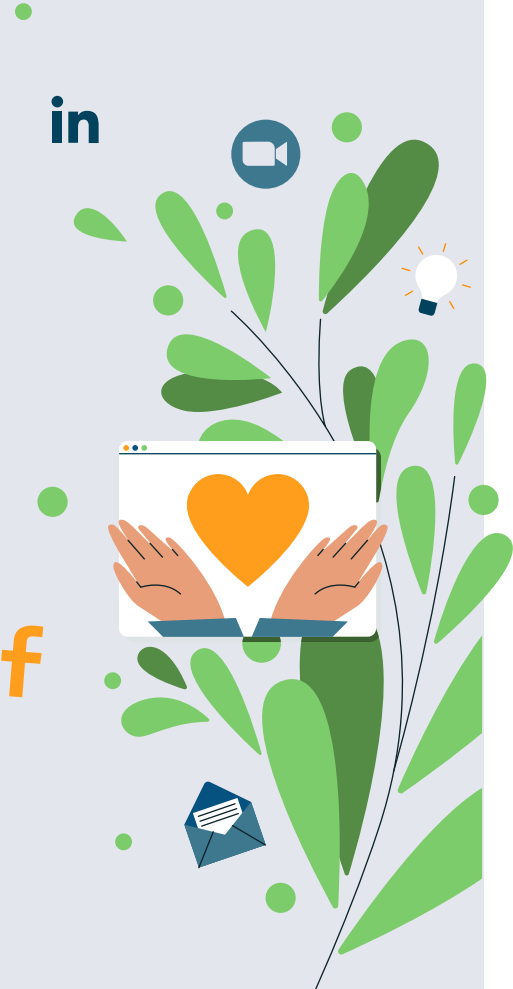
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INTRODUCTION



INTRODUCTION

When we went into lockdown in March 2020, charities adapted by offering online services, growing digital fundraising and working remotely. We saw some initial promising signs of this in the [2020 report](#). In this year's report we wanted to answer two big questions: *'Have charities started to embed digital change for the long term or not, and if so what does this tell us about the future of the sector?'* and *'What resources and support do charities need to better use digital to achieve their aims as we emerge from the pandemic?'*

The Charity Digital Skills Report is now in its fifth year and is the annual barometer of digital skills, attitudes and support needs across the sector. We've tracked how these have changed year on year across the sector and also analysed how other key building blocks in creating the right foundations for digital change are progressing, including understanding user needs, leadership, strategy and governance.

This year, we've redeveloped the survey and asked new questions to uncover the trends in these areas as well as other topics, such as the future of work and what charities anticipate doing with digital as we come out of the pandemic.

Our report aims to help:

- Understand the key trends in how charities' use of digital has changed over the last year, so that you can benchmark your organisation.
- Learn how other charities are changing their ways of working and developing their plans for digital as we reach the next phase of the pandemic.
- Track progress made over the last five years and what this means for the sector.
- Measure where charities have skills gaps but also what they need from forms of support such as funding and learning and development.

We are pleased to be working with Catalyst again on the report. Catalyst is a collective of individuals and organisations (like charities, funders, agencies and freelancers) helping UK civil society grow in digital. They are building an ecology of interconnected support initiatives, shared infrastructures, learning networks and community spaces that help charities and civil society organisations harness the power of digital, data and design to respond to the changing needs in their communities. The report will be an essential

resource for their work helping civil society rebuild from COVID-19 in a more responsive, sustainable, equitable way.

The findings this year do show some positive change in how charities have begun to use digital during the pandemic.

We've seen a lot of adaptation and innovation from charities over the last year and we hope that our findings will help charities to reflect on their progress and compare this in relation to the sector. We also hope that they can better make the case for where support and funding for digital is most needed. Most of all, we hope that charities can continue to harness that creative spirit as they develop their new ways of working, building on the skills and confidence they have gained so they can reach more of the people they support.

BACKGROUND TO THE RESEARCH



BACKGROUND TO THE RESEARCH

We developed this year's survey in March–April 2021 as the UK was beginning to emerge from the latest lockdown. We knew we had a short window in which to gather data on charities' reflections on a year of digital disruption and their intentions for future models of delivery, ways of working and income generation.

Between April and June, **365 charity professionals** shared their views on how they were using digital, what they'd done to adapt during the pandemic and where they saw digital as part of their future plans. We also asked about the impact this had on where they now need funding and support and where they saw the barriers to progressing with digital.

This year, we are pleased to have more responses from small and medium sized organisations. Close to **90%** of respondents were from registered charities and **49%** were from organisations with turnover under £1 million. Over a third of responses (**36%**) came from CEOs or those in leadership teams, closely followed by those in digital roles (**31%**). It is helpful to have this breadth of insights in the report.

We've reported all relevant data from the entire period the survey was open (26 April–7 June 2021). We have also shared relevant highlights about what the data reveals on the key trends for different sizes of charities and stages of digital maturity. Throughout this report we have adopted the following definitions and combined survey responses to aid the analysis.

Organisation income groups to indicate size

The following income groups are used to indicate organisation size, combining categories from the survey because they show a clear relationship with digital skills.

Small: **£0 -£100,000**

Medium: **£100,001 - £999,999**

Large: **£1 million +**

Digital maturity stage definitions

We use the following classifications of digital maturity stages which participants self-selected based on the associated statements.

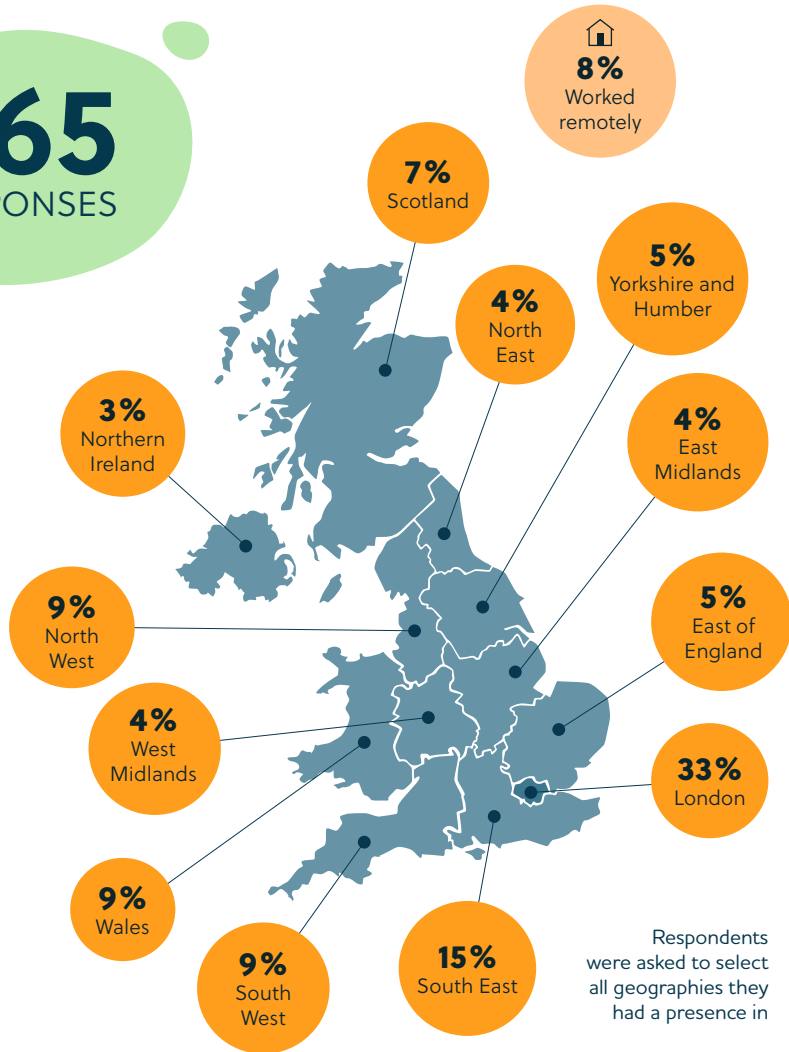
- **Barely online:** We're struggling to use the basics and have low digital skills, but we get by (we're barely online).
- **Curious:** We have some digital basics in place, such as social media or remote working, with ambitions to do more (we're curious).
- **Starting Out:** We're developing our use of digital across the organisation but we don't have a strategy in place yet (we're starting out).
- **Advancing:** Digital is part of our strategy, but we've not embedded this yet. We're investing in technology and developing our skills (we're advancing).
- **Advanced:** Digital is integral to our organisational strategy and embedded in everything we do (we're advanced).

For the purposes of this report, we combined the **1%** of respondents who selected '*barely online*' with the **12%** who selected '*curious*'. Overall, we found a clear relationship between digital stage and digital skills responses, showing that the classification is relevant and meaningful to respondents.

NB: All survey data was rounded up to the nearest decimal point. Percentages may not total 100 due to rounding.

SURVEY OVERVIEW

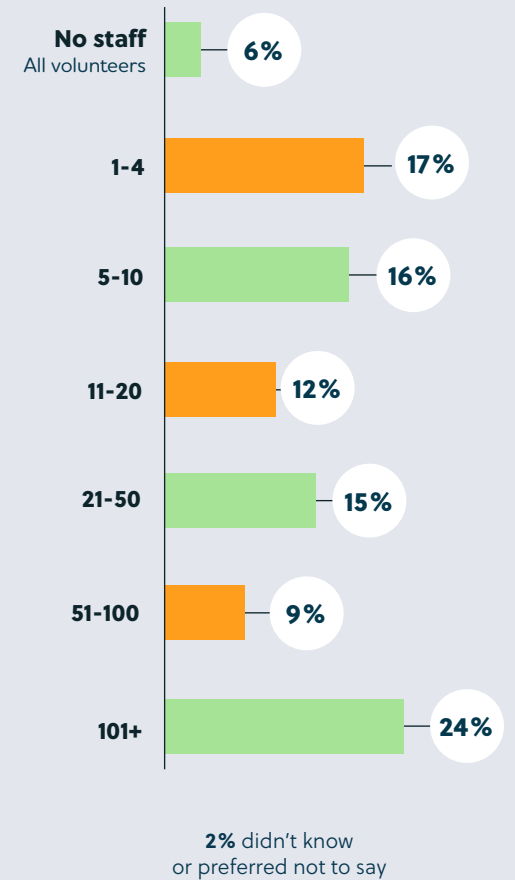
365
RESPONSES



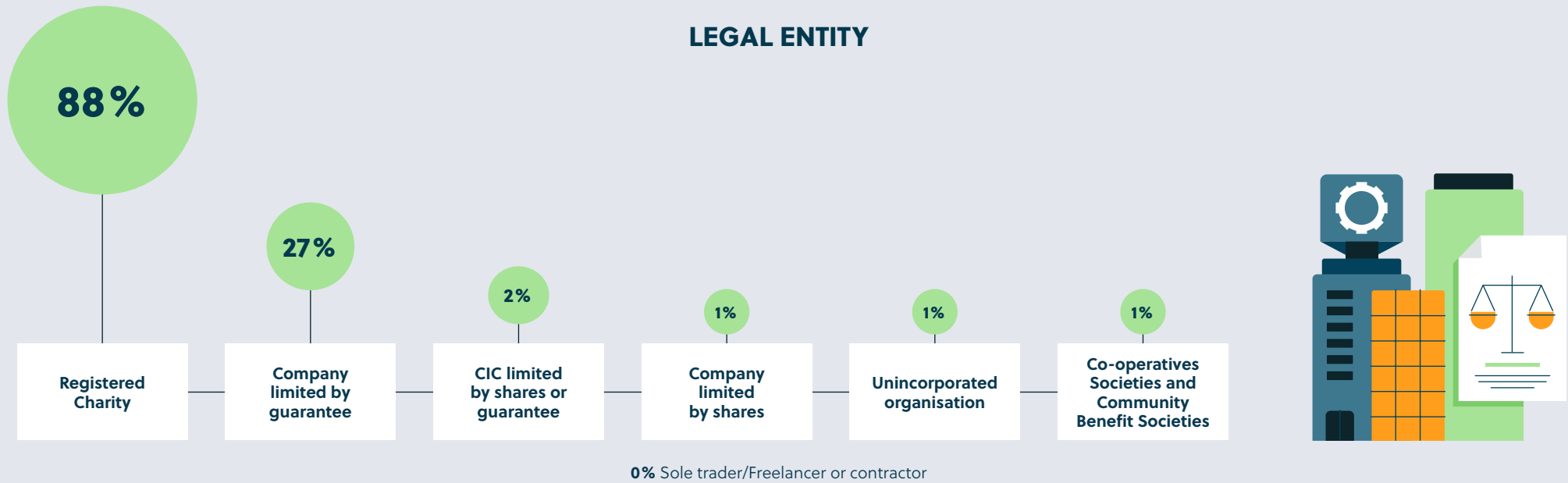
ROLE TOP 5 BY REPRESENTATION



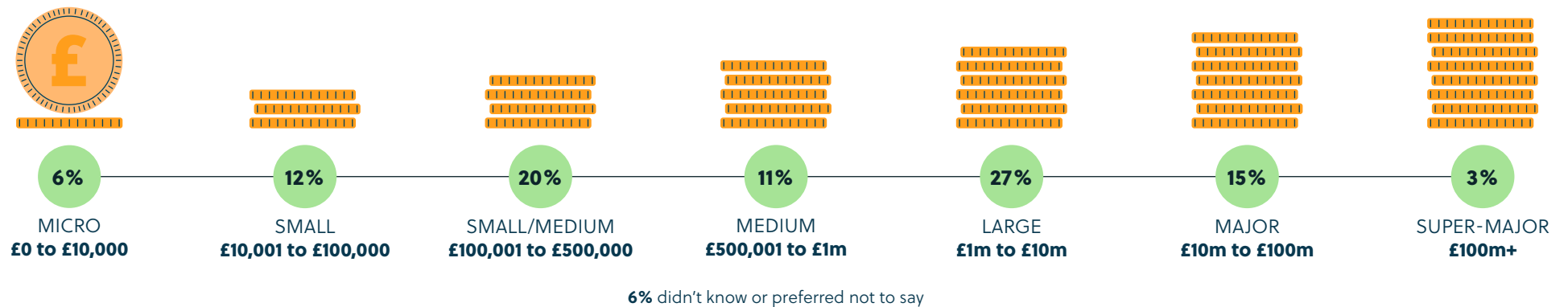
NUMBER OF STAFF



LEGAL ENTITY



CHARITY INCOME



KEY FINDINGS

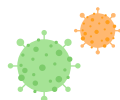


KEY FINDINGS

In last year's report we shared some promising initial findings about how charities were using digital to respond to the pandemic. This year we can reveal the scale of change across the sector.

There have been some very positive developments. Basic digital skills are improving and we are now seeing more charities taking a strategic approach. Charities are also making digital more of a priority generally and are planning to invest further in the coming year.

However, digital inclusion, burnout from remote working and poor IT are key barriers. Furthermore, digital fundraising, data use, service development and developing an online presence are significant areas for development. Across the sector, foundations need to be put in place, including skills, infrastructure and taking an inclusive approach to technology.



THE IMPACT OF COVID-19

- The scale of charities' adaptation to the pandemic is clear given that 83% changed their services in response to demand and close to 8 out of 10 (78%) used digital to reach new audiences.
- The positive signs about how charities were using digital to adapt at the start of the crisis are reinforced by our findings about the changes that have embedded over the last year. Just over two thirds (67%) continue to deliver all work remotely, whilst 41% are collaborating or sharing learnings with others about digital.
- However, digital inclusion has proven a challenge for digital service delivery, with over 1 in 5 (22%) cancelling services because their users don't have the skills or tech to use them. That is up from 15% at the start of the pandemic, showing how digital inclusion is still a pressing issue for the sector and a real area of concern when reaching beneficiaries.
- Almost half (45%) had to provide their users with devices, data or support to get online or access services.
- Meanwhile, 20% have cancelled services because they don't have the skills or tech needed to deliver them, a similar figure to the start of the pandemic.
- 27% have cancelled services because they think they would be less valuable online.



COVID-19 CHALLENGES

- Digital inclusion has proved to be the biggest challenge faced this year. Just over half (52%) are worried about excluding some people or groups and 24% are concerned that their audience is not online. 12% of charities themselves have struggled with basic tech access.
- Remote working has been the second greatest challenge, with 38% saying that they have found remote working challenging, exhausting or isolating.
- Just under a third of charities (31%) say their staff are burned out from the demands of intense remote working. In particular, 35% of staff from large charities say their colleagues are affected by this.



FUTURE OF WORK

- Just over two thirds of charities (68%) are planning a hybrid model for their working arrangements.
- Only 7% are planning for everyone to return to their office or usual workplace.
- 92% say that it is either very important or important for them to work for an organisation that is actively developing digital skills and capabilities, a 6% increase from last year, with the number of people saying it is very important rising from 52% to 65%.



STRATEGY

- 60% of charities now have a strategy in place for digital. This is a very positive increase from 2020, when just under half, or 49% of charities had a digital strategy in place (51% of charities did not have a digital strategy).



FUTURE DIGITAL PLANS

- Over two thirds (67%) now see digital as a priority for their organisation, which is encouraging, with a similar number (63%) planning to invest more in digital skills.
- 67% are planning to invest more in digital infrastructure and systems and 59% will be investing more in data skills and infrastructure.
- Half of charities now see digital fundraising as a priority.
- The majority of charities are now committed to digital service delivery, with 73% planning to continue delivering in this way and 71% offering them within a hybrid delivery model.



DIGITAL ASPIRATIONS

- For the second year running, charities see improving their digital channels as their top priority for the next year, with 42% rating it as key.
- Using data more effectively has risen up the table to become the second most important priority at 30%. This shows how the sector is beginning to value the role of data and insight further.
- For just under a third of charities there are still vital digital foundations that they need to get in place, with 29% wanting to take a more strategic approach and 28% keen to improve infrastructure or systems. Both of these areas have increased in importance over the last year.
- Just over 1 in 4 (27%) now see diversity of users as a priority.



BARRIERS TO DIGITAL PROGRESS

- IT has risen to be the biggest barrier facing charities, rising from being the sixth greatest barrier to the most important one for just under a third (32%) of charities. This is likely to have come to the fore due to the dependency on remote working
- There is also an increased appetite to understand the people that charities support, with 32% wanting to know how their audience is using digital. Compared to last year, this has risen from eighth place at 28% to second place at 32%.
- Skills are still a significant challenge. In 2020 they accounted for the second greatest barrier, whilst this year they took third place at 32%.



DIGITAL FUNDING

- Almost two thirds (62%) say that their need for digital funding has increased. Last year, just under half (48%) had not accessed any digital funding. This suggests that there is still a significant unmet need.
- In terms of the most important change that funders could make, almost half of the charities we spoke to (47%) want to include core digital costs in all applications. This is very similar to the 45% of charities who told us this last year. There is an urgent need for funders to better respond to this.
- There is potential for funders to up their game with a more developed 'funder plus' support model. 35% would like training for staff and volunteers and 27% would like better digital inclusion support.
- More than a quarter of charities (26%) would like funding to bring in external tech expertise and advice.



TOOLS, PRODUCTS AND SERVICES

- Just under half of charities (46%) are developing their own tools, services and products for their organisation. It is worrying that 44% feel they are poor at undertaking user research to inform these.
- Just over 1 in 4 (27%) are poor at regularly engaging with users to identify service design improvements, as opposed to the 62% who did not do this last year. This suggests that some charities are undertaking more user research.
- There is scope to share learning more, with 48% saying they are fair at this.



