BEST IN CLASS
TECHNOLOGY FOR CHARITIES

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Introduction

Best in Class Technology helps you to do more with less.

One of the key themes within charities is how to best utilise digital in order to become more productive, efficient and increase the number of donations.

Most charities and not-for-profits often struggle with finding technological solutions that are suitable for them and priced reasonably well to match their needs.

The solutions we offer in this document cover some of the frustrations some of our clients have encountered whilst running their organisation.

We recommend that all charities and not-for-profits carry out regular **System Improvement Reviews** to identify inefficient internal systems and processes, as well as new solutions on the market. These should focus on:

1. **Your Pain Points** - technology should help you run your charity more efficiently, if it isn't, why is this? Do you require further training or is it out-dated and no longer suitable for your needs?

2. **Team Insights** - your team are the ones dealing with your systems day-in/ day-out. Speak to them, understand what their most repetitive tasks are and what is the most time-consuming part of their job. There might be new systems that can now improve these processes or the systems in place may no longer be suitable.

3. **Your Budget** - do you know how much you intend to invest each year on your I.T infrastructure? This will help you prioritise on those tasks that need improving first.

Best in Class Charity Solutions

The technology your organisation should be using.

xero

Accounting and Finance

Canva

Marketing

f

MailChimp

buffer

yoast

Office 365

Google Drive

Trello

Productivity

Your Charity/ Not-for-Profit

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Fundraising

Give as you Live®

GoodBox

Accounting and Finance
1. Xero

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The latest Lloyds Bank UK Business Digital Index revealed that more than 100,000 charities lack basic digital skills, which is more than half of the registered charities in the UK. The report said that 9,000 charities don't use the internet at all and one in three believes being online is irrelevant.

- Kirsty Marrins, Third Sector News (2018)

Accounting and Finance Solutions
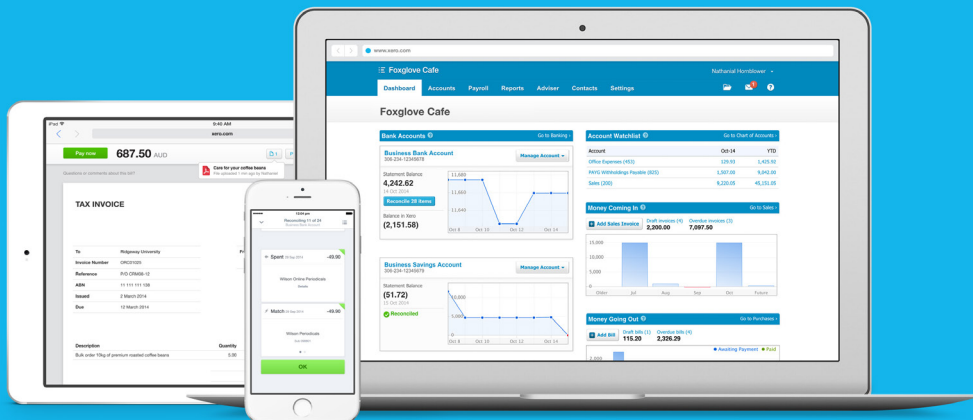# Cloud Accounting Software

Xero

- Get a clear overview of your financial position, whenever you need it
- Get paid faster with mobile invoicing and automatic reminders
- Multi-user access makes it easy to collaborate online with your team and advisors
- Save time on paperwork with automatic bank transaction imports and reconciliations
- Combine payroll with your accounting software

Our cloud accounting system of choice for charities is Xero. The beauty of this software is the flexibility it gives you to run your charity from the office, home, or on the go. You can be confident that you have an up-to-date picture of how your charity is doing, no matter where you are.

By using an industry-leading Cloud Accounting system you get instant access to the information you really need, **putting you in complete control of your numbers and your charity**.

Xero also has a special pricing plan for charities and not-for-profits. The plans start from £10 per month and allows you to send up to five invoices and quotes, five bills and reconcile 20 bank transactions. If your charity is still hesitant about this software, Xero allows a free 30-day trial.

