

Digital Strategy 2018-20

Objectives

We want to further embed the use of digital technologies, and our expertise in their use, across the organisation in the coming years, building on the successes we have had to date with core systems, such as finance, outlook and shared filing.

Our priorities remain the same as our earlier strategy:

- To increase our reach to include third sector and community organisations that are unaware of us (expansion)
- To make best use of our assets in delivering services and increasing our agility and flexibility (productivity)
- To improve staff retention and motivation through an improving working environment (sustainability)

We are mindful that there are also some impending legal and ethical changes that require to be addressed, such as GDPR and Cyber Security. Whereas these were not included in our previous strategy, being mindful of changes occurring, we have already progressed well on our journey towards both these objectives, but must continue to build on the work done.

Expansion

- Reaching new people and groups through the use of existing and new media.
- Delivering services on a more self-serve principle, re-using our expertise, to enable us to move away from standard repetitive time consuming work to focus better on those who need more intensive supports for a short term.
- Improving accessibility across all platforms.

Productivity

- Clients are able to self-serve across a broader range of topics
- Providing real time access to more staff when they are away from the office
- Providing more modern equipment and services for office based staff

Sustainability

- Ensuring staff are skilled at appropriate levels and upskilled when relevant
- Increased accessibility for everyone at all levels across the wider staff team and replicability

Underlying Principles

Underpinning everything we do are a set of assumptions that will always be integral to every activity we undertake:

- Transparency and openness

- Continuous improvement
- Data security and confidentiality
- Legal compliance
- Accessibility
- Developing brand awareness
- Delivery of Scottish Government's agenda for third sector interfaces

How are we going to deliver this?

We have identified both hardware and software needs to fulfil our objectives, in addition to training and staff supports. Whilst these are interlinked, we have split them into the headings of Capital and Revenue spend below:

Capital (or where there is a designated Reserve in our accounts)

- 1 The remaining 10 PCs are unable to upgrade to Windows 10, so we will have to look at a policy for replacing these. There are 2 mitigating circumstances that will assist with this process, and other staffing considerations.

At present we have 4 staff on the Aspiring Communities project who have SurfacePros and desk solutions, who will cease to be funded and whose employment contracts expire at the end of June 2019. This will release their equipment, which will only be 18 months old, for use by the wider staff team. It should be noted that Claire Kennedy is only seconded to the project, so will retain her AC funded equipment when she reverts to core staff. There is also 1 old PC in use with this project which will not be needed or replaced at the end of the project.

The 3 managers have both PCs and ipads, the latter approaching 5 years old now. There is the potential to retain this until the SurfacePros become free in July 2019. The only remaining Development Officer not having a SurfacePro is engaged for social enterprise activity, which is a shared role across Forth Valley, and could be the recipient of the final SurfacePro.

We currently retain old PCs for interns, placements, work experience etc. Our requirement for these will alter with our policy in respect of these (primarily office based) positions.

- 2 We will use an appropriate method of disposal of electronics, wherever possible building on our previous practice eg taking all our laptops back to vanilla, and then giving them to staff (on a ballot) to reuse at home, or providing equipment free of charge to other third sector organisations.

- 3 Forth Valley Top Toes is spinning out as a stand-alone social enterprise and must seek external funding for its own equipment needs going forward. In the meantime it can retain the 2 old PCs they are currently using.
- 4 The Finance Officer currently has a PC in the office and a laptop at home. It had been intended to provide a cloud-based solution that permitted working from anywhere, but that was not available when the change was made. This whole working solution needs to be revisited in due course, to bring it in line with organisation protocols. Meantime we have a working solution that is satisfactory for both the organisation and the employee concerned, so change is not a priority.
- 5 Our website is an ongoing development project. To date we have prioritised accessibility spend, but going forward we need to refocus around self service and provision of a wider community resource. We had intended to develop the use of video, but this has not been achieved to date. This can be developed in a number of ways, for example:
 - To record meetings and make them available to wider audience post event, engaging through the online forums
 - To facilitate remote access to meetings and training.
 - To provide recordings of training etc as an integral part of our Resource Library to facilitate wider self-service and reduce demand on staff time.

To make best use of this technology, we will need to invest in both hardware (camera, portable projector, screen) and software (for meeting management, auto recording meetings, simple editing) and potentially in a dedicated YouTube channel to manage our growing content, because there would be significant performance problem involved in adding the actual content to our website, whereas simple embedding links would have a marginal impact. We must be mindful of the hardware restrictions imposed by the lack of upgrading of our local BT exchange and the impact that has on our bandwidth, which has no foreseeable resolution.

We anticipate looking for additional funding to help us deliver against these objectives more quickly than would be possible if we had to meet all costs from reserves.