ACCESSIBILITY

- A third (33%) say that they are either poor or don't know if their products are accessible to users, compared to 57% last year who felt they did not ensure products are accessible to all users. This suggests an improvement in this area and that accessibility has become more of a priority, but it is still an area of concern, especially as many charities will have developed new digital products, services and tools this year.
- 72% think that their design and delivery is inclusive to some extent, which is encouraging. 73% think they are accessible to all users to some degree.
- 64% think that their products are designed for service users with different accessibility needs to some degree.



TECH ETHICS AND MANAGING RISK

- Just over a third of charities (35%) are looking into the challenge of choosing ethical suppliers.
- However, more than a half (54%) are looking at platform dependency.
- Almost 1 in 4 (24%) are looking at how algorithms make decisions.
- Just under a half are not looking at the impact of the tech they use on their carbon footprint (48%).



DIGITAL SAFEGUARDING

- Charities have had to review their practice. 51% have had to assess whether tools are safe and secure, 46% have had to identify safeguarding risks as part of a service and 39% have had to look at their GDPR compliance.



DIVERSITY

- 65% think that their design is informed by research with diverse users to some extent, with 58% making some efforts to monitor diversity of users to some degree.
- Diversity seems to be more of a priority, with over half (57%) looking at better representation amongst decision makers.
- Just over 1 in 4 (27%) now see diversity of users as a priority.



DIGITAL ROLES AND RESPONSIBILITIES

- 42% have someone leading on digital as part of their role or in addition to their main work.
- Around a quarter of charities have either an in-house digital team (25%) or a dedicated digital lead (23%).
- However, 14% don't have anyone pushing forwards with digital.



LEADERSHIP

- As we emerge from the pandemic, charities want stronger digital leadership from their CEO and boards. For the third year running, charities would like their CEO and board to provide a clear vision of what digital could help them achieve. This has declined from 66% last year but is still the most urgent need.
- Meanwhile, understanding trends and how they affect your organisation remains in second place, although it has fallen from 62% last year to 37%.
- More than a third of charities (36%) would like their CEO or board to develop or embed a digital strategy, down from 55% last year but rising to the third most important priority.



BOARDS

- Only 1 in 5 (20%) say that skills are low amongst their trustees, compared to 31.5% last year. This is very encouraging.
- However, 38% think there is room for improvement in digital skills at board level, which has grown from 34.5% last year.
- Taken together, over half of charities (58%) believe that their board has low digital skills or room for improvement. This has fallen from 66% in 2020, which is encouraging, but still indicates a need to increase digital skills at board level.
- Whilst there is still a digital skills gap on boards, close to 7 out of 10 charities (68%) are unclear on or don't have a plan for how to grow these skills.
- Just under a third (32%) of boards have provided buy-in and support for digital, whilst only 14% of organisations have a digital trustee. This indicates room for improvement.



SKILLS

- The amount of charities rating themselves as having excellent basic digital skills has almost doubled, with 56% putting themselves in this category compared to 29% last year.
- The lowest five skills overall are digital fundraising, user research to inform new services, advanced data use (such as using web data or statistics to plan services), SEO (Search Engine Optimisation) and use of digital in service delivery.
- Using managing and analysing data is still a skills gap. 49% rate themselves as fair and 36% as poor this year, which is significant and, taken together, has not changed greatly from 46% and 42% in these two categories last year.
- On a related note, there is also potential for charities to improve their advanced data use. 35% see themselves as either fair or poor (50%) at this, compared to 8% and 60% respectively last year.
- Learning more about users is an area where charities also feel that they have a skills gap. 39% think they are fair at this and 43% think they are poor. Last year, 52% said they were fair and 39% said they were poor at understanding how their audience uses digital, so there is further room for improvement here.
- Keeping up to date with trends is still a challenge. This year, 47% say they are fair at this (compared to 44% last year) and 39% say that they are poor.
- For every single skill, those at the earliest stages of digital (we described this as 'curious') rated their skills lower than those who were at all other stages. In turn, those who were starting out rated their skills lower than those who described themselves as advancing. Charities who described themselves as advanced rated their skills the highest across every area.



DATA

- Data is a big concern for charities this year. Getting more from their data has risen from second to first place this year, with just under half (47%) seeing it as key.
- Using, managing and analysing data is still a skills gap. 49% rate themselves as fair and 36% as poor this year, which is significant and, taken together, has not changed greatly from 46% and 42% in these two categories last year.



DIGITAL FUNDRAISING

- Digital fundraising skills also haven't changed much since last year, which is surprising as it's an area where more charities have had to up their game during the pandemic. 31% rate themselves as fair and 44% as poor, which has barely changed from 33% and 45% in these areas in 2020.
- Charities are also struggling with a shortage of digital fundraising skills. Just under a third (32%) have limited skills in this area, citing this as the third biggest challenge with digital during the pandemic.



DIGITAL SERVICE DELIVERY

- There have been some improvements in digital service delivery although there is still some way to go. 47% rate themselves as fair and 28% as poor, compared to 43% and 40% for these categories last year. It is a concern that this hasn't improved further during a year when the sector has greatly expanded its online service offering.
- For the first time this year, we asked about safeguarding. 48% see themselves as fair at this, with almost 1 in 4 (23%) rating themselves as poor. This is worrying.



DIGITAL MARKETING

- Charities rated themselves as having very similar levels of skills to last year.
- Charities feel confident about their use of social media, with 31% rating themselves as excellent, similar to 32% last year. However, there is still room for development, with 55% only rating themselves as fair.
- Social media as a skill is directly linked to the stage of digital maturity as well. Those charities who gave themselves the highest rating for excellence in this category were those in the advancing category (34%) or advanced category (51%).
- There is still a lack of confidence around digital marketing. In terms of email marketing, 50% rate themselves as fair and 26% as poor. 36% said they are fair and 39% told us they are poor at SEO and ads, which represents a significant skills gap. This could have an impact on the take up of digital services and support from charities. Charities also think they have a skills gap in making the most of their website and analytics, with 43% seeing themselves as fair and 41% as poor. This has barely shifted since 2020.



UNDERSTANDING USERS

- Understanding how audiences use digital is still a skills gap in the sector. 57% see themselves as fair and 26% as poor. Last year, 52% said they were fair and 39% poor at understanding how their audience uses digital, so there is still plenty of room for improvement here.
- 44% think they are poor at user research to inform new services, which is a similar rating to 2020. This is a worry as understanding user needs is essential to developing good digital services.

CALLS TO ACTION



TEN CALLS TO ACTION

1

Charities have shown innovation and adaptability during the pandemic, with 83% changing their services in response to demand and close to 8 out of 10 (78%) using digital to reach new audiences. We encourage charities to reflect, evaluate and learn from what has worked and what could have been developed from the last year and factor this into your digital plans.

2

Digital inclusion has become a major issue for the sector during the pandemic, with just over half (52%) of charities worried about excluding some people or groups. Organisations such as [The Good Things Foundation](#) and [FutureDotNow](#) can help charities, but further investment is also needed by funders so that charities can continue supporting their communities with training, devices and data.

3

Look at how you can improve remote working so that your colleagues' wellbeing is a priority. Just under a third of charities (31%) say their staff are burned out from the demands of intense remote working. Whether it's limiting the amount of time staff spend on video calls, mandating time off or changing your expectations of colleagues, review how you work and plan how to make it more effective, productive and motivating for everyone.

4

60% of charities now have a strategy in place for digital, which is a positive improvement on last year. We believe charities need to approach digital strategically and that they need support from their board to do this. Those who don't have this in place may benefit from support so they can develop their post pandemic digital game plans.

5

It's encouraging to see that over two thirds of charities (67%) now see digital as a priority for their organisation, with similar numbers planning investment in digital infrastructure. As charities look to ramp up their use of digital further, we encourage you to develop clear criteria for making decisions for prioritisation in order to make the right choices that ensure sustainability.

6

Using data more effectively is now a key priority for charities. Charities can grow their skills in this area by connecting with organisations such as [Datakind UK](#) and the [Data Collective](#).

7

IT is now the biggest barrier for charities' digital progress and we recommend that charities tap into the support and communities offered by [Catalyst](#) and [Charity Digital](#) to help. This requires significant investment and funders have a vital role to play here.

8

Funders need to up their game with digital funding. Almost half (47%) of charities want to include core digital costs in all applications and there is a clear need from charities in this year's report for additional support from funders, such as guidance and training. Funders should step up to meet these demands.

9

For the third year running, charities have told us that their most important need from their leadership team is a clear vision for digital. Leaders either need to provide this or they must seek out training and support to help them develop this.

10

There's further work to be done on understanding user needs. 44% of charities think they are poor at user research to inform new services, which hasn't changed since 2020, whilst a third (33%) say that they are either poor at knowing or don't know if their products are accessible to users. There are resources available on [Catalyst](#) to help charities develop their work so that it meets user needs.

DETAILED FINDINGS



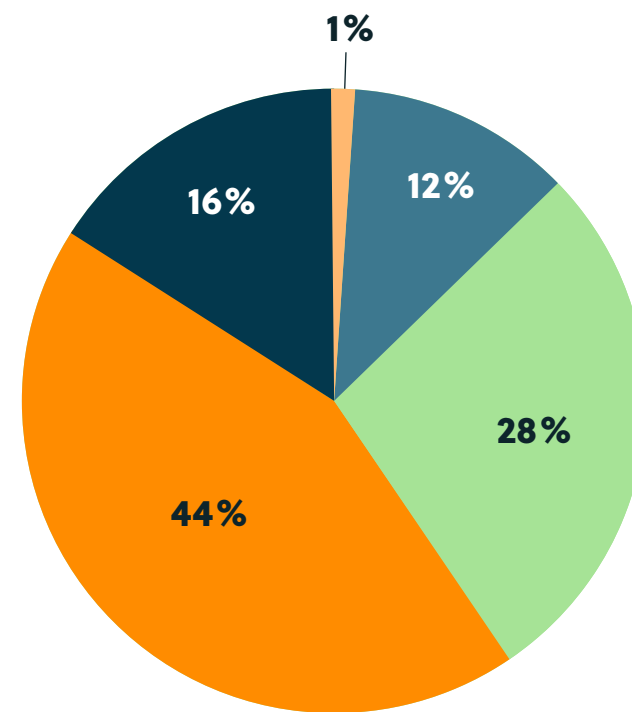
OVERALL TRENDS

1 WHAT STAGE IS YOUR CHARITY AT WITH DIGITAL?

60% of charities now have a strategy in place for digital. This is a very positive increase from 2020, when 51% of charities did not have a digital strategy.

We use the following classifications of digital maturity stages which participants self-selected based on the associated statements.

- **Barely online:** We're struggling to use the basics and have low digital skills, but we get by (we're barely online)
- **Curious:** We have some digital basics in place, such as social media or remote working, with ambitions to do more (we're curious).
- **Starting Out:** We're developing our use of digital across the organisation but we don't have a strategy in place yet (we're starting out).
- **Advancing:** Digital is part of our strategy, but we've not embedded this yet. We're investing in technology and developing our skills (we're advancing).
- **Advanced:** Digital is integral to our organisational strategy and embedded in everything we do (we're advanced).



1 WHAT STAGE IS YOUR CHARITY AT WITH DIGITAL?

DIGITAL STRATEGY INSIGHTS

- This year, 41% of organisations do not have a digital strategy in place, compared to 51% last year. They feel they are barely online, curious or starting out.
- This means that 60% of those surveyed now have a strategy in place and describe themselves as advancing or advanced, compared to 49% last year.
- This is a very positive indication of change, especially as this finding has been fairly static for the last two years. It is the biggest improvement we have seen in this area since the report began in 2017.



DIGITAL STAGES INSIGHTS

- **Barely online:** The proportion of organisations struggling with the basics has fallen from 2% to 1%.
- **Curious:** This year, 12% specified that they are curious, the same as last year.
- **Starting out:** 28% of organisations are starting out and don't have a strategy yet, compared to 37% last year. The fact that less organisations now see themselves in this category is also an encouraging development.
- **Advancing:** This year 44% say that they are advancing and that digital is part of their strategy, compared to 39% last year who told us that their organisational strategy includes digital (or they have a digital strategy).
- **Advanced:** There are signs that more charities are confident that they have advanced with digital. 16% told us that digital is integral to their organisational strategy and embedded in everything they do. This is a noticeable increase from 10% last year.

SIZE AND STAGE

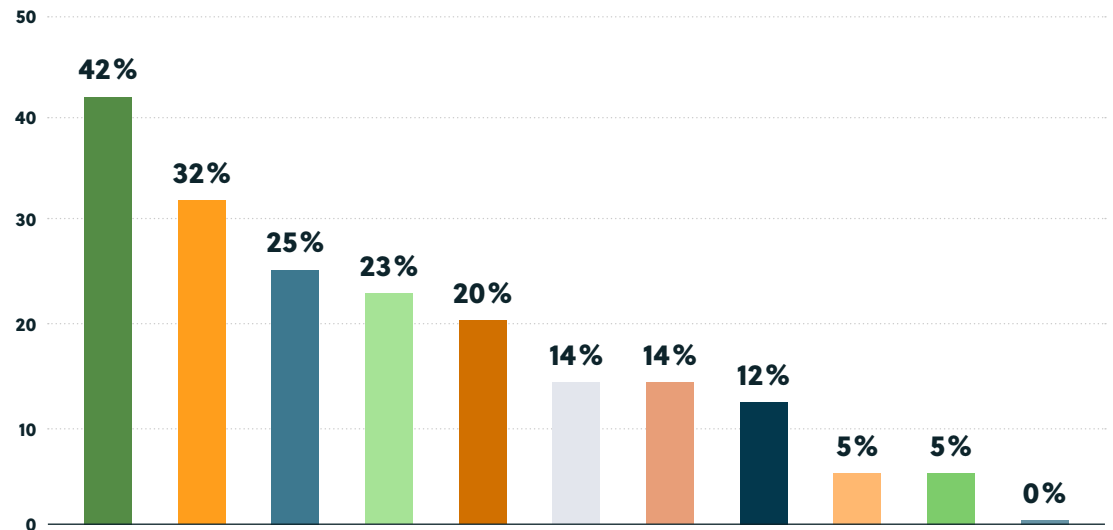
- We analysed the relationship between the size of charity and their stage of digital. The picture is mixed and organisations of different sizes are all at different stages. However, there is clearly a relationship. 64% of micro and small charities (with an income of under £100k) describe themselves as curious or starting out, compared to 42% of medium sized charities (income between £100k and £1 million) and 40% of large charities (annual income over £1 million).
- This shows that small charities would benefit from funding or support specifically to help them progress with digital.
- Charities also vary in their likelihood of having a strategy depending on size. Only 36% of micro and small organisations have a digital strategy, whilst 57% of medium (£100k to £1 million turnover) have a digital strategy and 69% of large charities (over £1m turnover) have a strategy.

2 WHAT IS YOUR SET-UP IN TERMS OF DIGITAL RESPONSIBILITY IN YOUR ORGANISATION, INCLUDING STAFF AND VOLUNTEERS?

42% of charities have someone leading on digital as part of or in addition to their work, and just under a third have support for digital at board level.

For the first time we asked charities about their digital responsibilities.

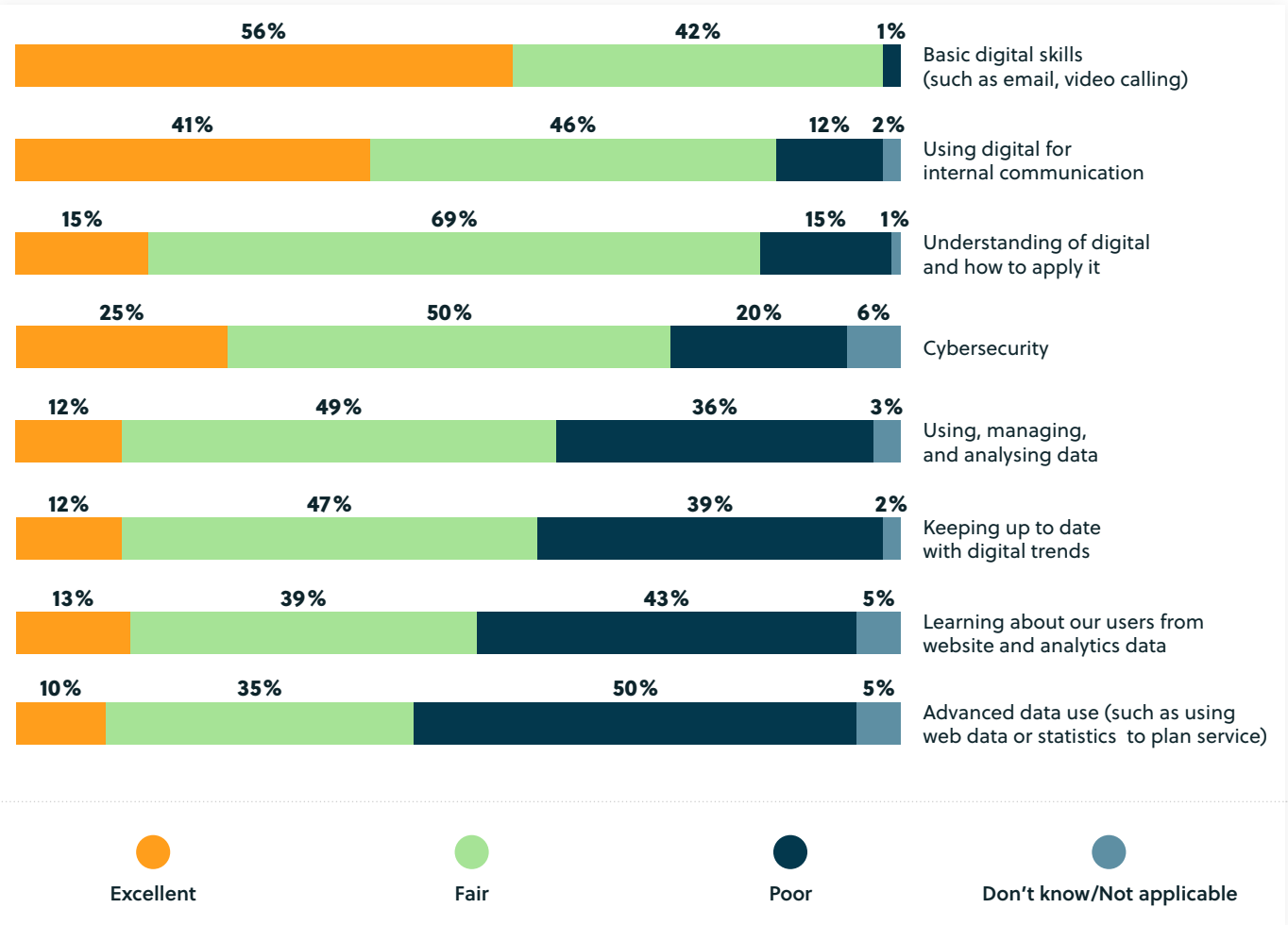
- 42% have someone leading on digital as part of their role or in addition to their main work.
- Just under a third (32%) of boards have provided buy-in and support for digital, whilst 14% of organisations have a digital trustee. This indicates room for improvement.
- Around a quarter of charities have either an in-house digital team (25%) or a dedicated digital lead (23%).
- However, 14% don't have anyone pushing forwards with digital.
- Overall, these results show how some charities now have leadership and clear roles and responsibilities for digital, whilst others have yet to put this place.



