Leading the way to...

ICT Success

The report of a study of the issues affecting the use of ICT in the voluntary and community sectors, funded by the Baring Foundation & the Worshipful Company of Information Technologists

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✛ **The internet changes everything; voluntary organisations cannot ignore ICT**

✛ **Inspiring managers to see how ICT could make a difference**

✛ **Managers can gain the confidence to use technology without being technical experts**

✛ **Internal barriers to ICT should be the priority for action**

✛ **Second-tier agencies should take a much more strategic approach to supporting and developing their members' and users' ICT**

✛ **Funders must accept that spending on ICT is not optional**

✛ **An ICT support technician is no less important than a book-keeper**

Baring Foundation & Worshipful Company of Information Technologists

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voluntary and community sectors

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context

What this report is about

The starting point for this study was that voluntary organisations ignore information and communications technologies (ICT) at their peril. In practice, this means that managers, like it or not, have to grapple positively with the challenges of ICT.

More technology is not always better. There are cases where it is not appropriate, or where tried and tested methods work well, or where the organisation's technology is adequate and it has more pressing issues to attend to. But increasingly, the two strands of ICT – 'doing things better' and 'doing better things' – make the difference between an organisation that is able to achieve its aims and raise the money to carry on doing so, and one that is seen to be falling behind.

At the level of 'doing things better', an organisation that has efficient systems will be able to respond more quickly and efficiently to its clients and its funders. Better statistics, less duplication of effort, a faster, more appropriate response: the right technology can deliver all of these, cost-effectively and often quite simply.

Beyond that, there are exciting possibilities for all organisations to 'do better things'. Information providers have found new ways to deliver information and interact with their target groups. Service providers, too, can use ICT to work with their clients in new ways, or to gain access to different resources for their clients' benefit.

The ability to take a lead on ICT must therefore be part of the repertoire of every senior manager.

Some, by chance or design, have the knowledge and understanding to be confident in their deployment of ICT, and to envisage pioneering ways of using it. They blaze a trail for others to follow.

Many others – probably the vast majority – recognise the importance of ICT but feel stuck. Either they don't feel they understand enough to make the best decisions, or they don't feel they have access to the resources and expertise they need.

This report is about how some managers are successfully overcoming these barriers, and how others could do the same.

Examples from our interviews

Several of the organisations we interviewed have made dramatic changes to the way they communicate with partners overseas:

✦ **the agency with offices in Africa which has slashed its bill for faxes and phone calls and, at the same time is consciously using technology to even up the information imbalance between the headquarters and the offices overseas;**

✦ **the small agency using Instant Messaging to link its UK office to Latin America;**

✦ **the disability organisation which has people in five countries in Europe, Africa and Asia collaborating on the same technical design programme.**

Agencies serving the UK are using technology to deliver new services to their clients:

✦ **up to the minute information for organisations working with disadvantaged people;**

✦ **interactive tools for working with young people on community regeneration schemes;**

✦ **using computers to help young men communicate their troubles;**

✦ **electronic consultation on policy issues.**

Others are less dramatic, but equally effective:

✦ **the housing agency which keeps its central staff as small as possible by running very efficient administrative systems, using computers where they can best be applied;**

✦ **the agencies which are using computers to collect information about their work as an important plank in their fundraising.**

Inspiration and confidence

The managers in our survey got their knowledge of ICT from a wide variety of sources, often by chance or without realising it at the time. This isn't usually enough. They need to be inspired by the potential of technology – but few can afford to take the risks of being out and out innovators. We suggest that this means actively seeking out information and, above all, not being afraid to 'steal' good ideas wherever they can be found.

Not all the ideas will be worth pursuing; a manager must draw on their knowledge of their own organisation to decide what is appropriate. Once they know what to do, however, many of the managers we interviewed spoke of their difficulty in getting things to happen. Often, the main obstacle was their own lack of confidence in dealing with 'technical' areas. External obstacles do exist, and we suggest ways in which the voluntary sector could work together to reduce these. But even now, the difficulties are not insuperable; with confidence and determination they can be overcome. Indeed, without confidence and determination, even small obstacles may prove too daunting. Drawing on the experience of confident and successful managers, we suggest ways for others to develop the same levels of confidence in tackling ICT.

Barriers to success

Although we were interviewing organisations which, on the whole, are satisfied with their use of ICT, or at least happy that they are now moving in the right direction, the interviews identified plenty of obstacles they had overcome and difficulties they were still facing.

