

# Charity IT Leaders Exploring Future Scenarios

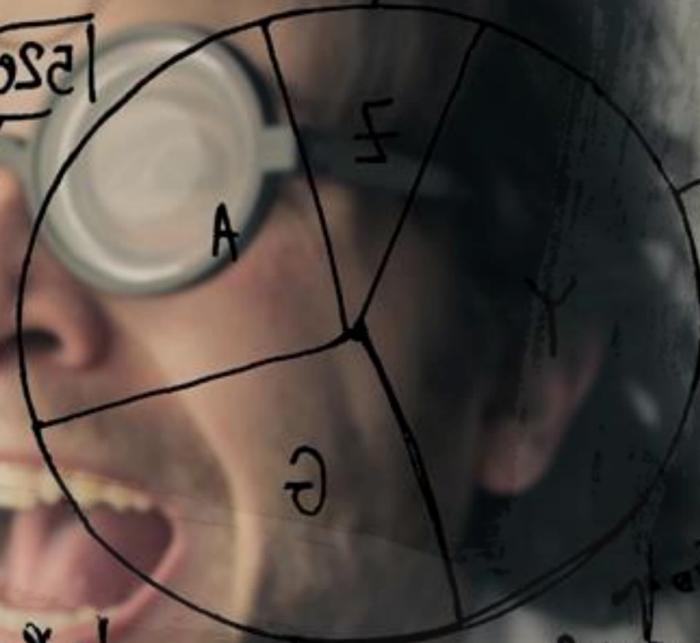
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**36 Charities**

**41 Responses**

**27 Completes**

**1000's data points**



# The Initial Survey Findings

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## First Findings

- Historically, which technologies have **driven change in the charity sector**
- Now that Covid has changed our world, **what will you snog, marry and avoid**
- **Which new technologies are on the horizon** and poised to drive new changes in the sector
- What could be the **positive and negative effects** of these change drivers on people, society and the charity sector
- What are the current **critical uncertainties** for the future



**Our first  
consensus poll**

**Top technologies**



## Social media has been transformative for the charity sector

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"It has massively allowed charities to reach out to entirely **new audiences**"

"Social media has had the biggest impact, expanding the methods for communicating with a **large audience**"

"**The biggest impact is awareness.** I have seen and read about a number of charities that I didn't even know existed due to social media and whilst it did not result in a direct donation it may mean that in the future when coming across a recognisable brand, I am more likely to donate"

**But its impact hasn't  
been entirely  
beneficial**

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"It's enabled organisations such as 38 Degrees and Avaaz to mobilise huge number of people to campaign, lobby and petition Government and organisations for social, cultural and political change. **Giving people a more direct voice to shape and direct change has been hugely empowering for many people who have previously felt disenfranchised from political discourse**, while also creating routes to be able to challenge our leaders about important issues.

"Of course, it has also given **voice to people who want to use social media platforms to spread hate, intolerance, bigotry and prejudice**, and to normalise racist, sexist, homophobic slurs as part of our everyday language"

## **In some cases, social media can actively damage charities' efforts**

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- "It's a forum for detractors/trolls, not accessible for anyone who isn't tech-enabled"
- "There has been a large negative impact on a number of charities, especially larger ones, and on the sector in general, through the sharing of information that damages the reputation of the charity. This covers everything from the sharing of news stories of misconduct in the third sector, to the continued discussions of third sector pay and what this means to donors (potential or current)"

# Cloud IT and digital fundraising have had similarly massive impacts

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- "Cloud IT allows us to be flexible and scalable, provisioning new services and removing them when no longer needed, **we only pay for what we consume** without locking us into long term commitments or expensive end user hardware purchases"
- "**The cost model** of cloud computing gives access to improved technology for smaller charities as well as scalable solutions for larger ones"
- "Digital fundraising platforms have made it **easier and quicker for charities to raise funds** via smartphones"



# What practices, methodologies, assumptions or ways of working should we avoid resuming once the pandemic is over?

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- “[We should avoid] the need to be in the office 9-5 every day of the week. People can still be highly effective in disparate locations as long as they are using the technology that underpins home/mobile working”
- “We should try at all costs to avoid going back to a culture of presenteeism in the workplace. Forcing people to spend time in offices when they could work more dynamically and freely from other venues contributes to a workplace culture based on clocking hours rather than productivity and achievement”
- “I would like to see us retaining a more flexible way of working, utilising mobile technologies, UC platforms and agile methodologies to empower a more dynamic, motivated and engaged workforce. Measuring people's outputs by impact rather than hours at a desk will enable organisations to see the true scale of work, and to adjust their focus and resources accordingly.”