- We have someone leading on digital as part of or in addition to their main work
- We have buy-in and support for digital at board level
- We have an in-house digital team
- We have a dedicated digital lead
- We all have digital responsibilities
- We have a digital trustee
- We don't have anyone pushing forward with digital
- We have digital champions
- I don't know
- Other
- We have someone leading on digital

3 HOW WOULD YOU RATE YOUR ORGANISATION'S SKILLS IN THE FOLLOWING AREAS INTERNALLY?

The amount of charities rating themselves as having excellent basic digital skills has almost doubled, with 56% putting themselves in this category compared to 29% last year. However, there is still room for significant improvement in most areas, such as using and managing data and cybersecurity, demonstrating that the sector still needs support with skills development.



3 HOW WOULD YOU RATE YOUR ORGANISATION'S SKILLS IN THE FOLLOWING AREAS INTERNALLY?

ANALYSIS

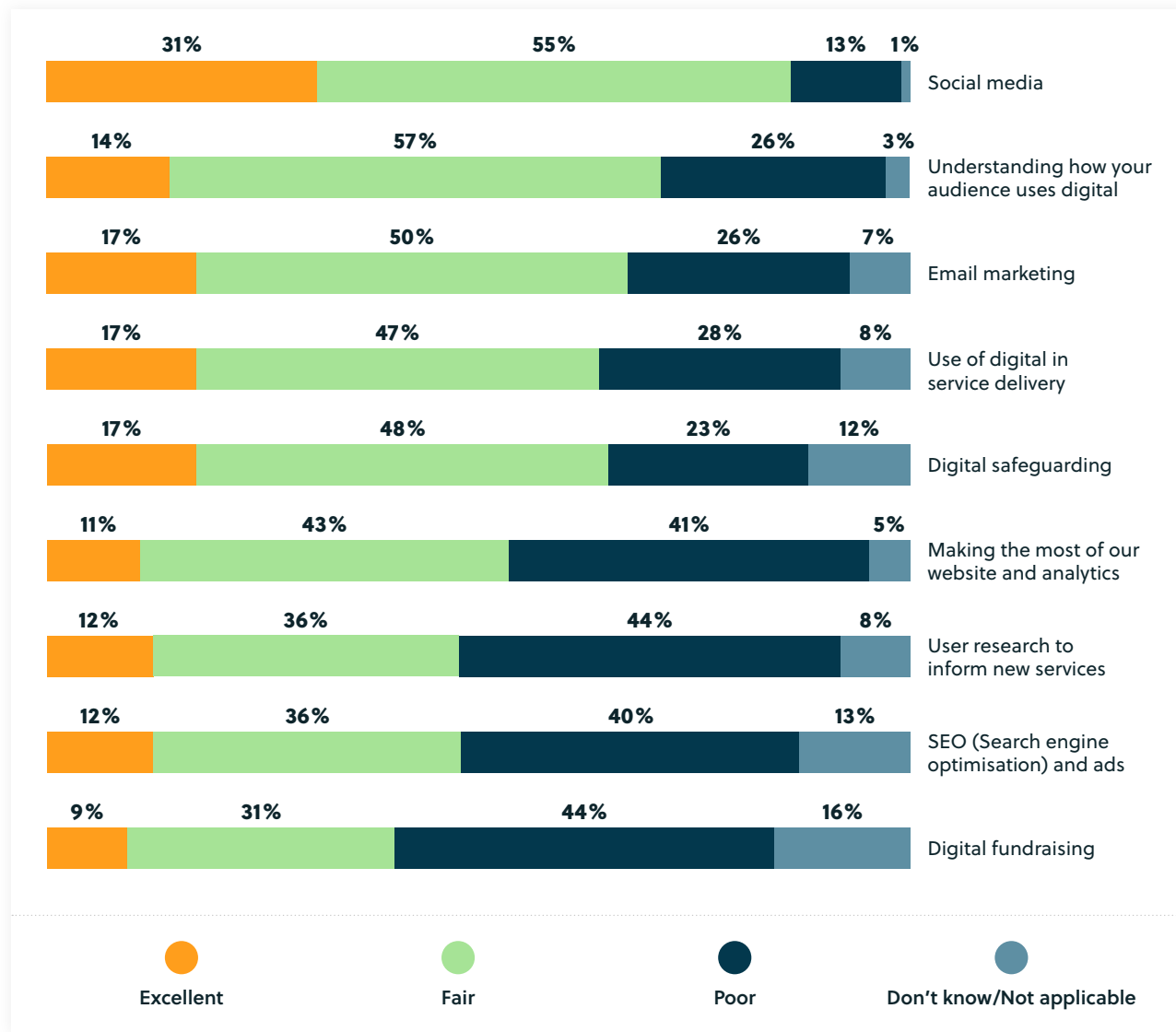
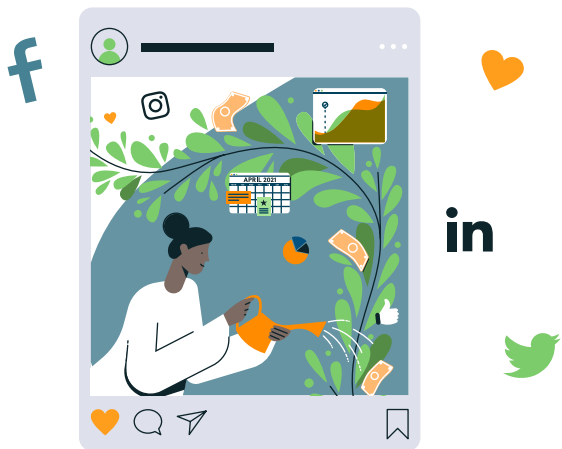
- The amount of charities rating themselves as having excellent basic digital skills has almost doubled, with 56% putting themselves in this category compared to 29% last year.
- Similarly, 41% rate themselves as excellent at using digital for internal communications, compared to 23% last year. However, there is still room for improvement as 46% rate themselves as fair in this area and good internal communications are even more essential for remote working.
- Defining what digital is and how to apply it is still an area that needs to be clarified. 69% rate themselves as fair at this, which hasn't changed much from 65% in 2020, despite adoption of tech over the last year.
- There have also been some improvements in charities' cybersecurity skills, with 25% rating themselves as excellent, compared to 18% last year. However, 50% see themselves as fair at this, compared to 54% last year, so there is further potential for improvement.

- Using managing and analysing data is still a skills gap. 49% rate themselves as fair and 36% as poor this year, which is significant and, taken together, has not changed greatly from 46% and 42% respectively in these two categories last year.
- On a related note, there is also potential for charities to improve their advanced data use. 35% see themselves as fair or 50% as poor at this, compared to 8% and 60% respectively last year.
- Keeping up to date with trends is still a challenge. This year 47% say they are fair at this (compared to 44% last year) and 39% say that they are poor.
- Learning more about users is an area where charities also feel that they have a skills gap. 39% think they are fair at this, whilst 43% think they are poor.
- For every single skill, those at the earliest stages of digital (we described this as 'curious') rated their skills lower than those who were at all other stages. In turn, those who were starting out rated their skills lower than those who described themselves as advancing. Charities who described themselves as advanced rated their skills the highest across every area.

- The survey definitively shows that more resources and capacity is equivalent to better digital skills. For every single skill we asked about, there is a clear relationship between size and skills ratings across the respondents.
- Overall, 1 in 3 charities (over 33%) feel they have poor skills in digital fundraising (44%), user research to inform new services (44%), making the most of their website (41%), search engine optimisation (39%), data use (36%) and keeping up to date with digital trends (39%).
- Basic digital skills have vastly improved. Last year just under 1 in 5 (18%) rated themselves as poor. This year, only 1% gave themselves this rating.
- Overall, the skills are very similar by size of charity. However, small charities rate their skills lower overall for every skill.
- The lowest five skills overall are digital fundraising, user research to inform new services, advanced data use (such as using web data or statistics to plan services), SEO (Search Engine Optimisation) and use of digital in service delivery.

4 HOW WOULD YOU RATE YOUR ORGANISATION'S SKILLS IN TERMS OF ENGAGING WITH YOUR AUDIENCES, CLIENTS, BENEFICIARIES OR CUSTOMERS?

Charities feel confident about their use of social media, with 31% rating themselves as excellent, but there are significant skills gaps in email marketing, online service delivery and user research.



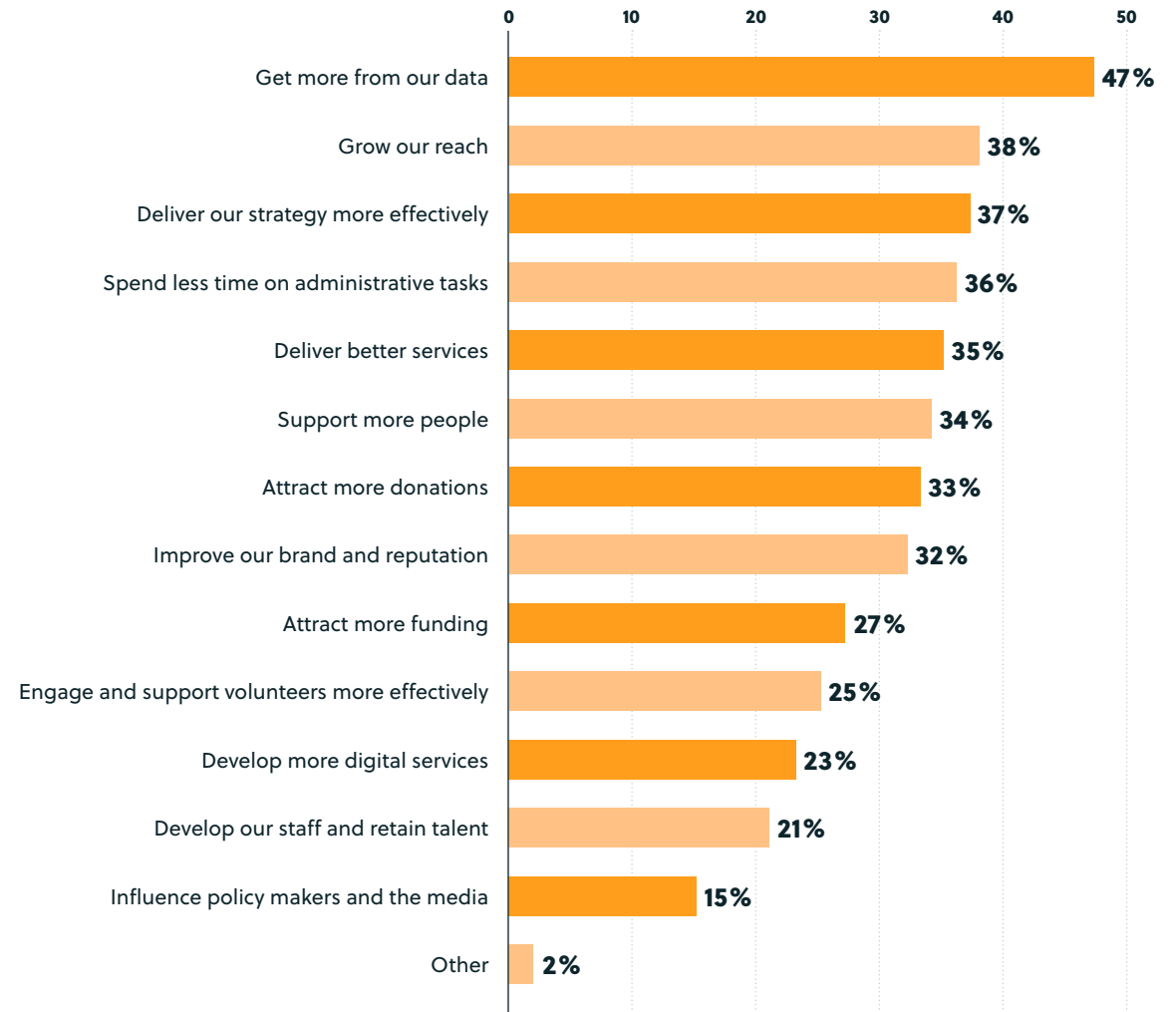
4 HOW WOULD YOU RATE YOUR ORGANISATION'S SKILLS IN TERMS OF ENGAGING WITH YOUR AUDIENCES, CLIENTS, BENEFICIARIES OR CUSTOMERS?

ANALYSIS

- Similar to last year, charities feel confident about their use of social media, with 31% rating themselves as excellent, similar to 32% last year. However, there is still room for development with 55% only rating themselves as fair. It has been overtaken by basic digital skills and using digital for internal communications though as the highest rated skill in the survey.
- Social media as a skill is directly linked to the stage of digital maturity as well. Those charities who gave themselves the highest rating for excellence in this category were those in the advancing category (34%) or advanced category (51%).
- However there is still a lack of confidence around digital marketing. In terms of email marketing, 50% and 26% rate themselves as fair and poor at this, which is similar to last year. 36% and 39% told us they are fair and poor at SEO and ads, which has fallen slightly since last year but nevertheless represents a significant skills gap. This could have an impact on the take up of digital services and support from charities. Charities also think they have a skills gap in making the most of their website and analytics, with 43% seeing themselves as fair and 41% as poor. This has barely shifted since 2020. This is a particular concern for medium size charities (£100k– £1m) where 58% feel this is poor, whilst being relatively consistent for other sizes.
- Digital fundraising skills also haven't changed much since last year, which is surprising as it's an area where more charities have had to up their game during the pandemic. 31% rate themselves as fair and 44% as poor, which has barely changed from 33% and 45% in these areas in 2020.
- Understanding how your audience uses digital is still a skills gap in the sector. 57% see themselves as fair and 26% as poor. Last year, 52% said they were fair and 39% poor at understanding how their audience uses digital, so there is still plenty of room for improvement here.
- There have been some improvements in digital service delivery although there is still some way to go. 47% rate themselves as fair and 28% as poor, compared to 43% and 40% for these categories last year. It is a concern that this hasn't improved further during a year when the sector has greatly expanded its online service offering. For the first time this year we asked about safeguarding and 48% see themselves as fair at this with almost 1 in 4 (23%) rating themselves as poor. This is worrying.
- 44% think they are poor at user research to inform new services, which is a similar rating to 2020. This is a worry as understanding user needs is essential to developing good digital services.

5 WHAT ARE THE KEY THINGS YOUR ORGANISATION COULD DO IF IT INCREASED ITS DIGITAL SKILLS?

Charities think that getting more from their data is the number one thing they could achieve if they grew their digital skills.



5 WHAT ARE THE KEY THINGS YOUR ORGANISATION COULD DO IF IT INCREASED ITS DIGITAL SKILLS?

ANALYSIS

- Getting more from data has risen from second to first place this year, with just under half (47%) seeing it as key.
 - Growing reach has fallen to second place, decreasing from 66% to 38%.
 - Delivering strategy more effectively holds steady as the third most important area of potential.
 - Efficiency and productivity remain important. Spending less time on administration and the efficiencies that follow is the fourth most important priority at 37%.
 - Just over a third (35%) think increasing skills will help them deliver better services. 23% think it will help them develop more digital services.
- There is a connection between digital skills, donations and funding. A third (33%) think that increased skills will equate to more donations and 27% to more funding. Strangely, the former represents a decline since 2020, when 59% wanted to grow skills with the aim of improving online fundraising.
 - 32% want to increase skills with the aim of improving brand and reputation, whilst 15% want to influence policy makers and the media. The latter compares to 36% last year, which is surprising, and indicates charities may need more support in this area.
 - 21% want to develop staff, which has fallen hugely from 49% last year. Just 1 in 4 (25%) think they need to grow skills so they can manage volunteers, decreasing from 39% last year.

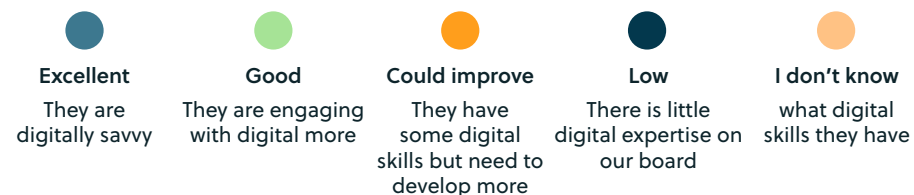
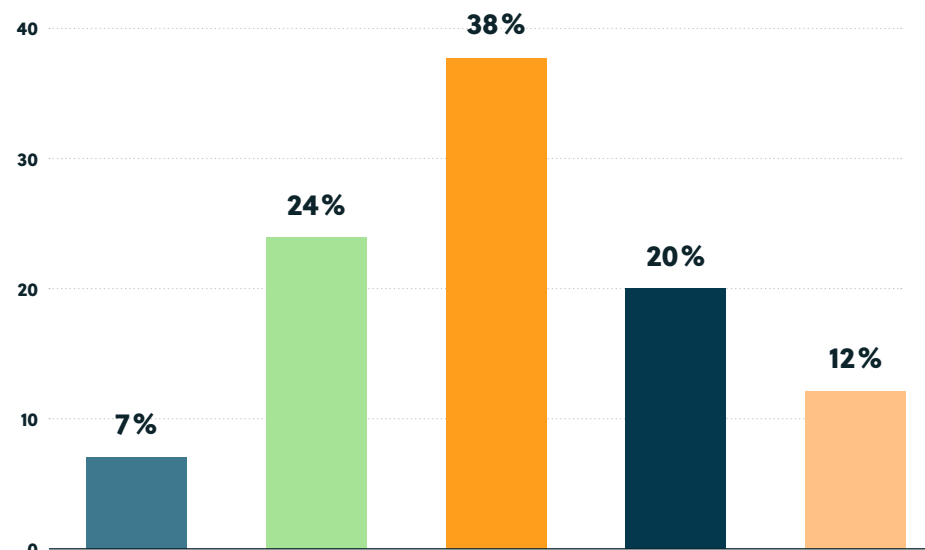


6 HOW WOULD YOU RATE YOUR BOARD'S DIGITAL SKILLS?

58% of charity boards' digital skills are low or have room for improvement. This has declined since last year and there has been a small improvement in charities rating their trustees as good or excellent. These are positive signs but boards still need to upskill significantly if they are to help their charities plan effectively for a digital future.

ANALYSIS

- There have been some improvements in boards' digital skills this year, which isn't surprising given that boards will have had a steep learning curve during the pandemic.
- 1 in 5 (20%) say that skills are low amongst their trustees, compared to 31.5% last year. 38% think there is room for improvement in digital skills at board level, which has grown from 34.5% last year. However, taken together, the amount of boards with low digital skills and room for improvement has fallen to 58% compared to 66% in 2020, which is encouraging.
- There has been a corresponding small increase in boards who have good digital skills (24%), up from 19% last year, and those in the excellent category, rising from 4% to 7%.
- Whilst these are encouraging signs, we would urge caution in seeing them as indicative of significant improvement. There is still further potential for boards to grow their digital skills.
- There is no difference between the strength of digital skills on the board and the stage digital organisations are at.