The most important finding was that – contrary to many commentators – we believe that the biggest barriers to effective use of ICT are *internal*. This is not to deny that external barriers exist; but some organisations have clearly overcome them. If others could learn from their experience, the barriers would be less serious obstacles.

To say that the barriers are internal is not a criticism or a suggestion of failure, but it does mean that the managers in any organisation can choose to do something about them. It also means that these barriers should be directly addressed by anyone with a capacity-building agenda, including umbrella bodies and management development agencies.

The manager we would like to see has developed the two most important attributes:

✛ a vision about what the organisation could be doing with ICT.

✛ the confidence and determination to take ideas forward.

A lack of either of these attributes is a major barrier to success. The final barrier is the capacity

A manager's view

… Managers do have to get a fuller conceptual grasp of the possibilities and potentials of IT. Take the examples of managing buildings or finances. As a manager, I do not need to grasp the level of skill of an architect or know much about building terminology, I don't need the skills of an accountant or necessarily need to know the detailed processes involved in VAT management or double entry bookkeeping. But with each of these examples, I have a confidence and capacity to analyse and translate what is on offer. I can generally read/conceptualise and communicate with what the 'experts' place in front of me. There is a common language built into this intermediate area and one which I can use.

Managers need to have a kind of intermediary knowledge of what they are managing, enough to be able to ask searching questions of the architect or accountant – to be able to analyse and scrutinise what is offered to ensure it will meet expectations. There is a sense of insecurity therefore, when it comes to 'taking advice from experts' where that 'intermediate knowledge' feels poor – where you feel expected to take things 'on trust' because you don't know the ground well enough. I think the head in the sand response is a result of this.

It's rather like going to a consultant with a serious health problem, knowing nothing, feeling scared and uneasy having to just trust and 'have faith in' what you're told. The alternative is going out and finding out the issues, the lingo and coming back confident enough to use it to ask the consultant questions – you are then back in the decision-making chair, still taking advice from an expert, but in an appropriate way, skilled enough and confident enough to make judgements, to scrutinise the advice and to decide for yourself. …

Marion Fitzpatrick
(writing as Lasa director)
Computanews No. 105 (January/February 2000)

to implement the project. Some of the obstacles here are internal, some external:

✛ difficulty in finding reliable, trustworthy professional advice.

✛ difficulty in securing internal technical expertise.

✛ difficulty in finding affordable external technical expertise.

✛ unfamiliarity with project management techniques.

✛ unwillingness of many funders to accept a realistic level of ICT expenditure.

Our evidence is that the external obstacles can be tackled, if the organisation wants to. Even relatively poor organisations can make effective and even innovative use of IT. They do it in the time-honoured voluntary sector ways – use of volunteers, piggy-backing projects, wangling resources at knock-down prices and, if necessary, judiciously cutting a few corners. The key to this is that *they must know what they are doing and why*; the creative use of resources can then be applied in the right way.

That is not to say that these problems are always easy to solve, and we have devoted specific sections in this report to material we have gathered around these issues.

Our key message is that dealing effectively with ICT does not require a manager to be a technical expert, any more than dealing with finance requires high-level financial expertise. Good management of ICT can be part of any manager's repertoire.

The internet means that ICT matters more than ever

Technology has crept up on us. Twenty years ago, 'should we buy a computer?' was a reasonable question. Before long, many people's working day came to revolve around ICT . Then came the internet – the infrastructure that permits e-mail, web access, instant messaging, video conferencing, virtual private networks and a growing range of other applications.

This is where much of the current interest is focused, and for good reason. There is almost no disagreement that the internet has changed the environment in ways that many voluntary organisations have not yet realised. Lack of e-mail already marks organisations out as being behind the times, and a few pioneers are already well on the way to using the internet for delivering services as well as improving internal and external communications.

Many other studies have set out to make the case for voluntary organisations taking the internet seriously. We will not repeat the arguments here.

It is hard to think of a parallel in recent times. Perhaps non-technical areas are better able to suggest the extent of the cultural change: the move from individual benefactors to an era of grants and mass fundraising, or from reliance exclusively on volunteers to the professional management of services. There are a few generous individual philanthropists, and volunteers are still important, but in most organisations grants, mass fundraising and professional management are now taken for granted.

That is not to say that the internet is the only technology worth attention. Organisations which are not exploring the opportunities the internet brings, or

are not confident that they have made the right decisions, are also likely to be missing out on other potential benefits of technology.