Marketing Solutions
Graphics and Design

Canva

- Create aesthetic images for your social media
- Can design presentations, invitations, flyers
- Easy drag-and-drop feature for seamless experience
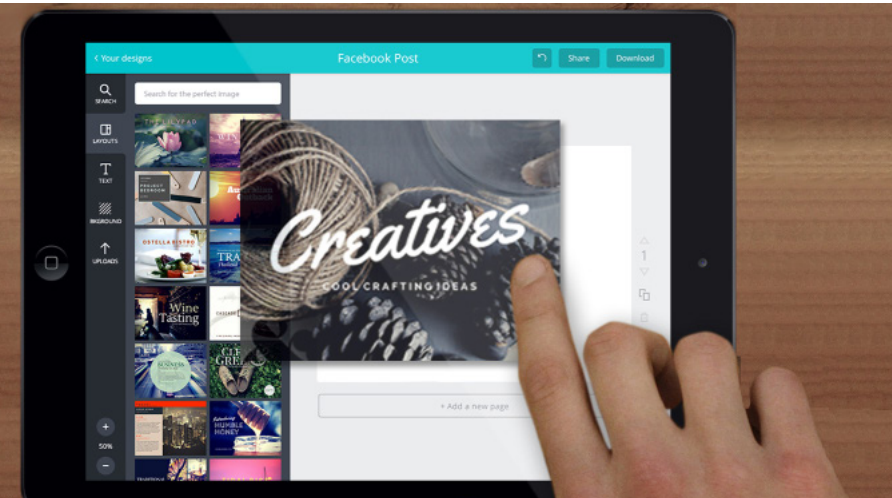- Large portfolio of stock images ready to use

Canva is an online design platform that enables both designers and non-designers to create professional-looking graphics.

The platform covers different types of marketing material ranging from infographics, presentations, posters, letterheads and even business cards.

Canva enables you to also make images that are easy to upload to social media. The template sizes are adjusted to each channel size to ensure full visibility of the image. This includes YouTube thumbnails, Twitter headers and LinkedIn banners.

There are also free icons, shapes and elements within Canva as well as millions of stock photographs to make more visually appealing graphics. In addition to the images available, you can add your own. Once you're done with your image, there's the option to add a filter or edit it so that it matches your charity's brand.

The great thing about Canva is that it is absolutely free to use and relatively simple, meaning your charity can spend more time on fundraising activities. Charities are also eligible for free premium Canva services.

Social Media

Facebook

- Social media channel with over 2billion monthly active users
- Charitable Giving Tools available for charities and not-for-profits
- No fees for processing donation transactions
- Charities qualify as long as their page is registered as a not-for-profit on Facebook

Facebook is amongst one of the most used social media channels. In 2017, they rolled out a 'Donate' button for organisations who were listed as a not-for-profit.

In a bid to help charities raise funds and spread their message further, Facebook has launched a set of 'Charitable Giving Tools' so that charities can improve their efforts. One major tool is Facebook's 'Donate' button which makes it easier for donors to send money to the charity without leaving Facebook. This is especially convenient as donors do not need to find the charity's website and set up payment details there. The button can be added to your page as well as posts.

In addition, supporters of your charity can set up a dedicated page if they're fundraising for your organisation. Their friends and family can hit the donate button on that page and the money will go straight to your charity. To make things more interesting, Facebook allows the 'Donate' button to be featured on live video.