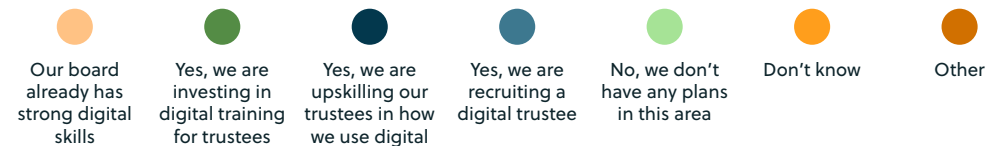
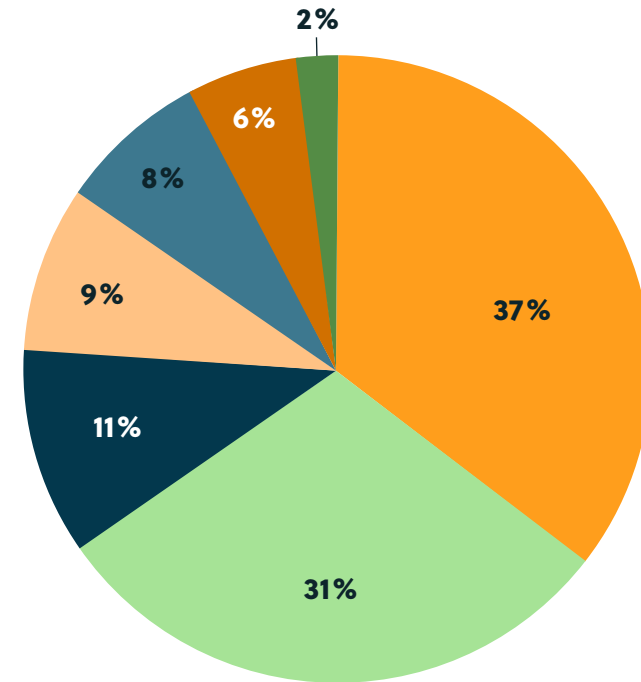


7 ARE THERE ANY PLANS TO INCREASE DIGITAL SKILLS ON THE BOARD?

Whilst there is still a digital skills gap on boards, close to 7 out of 10 charities (68%) are unclear on or don't have a plan for how to grow these skills.

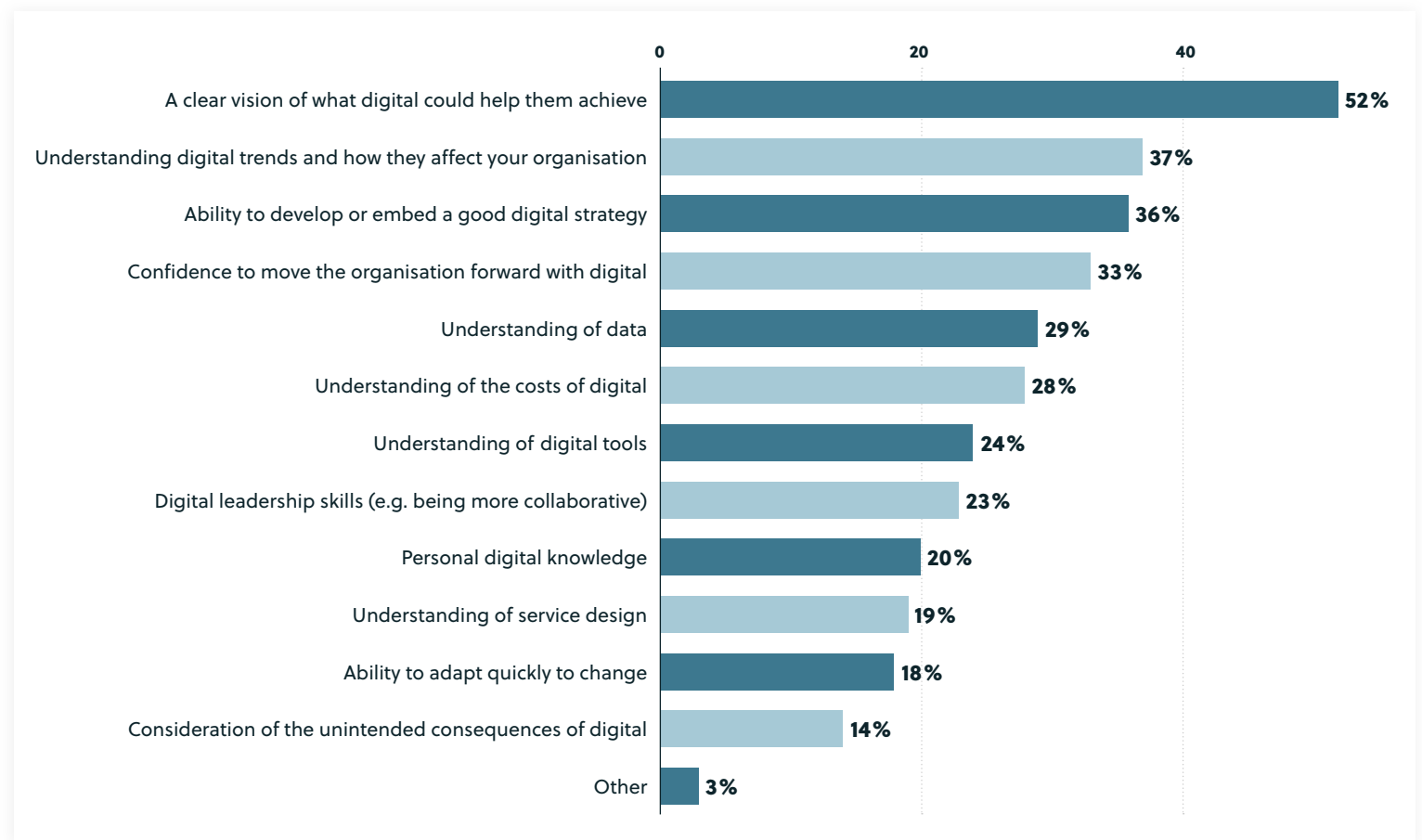
ANALYSIS

- Despite the digital skills gap on boards shown in the previous question, some charities still haven't made progress in this area.
- The most common responses to this question were 'don't know' at 37% and 'no plans' at 31%, attracting a very similar response rate to last year.
- 11% are upskilling their trustees and just 2% are investing in training, compared to 4% doing the latter last year. It's a surprise that more charities are not doing this given the skills gap.
- Surprisingly, there has been little fluctuation in recruitment for digital trustees, with only 8% planning to do this. The fact that this has barely shifted despite the digital disruption triggered by the pandemic is a concern in itself.
- 9% of boards have good digital skills, a very small increase from 7% last year.
- Overall, this paints a picture of a sector that is aware of a digital skills gap on boards but is struggling to close it.



8 IN ORDER TO PROGRESS WITH DIGITAL, WHAT SKILLS, KNOWLEDGE OR BEHAVIOUR WOULD YOU MOST LIKE TO IMPROVE AT CEO OR BOARD LEVEL?

Charities want to see better digital leadership from their CEO and board. Despite the digital disruption caused by the pandemic, charity leaders still need to offer a clear vision, understanding of trends and strategic thinking about digital.



8 IN ORDER TO PROGRESS WITH DIGITAL, WHAT SKILLS, KNOWLEDGE OR BEHAVIOUR WOULD YOU MOST LIKE TO IMPROVE AT CEO OR BOARD LEVEL?

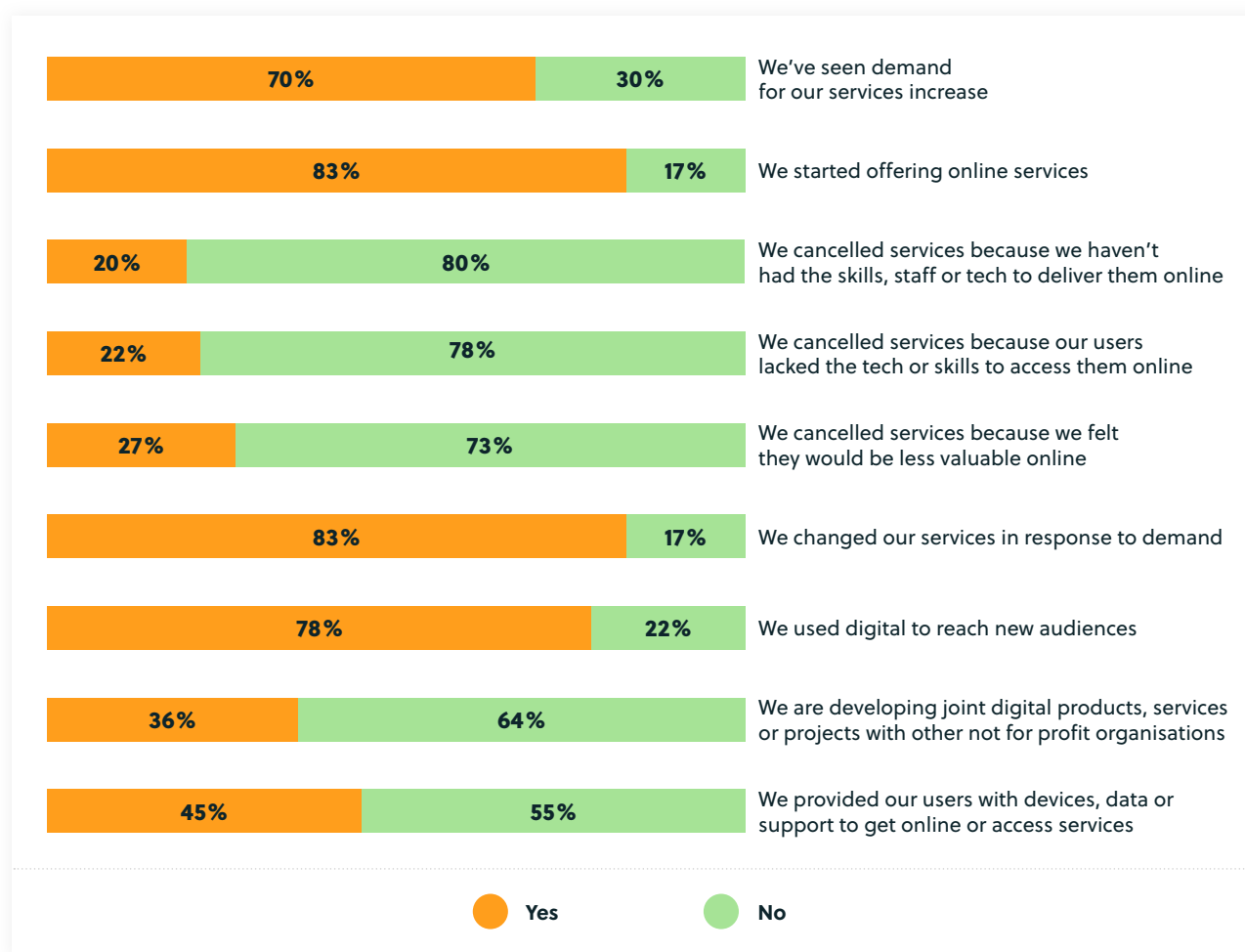
ANALYSIS

- For the third year running, charities would like their CEO and board to provide a clear vision of what digital could help them achieve (52%). This has declined from 67% last year, but is still the most urgent need.
 - Meanwhile, understanding trends and how they affect the organisation remains in second place, although this has fallen from 62% last year to 37% this year.
 - More than a third of charities (36%) would like their CEO or board to develop or embed a digital strategy, down from 55% last year but rising to the third most important priority.
- 1 in 3 charities would also like to see their CEO or board being more confident moving their organisation forward with digital, falling from 57% to 33%. This may indicate increased confidence with digital during the pandemic, but there is obviously still room for improvement given that strategy is the key priority that charities would like to see from their CEO or board.
 - Just under a third of charities would like their CEO and board to have a better understanding of data (29%) and the costs of digital (28%). These have fallen from 42% and 39% respectively last year, but are nevertheless a skills gap in a fundamental part of the digital leadership toolkit.
 - Close to 1 in 4 (24%) would like their CEO or board to have an understanding of digital tools, falling from 41% last year. 20% would like their CEO or board to have personal digital knowledge, falling from 37% last year. This could be because more CEOs and boards have had to use digital during the pandemic.
- 23% would like to see better digital leadership skills from their CEO or board, although this has fallen by 10% from last year.
 - On a positive note, the number of charities who would like to see their CEO or board adapt quickly to change has dropped from 41% to 18%. Again, this is likely to be a positive by-product of the pandemic.
 - There are still gaps in the understanding of more advanced areas of digital such as service design (19%) and consideration of the unintended consequences of digital (14%). Whilst both of these have declined markedly since last year, there is still room for development.

THE IMPACT OF COVID-19

9 HAS THE PANDEMIC CHANGED YOUR ORGANISATION'S SERVICES IN TERMS OF DIGITAL IN ANY OF THE FOLLOWING WAYS?

Charities have adapted hugely during the pandemic, with 83% changing their services in response to demand. However, reaching digitally excluded beneficiaries is challenging.



9 HAS THE PANDEMIC CHANGED YOUR ORGANISATION'S SERVICES IN TERMS OF DIGITAL IN ANY OF THE FOLLOWING WAYS?

ANALYSIS

- In this question we wanted to revisit our findings from the early stages of the pandemic about how digital has changed charities' services.
- 70% have seen an increased demand for their services and 83% started offering online services, which supports the anecdotal evidence we've heard from charities over the last year.
- The greatest increases in demand were seen by those in the advanced and advancing categories.
- However, digital inclusion has proven a challenge for digital service delivery, with over 1 in 5 (22%) cancelling services because their users don't have the skills or tech to use them. That is up from 15% at the start of the pandemic, showing how digital inclusion is still a pressing challenge for the sector and a real area of concern when reaching beneficiaries. Almost half (45%) had to provide their users with devices, data or support to get online or access services.

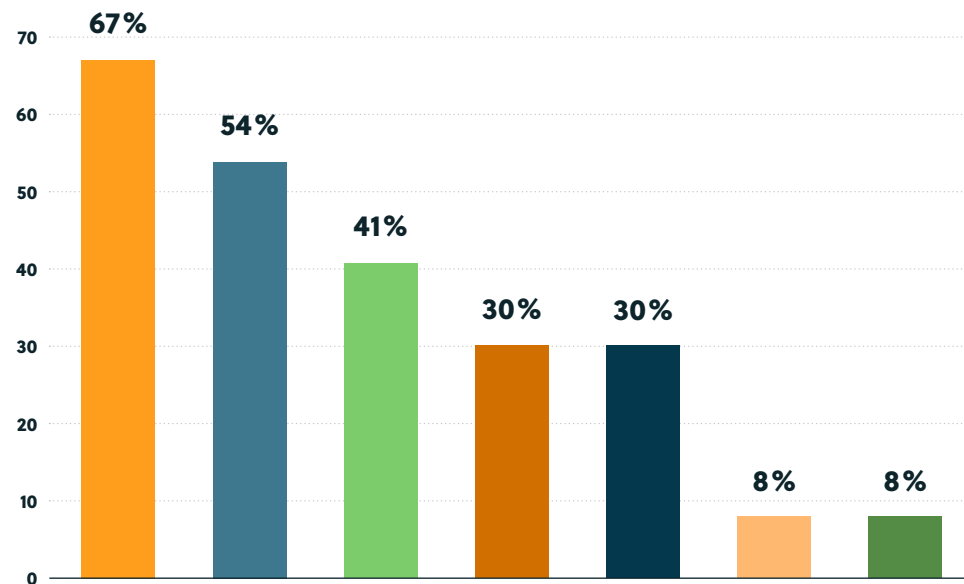
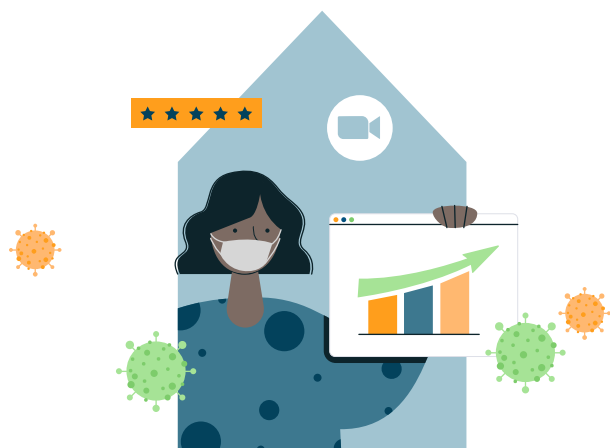
- Meanwhile, 20% have cancelled services because they don't have the skills or tech needed to deliver them, a similar figure to the start of the pandemic.
- 27% have cancelled services because they think they would be less valuable online, which may be due to the skills factors for staff or users, or simply the nature of the intervention.
- Those most likely to cancel services because users lacked the skills or tech or because they felt that their services would be less valuable were those in the curious or starting out categories.
- There is scope for charities to partner more on joint digital products, services and projects. 64% still aren't doing this.

- There is no significant relationship between the size of the organisation and response to the pandemic.
- Overall, the scale of charities' adaptation to the pandemic is made clear in our finding that 83% changed their services in response to demand and close to 8 out of 10 (78%) used digital to reach new audiences.



10 HAS THE PANDEMIC CHANGED YOUR ORGANISATION'S OPERATIONS IN TERMS OF DIGITAL IN ANY OF THE FOLLOWING WAYS?

The positive signs about how charities were using digital to adapt at the start of the crisis are reinforced by our findings about the changes that have embedded over the last year. Just over two thirds (67%) continue to deliver all work remotely, whilst 41% are collaborating or sharing learnings with others about digital.



- We have been delivering all of our work remotely
- We needed to train and support our staff and volunteers to use digital tools
- We are collaborating/sharing learning with others around digital
- We have increased our digital fundraising
- We have changed or recruited roles to accommodate new responsibilities
- Other
- The pandemic has not changed our operations

10 HAS THE PANDEMIC CHANGED YOUR ORGANISATION'S OPERATIONS IN TERMS OF DIGITAL IN ANY OF THE FOLLOWING WAYS?

ANALYSIS

- Just over two thirds (67%) are delivering all work remotely, which is consistent with the 66% operating this way at the start of the pandemic.
 - More than half (54%) needed to train their staff to support staff and volunteers, compared to 61% at the start of the pandemic.
 - It is positive to see that 41% of charities are continuing to collaborate and share learnings around digital, not far off the 47% doing this at the beginning of the pandemic.
 - Just under a third (30%) have grown their digital fundraising, following on from the third planning virtual fundraising events at the start of the pandemic.
 - 30% have changed or recruited roles to accommodate new responsibilities, which is broadly consistent with the data we saw at the start of the pandemic.
- The findings from last year's report about changes to charities' operations were indicative of the longer term findings we have seen over the last year about how charities have adapted.
 - Those advancing were more likely to need to train their staff and volunteers.
 - Those advancing and advanced were better able to fundraise online and were more likely to be collaborating and sharing learning around digital.
 - Small charities were less likely to have been delivering all work remotely and to collaborate/share learning with others around digital.