The problems of technological change

One possible reason for not taking up the internet is the history of over-selling technical advances. Joe Saxton says in *Virtual promise*, 'As with all new technologies society is exaggerating the short-term benefits and under-estimating the long-term benefits'. Persuading people that, despite the hype, it is important to take the internet very seriously is a major task in its own right.

Supporters of a new technology also tend to under-state the difficulties. Databases are a clear example. Many organisations have struggled, or are still struggling, with ineffective databases that have cost them far more money than they expected, for far less benefit than they were promised. Is it any wonder that they are disposed to hold back now? Databases, in fact, raise particular problems which we discuss later, but the same story could be told about networks, finance packages, desk-top publishing, even – in the days of printers that couldn't cope with the '£' sign – word processing.

The proselytisers for greater use of the internet don't always spell out fully the technical base on which it must rest, and in particular the need for a fully-functioning network.[1] The full benefit only comes when everyone in an organisation is connected, with their own e-mail account and direct access to the web. Only then can the organisation really begin to base some or all of its services and some or all of its administrative systems on the internet. This is not to say that the enthusiasts are unaware of the issue; rather that their listeners will miss the point if it isn't hammered home.
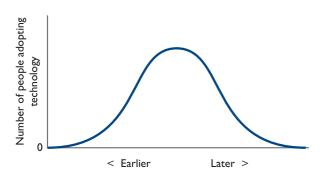
Full use of the internet doesn't just demand a sound technical basis; it also brings – or should bring – organisational change. When the possibilities for communication and information-sharing are different, the only way to take full advantage of them is for the way people work to be different as well. Advocates of new technology can under-estimate the difficulties of managing change. It is quite understandable why many managers are reluctant to push through changes derived from new technology at the same time as responding to changes introduced by other pressures, such as monitoring and quality control measures, new funding arrangements and legislative change.

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1   We generally use 'network' in this report to mean a local area network of computers. Where we refer to human networking this is made specific.

Short-cuts the manager can safely take

Many technical innovations are potentially very beneficial but either risky or only applicable in certain circumstances (or both). We argue that some technologies, however, can be regarded as *core*. In Part 3 of the report we try to identify the core technologies, because we believe that clear recommendations can be made in these areas, which are applicable to almost every organisation. By offering these as uncontroversial decisions, we seek a means of short-circuiting the 'confidence' issue for managers who are unsure of which technologies to trust. Equally, they can then realise that taking on a non-core project is more risky.

The true pioneers will always have to work things out for themselves, by spotting the potential in previously untried technologies. For most organisations, however, this strategy is too high a risk. The standard model of technological adoption is a 'normal' distribution: a few pioneers establish the technology, then it gets taken up by 'early adopters' and the rate of adoption rapidly picks up. By the time the technology is mainstream, the number of adopters peaks, then declines as later adopters join in, leaving just a long tail of a few laggards, some of whom may never adopt it.

Most voluntary organisations cannot afford to be pioneers in ICT; there may well be other areas of practice where they are pioneers, but no one can be a pioneer in everything at once. The task for most organisations is not to be completely innovative in ICT, but to adopt techniques that others have already tested out as soon as they can benefit from them, rather than waiting until the second half of the adoption curve. This is the type of situation we are most concerned with, although, of course, any organisation that has got left behind also needs help in catching up.

The organisations we interviewed were at various stages in this process of ICT adoption. We discuss this in more detail in Part 3.

Outside pressures for change

As if the difficulties of technical and organisational change were not enough, managers also have to put their ICT decisions in the context of changes being introduced by a range of external agencies they have to deal with.

From our interviews it appears that funders, in one way or another, are an important driver of change for some organisations. In particular we were told several times of changes to databases and ways of handling records which were a direct response to the demands from funders for monitoring information.

Alongside this is the growth of collaborative working, and an increasing number of funding schemes which are only available to consortia. Again, we were told by organisations we interviewed of changes that had been made or were in the pipeline in order to manage the additional requirements of this way of working.

We were disappointed to find that umbrella bodies appear to be less involved in promoting technological change and helping their members than we had expected. Some interviewees, indeed, told us that their umbrella body was now doing less in this area than previously, having had their fingers burned by endorsing inappropriate systems in the past. Others, whose ICT use was not particularly innovative or advanced, nevertheless provided evidence that their umbrella body regarded them as pioneers, and relied on them to promote ICT among the network.

