

# Principles and resources for digital success



**CAST**  
Driving social change  
with digital technology



Hello!

CAST helps nonprofits - and their funders - embed digital across their services, strategies and culture.





So, digital... eh?

# Why is this important?

1. User expectations for digitally enabled services
2. Impact of digital on civil society
3. Rapidly changing environment
4. Funding squeeze.

*“As good as we think many of our services are, almost all of them are in the same shape they were in when we first set them up decades years ago.*

*Actually, that sounds awful. Don't write that down.”*

- Social organisation

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# Opportunities

1. User-centred services
2. Shared digital solutions
3. Re-use of existing technologies
4. Use of data to learn, respond and improve services
5. Charities leading the conversation around what 'ethical tech' looks like.

*There are over **250,000** apps available to support more positive mental health.*

*Downloaded over **3.2 billion times***

***Less than 0.1%** have any evidence of efficacy*

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# Challenges

...organisational change

The **digital capability of UK charities has almost doubled since 2014**. In 2014, 24% of charities were offline - this is now less than 1%

38% of small charity bosses cite digital and IT as the **top skill** they'd like their organisation to improve

92% of charities with a **digital strategy** in place say that they expect to increase their measurable impact in 2018

63% of charity staff think their **leaders should understand digital trends** and how they affect their organisations

Vital civic and social organisations are **resilient** and **responsive** to the changing **needs**, **behaviours** and **expectations** of their communities, confidently using **digital** tools and processes to achieve their charitable objectives

## Good use of digital is **not...**

- Getting over-excited by the shiny
- Jumping straight to the solution before understanding what problem we need to solve
- Necessarily building something new
- Necessarily expensive
- Necessarily even 'tech'
- Big and scary

## It **is...**

- Driven by real needs and behaviours (not assumptions!)
- Using what's already out there
- Taking small, manageable steps
- Continual learning and improvement
- End-to-end services
- Inclusive, collaborative and open
- Embedded across an organisation, not in silos

Some examples

# Law Centres Network

## Core Challenge:

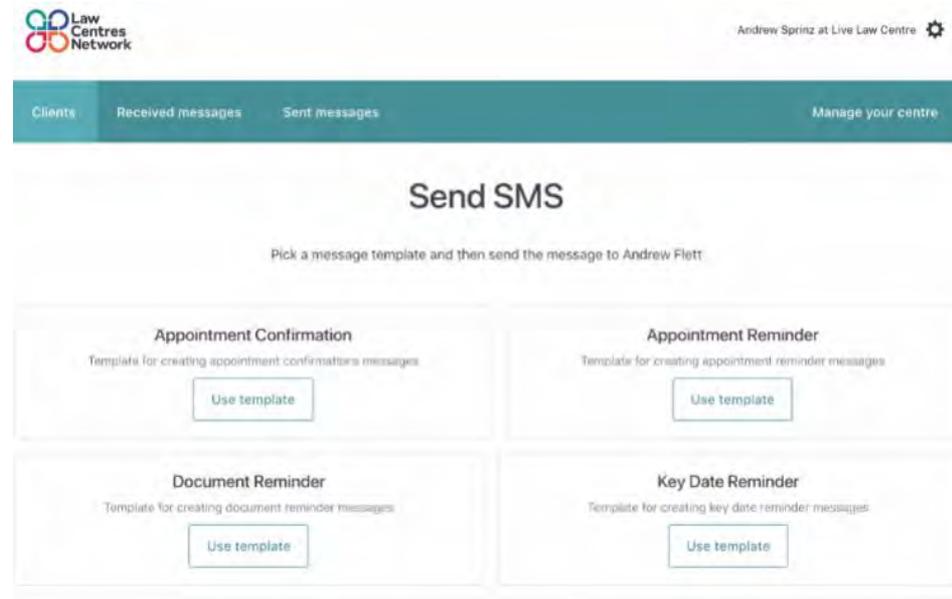
- How to manage client demand and provide a better service to people visiting law centres

## Solution:

- 94% of adults use a mobile phone and many clients had requested phone updates
- SMS tool that allows law centre staff to send appointment reminders, case updates and other important information to clients

## Next steps:

- Launched the service with 6 different law centres
- Hoping to allow other charities to reuse the tech.