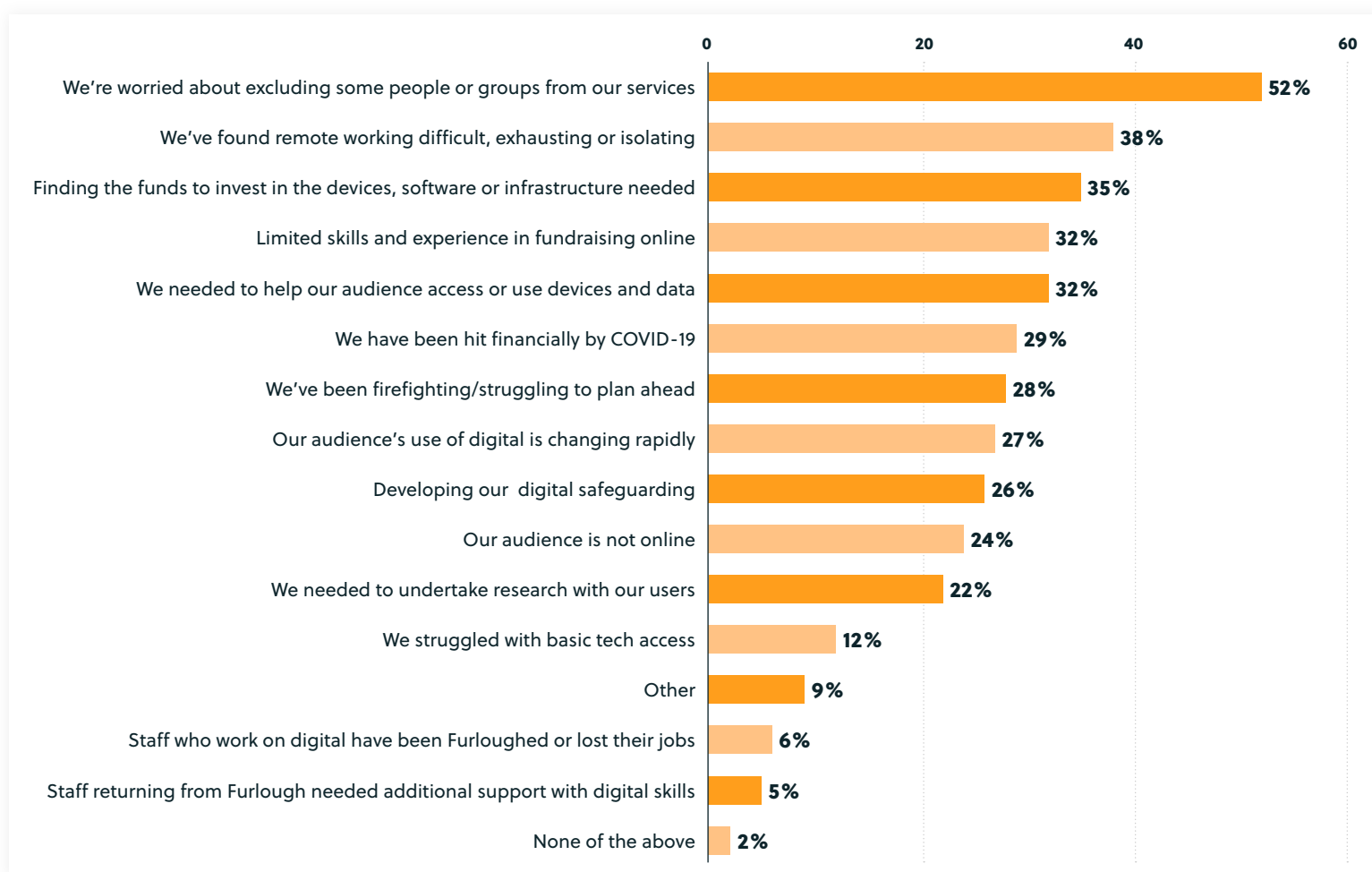
CHARITIES ALSO TOLD US THAT:

"We have extended and at times replaced our in-person services with digital services; we have moved to a more localised model for digital, e.g. we had to close our national online community because of staff cuts/restructuring caused by the pandemic but were able to offer some equivalent and additional support services via social media through our local centres' accounts instead."

"Had to offer virtual service delivery when we couldn't see clients face-to-face, some of this has continued post pandemic e.g. blended delivery."

11 OVER THE COURSE OF THE PANDEMIC, WHAT ARE THE BIGGEST CHALLENGES YOUR ORGANISATION HAS FACED OR IS CONTINUING TO FACE IN RELATION TO DIGITAL?

Charities' top 3 challenges over the pandemic have been digital inclusion for their users, remote working and wellbeing and finding the funds for tech.



11 OVER THE COURSE OF THE PANDEMIC, WHAT ARE THE BIGGEST CHALLENGES YOUR ORGANISATION HAS FACED OR IS CONTINUING TO FACE IN RELATION TO DIGITAL?

ANALYSIS

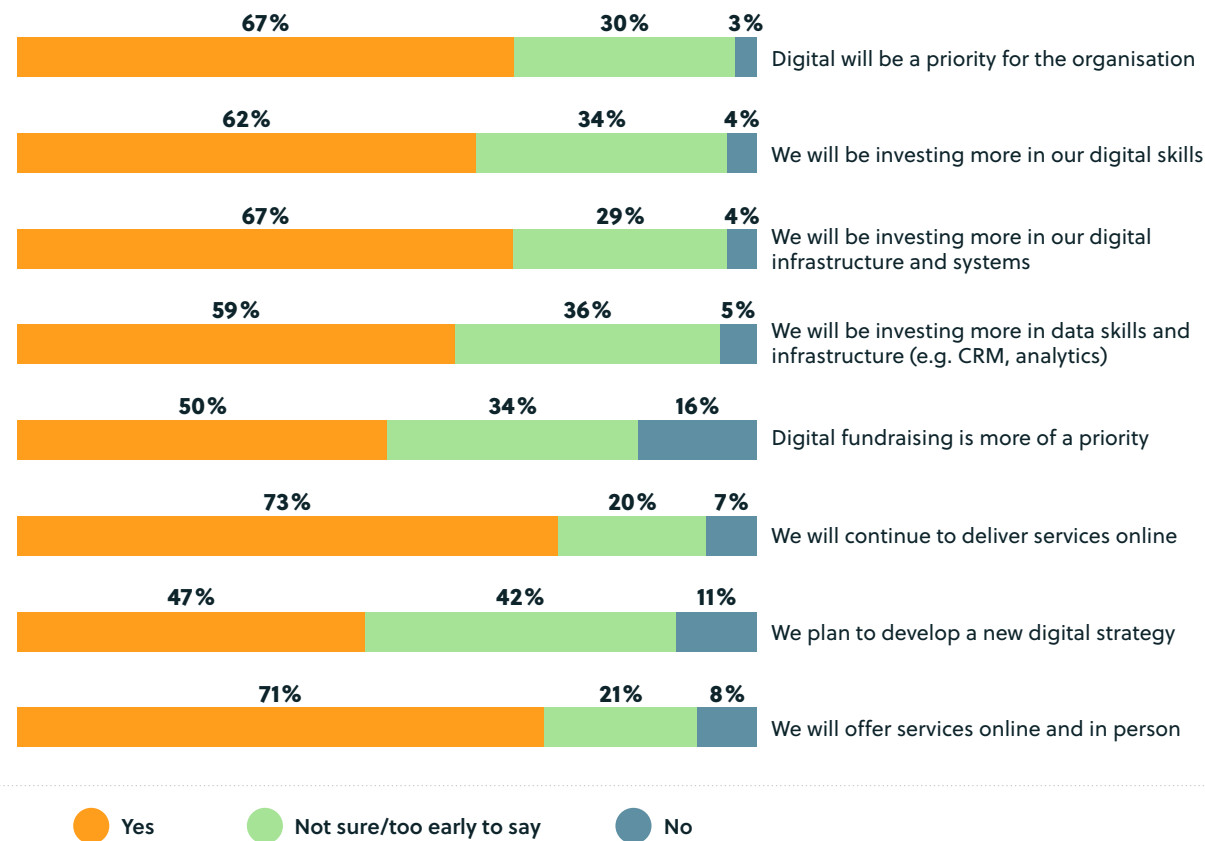
In this question we wanted to hear charities' reflections on a year of profound change. They told us that:

- Digital inclusion was the biggest challenge charities faced, with 52% worried about excluding some people or groups. 32% needed to help their audience access or use devices and data and 24% were concerned that their audience is not online. 12% of charities themselves have struggled with basic tech access.
- Remote working has been the second greatest challenge, with 38% saying that they have found remote working challenging, exhausting or isolating. This echoes the finding from [Blackbaud's Future of Work report](#) about remote working, which found that despite feeling supported by their employer, 48% of charity professionals felt that their wellbeing had deteriorated over the past year.
- Funding has also been an issue during the pandemic, with 35% of charities finding it an issue to get the funds for the devices, infrastructure and software needed.

- Meanwhile, charities have been fighting battles on several fronts which have prevented them making progress with digital. 28% have been firefighting and struggling to plan ahead and 29% have been hit financially by COVID-19.
- Charities are also struggling with a shortage of digital fundraising skills. Just under a third (32%) have limited skills in this area.
- Organisations are also grappling with how their audiences are using digital, with 27% citing rapid changes in this area as a challenge and just over 1 in 5 (22%) needing to undertake user research.
- Smaller charities have struggled slightly more with accessing the basic tech that they need during the pandemic. Those with turnover under £100k were 10% more likely to struggle with this than large charities.
- Small charities have struggled more with 'Limited skills and experience in fundraising online'. 44% found this an issue compared to 26% of large charities.

12 AS WE EMERGE FROM THE PANDEMIC, DO YOU ANTICIPATE ANY OF THE FOLLOWING?

Charities have a renewed sense of what's important, citing digital as a priority and planning to invest more in online skills, infrastructure and systems.



12 AS WE EMERGE FROM THE PANDEMIC, DO YOU ANTICIPATE ANY OF THE FOLLOWING?

ANALYSIS

We wanted to find out about charities' immediate concerns as we come out of the pandemic. They told us that:

- Over two thirds (67%) now see digital as a priority for their organisation, which is encouraging, with a similar number (63%) planning to invest more in digital skills.
- 67% are planning to invest more in digital infrastructure and systems and 59% will be investing more in data skills and infrastructure.
- Half of charities (50%) now see digital fundraising as more of a priority.
- The majority of charities are now committed to digital service delivery, with 73% planning to continue delivering in this way and 71% offering a hybrid delivery model.

- Finally, just under half (47%) want to develop a new digital strategy.
- Lower numbers of small charities, however, were likely to see digital infrastructure and skills as a priority.
- These are all indications of a sector that is growing in confidence with digital and sees it as a priority.
- Those in the advanced category were most likely to see digital as a priority and to be investing more in skills and infrastructure. Smaller charities were less likely to be investing in these areas.

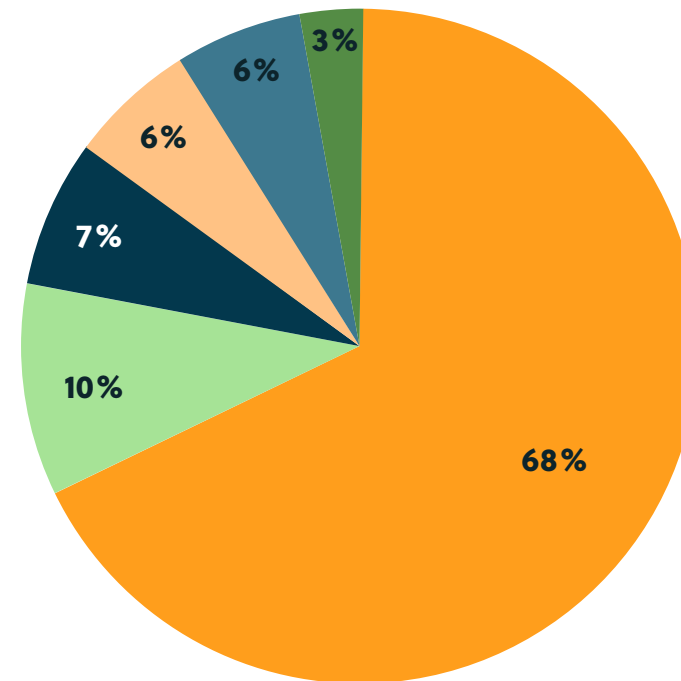


13 AS WE COME OUT OF THE PANDEMIC, WHICH OF THE FOLLOWING BEST DESCRIBE YOUR WORKING ARRANGEMENTS FOR THE FUTURE?

More than two thirds of charities (68%) are planning hybrid working arrangements.

ANALYSIS

- Just over two thirds of charities (68%) are planning a hybrid model for their working arrangements. Medium and large charities were more likely than small ones to be planning for hybrid working.
- 10% still don't know, whilst only 7% are planning for everyone to return to their office or usual workplace.
- There are a small number of remote first charities, with 6% continuing to work remotely and 3% planning that all their staff will now be working in this way.
- A larger proportion of advanced charities are more likely to be moving to hybrid remote and in person working.
- Large and medium sized charities are more likely to be adopting hybrid working, combining remote and in person.

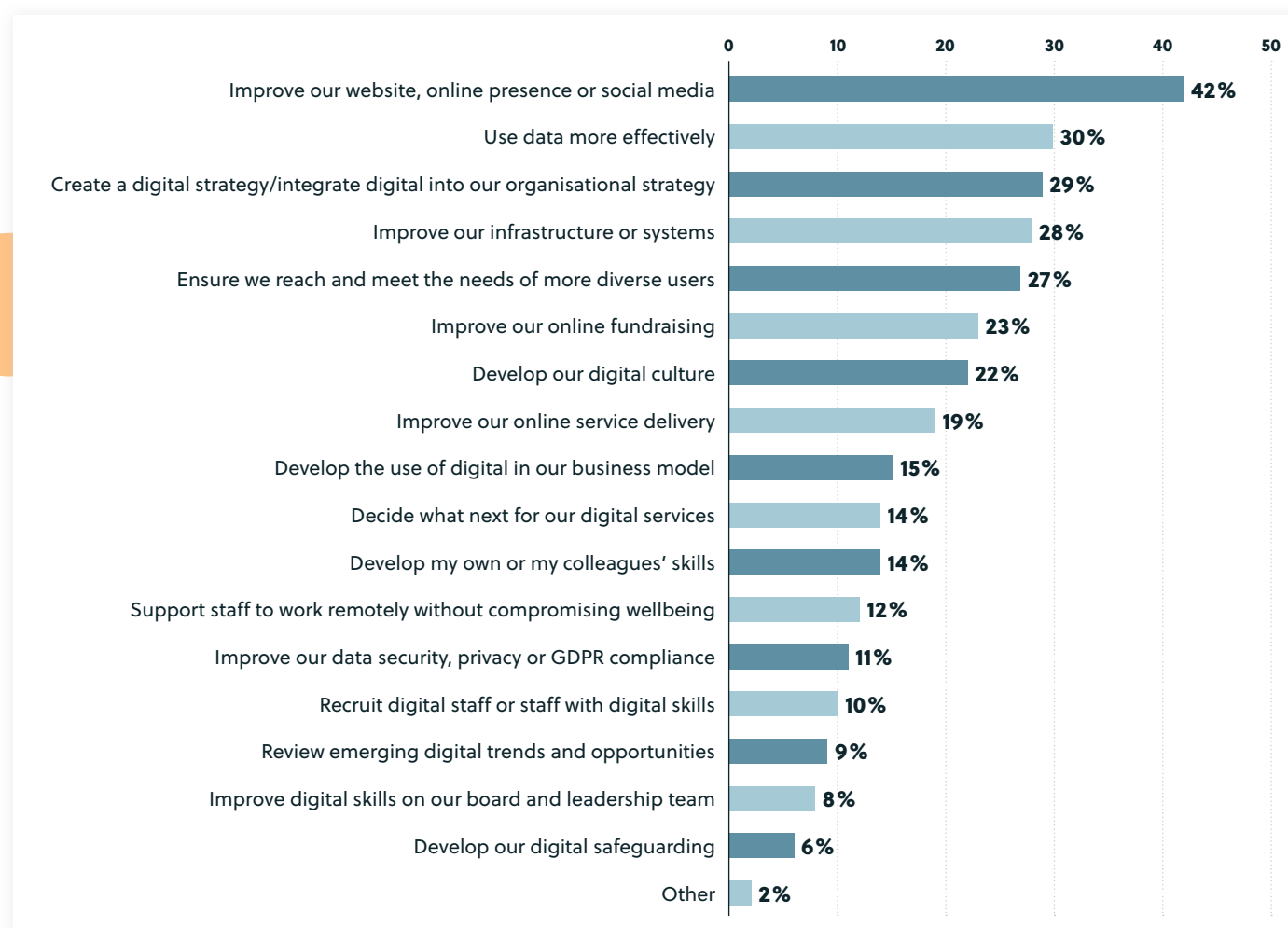


DIGITAL ASPIRATIONS

14 WHAT DO YOU SEE AS YOUR TOP THREE DIGITAL PRIORITIES FOR THE NEXT 12 MONTHS?

THINK ABOUT THE CORE AREAS THAT YOU ARE FOCUSING ON AND INVESTING TIME AND MONEY INTO CHANGING AT THE MOMENT.

For the second year running, charities' top priority is improving their digital channels. However, using data more effectively has risen to be the second more important priority.



14 WHAT DO YOU SEE AS YOUR TOP THREE DIGITAL PRIORITIES FOR THE NEXT 12 MONTHS?

THINK ABOUT THE CORE AREAS THAT YOU ARE FOCUSING ON AND INVESTING TIME AND MONEY INTO CHANGING AT THE MOMENT.

For the second year running, charities' top priority is improving their digital channels. However, using data more effectively has risen to be the second more important priority.

ANALYSIS

- For the second year running, charities see improving their digital channels as their top priority for the next year, with 42% rating it as key.
 - Using data more effectively has risen up the table to become the second most important priority at 30%. This shows how the sector is beginning to value the role of data and insight further.
 - For just under a third of charities there are still vital digital foundations that they need to get in place, with 29% wanting to take a more strategic approach and 28% keen to improve infrastructure or systems. Both of these areas have increased in importance over the last year.
 - Just over 1 in 4 (27%) now see diversity of users as a priority.
 - Online fundraising is a priority for just under a quarter (23%) of charities, down from 41% last year, which is surprising.
 - Developing a digital culture is down from 47% last year to 22%, which may indicate charities' growing confidence in this area.
- Some charities still have aspirations around improving digital services, with 19% prioritising digital service delivery, 14% keen to decide what is next for digital services and 15% are interested in developing the use of digital in their business model.
 - Skills and ways of working are a priority for some charities, with 14% keen to develop their own or their colleagues' skills, 12% keen to help staff work remotely without compromising wellbeing, 10% keen to recruit staff with digital skills and 8% want to improve digital skills on their board and leadership team.
 - Only 11% see data security, privacy and GDPR compliance as a priority and just 6% are making digital safeguarding a priority. This may be because they are confident in the policies and processes that they have in place.
 - Only 9% of charities see reviewing trends as a priority.

15 WHAT DO YOU SEE AS THE BIGGEST BARRIERS TO ACHIEVING YOUR PRIORITIES AND GETTING THE MOST FROM DIGITAL?

Charities say that IT is the biggest challenge, rising from being the sixth greatest barrier to the most important one. Understanding users and skills are the other most important barriers.



15 WHAT DO YOU SEE AS THE BIGGEST BARRIERS TO ACHIEVING YOUR PRIORITIES AND GETTING THE MOST FROM DIGITAL?

ANALYSIS

- IT has risen to be the biggest barrier, facing close to a third of charities (32%). This has increased from being the sixth greatest barrier to the most important one. This is likely to have come to the fore due to the dependency on remote working during the pandemic.
- There is also an increased appetite to understand the people that charities support, with 32% wanting to know how their audience is using digital. This has risen from eighth place at 28% last year to second place in 2021.

- Skills are still a significant challenge. In 2020 they accounted for the second greatest barrier. This year they take third place at 32%.
- Burnout is also an issue. Just under a third of charities (31%) say their staff are burned out from the demands of intense remote working. In particular, 35% of staff from large charities were worried about burnout.
- Just under 1 in 3 charities (31%) feel that their culture needs to change.
- Funding is still a challenge, although it has dropped from being the biggest barrier to the sixth most important at 31%. It is a concern that just under a third of charities feel this is a barrier to progress. 15% of charities have been hit financially by the pandemic and this is holding them back from digital progress.

