COVID-19 digital checklist for charity trustees and leaders

The coronavirus crisis has created a huge challenge for the sector. Many charities will be grappling with loss of income, closure of face to face services and staff absence, whilst simultaneously accelerating remote working, digital service delivery, and digital fundraising.

We know that this is an exceptionally difficult period for the sector and its leaders. Yet it may also be a chance to think differently about what your charity does and how it delivers its mission. Digital is more than a channel. Leveraging its potential could position your charity for the opportunities that arise in the future once the crisis ends.

We've created this checklist to help charity boards and leaders with the decisions they need to make about digital during the crisis, and to get them thinking about what they'd like their charities to achieve during this time.

We've based it on the charity user needs identified by [Catalyst's COVID-19 digital research.](#)

This list is a starting point to get charity trustees and leaders thinking, and is not exhaustive. We will be adding to it as we gain more user insights about how charities are dealing with the COVID-19 crisis.

This checklist draws on best practice in [The Charity Digital Code of Practice](#) and was inspired by [Making Digital Work](#), the Charity Commission's digital guidance for trustees.

How to use the checklist

The checklist aims to help charity trustees and leaders do the following during the crisis:

- Make the right decisions about digital
- Review view digital progress made so far
- Create a shared understanding of your charity's digital goals

As charities increase their use of digital there is a lot to think through. This can be made manageable by:
- Choosing only the most relevant topics from the checklist - you don't have to use the whole resource. Pick one topic that's most important to your charity right now and discuss at your next board meeting
- The executive team, or a working group, could review progress against the checklist and report this to the board

If you're new to digital see [NCVO's introductory guide.](#)

D'Arcy Myers, Chair of Trustees for the Association of Charitable Organisations, one of the early testers of the checklist says:

"Many charity trustees are put off by the word 'digital' and it is often tempting to leave decisions about digital activity to other board members if you don't feel confident about your own knowledge and skills. To govern successfully we need collective decision making at Board level and this applies to digital strategy too. The great thing about this new checklist is that it's accessible to everyone. It is a tool which can bring an understanding of digital to the entire Board, giving them everything they need to understand what they should be aiming to achieve and how to go about it."

The checklist

Click on these links to jump to the most relevant topic to you and your organisation.

1. Remote working

Following the implementation of our business continuity plans, what have we learned? For example:

- What has gone well, what could be improved and what else needs to be done?
- How can we support colleagues with their mental health and wellbeing, motivation and morale, including building confidence and recognising progress?
- Do we have a process for staff to share their insights about their experience of remote working, and to test, learn from and improve on existing systems?
- Are our systems and data secure? See [National Centre for Cyber Security's remote working advice](#) and their [charity guide](#)
- How can we ensure that these new ways of working are inclusive for everyone, and which approaches work for different colleagues? (For example: techniques to involve both extrovert and introvert colleagues in online meetings)

- Do people have the right devices and software to work remotely?
- How is COVID-19 and remote working changing our culture at all levels of our charity, and what else can we do to support staff and volunteers in becoming even more collaborative, innovative and willing to try new ideas?

See [Catalyst's remote working resources](#)

2. Services

Whether you've shifted your services online, or are planning to do so, you might want to think about the following. How might you:

- Keep beneficiaries engaged if there's a gap in service provision whilst you transition to digital services
- Identify the right platform which is both secure and accessible for beneficiaries and staff or volunteers
- Preserve what works about face to face services when transferring them to digital (eg quality of support) whilst acknowledging what will need to change
- Undertake rapid testing of new online services before launch?
- Involve funders and ensure the new digital service meets their funding, information governance and security guidance
- Develop a protocol for digital services, including processes but also safeguarding measures? (See [SCVO's safeguarding resources)](#)
- Protect vulnerable beneficiaries who may not be able to access digital services? What alternative forms of support can we offer them
- Create a simple process for continually gathering user insights and feeding these into staff learning and the development of the service including scaling, if appropriate, and also creating new services

- Plan how to make services sustainable

[Find out how Young Somerset digitised their face to face therapy services](#)

[Undertake a risk assessment for digital service delivery](#)

3. People

Whether your charity is large or small, staff and volunteers will need extra support to develop the confidence, skills and motivation needed as your charity becomes more reliant on digital. Ways in which you could do this include the following. How might we:

- Understand what digital skills we have amongst staff and volunteers and if not, find a way to access them eg recruiting volunteers? See the [Essential Digital Skills Framework](#)
- Skill up our people in digital quickly and cost effectively e.g. through online training or encouraging staff with digital skills to share them
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- Recruit a trustee/trustees with digital expertise and how can we help our charity make the most of their expertise. Find out how to [recruit a digital trustee](#)
- Run effective interviews online, for example by assigning different roles to panel members and testing the technology in advance
- Plan for our board to change post crisis to deliver our new strategy (if required?)