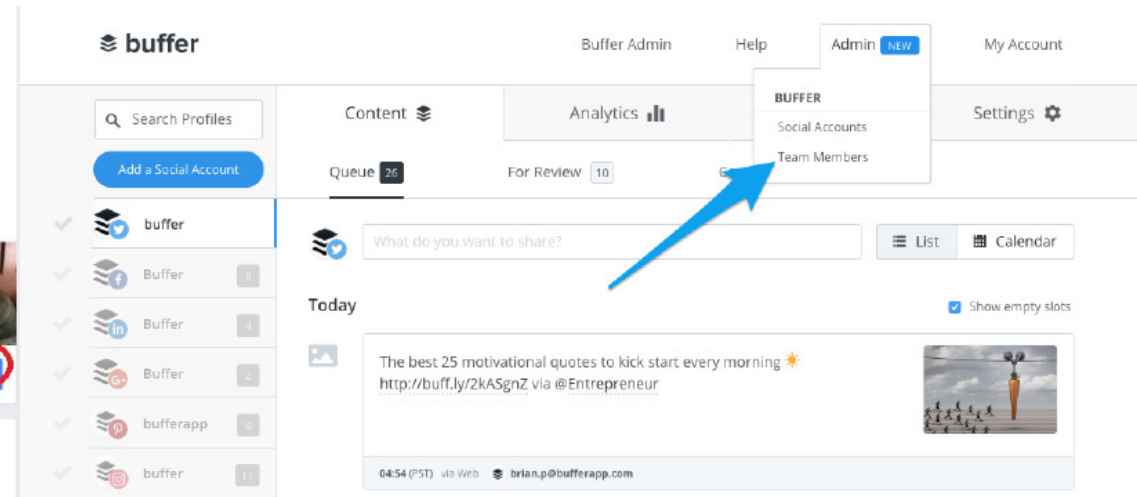# Social Media Scheduling

Buffer

- Schedule social media content in advance
- 'Re-buffer' function to repost content easily
- Can add up to 10 social media channels
- Compatible with both Android and Apple, if scheduling on mobile phone or tablet

Buffer is a social media management platform which can be used on web and mobile. It schedules and posts your content automatically.

With Buffer you can create your own schedule, according to when your audience is mostly active. Analytics and reports are available, allowing you to track engagement and interactions on the posts you've shared, which means you can see how your content is performing and which resonates most with your audiences.

At the moment, Buffer is currently integrated with Twitter, Facebook, LinkedIn, Google+, Pinterest and Instagram.

Buffer has a free plan, but it is limited to three social media accounts and 10 scheduled posts. They do however have paid plans whereby multiple team members can be added to spread the workload. Charities are also eligible for 50% discount on the monthly plans.

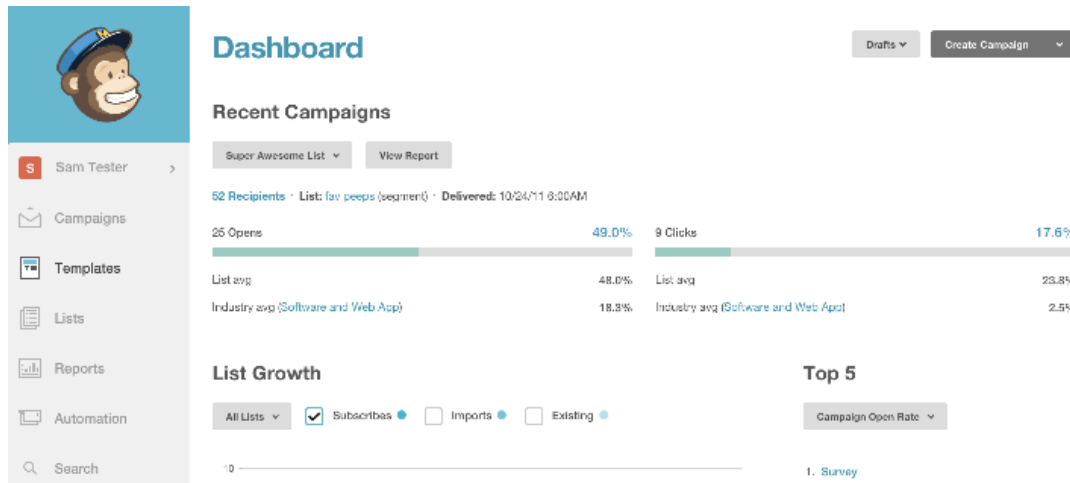# Email Solution

MailChimp

- Pre-set templates for email campaigns
- Templates are customisable with easy drag-and-drop function
- Analytics available to see how campaigns performed
- Free if you have less than 2,000 subscribers across your email list
- Integrates with different apps and WordPress

MailChimp is a marketing automation platform and an email marketing service. It can be used on web and mobile, being suitable on both Apple and Android.