It appeared that even those umbrella bodies which were pushing things forward by introducing ICT-based services and resources for their members, had not done enough to support the necessary changes at the local level. We interviewed organisations that were struggling to accommodate changes introduced by their umbrella body. We also interviewed umbrella bodies that were pushing forward with their own ICT use, and expecting their members to do likewise. More than one expressed an ambition for all the communication within their network to take place electronically within a very short time. They recognised that this might pose problems for some of their members, and proposed offering them support, but it was not clear to us what sort of support that might be. We hope that this report gives them – and other umbrella bodies – as much encouragement as possible to offer support and some ideas for what to offer.

Finally, there are government initiatives in specific areas of ICT. These have undoubtedly helped some organisations to acquire technology. Several of our interviewees were offering training in ICT skills to their clients, and other client-focused activities, with equipment provided through UK Online, for example, and there were usually spin-off benefits for the rest of the organisation. However, we did not find that this influx of equipment had been accompanied by any measures to raise the *capacity* of the organisation to use, manage and develop its ICT. To this extent, initiatives based around the provision of equipment, software, web space and so on will only be peripheral to the vast majority of organisations.

Attitudes to ICT

All the managers[2] we interviewed convinced us that they believed ICT to be crucial for their organisation and its continued development. Where they differed was that, while a few were technically literate and on top of the latest technologies, many professed not to be technically-minded and, often, not to be ICT enthusiasts. That was by no means a bar to the organisation using ICT effectively; what it does mean, however, is that many of the managers we spoke to were uncertain whether they were using ICT well, or how to ensure that they could use it better. We see this as one of the key issues the voluntary sector needs to address: to harness the willingness of these managers to address ICT issues by giving them the skills, confidence and support they need, as painlessly as possible.

It was noticeable that in a fair proportion of cases our initial approach for interviews was directed to the 'IT expert' because ICT was mentioned in the topic. We sometimes had to convince the organisation that we were genuinely interested in talking to the chief officer as well. This suggests that any approach to managers on ICT issues must be very carefully thought through; if it carries an ICT label, it will be unlikely to reach many of the people who need the message most.

We did not detect a noticeable age divide. While some of the younger managers were obviously more likely to have grown up with ICT, older managers were just as likely to be confident in their personal use of it. This personal confidence did not necessarily translate into confidence about how to manage ICT for the organisation.

On gender our sample was too small to be categorical, although it did appear that pioneers – managers with technical expertise and innovative ideas in ICT – were much more likely to be men, although plenty of male managers told us they were not ICT experts. Given the large proportion of managers in the voluntary sector who are women, it would be wise to take gender into account in the way ICT is presented to managers.

The ICT 'experts' in our sample were naturally the most technically competent and confident. They were refreshingly restrained in their approach: on the whole they were happy to recommend and to implement mainstream technologies rather than taking the opportunity to experiment at the organisation's expense (unless this was specifically demanded of them). Many, however, were frustrated at obstacles or other people's doubts which slowed down the implementation of developments which seemed so 'obvious' that they should not be a matter of controversy.

Elsewhere in the organisations, we spoke to relatively few people with a view of the possibilities for ICT, although our interviewees generally welcomed being consulted about the detail of new systems. Their concerns were much more with the day to day functioning of their equipment.

There must, however, be some middle managers and more junior staff with ideas and enthusiasm for ICT, because several of the managers told us that this was where they got their ideas from for where the organisation could be going with its ICT.

Many voluntary sector workers now use ICT to the extent that their job would be almost impossible without it. It has become so pervasive that they find it hard to think of areas where ICT is helping them do their job; without the technology, the job wouldn't be the same job. If the computer is working well they take it for granted, and only notice if it isn't working. We did, however, speak to some who use it little or not at all. It must not be forgotten that there are people providing front-line care, counselling and other support services who feel that they do their job better, and have closer contact with the clients, unobstructed by ICT. Policies for the development of ICT, both within an organisation and at wider levels, must take these people into account.

The board members and trustees we spoke to did not see themselves as having professional ICT skills, and were quite happy to leave all the technicalities to those who do. Occasionally this would be a fellow board member, but in most cases the board have neither the time nor the inclination to go into detail. Their role clearly should be governance, not management. We suggest later on what this might mean in practice.

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2 Mainly chief officers or other members of the senior management team. See 'Background and Methodology' on page 24 for details.

enabling managers

In some ways, the process of introducing technology can be seen as a journey.

First you have to decide where you want to go; you might be an explorer, charting new territories, but it's more likely that you will be inspired by a book, or a friend's report of somewhere they have already been. This is where our manager has to be consciously open to new possibilities.