## Tech:

- Off-the-shelf SMS tool
  - £20 per month during the three-month trial
  - Additional digital design for admin and client versions
-

# The Well

## Core Challenge:

- Peer-to-peer support service unable to help abstinence-based recovery clients 24/7 if they relapse outside office hours

## Solution:

- Online version of the service tested using a WhatsApp chat group

## Next steps:

- Service users received peer support within 14 seconds of activating the app
- Awarded funding to build a native mobile app





**WhatsApp**

Tech:

- Free WhatsApp group
  - £5k initial grant funding to test proof of concept
  - Users actually prefer WhatsApp to a new tool
-

# seAp

## Core Challenge:

- Urgent need to scale local face-to-face advocacy service to help some of the 720,000 people affected nationwide

## Solution:

- Interactive, anonymous website to walk clients through the Work Capability Assessment process and predict their likely outcome

## Impact:

- Over 300,000 users since 2016 launch
- Boosts confidence and helps identify wrong decisions (34% of which are then overturned)
- Increased charity's reach 1,500X for just 10X the level of investment in their face-to-face service.

## Need help applying for PIP or ESA?

Applying for benefits can be a bit confusing. It can even seem a bit overwhelming.

C-App can help.

### Help preparing for ESA

This site covers Employment and Support Allowance, the benefit for people who can't work because of illness or disability.

In some areas [Universal Credit](#) is replacing new claims for ESA. [Check here to find out what to claim.](#)

### Help preparing for PIP

This site covers Personal Independence Payment, the benefit for people of working age who have a long term health problem or a disability, to help meet the extra costs they face.

#### These sites will help you learn more so you:

- ✓ Understand what the benefits are and how to apply.
- ✓ Understand the forms and the assessment processes.
- ✓ Know how to answer the questions in your assessment.



## Tech:

- Mobile-responsive website
  - Tested thoroughly through paper prototypes
  - Grants totalling over £100k covered development costs
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## Good use of digital is **not...**

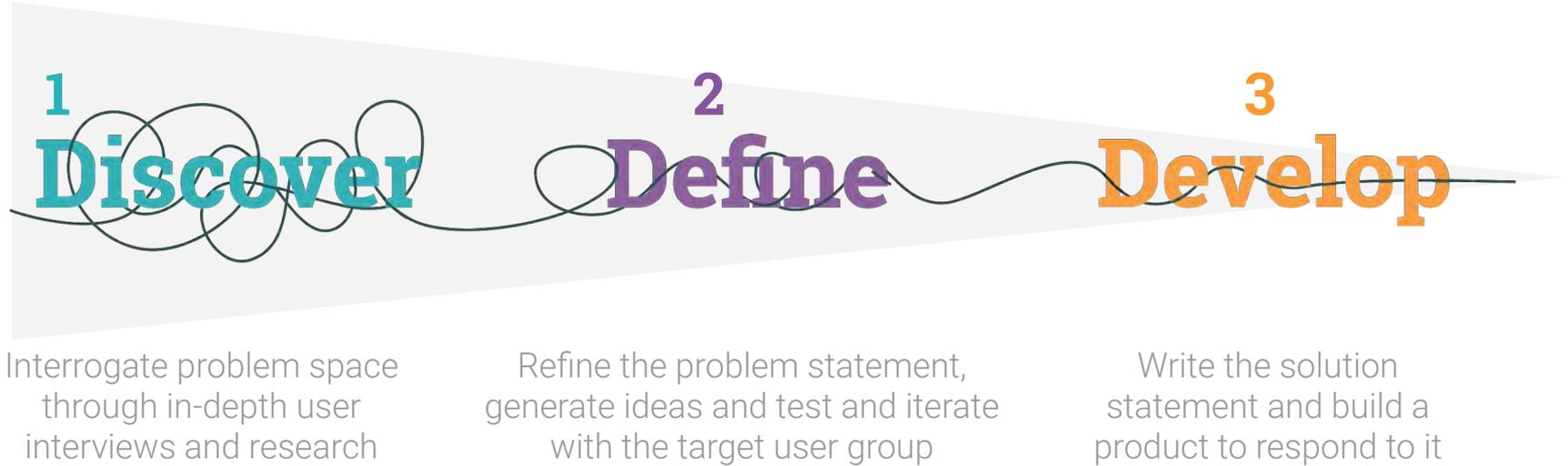
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## It **is...**

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Process

# The user at the heart of the process



Let's try it!