- Just over 1 in 4 charities are dealing with barriers that indicate a lack of clarity for digital: 29% lack confidence and 27% are facing other challenges that are seen as a priority. Meanwhile, just under 1 in 4 (24%) don't think they are agile enough and 15% feel that digital changes very rapidly and it's hard to keep up.
- Charities are also concerned that their users aren't online, with 21% citing that their audience is struggling with digital. This echoes the challenges we saw previously about digital inclusion.
- More than 1 in 10 charity professionals are concerned about leadership. 14% think there is a lack of leadership and 12% want more understanding from trustees.
- 14% are worried that their competitors now pose a major threat to digital progress.

CHARITIES ALSO TOLD US THAT:

"We're trying to do too many things at the same time, we struggle to prioritise."

"Our digital lead is part time and we are limited to the amount of hours they work. There is only so much we can do in the time we have."

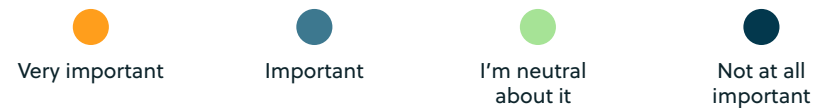
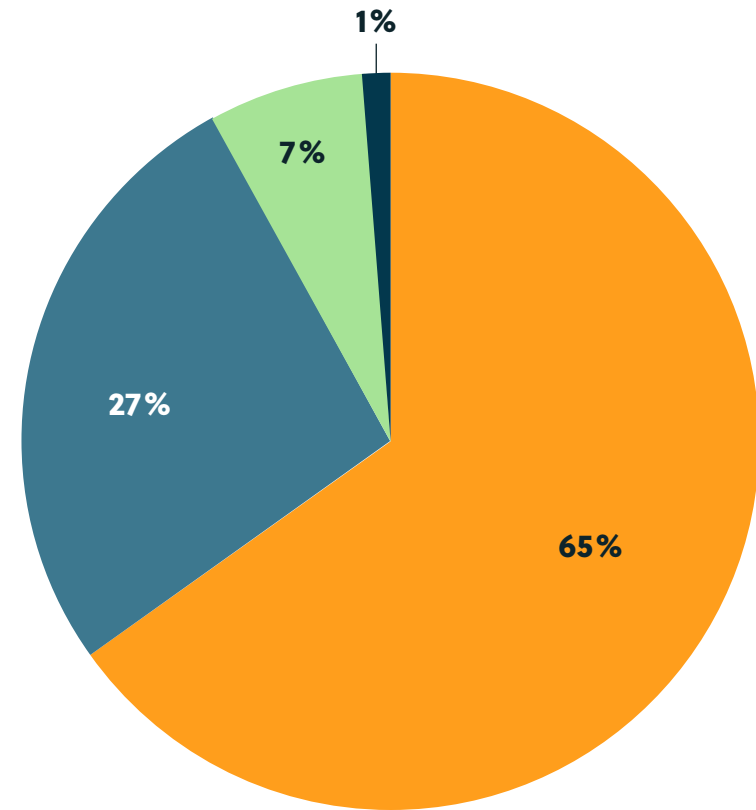
"Capacity – staff have other roles –not understanding time taken to do digital user led service design etc."

16 HOW IMPORTANT IS IT TO YOU TO WORK FOR AN ORGANISATION THAT IS ACTIVELY DEVELOPING ITS DIGITAL CAPABILITIES AND SKILLS?

More than 9 out of 10 told us that this was either very important or important, a 6% increase from last year.

ANALYSIS

- 92% say that this is either very important or important, a 6% increase from last year, with the number of people saying it is very important rising from 52% to 65%.
- Only 7% were neutral about it, with less in this category than the 13% last year.
- It is slightly more important for those working in large organisations to be working for an organisation that is actively developing digital capabilities and skills, with 96% of those in large charities specifying this was very important or important to them, compared to 86% of small charities.



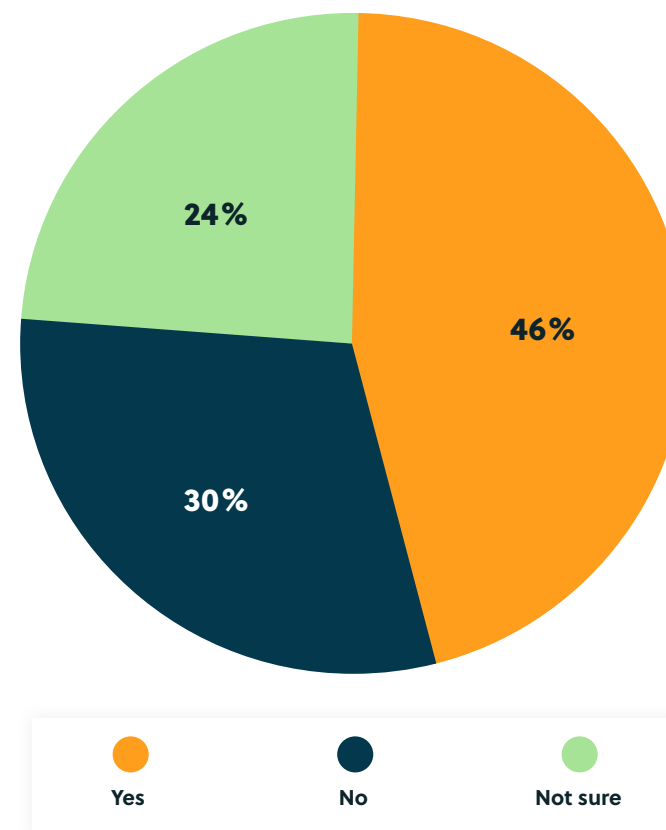
SERVICE DESIGN

17 ARE YOU DESIGNING AND DEVELOPING YOUR OWN DIGITAL TOOLS, SERVICES OR PRODUCTS SPECIFIC TO YOUR ORGANISATION?

Just under half of charities (46%) are developing their own tools, services and products for their organisation.

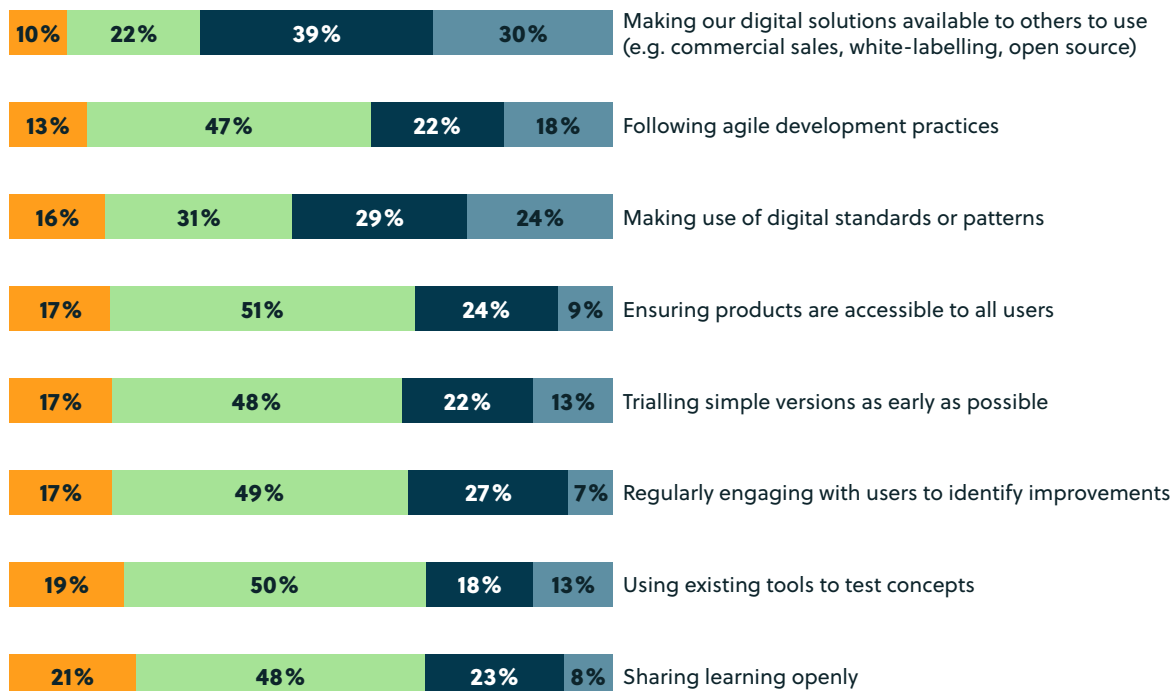
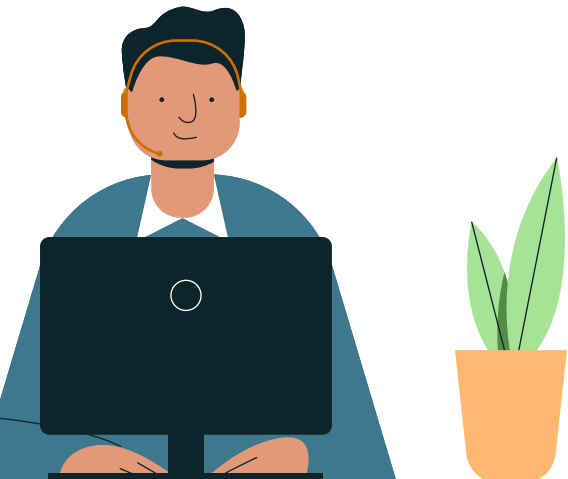
ANALYSIS

- Just under half (46%) are developing their own digital tools, services or products for their organisation.
- 30% are however not doing this, whilst 24% aren't sure.
- Larger organisations are more likely to be designing digital services, with 54% of large organisations doing this compared to 16% of small ones.
- This question was a filter for the following questions around service design. Approximately 190 respondents completed these.



18 HOW WOULD YOU RATE YOUR SKILLS IN THE FOLLOWING AREAS?

Whilst there have been some improvements, charities are still struggling with making solutions available to others for reuse, accessibility and sharing learnings with others.



Excellent

Fair

Poor

Don't know

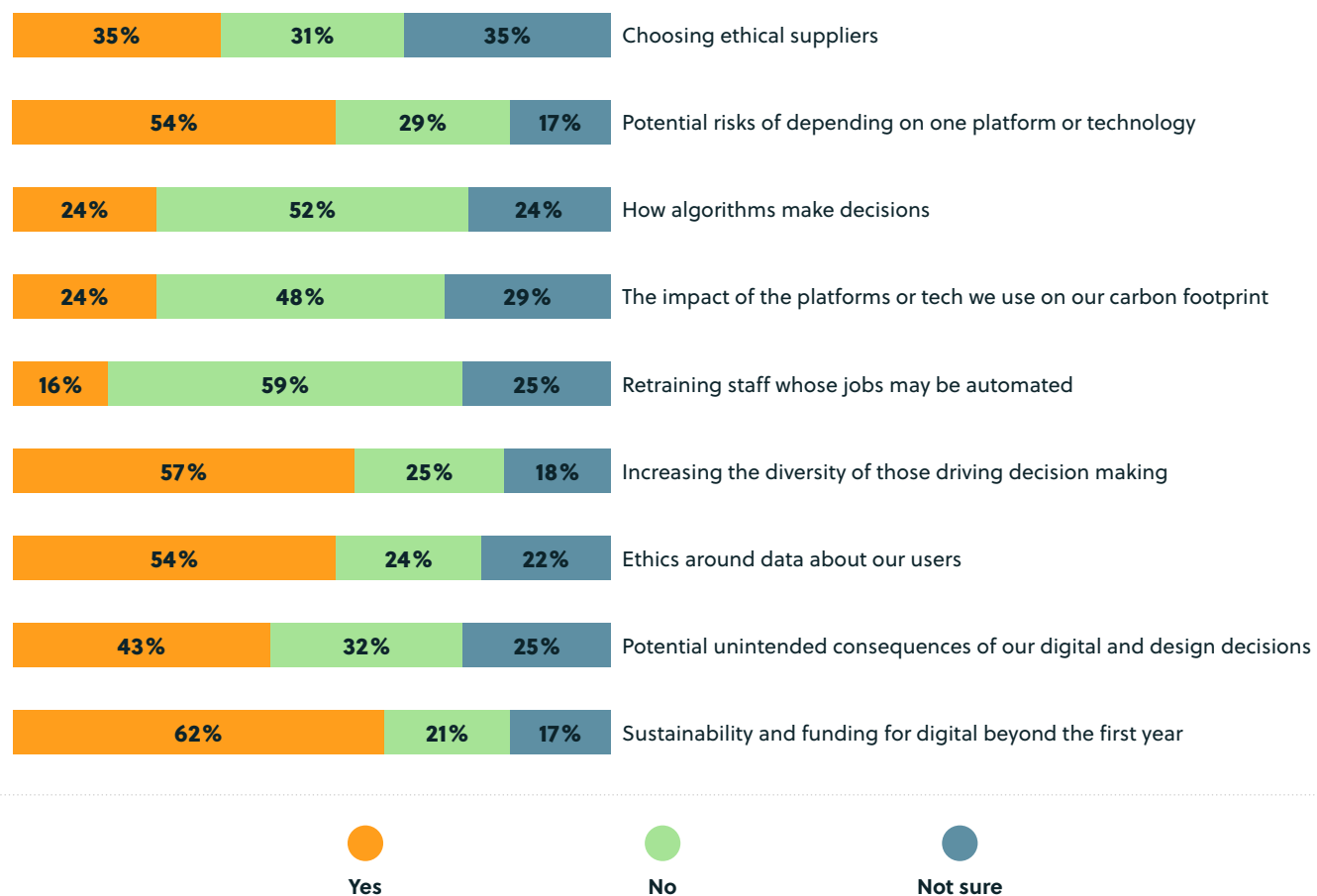
18 HOW WOULD YOU RATE YOUR SKILLS IN THE FOLLOWING AREAS?

ANALYSIS

- There have been some improvements in making solutions available to others. Last year 89% did not make their solutions available for others to use. This year 39% say that they are poor at this, although 30% don't know if their organisation is doing it.
- There have been some improvements in following agile development practices. In 2020, 68% did not follow agile development practices. This year, 22% say they are poor at this, whilst 18% don't know.
- The majority of charities are struggling with following digital standards or patterns, with 29% saying that they are poor at this and 24% saying that they don't know if their organisation is using them. This compares to 71% last year who said that they do not make use of digital standards or patterns.
- A third (33%) say that they are either poor at or don't know if their products are accessible to users, compared to 57% last year who felt they do not ensure products are accessible to all users. This suggests an improvement in this area and that accessibility has become more of a priority, but is still an area of concern, especially as many charities will have developed new digital products, services and tools this year.
- 22% think they are poor at trialling simple versions as early as possible, whilst 62% last year did not do this. This suggests that charities have made some improvements in this area, albeit with room to improve.
- Just over 1 in 4 (27%) are poor at regularly engaging with users to identify service design improvements, as opposed to the 62% who did not do this last year. This suggests that some charities are undertaking more user research.
- There is scope to share learning more, with 48% saying they are fair at this.
- Half of charities are fair at using existing tools to test concepts, compared to 57% who didn't do this last year. This suggests an improvement.

19 ARE YOU LOOKING AT ANY OF THE FOLLOWING CHALLENGES IN TECHNOLOGY?

There is some awareness of key issues, with just over 1 in 3 charities (35%) looking into the challenge of choosing ethical suppliers. However, just under a half are not looking at the impact of the tech they use on their carbon footprint (48%).



19 ARE YOU LOOKING AT ANY OF THE FOLLOWING CHALLENGES IN TECHNOLOGY?

ANALYSIS

- Just over a third of charities (35%) are looking into the challenge of choosing ethical suppliers. However 66% either aren't or aren't sure.
 - However, more than half (54%) are looking at platform dependency.
 - Almost 1 in 4 (24%) are looking at how algorithms make decisions.
 - Just under a half are not looking at the impact of the tech they use on their carbon footprint (48%) and 29% aren't sure if they are.
- 59% of charities are not looking at retraining staff whose jobs may be automated, indicating that the impact of automation on the workforce is not seen as a priority by charities currently.
 - Diversity seems to be more of a priority, with over half (57%) looking at better representation amongst decision makers.
 - More than half (54%) are looking at ethics around data about users.
 - 43% are looking at the unintended consequences of their digital and design decisions.
 - 62% are looking at sustainability and funding of tech beyond the first year.

In summary, this indicates positive awareness of some key issues, but also areas for improvement.

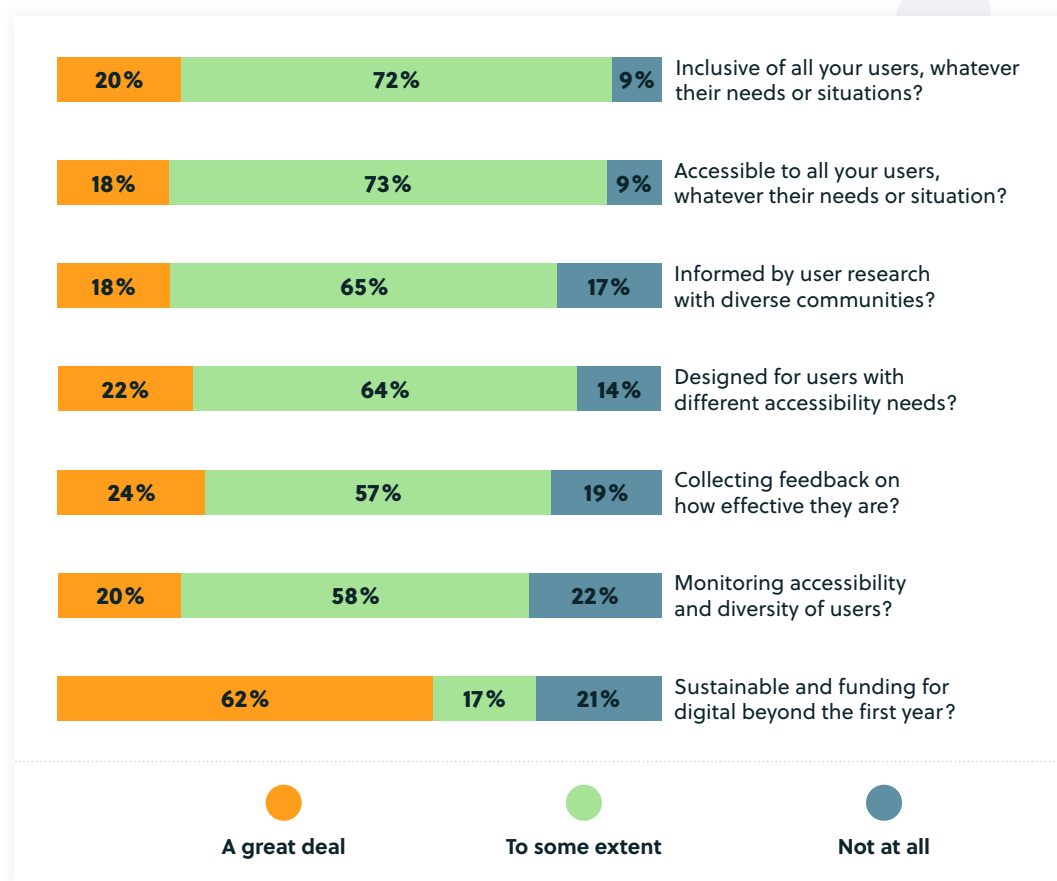


20 TO WHAT EXTENT DO YOU FEEL THAT THE DESIGN AND DELIVERY OF YOUR ONLINE (AND ALTERNATIVE OFFLINE) SERVICES, DIGITAL TOOLS OR PRODUCTS ARE ...