The program is clean, very easy to use and also free which is great for charities and not-for-profits. Within the emails you can also integrate your social media links to make it easier for your audience to follow your channels. If you currently use a different email automation platform, it is very easy to switch as MailChimp allows you to import Excel lists.

MailChimp also has an A/B Testing feature so your charity can test which campaigns perform better. If you find yourself overwhelmed with features, there are free tutorials to help with the campaigns. For bigger teams needing more from MailChimp, there is a 15% discount for charities and not-for-profits.
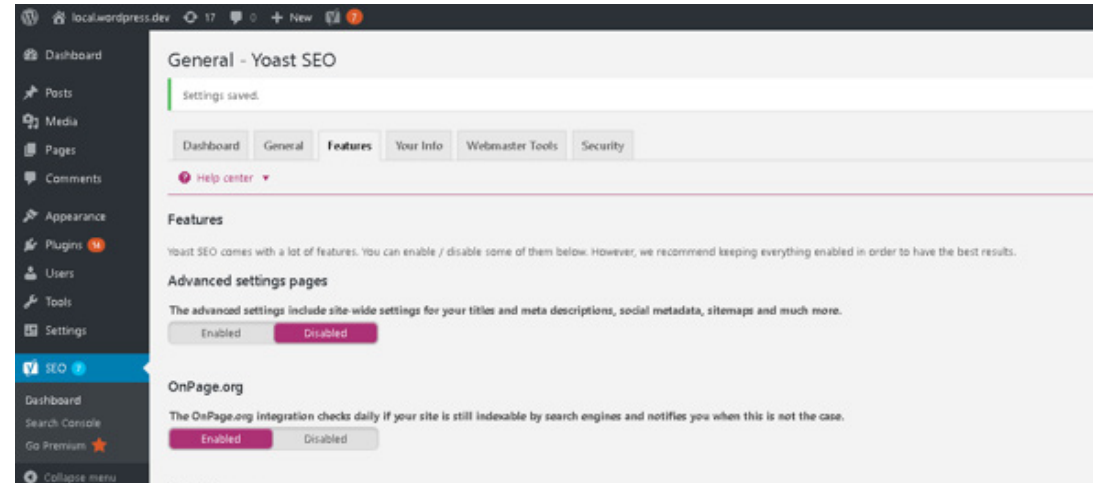
Search Engine Optimisation (SEO)

Yoast

- Comprehensive WordPress SEO plugin
- Free version packed with a huge list of features
- Easy set-up on WordPress
- Preview how content looks on Google before publishing

Yoast SEO is a widely used WordPress plugin that makes it easy for users to practice SEO and make their websites as search engine-friendly as possible.

Yoast SEO is free and can be installed on self-hosted WordPress websites. The free version contains some of the most important functions which allow you to control the title, meta descriptions and set target keywords. With the plugin you also get a preview of how your blog post may appear on Google. Yoast even has the ability to get you verified Google authorship for your site.

The premium version (which costs around £60 for use on a single site), includes video tutorials to help users understand each feature. There's also support provided directly from Yoast's company. This plugin is a great way to make sure your charity's content is viewed online.

Office 365

- Widely used
- Extra functions such as 'Teams' which is good for virtual workers
- High security features such as encrypted email on Outlook
- Option to mix-and-match plans so that you only pay for programs you'll use

Office 365 is a web-based subscription service from Microsoft that offers access to Office applications such as Word, Excel, PowerPoint and OneNote.

Microsoft Office is widely used and their subscription service makes it easier to select programmes that are needed in order for you to be more productive in your charity. In addition to the standard programs such as Word, PowerPoint and Excel, Office 365 comes with Microsoft Exchange for emails, Skype and OneDrive to store your work.