# **Covid's impact will be painful for organisations that fail to adapt**

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- "In time I believe donations will dry up - realistically speaking, donations are an extra that people will need to tighten as budgets tighten"
- "Unemployment, business pressures, etc. will affect the ability, if not the willingness, of the population and businesses to donate/offer CSR to the same level"
- "The biggest impact is volunteers, the majority of which fall in to the most vulnerable groups"
- "Huge implications for those in the sector that do not embrace the changes and opportunities that present themselves to allow smarter working practices"

# What should charities do to mitigate risk in the current and future climates?

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We need to come out fighting the negative narrative of press and others that big charities are bad or that they are in some way beholden to the public. they are not. We should also be ready to merge. We may need to.

Innovation and value for money are key to delivering a high quality ICT provision while reducing costs.

Build systems and processes with flexibility and scalability Invest in skills for the future - Cloud computing, data science, Info Security

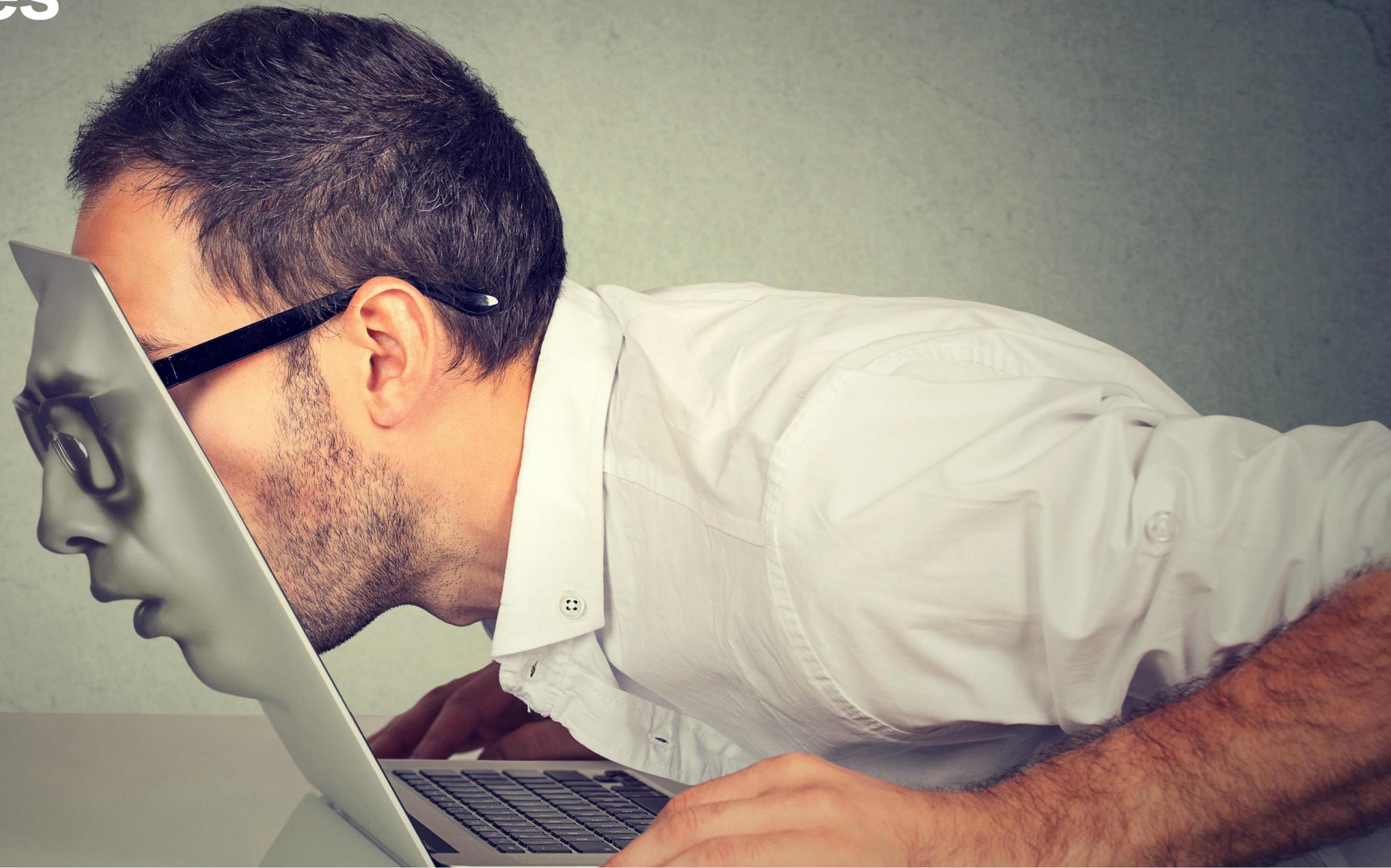
MDM and other security and monitoring software to ensure that the remote environment is safe for staff and students