The next stage is the planning. You buy your maps, get your inoculations, make sure that you have enough money for the journey, and perhaps read up on some of the pitfalls. A well-trodden path is still new to you – that's why you're making the journey – but you can set off with the benefit of everyone else's experience. In the same way, our manager takes advice from sources they trust, in order to have the confidence that they are doing the right thing.

Once the journey is underway, you rely on all sorts of specialists to help you along: you cross the channel by ferry, not swimming; you find a hotel for the night rather than make a bivouac. And things *never* go exactly to plan. You might fall ill, or get lost, or decide to make a detour because a new attraction has opened up. You don't give up when these things happen, but you might need to take stock, and find additional sources of help. Likewise our manager buys in the technical help that they need and is prepared to accept that things will not necessarily go to plan, or even that the plans will need changing along the way if new opportunities come along or circumstances change.

Sometimes, of course, your journey isn't about the excitement of travel, it's for relaxation, or for a specific purpose. In this case, you buy a package deal. You buy the ferry, the hotel and the car hire all in one go from someone you trust, and rely on them to get you there. What you get is the same as everyone else gets but you have time to enjoy yourself and get on with other things because someone else has planned the journey for you. This is akin to the packages of 'core' technologies that we propose in this report. The manager can take them on, knowing that there is relatively little risk and that millions of people have been down that route before.

The ICT journey, of course, is one-way. When you get to the end you stay put. You learn new skills, meet new people, and find a way to support yourself in your new environment. All of these have parallels in the staffing, budgeting and training that our manager has to put in place.

Then, after a while, you feel inspired to set off on a new journey.

The analogy isn't perfect, but we hope it gives a sense that introducing ICT isn't a one-off decision, but a process, with many components, and many different considerations at different stages. Our interviewees offered insights into how these stages appear in reality.

Inspiring managers to see the potential of ICT

We did not interview a successful organisation where the chief officer was uninterested in ICT, although many claimed to be under-informed and therefore making less progress than they could be. This therefore has to be the starting point: it must become part of the expectation of managers that they will take ICT into consideration, in the same way as they are expected to think about money, staff and all their other resources – and not just for administrative purposes. Managers with a focus on service delivery should also be looking at the potential of ICT.

However, a strength of the voluntary sector is its diversity. From being convinced of the importance of ICT it is another large step to being sufficiently aware of the options to choose the applications and pace of development that are most appropriate to any particular organisation. One manager told us that some things could not be introduced yet because key staff would not accept them, and retaining key staff was more important. Others were concerned to protect their front-line staff from having to use ICT unnecessarily. This is realistic. Just as voluntary sector premises are not always as flashy and 'neat' as their commercial counterparts, so ICT has to fit appropriately into an organisation's ethos.

Managers need access to information that they can quickly absorb which will give them a range of ideas to choose from. They also need to be able to judge easily which ideas are not appropriate for them, so that they can be quickly dropped.

Managers who do not take ICT seriously are risking their organisations' health and even existence. We make a specific recommendation that all those who have influence over these managers should be aiming to raise their expectations. Before too long, employing a

manager with a poor awareness of ICT should be as unthinkable as employing one with a poor understanding of finance.

Recommendation:

Umbrella bodies, funders, management development agencies and management committees should promote an expectation of ICT awareness among all the managers they come into contact with or employ.

Where do managers get their ICT ideas?

The managers we spoke to mentioned many sources for their ICT awareness. These fell into several categories, with no clear pattern. It just seemed to depend on what was available to that particular person. The categories we found, in approximate order of frequency, were:

✢ **By osmosis**. This was the commonest response. The manager was just aware of things going on in the world, without necessarily being able to pinpoint where the awareness came from.

✢ **From informal contacts**, often family members – partners, sons and daughters – who were either ICT professionals or had personal experience from their work or home use.

✢ **From an in-house ICT expert**. Many of those managers whose organisations employed people with a professional ICT expertise made a point of saying that one of that person's roles was to provide current awareness to their senior colleagues.

✢ **From experience**. 'I knew we needed a network/e-mail because I was used to having one where I worked before.'

✢ **From changes in circumstances**. Having to establish a working relationship with a new partner organisation, or being forced to find new ICT contacts because the existing source of information moved on was a source of ideas for several interviewees.

✢ **From deliberately cultivating ICT experts**. A few of those who did not have an in-house expert said that they sought out ideas through contacts or even, for example, by accepting offers from sales people to come in and demonstrate software.

✢ **From an external consultant**. A few, but not many, of our interviewees had used external consultants to give them ideas.