# 1. Discover

## I'm experienced but not an expert

“In the beginner’s mind there are many possibilities, but in the expert’s there are few”

*Shunryu Suzuki*

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By the end of Discover...

I know the problems we need to address **from the perspectives of those affected** and have evidence my solutions provide well-balanced user, social and financial value.

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## By the end of this session...

Established a baseline understanding of the problem from the perspective of those who face it and prioritised where you need to improve your understanding.

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## Knowledge Board

When we're tackling complex social challenges, we all make assumptions about the nature of a problem and how our service users or stakeholders experience it.

The 'Knowledge Board' is a simple template to help structure these assumptions.

**You should only base decisions on information in the 'What we know' column.**



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### Name of organisation

|  |
|--|
|  |
|--|

### Problem

|  |
|--|
|  |
|--|

### What we know

Things you know for certain, and why (e.g. you have evidence from research or analytics data)

|  |
|--|
|  |
|--|

### What we think know

What do you think you know but need more evidence for?

|  |
|--|
|  |
|--|

### What we don't know

What do you not have any evidence for and so need to find out?

|  |
|--|
|  |
|--|

## Knowledge Board

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| Name of organisation                                                                                                                | Problem                                                                                            |                                                                                                            |
|-------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| <b>What we know</b><br><small>Things you know for certain, and why (e.g. you have evidence from research or analytics data)</small> | <b>What we think know</b><br><small>What do you think you know but need more evidence for?</small> | <b>What we don't know</b><br><small>What do you not have any evidence for and so need to find out?</small> |

A brief description of the problem, who faces it, why it's an issue and the importance of solving it.

## An example...

When people needing legal support make an appointment to speak to a pro-bono lawyer, they forget to note down what they need to bring for the meeting, so turn up without the right documents.

Which means they have to make the appointment again

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## Create a problem statement

**When...** [the people affected by the problem]

**Are in this situation** [the situation in which problem occurs]

[The problem] **happens**

**Which means** [effects of the problem]

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## Knowledge Board

When you're working on a complex problem, you often have to make assumptions about what you know, what you think you know, and what you don't know. The 'Knowledge Board' is a simple template to help structure these assumptions.

You should only base decisions on information in the 'What we know' column.



Given the Problem Statement ask yourself, what do we know, think we know, and don't know about the problem?

| Name of Organisation                                                                                                            | Problem                                                                                        |                                                                                                        |
|---------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| <p><b>What we know</b></p> <p>Things you know for certain, and why (e.g. you have evidence from research or analytics data)</p> | <p><b>What we think know</b></p> <p>What do you think you know but need more evidence for?</p> | <p><b>What we don't know</b></p> <p>What do you not have any evidence for and so need to find out?</p> |

## Quality over quantity

Start broad and reaffirm what you take for granted.

**This:** What's stopping people from accessing our services from their homes?

**Before this:** What's stopping people from finding the right information on our website?

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## Knowledge Board

When you're working on a complex problem, you often have to make assumptions about what you know, think you know, and don't know. The 'Knowledge Board' is a simple template to help structure these assumptions.

You should only base decisions on information in the 'What we know' column.



Given the Problem Statement ask yourself, what do we know, think we know, and don't know about the problem?

| Name of Organisation                                                                                                            | Problem                                                                                        |                                                                                                        |
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## Knowledge Board

When we're tackling complex social challenges, we all make assumptions about the nature of a problem and how our service users or stakeholders experience it.

The 'Knowledge Board' is a simple template to help structure these assumptions.

**You should only base decisions on information in the 'What we know' column.**



### Name of organisation

### Problem

A large rectangular box for describing the problem, containing a single yellow sticky note.

### What we know

Things you know for certain, and why (e.g. you have evidence from research or analytics data)

A large rectangular box for listing known facts, containing two yellow sticky notes.

### What we think know

What do you think you know but need more evidence for?

A large rectangular box for listing assumptions that need more evidence, containing four yellow sticky notes.

### What we don't know

What do you not have any evidence for and so need to find out?

A large rectangular box for listing unknowns that need to be investigated, containing three yellow sticky notes.