Extend fundraising into digital channels.

don't know what this means

Understand our own individual markets/clientele and how these have changed. This is not about charities in isolation. Review business and operating models to ensure the former meets revisions to need/economy and that the latter is as cost effective, flexible and resilient as possible. 'Flexible, scalable and responsive' should be a frequent mantra to support the above. We don't know what will come next. We didn't predict COVID and its impact.

# Future Technologies



# What are your top three future technologies to impact the charity sector to 2030

Technology	% of Audience
AI	19%
Cloud	10%
Chat Bots	6%
Virtual Reality	5%
Social Media	5%
Data and Analytics	5%

- 77 technologies in total were selected
- 36 different technologies were selected, including; Internet of Things, CDP/Digital Marketing, UC Advances, Biometrics, Platform Technologies, Blockchain and Digital Currency, Augmented Reality, Robotics

# Charity leaders have high hopes for AI

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- "Huge swathes of work are carried out at lower cost"
- "Scale of charity help - use true intelligent AI to answer queries and help without humans so you can triage and have more resource available for personal support"
- "Better understanding your customers / community to improve services. Bringing multiple sources of data together and using machine learning and AI to personalise experiences providing a unique service for individuals. Moving from reactive and pro-active models to predictive models that could identify potential health issues or fund raising opportunities"
- "Understanding peoples' thought processes and targeting their individual needs for services very quickly, without the need for human intervention. This will allow business to take on more clients as an AI could provide the data they require"



# **The Negative Impacts of Future Technologies**

## **Consensus Poll 2**

**For your number one technology only, what do you think could be the negative effects on people, business and society?**

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<b>Negative Impact of New Technologies</b>	<b>% Audience</b>
Loss of real human engagement	27%
Increased fraud, exploitation and unethical behaviours	18%
Unemployment	14%
Algorithmic biases and errors	9%