It is clear that most of these sources of ideas involve talking to individuals. Many managers told us that they do not have time to read – certainly not specifically about ICT. None mentioned more formal sources such as conferences on ICT issues, and it was notable that almost none of the managers mentioned initiatives from umbrella organisations as a stimulus to new ICT ideas. We argue below that umbrella bodies should be playing a much more important role here.

Some managers told us that contact with other managers in similar situations is a source of new ideas on ICT. Somewhat surprisingly, perhaps, they were in a minority. This is not to imply that the other managers don't reflect. One told us of spending 25% of their work time thinking about future directions for the organisation. But many seem to do this in isolation – in contrast, for example, to the ICT specialists we interviewed, who were much more likely to describe a web of networks with others in similar situations, often mediated through the internet.

Many of the sources of ideas are unvalidated. They clearly work because they are trusted, or based on the manager's own experience. There is no guarantee that they are relevant to the manager's current organisation or up to date. This doesn't matter, provided they inspire the manager to think of new possibilities. The danger comes if partial or inappropriate ideas are then implemented without taking sound advice. We address this in the next section.

There is no harm in managers continuing to get ideas from trusted informal contacts, but the voluntary sector could be doing more to bring the potential of ICT into the focus of its managers.

We suggest that there is no one way to ensure that managers have access to ideas about what ICT could do for them. With all the pressures they face, it is perhaps not surprising that most of those we spoke to described how they picked up information about ICT as they went along, rather than seeking it out deliberately.

We would stress that managers have no time to waste and, except for the technical pioneers, are unlikely to respond to anything with an explicit ICT focus. Multiple pin-pricks which may or may not spark their interest – but which will all contribute to an environment of ICT awareness – are more likely to be successful than a single javelin, however well aimed.

Our proposals are based on several propositions:

✢ Managers are unlikely to be attracted to something labelled 'ICT'.

✢ Managers are more likely to pay attention if they recognise the problem being addressed, and if this is put to them in terms they understand.

✢ Managers often prefer to wait until an issue is immediately relevant before seeking out information.

One of the strengths of the voluntary sector is that, despite elements of competition, it is generally a co-operative enterprise. We therefore suggest that there is scope for managers to learn both directly from each other, and from other organisations via intermediaries.

The key difference between our proposals and the informal sources of ideas that many managers told us about is that we believe it will be more effective if the opportunities for awareness raising are deliberately constructed with that end in mind. This means that it is not enough, for example, for a magazine editor or conference organiser to commission an article or workshop about an aspect of ICT, from an ICT expert. They must instead seek out someone who speaks the same language as the managers, who can, if necessary, be guided into an appropriate form of presentation.

For general awareness raising we propose:

✚ Reports of success stories (and occasional failure stories) in magazines read by managers, written from the manager's perspective, and couched in terms of the outputs, costs and benefits, not the technicalities.

✚ Discussion, along similar lines, at networking events for managers.

✚ Using internal think-tanks to canvass the staff of an organisation for ideas they may have picked up elsewhere, or through personal interest.

✚ Opportunities at annual general meetings of networks and umbrella groups for discussion on ICT, and for exhibitions by suppliers. (These can be over-technical, but for some people it is important to be able to see and touch the technology.)

✚ Awards and showcase events for *effective* uses of ICT, not necessarily just for innovative uses – an award for 'best copycat project' might be worthwhile, for example.

✚ Occasional – perhaps annual – 'state of the ICT world' briefings. These could give a run-down of current 'typical' ICT projects, with costs, and might include a section on technologies that can safely be ignored, either because they are not ready for mass adoption or are failing to live up to their hype. They could also invite managers to 'take five minutes to assess where your organisation is strongest and weakest on ICT, using this checklist'.

For managers who do have a specific concern, or find it easier to explore ideas in discussion, one-to-one contact with a 'guru' or mentor who has relevant specialist knowledge is often the best way forward. This person could be any one of: an in-house ICT manager, a manager in another organisation, an external consultant, or a contact in the ICT profession. We propose several ways in which the development of this type of relationship could be supported:

✚ Guided visits to showcase projects that had been identified – perhaps through an award – as particularly suitable; they would, in return, host visits by managers who needed to see for themselves what is involved.

✚ Provision of trustworthy, affordable and accessible consultancy services by umbrella groups, 'circuit riders' (see below) and other support agencies.

✚ Non-managerial supervision on ICT may be appropriate for some managers, in the same way as it is used for personnel issues and other specialist areas.