There is a nice discount for charities and not-for-profits who want to upgrade their work systems and use Office 365. The Office 365 Non-profit Business Premium subscription is offered to charities for just £2.30 per user per month.
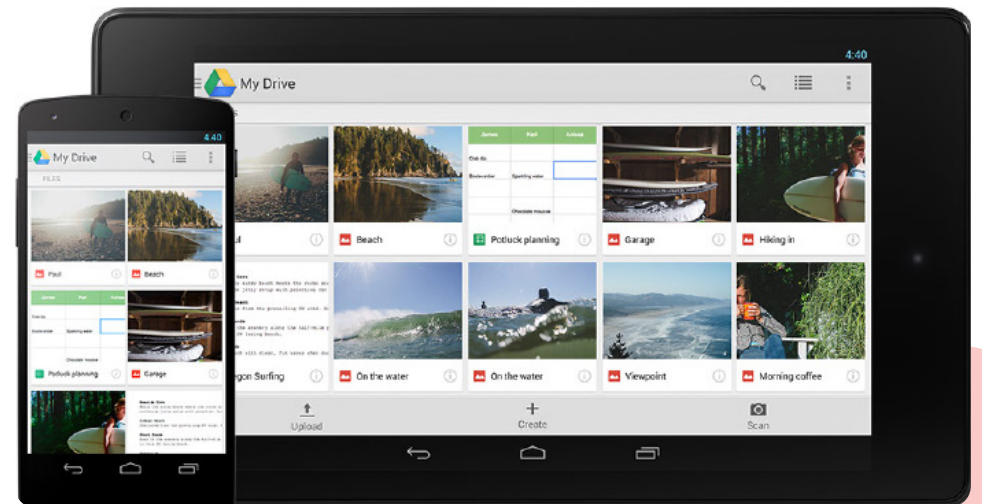
Google Drive

- Free for everyone
- All work is backed up automatically
- Cloud storage available for work online
- Docs, Sheets and Slides compatible with Word, Excel and PowerPoint
- Easy to collaborate and share files with other users

Google Drive is a file storage and synchronisation service which allows users to store files on the drive and across multiple devices.

Google Drive allows you to store any type of file from images to illustrations, recordings, videos, spreadsheets and PDFs. If you previously held documents on Word documents or Excel spreadsheets, these can be imported to Google Drive without losing its format. This is a great solution for remote working and creating documents on the go as work is backed up automatically.

It initially comes with 15GB free storage which may be sufficient for smaller charities, however pricing is reasonable for an upgrade. 100GB of storage starts at £1.59 per month and 1TB is priced at £7.99 per month.

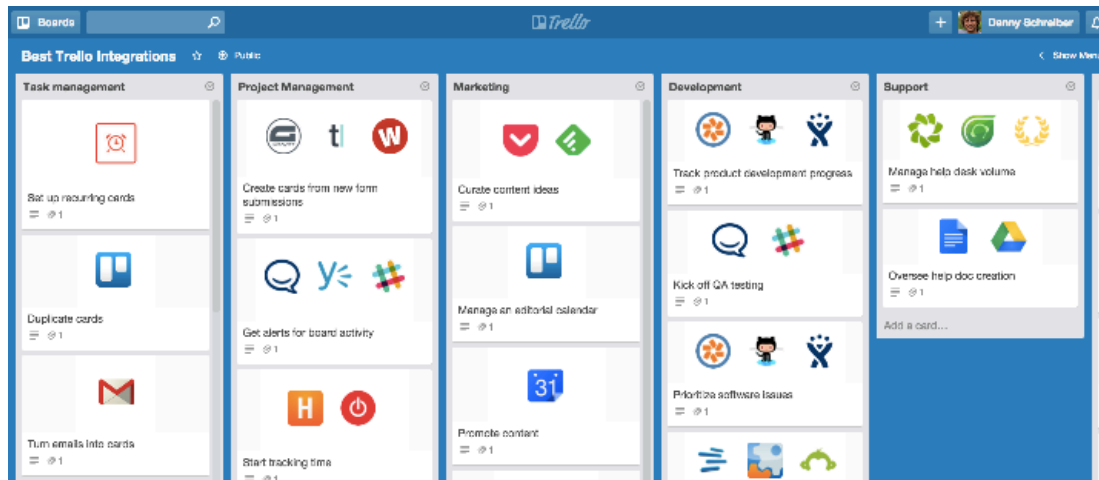## Productivity Solutions
Task Management

Trello

- Easy card function, drag-and-drop style to manage tasks
- Add team members and assign tasks
- Web-based application, no software needed
- Deadline reminders
- Can upload files and other attachments to tasks

Trello is a leading web-based project management application that can be used on a desktop, tablet or phone. It allows organisations to manage multiple projects online.