## User needs

*From:* Volunteers want to know if their branch is at risk of unplanned closure. - *Samaritans*

*To:* **As a** volunteer,  
**When** my branch is at risk of unplanned closure,  
**I want** to be notified,  
**So that** I can best allocate my volunteering time.

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## Knowledge Board

Write one or more user needs statements and add them to your knowledge board.

The 'Knowledge Board' is a simple template to help structure these assumptions. You should only base decisions on information in the 'What we know' column.



Name of organisation: \_\_\_\_\_

Problem: \_\_\_\_\_

### What we know

Things you know for certain, and why (e.g. you have evidence from research or analytics data)

### What we think know

What do you think you know but need more evidence for?

*E.g.*

**As a** volunteer,  
**When** my branch is at risk of unplanned closure,  
**I want** to be notified,  
**So that** I can best allocate my volunteering time.

### What we don't know

What do you not have any evidence for and so need to find out?

## Knowledge Board

When we're tackling complex social challenges, we all make assumptions about the nature of a problem and how to solve it. The 'Knowledge Board' is a simple template to help structure these assumptions.

You should only base decisions on information in the 'What we know' column.

Prioritise the things you need to know, and make a note to follow them up.



Problem

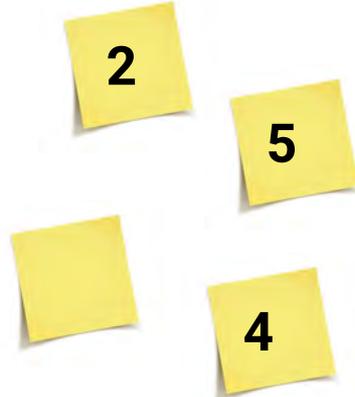
### What we know

Things you know for certain, and why (e.g. you have evidence from research or analytics data)



### What we think know

What do you think you know but need more evidence for?



### What we don't know

What do you not have any evidence for and so need to find out?



## By the end of this session...

Established a baseline understanding of the problem from the perspective of those who face it and prioritised where you need to improve your understanding.

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## Knowledge Board

When you're tackling complex social challenges, we all make assumptions about the nature of a problem and what we know or don't know about it. The Knowledge Board is a simple template to help structure these assumptions.

You should only base decisions on information in the 'What we know' column.

# What activities would you do to be confident to shift a card across the Knowledge Board



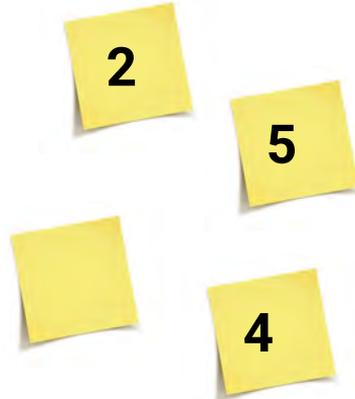
### What we know

Things you know for certain, and why (e.g. you have evidence from research or analytics data)



### What we think know

What do you think you know but need more evidence for?



### What we don't know

What do you not have any evidence for and so need to find out?



Resources to help

# 1. Charity Digital Code of practice

Helps build shared  
understanding of what  
'good' looks like (good  
for trustees)

The logo for the Charity Digital Code is displayed on a white background. It features the text "</CHARITY" on the top line, "DIGITAL" in white capital letters inside a horizontal bar with a blue-to-teal gradient, and "CODE >" on the bottom line. All text is in a bold, sans-serif font.

</CHARITY  
DIGITAL  
CODE >

## 2. Digital design principles

To create better digital services (good for leadership and teams on the ground)

### Principles

10 design principles to help charities build better digital services:

- 1 Start with user needs, and keep them involved
- 2 Understand what's out there first
- 3 Build the right team
- 4 Take small steps and learn as you go
- 5 Build digital services, not websites
- 6 Be inclusive
- 7 Think about privacy and security
- 8 Build for sustainability
- 9 Collaborate and build partnerships
- 10 Be open

### 3. SCVO Digital Check-up

To identify your digital strengths and gaps in four key areas

## Benchmark your organisation and plot a route ahead

Take our simple Digital Check-up to assess your current digital maturity and how this compares to other organisations

START THE CHECKUP



The information you provide will be stored in our database to allow us to analyse responses. Read our full privacy notice.