✚ 'Surgeries' as part of larger networking events or conferences, where managers could get a quick assessment of the areas they should be looking at.

✚ In larger organisations, employing a professional ICT manager part of whose role is to advise on possible new developments.

✚ Ensuring that others involved in a manager's professional development – consultants with other areas of specialisation, for example, or designers of courses and development programmes – are aware of the kind of questions they should be asking around ICT.

In all these proposals, the key is to see things from the manager's point of view. 'We had this problem, and this is how we solved it.' or 'We spotted this opportunity and now look at us' – or even 'We tried this, but it didn't really work' – are approaches which are likely to be more attractive than 'Come and talk about how to use the internet'. Even if the specific solutions aren't applicable, good managers need the space to think laterally

Boards or management committees, managers and their colleagues must see thinking time and professional development time as part of a senior manager's legitimate activities. Many of the managers we interviewed clearly relished the opportunity to talk about what they were doing, and frequently commented that the questions had prompted them to think about things they would not otherwise have addressed. This should be part of a manager's appraisal: 'How many new ideas have you explored in the past three months?'

We propose guided visits because there is very little to compare with actual hands-on experience. In carrying out the interviews for this study it was clear that actually being on site and talking to a range of people was far more informative than a paper, or even telephone exercise could have been. Equally, it was far more labour intensive and costly. We believe that managers would benefit from the opportunity to see directly how technology is being used in other organisations, as long as it can be made worthwhile to both parties, perhaps as part of a programme – three or four visits to see how different organisations approached a similar issue.

Recommendation:

The voluntary sector as a whole, should seek to develop a range of ways in which managers can be introduced to the possibilities of ICT. Specific proposals are made in the discussion above to address two main themes:

✤ **general awareness raising, and**

✤ **opportunities to discuss the needs of a particular organisation with people who have relevant experience or expertise.**

The emphasis for most managers must be on approaching ICT from a non-technical perspective.

Helping managers to be confident about their ICT decisions

Organisations *can* change very quickly, once those in charge decide to do something. There has been no shortage of applications for lottery money; it didn't take long for managers to incorporate it into their fund-raising strategy.

There is much merit in ICT developments being brought in without delay, as several interviewees pointed out. One said, 'Whatever you are going to do, do it quickly before the technology moves on, then pause and consolidate. Agree the level at which to pause – don't add new bits piecemeal, as it disrupts things too much.'

From our interviews, it is clear that things move much more quickly if there is an *internal* advocate or champion for ICT developments. Even if they don't know much about it themselves they must believe in the potential. The champion doesn't have to be the chief officer, but clearly a project without their support is unlikely to progress quickly. The main attribute the champion must have is a soundly-based confidence in the developments being introduced.

The problem for many managers is that they believe in the potential, but do not have enough knowledge to be confident that any particular solution is right. We heard chief officers speak about how difficult they find it, as non-technical people, to judge the technical merits and value for money of tenders, for example. Even when they go outside the organisation for expertise and take a structured approach, the organisation needs a technical expert they can trust, working on their behalf, to make sense of what is being offered.

We also heard several times of organisations being talked into going down the wrong route by ill-informed enthusiasts who won over the chief officer or board. Because of past experiences like this, one interviewee described feeling much more confident when a proposal

from a staff member with previous experience of a particular package was checked with an external consultant who was able to provide specific hard information to back up the idea.

Reliable advice leading to greater confidence

We are proposing a specific role for an external source of expertise which is perhaps slightly different from the traditional consultant. It may sometimes be appropriate to bring a consultant in to carry out an ICT review, or to draw up an ICT strategy and, indeed, such a consultant may be a rich source of inspiration about the potential of ICT. But whether or not a consultant is the source of ideas, we believe that many managers need access to a source of external validation: someone who can confirm that an idea is realistic and achievable, and help them to budget and plan for it.

This will not be appropriate in every organisation; if the organisation already employs an IT person with strategic responsibilities, not just a technician, then they obviously fulfil that role – unless the proposal is for an area of ICT outside their experience. For the majority, however, the key requirements are that their source of outside expertise should be:

✤ reliable,

✤ competent,

✤ able to understand the voluntary sector,

✤ inexpensive, and

✤ available.

Because the lack of such expertise was an important stumbling block for so many of the organisations we interviewed, we have devoted the following section to considering how the need might be met.

The essential element of this advice – and the reason why it is not automatically available – is that it must combine a sound understanding of the technical aspects with a clear focus on the needs of the organisation. The adviser must be able to use the 'intermediate language' referred to by Marion Fitzpatrick (page 2) so that the manager is able to make use of what they say.