Charities are making efforts with improving diversity and accessibility, although there is room for improvement.

ANALYSIS

- 72% think that their design and delivery is inclusive to some extent, which is encouraging, whilst 73% think they are accessible to all users to some degree.
- 65% think that their design is informed by research with diverse users to some extent, with 58% making some efforts to monitor diversity of users to some degree.
- 64% think that their products are designed for service users with different accessibility needs to some degree.
- Over half (57%) are collecting feedback on how effective their products, services and tools are to some extent

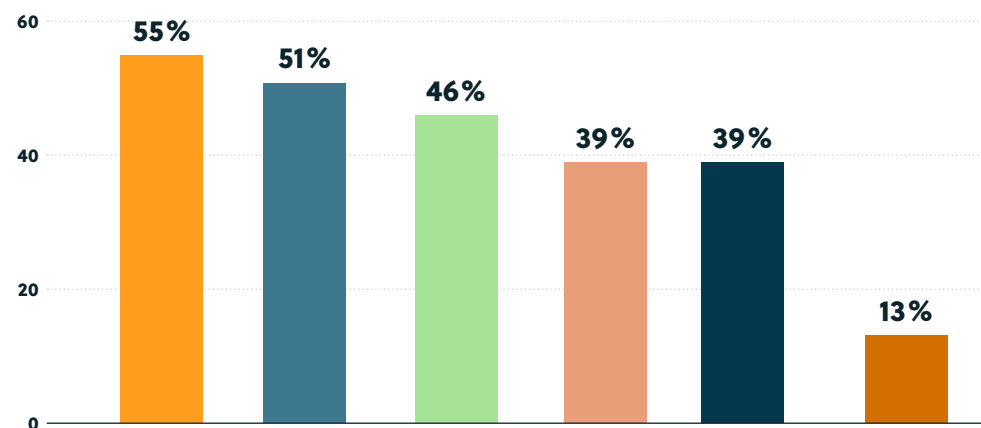


21 HAVE YOU FACED ANY OF THE FOLLOWING SAFEGUARDING CHALLENGES THIS YEAR IN RELATION TO DIGITAL SERVICES?

Charities have had to update their policies and review processes as part of their move to online services.

ANALYSIS

- More than half (55%) had to update their safeguarding policies and 13% have had to develop a policy from scratch.
- Charities have had to review their practice. 51% have had to assess whether tools are safe and secure, 46% have had to identify safeguarding risks as part of a service and 39% have had to look at their GDPR compliance.
- 39% have supported staff to implement safeguarding measures.
- From the trends about digital safeguarding we have seen elsewhere in the report, there seem to be some contradictions, for example 48% see themselves as fair at this, with almost 1 in 4 (23%) rating themselves as poor. When asked about their top 3 digital priorities for the future just 6% rated digital safeguarding as important. Taken together, all of these insights may indicate that charities undertook work at the start of the pandemic to improve digital safeguarding, but it is no longer a burning issue for them. However, there is clearly room for improvement.



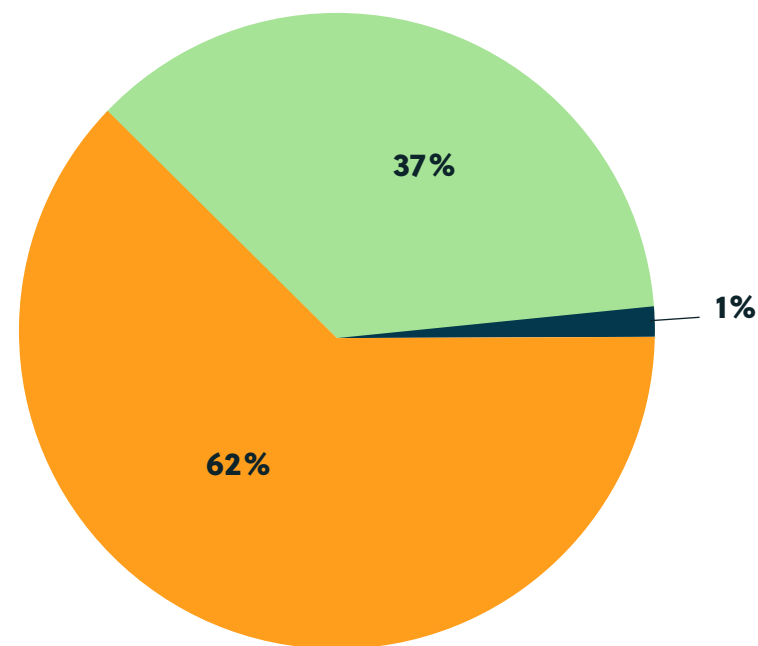
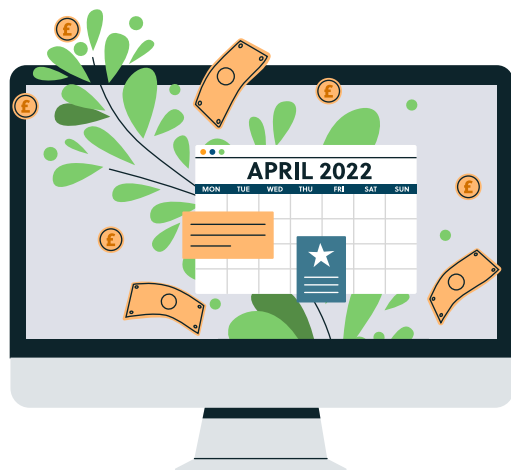
- Updating existing safeguarding policies
- Assessing whether the tools we use are safe and secure
- Identifying safeguarding risks associated with a service
- Our GDPR compliance
- Supporting staff to implement safeguarding measures
- Developing a safeguarding policy from scratch

DIGITAL FUNDING

22 WOULD YOU SAY YOUR NEED TO ACCESS GRANT FUNDING FOR DIGITAL HAS CHANGED?

ANALYSIS

- Almost two thirds (62%) say that their need for digital funding has increased. Last year, just under half (48%) had not accessed any digital funding. This suggests that there is still significant unmet need.
- Just over a third (37%) say their need has stayed the same.
- Interestingly, the group with the most significantly increased funding needs were medium sized organisations, with 73% agreeing with this statement, in comparison to 56% of small charities and 56% of large charities.



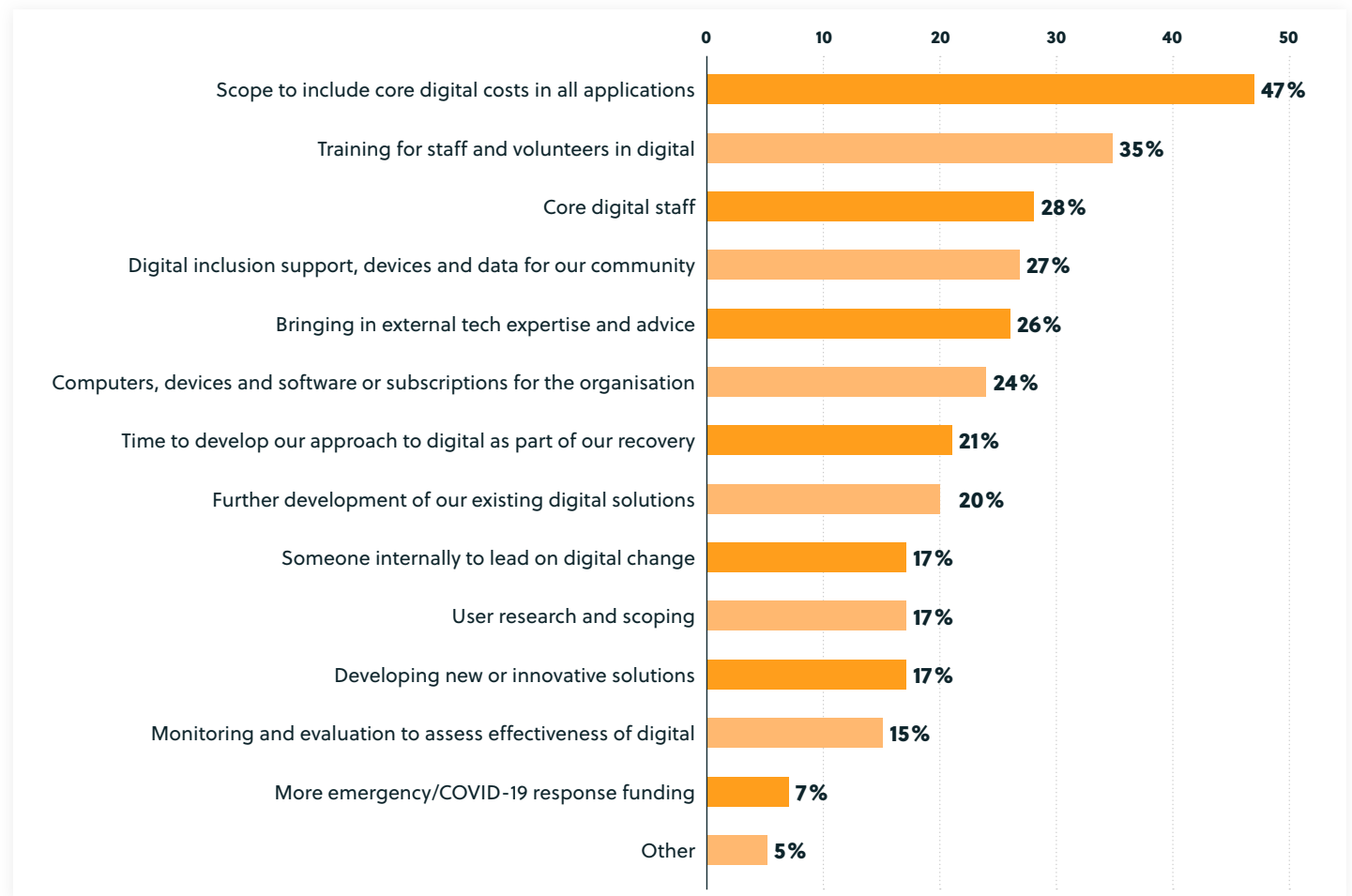
It has increased

It has stayed the same

It has decreased

23 WHAT ARE THE THREE MOST IMPORTANT CHANGES FUNDERS COULD MAKE IN TERMS OF THEIR DIGITAL FUNDING AND WHAT THEY WILL FUND?

There is clearly an unmet need across the sector for digital funding, with almost half wanting funding to include core costs in all applications. Charities also want a better digital 'funder plus' model and resources to bring in external expertise.



23 WHAT ARE THE THREE MOST IMPORTANT CHANGES FUNDERS COULD MAKE IN TERMS OF THEIR DIGITAL FUNDING AND WHAT THEY WILL FUND?

ANALYSIS

- Given that there is a strong need for digital funding across the sector, we wanted to find out what funders could do to help.
- The most important change that funders could make for almost half (47%) of the respondents is to include core digital costs in all applications. This is similar to the 45% of charities who told us this last year. There is an urgent need for funders to better respond to this.
- There is potential for funders to up their game with a better digital 'funder plus' model of support. The second most important change, for 35% would be training for staff and volunteers

- Charities also want funding for digital staff, with 28% wanting funding for this and 18% needing additional resources for someone internally to lead on digital change. This is the third most important change.
 - Over a quarter (27%) would like funders to enable them to give digital inclusion support, devices and data for their community.
 - More than a quarter of charities (26%) would like funding to bring in external tech expertise and advice.
 - A quarter (24%) would also like access to hardware and software, showing that this basic need is not being met by funders.
 - Charities would also like time and space to plan and review. 21% would like funding for time to develop their approach to digital as part of their recovery and 17% the space to develop new and innovative ideas.
- Finally, funding could help charities to understand their audience and to assess their impact, with 17% requesting funding for the former and 15% preferring funding for monitoring and evaluation of their digital solutions.
 - The top funding requests from small charities are: training for staff and volunteers (47%); computers, devices and software or subscriptions for the organisation (33%) and digital inclusion support (33%).
 - The top priority for both medium and large charities is the scope to include core digital costs in all funding applications. They similarly prioritise training for staff, digital inclusion support and core digital staff costs.

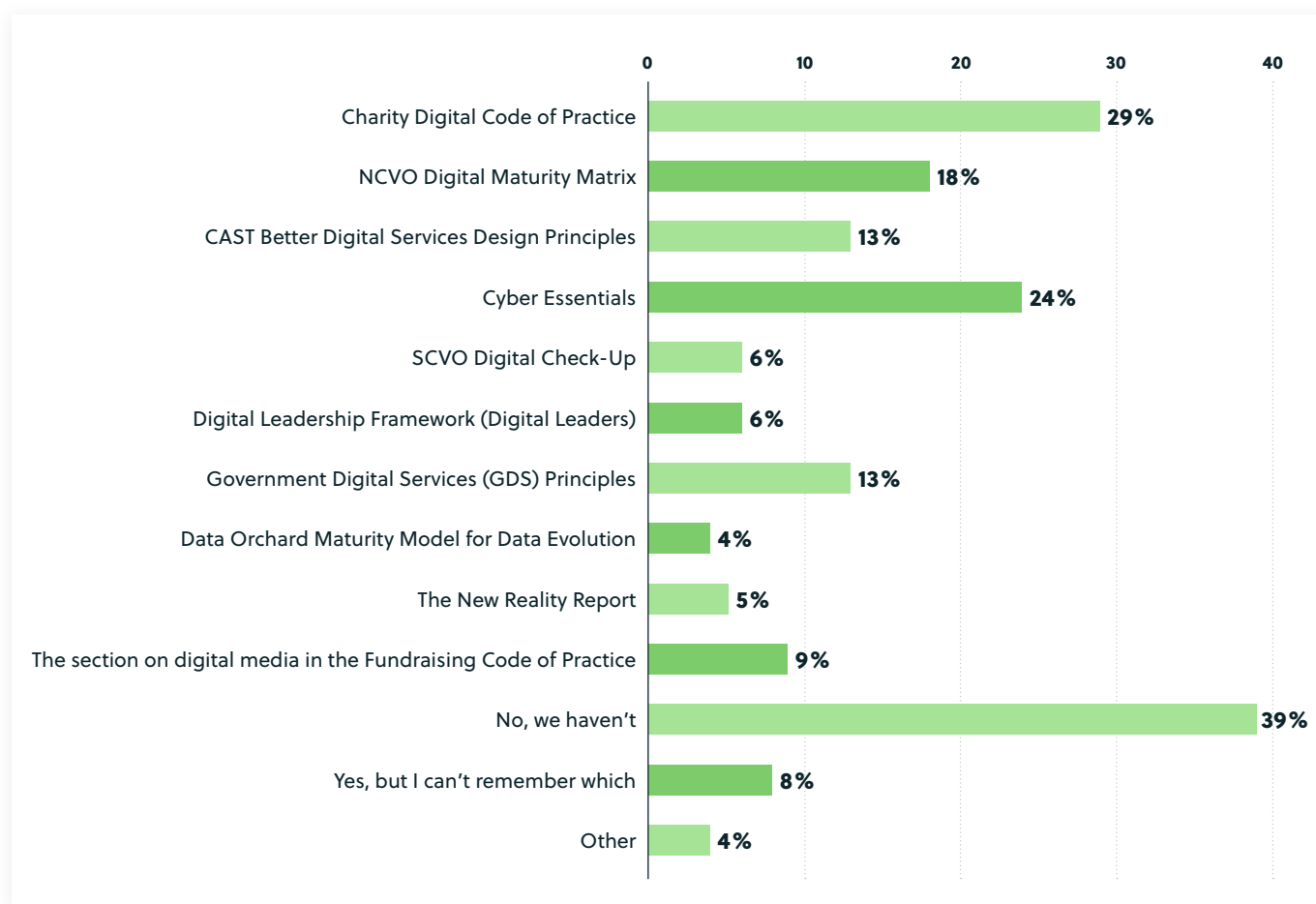
DIGITAL BEST PRACTICE

24 IN THE LAST YEAR, HAVE YOU MADE USE OF ANY OF THE FOLLOWING DIGITAL MATURITY DIAGNOSTIC TOOLS OR BEST PRACTICE FRAMEWORKS IN YOUR ORGANISATION OR TEAM?

Charities are using a variety of frameworks and tools.

ANALYSIS

- Overall, 61% of charities are using frameworks or tools to help with digital. They use a variety of options.
- 29% are using The Charity Digital Code of Practice.
- 24% are using Cyber Essentials.
- 18% are using NCVO's Digital Maturity Matrix.

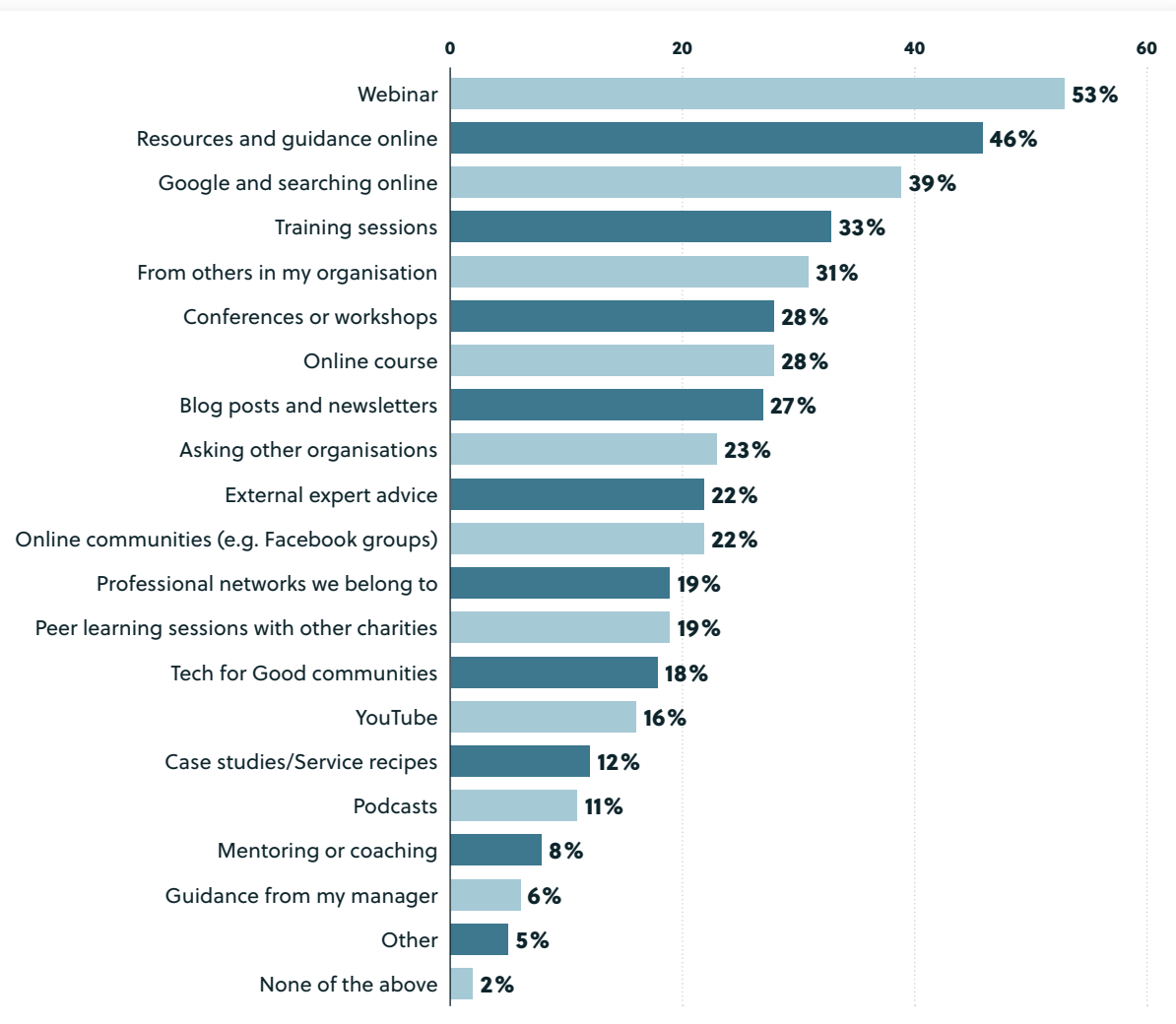


DIGITAL EDUCATION

25 HOW OR WHERE HAVE YOU LEARNT MOST ABOUT DIGITAL OVER THE LAST YEAR (WE'RE ASSUMING MOST WERE DELIVERED ONLINE)?

ANALYSIS

- Webinars are now the most popular choice to learn about digital, with over half (53%) having used them over the last year.
- Just under half (46%) accessed resources and guidance online.
- Close to 4 out of 10 (39%) charities have learned through problem solving by searching online or using Google.
- Almost a third (31%) have learned from others in their organisation, showing that peer learning matters.
- The range of responses spread across a variety of methods shows how charities have found a 'pick and mix' approach to digital learning helpful, including blogs and newsletters, asking other organisations and professional networks.