Identify the strengths and the gaps your organisation is facing with digital technology



Leadership, culture, and skills



Tools and equipment



Content, marketing and data



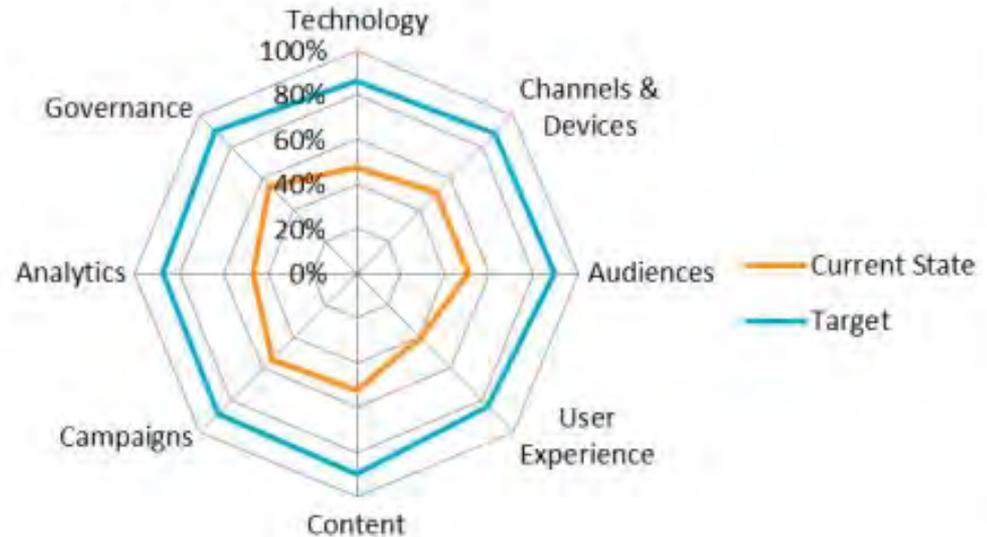
Cyber resilience and online threats

## 4. Voluntary sector maturity matrix

To assess your level of digital capability, compared with a target state (good for strategy)

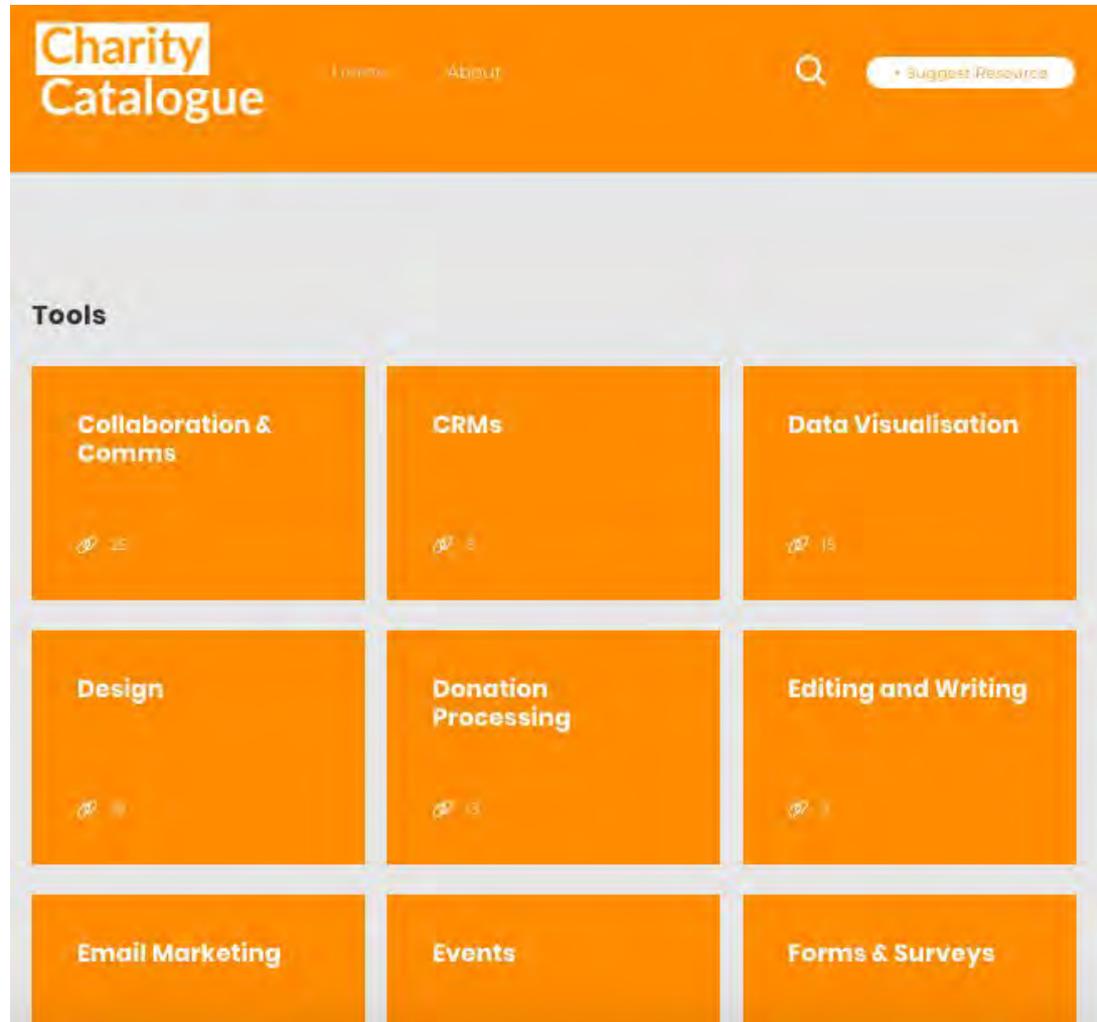
# Voluntary Sector Digital Maturity Matrix