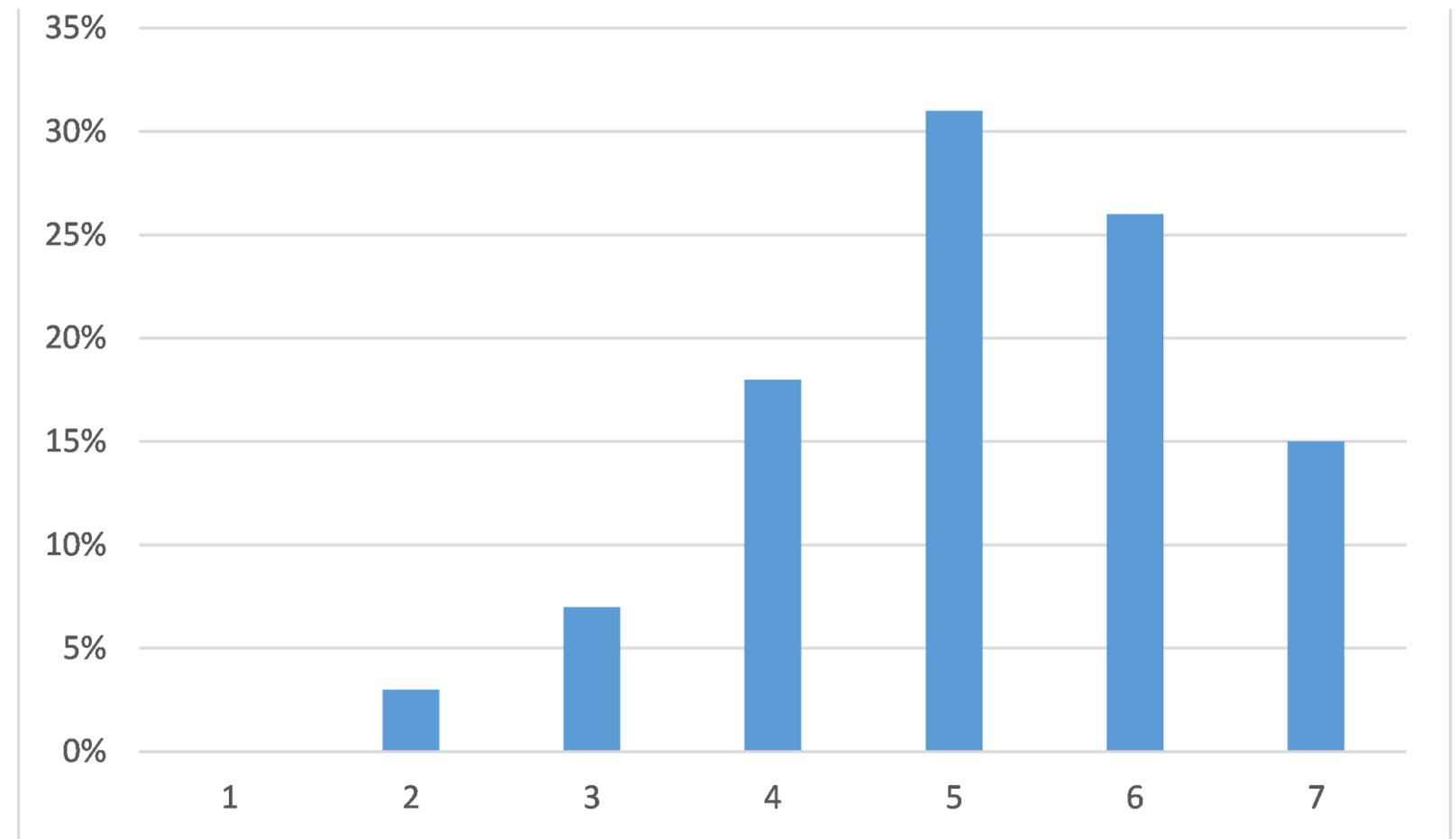
For your number one technology only, what do you think could be the negative effects on people, business and society?

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**"Most cybersecurity extensions now are additive - you very rarely see something which is a replacement." (CIO - Higher Education sector)**