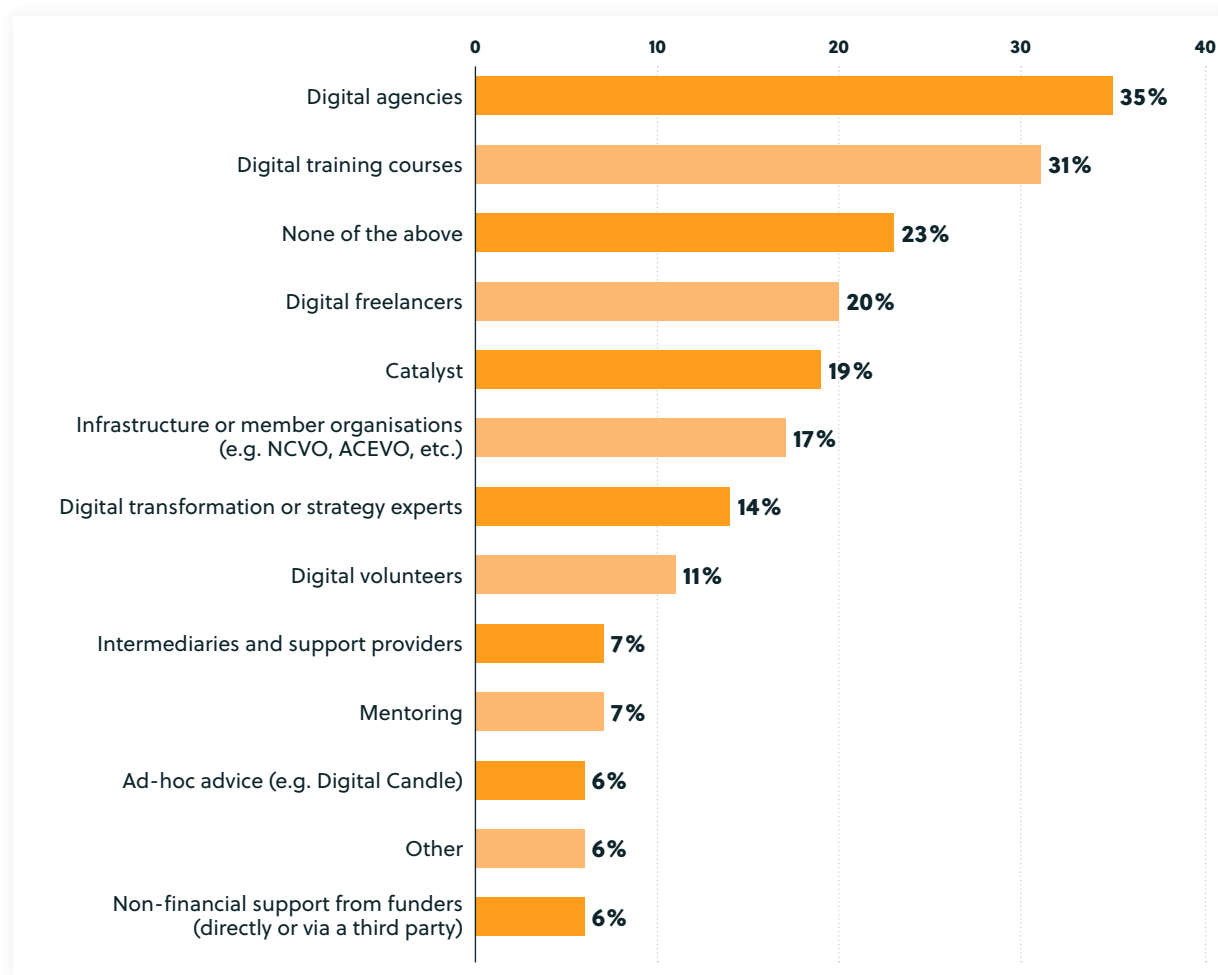
DIGITAL SUPPORT NEEDS

26 IN THE LAST YEAR, HAVE YOU MADE USE OF DIGITAL SUPPORT OR GUIDANCE FROM ANY OF THE FOLLOWING SOURCES?

Whilst 23% of charities have not accessed any help, 31% have been on training courses and 35% have used digital agencies.

ANALYSIS

- 35% have accessed help from digital agencies, and 1 in 5 (20%) from freelancers and 14% from digital experts.
- 31% have accessed digital training courses.
- 23% have not accessed any help.
- 17% have made use of support from infrastructure organisations (such as NCVO or ACEVO).



KEY SURVEY COMMENTS



27 IS THERE ANYTHING ELSE YOU'D LIKE TO TELL US ABOUT HOW DIGITAL SKILLS COULD HELP YOUR CHARITY?

"We need to build digital skills and resilience internally so knowledge and experience is broader than in the hands of a few."

"Board-suited digital skills training would be really welcome to equip us with know-how to ask the right questions/evaluate value-added of digital investment to date/prospectively."

"Working remotely happened really quickly for us but with IT support and some digital confidence in the team, this was pretty seamless. More digital training would be useful."

"2020 was an incredible year where we made huge progress on digital. To maintain this going forwards our culture needs to change to be more accepting of digital in service delivery and our leadership needs to align on our digital priorities."

"Our client base are adults with learning disabilities and it has therefore been challenging to engage with many of our clients online/virtually. We have managed to support some clients to access online groups/video call meetings by accessing funding support from the local authority, however this involves a large commitment of staff time to support them to learn how to use new technology."

"Funders need to better understand how digital integrates with face-to-face service delivery and not insist on having digital for digital's sake. This is a big issue we are facing as a charity right now. Also, internally, people want digital to be the magic solution yet there is a high level of resistance to using digital due to issues around risk, safeguarding, data, legal – it's not very well understood. We are being asked to create digital products without clear evidence of need/what problem digital is going to help solve – this is very much driven from funders wanting digital because they have been told it's important to our audience, as well as internal pressure to have shiny digital products."

27 IS THERE ANYTHING ELSE YOU'D LIKE TO TELL US ABOUT HOW DIGITAL SKILLS COULD HELP YOUR CHARITY?

"I think there remains a huge language and understanding barrier around digital – even the word digital means so many different things to different people and can switch people off quite early on. Listening and empathy skills must come first, to learn and understand where someone is at with regard to digital. The ultimate aim being to make digital work for them, so effectively to almost become an enabling, unnoticeable tool, rather than something that 'gets in the way'. I learned a mantra from an ex colleague who I worked on a digital transformation project with and I try to always be mindful of this in my approach: People, Process, Technology, in that order."

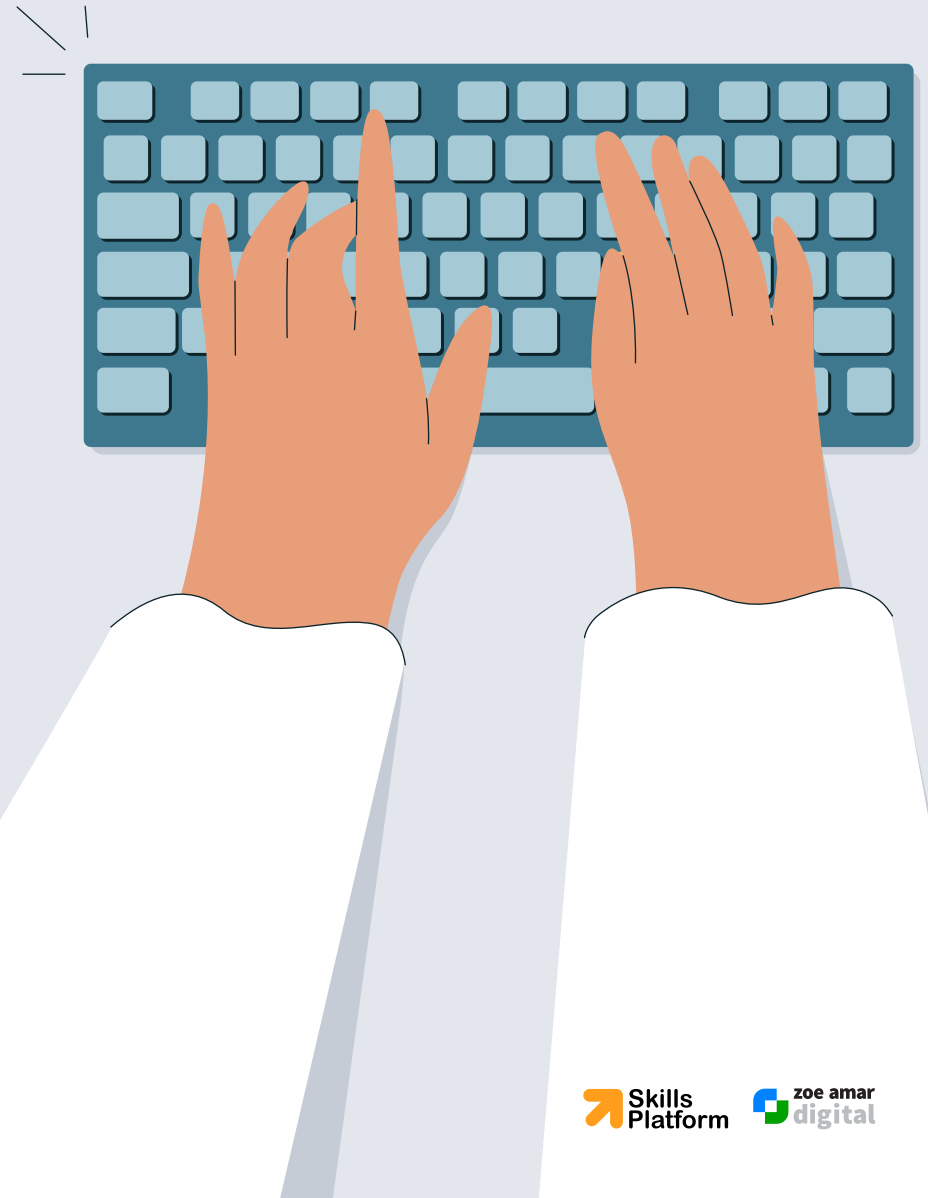
"We need to be confident to work in both digital and non-digital ways and to support our service users to do the same, whilst retaining their choice of how the services are delivered to them. We received funding to allow some of our most vulnerable service users (asylum seekers) access to devices and data to enable group and peer support."

"1. It's so frustrating to be one of very few people in an organisation actively pursuing change – it needs to be driven from the top but trustees/bosses often don't have the basic skills themselves and don't like being told. 2. Any developments also need to receive recognition, or at least interest, e.g. I have made training videos and delivered online training but little interest is shown and no one wants to join in or learn how to do it."

"The pandemic has accelerated the pace of change towards digital delivery and made us do things that we might not ever have done. On the whole, our audience has responded well to our digital offer – we have had larger numbers attending online events and courses. We have not paid out any travel expenses and our carbon footprint has been reduced. We are also able to work in flexible teams across different geographies which is extremely useful."



ABOUT THE AUTHORS



ABOUT THE AUTHORS

ZOE AMAR

Zoe Amar is widely regarded as one of the charity sector's leading digital experts. She founded digital agency and social enterprise Zoe Amar Digital in 2013. Their clients have included Sense, Anglia Ruskin University and The School for Social Entrepreneurs. Zoe is Chair of The Charity Digital Code of Practice. She writes for Third Sector about charities and also co-authored The Charity Commission's digital guidance for trustees, 'Making Digital Work'. Zoe has 13 years' experience as a charity trustee and currently sits on the board of Charity Digital Trust. Previously, Zoe worked for 5 years as part of the leadership team at a national charity that advised non-profits about technology. She is the winner of an Inspiring Communicator award from Charitycomms. She was recently voted one of the 25 most influential charity leaders by Charity Times.

THE SKILLS PLATFORM

The Skills Platform is a unique marketplace resource committed to sector-specific learning and progression in the health, social care and not for profit sectors. The platform provides an online marketplace where employers and individuals can search for and compare solutions to their training needs – whether that is direct training, mentoring, consultancy, elearning or more informal activity. The Skills Platform is hosted by Skills for Health who are a registered charity and a not for profit organisation.

NISSA RAMSAY

Nissa Ramsay is the founder of Think Social Tech, providing independent research, learning and evaluation consultancy. She helps organisations design funding and support services, with a dedicated focus on digital skills development in the charity sector. Clients have included Catalyst, Power to Change, Reach Volunteering, Comic Relief, Nesta Challenges, Nominet and the Charity Governance Awards. Nissa has a PhD in Human Geography and an MSc in Digital Sociology, alongside 15 years experience in the charity sector. She also sits on the board for Chayn.

WITH THANKS TO CATALYST FOR THEIR SUPPORT

Catalyst is a collective of individuals and organisations (like charities, funders, agencies and freelancers) helping UK civil society grow in digital. We are building an ecology of interconnected support initiatives, shared infrastructures, learning networks and community spaces that help charities and civil society organisations harness the power of digital, data and design to respond to the changing needs in their communities.

ACKNOWLEDGEMENTS

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Blue Cross

RNID

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Art Fund

Fellowship of St Nicholas

Diabetes UK

British Lung Foundation Westminster Support Group

The Literacy Pirates

The Josh Hanson Trust

Advice NI

Redwings Horse Sanctuary

The Quilters' Guild of the British Isles

Tools For Solidarity

Headway Surrey

Nordoff Robbins

Dadihiye Somali Development Org

London Infinity Elite

Salisbury World Refugee Centre

Kidney Research UK

Work for Good

Jack Dulson Memorial Fund

Neuro Therapy Centre

Bumblebee Conservation Trust

Reach Volunteering

Bolton Hospice

Pause

SLQ Sports Leaders

Ruby's Fund

The Together Trust

Helena Kennedy Foundation

Power to Change

The Leprosy Mission

England and Wales

Peace Direct

SafeLives

Roundabout Dramatherapy

Frontline AIDS

Wales Council for Voluntary Action

Havens Hospices

Comic Relief

Independent Arts

Together Co

Turn2us

Darnall Well Being

Kingston Voluntary Action

Vista

Irish in Britain

South Staffordshire Network for Mental Health

Rape & Sexual Abuse Support Centre (RASASC) Guildford

Dundee Law Centre

Glass Door Homeless Charity

UpRising

Cardiff University Students' Union

All We Can

Girlguiding Greater Manchester West

THANK YOU TO ALL THE ORGANISATIONS WHO TOOK PART, INCLUDING:

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Carefree

Imara CIO

South Shropshire Youth
Forum South Shropshire
Youth Network

Caring Together

Stroudco

The Scouts

Skills & Training Network

The Garwood Foundation

MO

Erlestone Manor Fund

CharityComms

CVS Brent

Mid Sussex
Voluntary Action

Salford CVS

WM Funders Network

Impetus

Brook

Pembrokeshire Association
of Voluntary Services
(PAVS)

Deaf Action

Chayn

Newcastle Carers

Cats Protection

AWA DANCE
(Advancing Women's
Aspirations with Dance)

SNAP Cymru

Parenting Across Scotland

Sunlight Development Trust

Resolven Miners Welfare

Parkinson's UK

Scottish Sports Futures

Data4Change

GSD 2000 German
Shepherd Rescue
& Re-home

Kidscape

Carers UK

Charity Digital

Vibrance

Social Firms Wales

Success4All CIO

Flintshire Local
Voluntary Council

Northumberland CVA

Haddenham
Community Library

Disability Sport Yorkshire

Newcastle United
Foundation

Charity IT Leaders

Volunteer Centre Hackney

Innovate Trust

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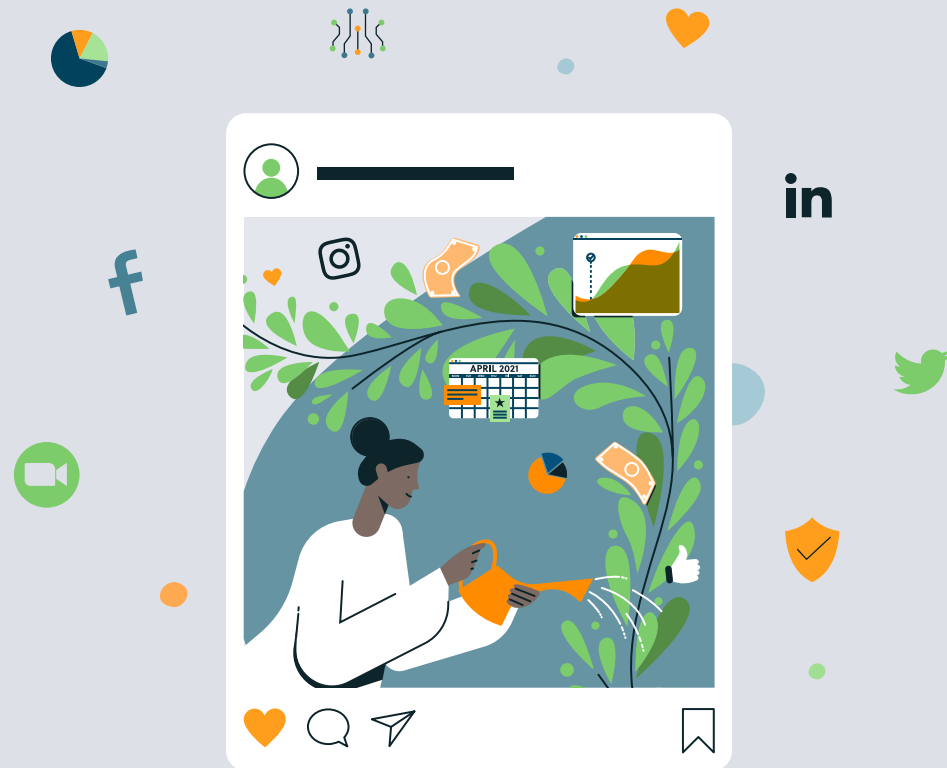


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