Trello's card system makes it easy to see which tasks need to be completed by certain departments and team members. On these cards you're able to add comments, create checklists, add labels and due dates, upload file attachments, and more. Your team will receive notifications on changes within a task either by email or through the app.

The app also has great integration features whereby your team can connect with services such as Google Drive, Evernote, Salesforce and MailChimp. Trello is completely free to use but its paid subscription starts from roughly £7.99 per month for extra features.
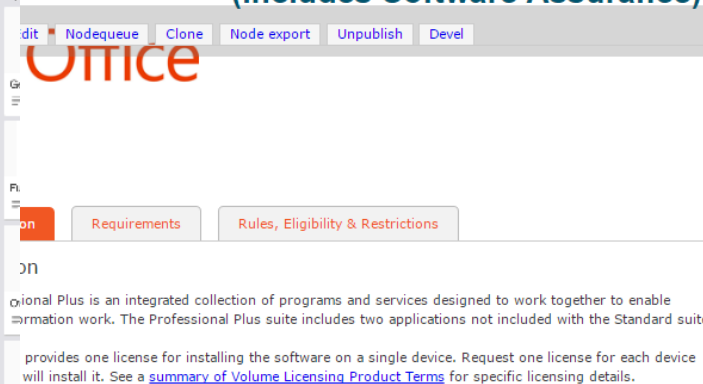
I.T Solutions
Software

tt-exchange

- UK's only technology donation program
- Discounted I.T solutions for charities and not-for-profits
- Big brand products available through the programme at low prices
- Easy registration and set-up

The tt-exchange (from Tech Trust) is a social enterprise with an aim to help charities and not-for-profits increase their impact through the use of information technology.

The tt-exchange has built a good relationship with some big brands meaning that your charity can take advantage of high-range products to improve your I.T. Some of these brands include Microsoft, Amazon, Symantec, Shopify and Tableau.

Signing up to the tt-exchange is very simple and just requires that you are registered with the Charity Commission. Once you receive notification of your eligibility you can place your donation request. To date, the tt-exchange has helped charities save over £200million on software costs, meaning you can put more money towards your cause.

eShopping

Give as you Live

- Free to register
- Choice of 4,100 retailers to help raise funds for your charity
- Free marketing tools to help your charity spread the word on your campaign
- Dedicated account manager to help you generate better results

Give as you Live is an online fundraising platform allowing users to shop at multiple retail stores and raise free funds for charity.

The stores pay the platform a percentage of shoppers' total purchase price in commission, and 50% is passed onto your charity. Charities and not-for-profits can register for free and the platform offers multiple ways to raise funds. There's 'Give as you Switch' where users can compare and switch insurance or energy provider whilst raising funds for your charity. Personalised greeting cards are also an option where users can send cards that raise up to £1.

Give as you Live is an easy fundraising platform to use with over 10,000 charities being registered and 4,100 retailers supporting the cause. It's a great way for your charity to encourage donors in the simplest way.

Contactless

GoodBox

- Quick, easy contactless donations
- Two portable contactless solutions with LCD screens to display charity's promotional material
- Can process contactless payments over the £30 limit
- Takes Visa, MasterCard, American Express, Apple Pay and Google Pay

GoodBox is a company that's dedicated to helping charities and not-for-profits become more efficient whilst fundraising through the use of technology.

The UK is slowly becoming a cashless society, with the amount of card payments currently surpassing cash-based payments since 2017. This trend will continue to see card payments increase especially as contactless technology has made it easier.

There are three versions of the GoodBox payment terminals - the GoodBox Mini which is a stand-alone tap-and-go payment system; the GoodBox which comes with an LCD screen to showcase your charity or show promotional material; and the GoodBox pro (below) which is a large payment terminal with a fitted LCD display that can also take contactless payments of over £30.