- 6 MILO is in wide use (as mandated by Scottish Government) across the whole organisation. It is a heavily bespoke Salesforce solution. We have

worked hard to ensure that, if Scottish Government retract this as a condition of grant, we have the option to utilise our own software, which will bring additional functionality. It would be our intention in these circumstances to move across to a vanilla Salesforce for non-profits system. The first 10 licences are free, so we would need to review our usage at the time. This would enable us to transfer almost seamlessly and have all our history and data migrated.

There are ongoing discussions around the use of our data in MILO, which we know is used by SCVO – who hold themselves as the data owner – for other reasons. This is a potential breach under GDPR, so we also have a mechanism in place whereby we could move to a stand-alone Salesforce solution that automatically fed only key data field to MILO, if we determined there was a risk, and if Scottish Government insisted that its use remained a condition of grant.

Both of these options have been undertaken already by parts of the TSI network (North Ayrshire, North Lanarkshire and Dumfries & Galloway), who have helped us with the redesign of our existing solution, so we are comfortable that we can take the appropriate actions when we need to, but there is no major driver for making the change at this present time.

Revenue

- 1 We last undertook a staff IT training programme in early 2014, and since that time we have had a number of new employees. It is proposed that we again run the Microsoft training, with a focus on Word, Excel and Powerpoint, and that all staff (who were not on the previous training) except the managers are encouraged to attend these courses. There were 2 days for each topic in Stirling, and we are again engaging with YouTrain around delivery as a dedicated session for our staff team. When we undertook this previously we saw a productivity increase as everyone became more confident in their use of software, and it appears that the current cohort would achieve a similar benefit.
- 2 We will continue to use Mail Chimp for managing our mailing lists, as this is currently restricted from us in MILO (although would be available if we migrated to Salesforce). As we are now managing a single contact list with a matrix of opt-ins, this will ensure we can evidence GDPR compliance across all our external communications. We are at the last stages of testing, and will have this fully live by the 24th May 2018. At present our use is free, but if we continue to expand its use there will potentially come a time when we will incur costs, and at that point it needs

to be re-evaluated for cost effectiveness against a range of alternative solutions (including SalesForce).

- 3 We are having difficulty with monitoring and reporting staff statistics, particularly around sickness absence. Having increased take-up of flexible working and everybody also working flexitime has further complicated the picture. We have identified a software solution that is free to non-profits, and we will look to implement this during the first half of 2018/19 to alleviate the difficulties.
- 4 We are engaged in a programme around cyber security with our IT partner Grant McGregor, and we will continue with this process as quickly as possible. We have no desire to start a BYODTW (Bring Your Own Device To Work) policy, so will be looking instead at securing access to all of our cloud applications by personal login and device identifier, to prevent anybody accessing them from personal or unknown devices.

We will institute an ongoing cyber security monitoring process, and ensure we both follow advice about best practice, and evidence the same. We have produced brief guidance about keeping your devices secure, storing minimum data, and are holding a cyber clean-up day (with guidance) to try to make our people and our devices as efficient as possible.

- 5 We can enhance the usability of our website and improve self-serve options without recourse to major expenditure, in areas such as updating our interactive forms, and improving our service directory. We would look for additional funding to support expansion of this work strand.

What does success look like?

The investments of capital, revenue and staff time must enable us to achieve our objectives, or deliver step-change towards these. They should not be change for its own sake, but to meet the increasing demands on us and the wider third sector by facilitating what we can without the need for face-to-face standardisation of service delivery, and enabling everybody concerned to increase effectiveness in the most efficient and accessible manner.

In order to ensure we achieve this, we will collect evidence of progress. This will include (but is not limited to):

- Automatic analytics such as number of ebulletins opened, website page views, retweets etc
- The number of new clients who engage with us over a year and their satisfaction with our services
- The number of people engaging through our forum meetings and online discussion boards.

- An increasing awareness in the third sector of who we are and what we do, and brand recognition
- A significant (10%+) increase in the number of member organisations
- Staff productivity increases, focusing resources on those voices less often heard, in line with our CPP commitments, rather than staff being portfolio holders for a much smaller number of organisations or individuals
- Short pieces of work that make a significant contribution rather than hand-holding over a sustained period
- A reduction in printed materials across all aspects of our work

Priorities for 2018/19

Completion of GDPR activities ensuring compliance with new regulations

Achieve Cyber Essential accreditation in order to demonstrate cyber security

Cyber clear up complete and diarised as annual activity

IT training for new staff

HR Software fully implemented

Video Conferencing technology enabled and utilised both for forum attendance and 1 training video

Priorities 2019/20

Scottish Government reporting updated to reflect any updates to grant outcomes

Wider use of video for resource library allowing individuals and organisations to self serve

Make online forms interactive with save and resume function as well as send option

Cyber clear up

Revisit Finance Officer working arrangements

Transfer Manager's mobile IT

Purchase new office based PCs running Windows 10 (define minimum configuration).

Consider use of Fuse programme with CAST (Centre for the Acceleration of Social Technology)

Explore CITA (Charity IT Association) for volunteer IT staff