Find out how [Mind are using digital to support their staff.](#)

[See COVID-19 charity training options](#)

4. Fundraising

Charity fundraising has been hit hard by the economic impact of the virus, and many organisations will be ramping up their digital fundraising. There will be many issues to think through here, for example:

- Can we pivot our fundraising propositions so that they major on digital?
- How might we test digital fundraising ideas? Do we have a diverse range of digital fundraising campaigns?
- How can we optimise the conditions for digital fundraising by building communities around our cause?
- How might we gather insights from donors about their rapidly changing needs? How can we test, learn and improve on our digital fundraising activities accordingly?
- Do we have digital fundraising skills in-house and if not, how can we access them?
- Are we prepared for digital fundraising income to take time to materialise?

[Find out how charities are fundraising during lockdown](#)

5. Governance

How are we changing our governance processes to facilitate the quick decision making needed for digital during COVID-19? For example:

- Is our board comfortable with working in an agile way eg making quick decisions, and comfortable with responding to fast moving developments?
- Are our online board meetings organised so that they enable all trustees to participate and make informed decisions? For example: chairs contacting trustees ahead of the meeting to engage them, and having shorter, more frequent board meetings focused on a single issue if a major decision is required.
- How can we create the space for trustees and the senior management team to reflect at a time when they are under pressure, and to consider decisions carefully?
- Do we have a diverse range of perspectives represented on the board and how can we help all trustees feel included?

- If our charity's business model is changing, are committees and executive teams clear on what is expected of them, what authority they have to act and what the charity's policies and procedures relevant to digital are, such as social media, crisis response or risk management?

6. Strategy

With digital likely to now be a key part of how your charity delivers its vision and mission, you might want to consider:

Decision making

- How can we make effective decisions about digital? Do we have a sound understanding of the context and how this is changing for our beneficiaries and supporters, and the right criteria for making decisions e.g. delivering on our charitable purpose and supporting our users, saving money or generating income?
- Are we recording what decisions have been made about digital and why?
- How will we prioritise and manage all of our digital activities? Who has the key responsibilities for this and how will they monitor our plans?
- How can we gather insights from our beneficiaries, donors and stakeholders to inform our decision making?

Planning during COVID-19

- How does the crisis change what we were aiming to achieve strategically with digital? What do we need to stop, start, accelerate or change?
- What is our roadmap for digital during COVID-19? What does success look like and what metrics do we need to measure, and what needs to be delivered and when?
- How do we mobilise everyone in our charity behind what we want to achieve?
- How are charities who are similar to ours using digital during the crisis, and could we partner with them or other organisations to achieve our goals?
- With digital becoming a growing part of society, how can we position our charity to take advantage of any opportunities either during or after the crisis?
- How should we improve our online presence e.g. website, social media so we can help more beneficiaries, for example through accessing online training, resources or other forms of support?

[Find out how UK Scouts are using digital to respond to the pandemic](#)

Looking to the future

- How might our board and leadership team identify long term changes in how our charity uses digital after the crisis? For example, how can we gather the insights tohelp inform this decision

- How can we best support colleagues as organisations transition out of lockdown, eg preferences around working from home or the office ?

Assess your charity's progress with [NCVO's Digital Maturity Matrix](#)

7. Resources

What resources do we need to achieve our digital objectives during the crisis? For example:

- What level of investment is required to achieve our goals, and how will this be delivered and monitored?
- How can we ensure that this investment offers value for money?
- What is the cost of switching to digital solutions and do we have the supply chain to do this? Have we put the right governance in place for moving to digital?
- Are there other sources of support for digital which could access e.g. emergency funding or advice from infrastructure or membership organisations, or volunteers?
- Can we combine back office functions with other charities or automate any processes?

8. Further reading

For more COVID-19 digital resources for charities take a look at [the Catalyst site.](#)

For further guidance on digital best practice see the principles and resources in [The Charity Digital Code of Practice](#)

For guidance on running your charity during the Coronavirus crisis see [The Charity Commission's guidance.](#)