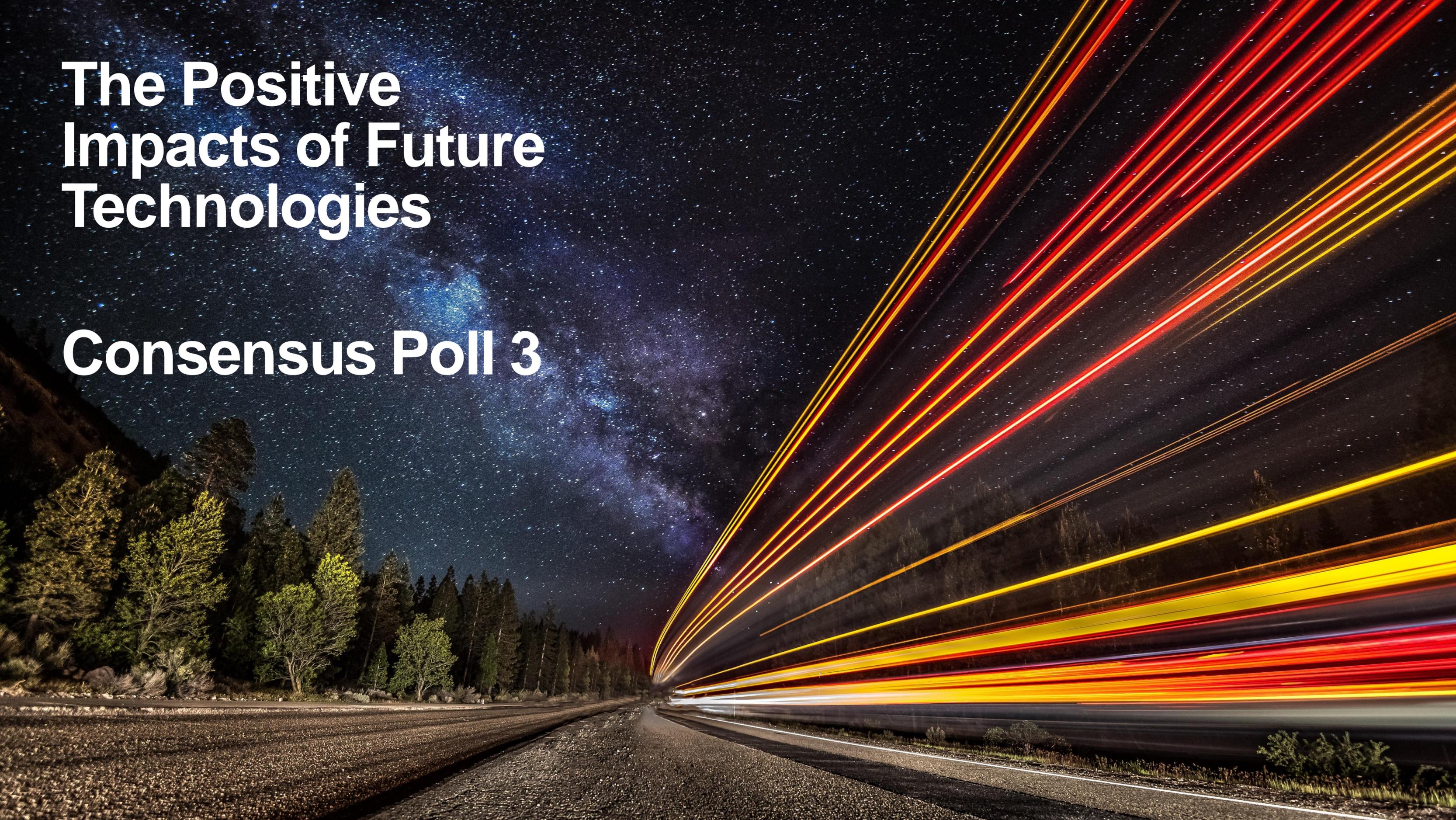
**"I would never have that alone. I use it on top of what I already have." (Director of Technology - Public Sector)**



On a scale of 1 to 7, where 7 is totally agree and 1 is no agreement, how much do you agree with the statement, 'AI-enhanced cybersecurity is necessary to operate in today's threat landscape'?

# The Positive Impacts of Future Technologies

## Consensus Poll 3



**For your number one technology only, what do you think could be the positive effects on people, business and society?**

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<b>Positive Impact of New Technologies</b>	<b>% Audience</b>
Understanding Human Needs	21%
Customer Service	21%
Lower cost and improved productivity	16%
Enhanced Charitable Donation Targeting	11%

# Critical Uncertainties

## Consensus Poll 4



**On a 5-10 year horizon, what are the top three critical uncertainties for the charity / not-for-profit sector?**

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<b>Critical Uncertainty</b>	<b>% Audience</b>
Stagnant economy / no expendible income / recession	21%
Climate change	14%
Long-term effects of Covid-19 / natural disasters	12%
Reduced funding from the government	11%
Brexit	8%
Changing societal support for charities	6%

# Recession, climate change and politics drive concerns about the future

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- "Natural environmental disasters"
- "Global warming"
- "Climate change"
  
- "China/Russia/America/India undermining opponents' political systems"
- "The rise of populism and the political environment"
- "War in areas of scarcity of water and other resources"
  
- "Global financial instability driven by factors such as future pandemics, but also increasing decentralisation of finance driven through alt-coin"
- "Increasing inequality in the global economy"
- "Economic recession"
  
- "Leaving the EU and the loss of EU-grade protections"
- "Declining economy (Brexit)"
  
- "Changes in Government policy"
- "Funding from the Government"
- "Government support (or not)"

**So what...**

**What's next?**



## The third stage of this research, a roundtable workshop

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### We will take the findings

- Build a PESTEL analysis, which will feed into...
- A dynamic SWOT analysis, to understand which areas you can attack, defend, develop and exit
- The creation of a 2x2 uncertainty matrix to create scenarios that we can use to understand how to tackle the challenges and opportunities that lie ahead, based on your research findings
- Delta research and horizon scanning in 2021, plus all of the research outputs and quotes from your fellow CITL members
- Your recommendations for tools and models to help create strategic recommendations from the findings

**Thank You**

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