Digital Maturity in the Third Sector



## 5. Charity Catalogue

Free or discounted tools and resources to help your charity



# 7. Conversation Menu

To improve communication between nonprofits and tech partners



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## Conversation Menu

Starting your nonprofit:digital partner relationship on the right footing.

Waiter: Good evening... would you care for something to talk about?  
Monty Python's [Conversation Menu](#)

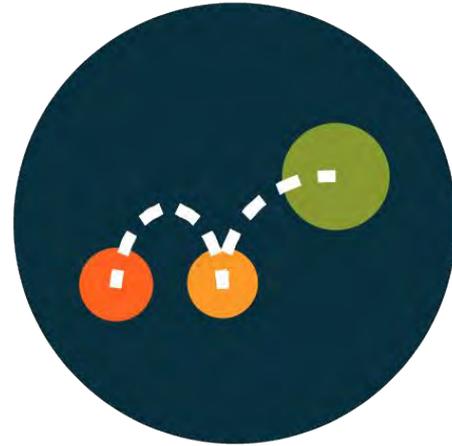
### Background

The **relationship** and **integration** between a digital product team and a charity is vital in creating effective and impactful digital products and services. Often the two parts of this delivery team are used to working in different ways, to differing time scales, pressures and bringing different expertise to bear on the development of a new digital product. However, if this relationship works well, then we have the potential to create incredible impact by harnessing digital to realise social and charitable value.

But with different styles and tempos of working; different pressures and accountability and often different approaches to decision making, there can be tensions/difficulties in making these relationships work well. With that in mind, we've started a conversation menu to help charities/nonprofits and digital teams to have open and honest conversations at the start of a project. It covers issues that *can* cause problems later - so best to address them early on. It starts with a conversation - if documented well, this can create a Memorandum of Understanding (MOU) and form the spirit and detail of a contract.

## 8. Support at different stages through our network

Workshops  
Peer learning  
Blended support



# Networks

TECH for  
GOOD

near you

events from:

Today

This week

This month

All events

events near:

postcode



## Charity Digital Code - in Practice

WHEN?



November 15, 6:00 PM

WHERE?



join the meetup group to see the location

WHO?



netsquaredlondon

**14 active meetups**  
**Over 15,000 members**

Through networks  
we can drive  
change at scale



## Four postits please... They're for CAST's eyes only...

What **would help** you put these ideas into practice?

What would **stop** you putting this into practice?

What have you found **useful** today?

What **lacked** today? (wasn't useful, wish we had)



# Thank you

hello@wearecast.org.uk  
@TechForGoodCAST



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