It is also clear from our interviews that managers sometimes struggle to convince their staff that decisions must be made in the interests of the organisation. An important part of the culture of many voluntary organisations is to support DIY initiatives and to give a lot of freedom to staff – for example on dress code and working hours. People sometimes abuse this – for example not agreeing to put their appointments in the diary or let colleagues know where they are. This applies to ICT as well: people tinker with their machines, or insist on using a particular favourite piece of software, or develop private data sets instead of

using the corporate one. The job of managers is to allow individuality when it is productive for the organisation and the individual, but to curb it where it is counter-productive.

This should also apply to training. The organisation should define people's training needs, not leave it to the whim of individuals. One of our interviewees had been happy to support a worker in developing word processing and file management skills through external courses, but drew the line at database development, for which the organisation had no need.

An important side-effect of greater confidence should be that managers feel more able to justify and enforce these decisions.

Recommendations:

Managers in the voluntary sector need access to trustworthy, affordable and accessible advice, couched in 'intermediate language'. Its absence is one of the main obstacles to more effective use of ICT. Managers must be prepared to make decisions in the interests of their organisation, and not be swayed by individual preferences.

What kind of technical advice should the voluntary sector be offering?

The importance of better technically-qualified advice suggests that new resources should be invested in this area. At the same time it is worth considering how some of the existing expertise could be improved and consolidated. We propose, in brief:

✣ better coordination of existing services, ideally through an authoritative central resource;

✣ investment in a UK version of the 'circuit rider' approach;

✣ more opportunities for mutual support between providers of ICT advice;

✣ some form of accreditation so that managers would know whom to trust for their ICT advice;

✣ 'packages' of investment that managers could buy into confidently with relatively little advice.

We believe that it is important to distinguish between technical advice and hands-on technical support. Although they may sometimes be provided by the same person there are dangers in this. Technical support people may not be aware of the wider considerations that need to be taken into account when advising managers, or be able to put things in 'intermediate language', while advisers may have a broad understanding of the technical concepts,

without the up-to-date hands-on skills.

Technical advice aimed specifically at voluntary organisations has traditionally been provided largely through projects run under the auspices of umbrella bodies and networks, both area based (such as councils for voluntary service) and sector-based. There are a few independent specialist centres and consultants, and a handful of commercially run organisations that see the voluntary sector as their market.

Many of our interviewees had not been able to make use of services aimed specifically at voluntary organisations. Where they had, with minor reservations their experience had been positive. Many others had obtained technical advice from commercial organisations or, in several cases, sympathetic staff at the local higher or further education establishment.

Several of the umbrella bodies we talked to saw ICT support as part of their role. Typically, support to the members was provided by the same person who provided internal ICT support, and in many cases the experience had been that the internal issues were more clear cut – and more pressing – so that these needs had received more attention, more successfully, than those of the wider network membership. Nonetheless, there is clearly a role here for umbrella bodies and networks, and we would encourage them to continue, or begin, providing ICT advice.

What we are keen to avoid, however, is for every second-tier agency that perceives a need for ICT advice to feel it has to start again at the beginning. Typically this will involve the preparation of a series of factsheets on ICT topics. But we have already argued that most managers don't want to read about ICT, while ICT specialists will generally find such briefings too basic – and there are many examples which essentially duplicate each other.

There is probably a market for basic technical information, for those who want to know out of personal interest, or for people who have been given ICT responsibilities and need to start at the beginning. We suggest that it would be worthwhile to develop and promote a service to pool and manage good practice and other resources around ICT use. There is an existing model on the **rightsnet** site where welfare rights workers exchange leaflets, etc. on welfare rights issues. The ICT community should be strongly placed to use its own technology to help people to avoid reinventing the wheel. Ideally, an agency providing this central resource would be accepted as an authoritative voice, representing best practice and considered recommendations which had the support of the large majority of ICT support workers.

Supporting the technical advisers and 'gurus'

A clear finding from our interviews was that ICT support staff and specialist managers themselves need

support. Because of the speed of change, and the range of available technologies, one person on their own quickly becomes out of date and is unlikely to have the breadth of experience to cover all the topics that affect an organisation. Some of these needs could be met through the enhanced mutual support suggested above.

Advisers not only need technical expertise. In fact, too much hands-on knowledge may be a disadvantage. The key requirement is to be able to talk the 'intermediate language' that the manager can understand. This is a skill that some people have, and others can learn. An important role of any support network for advisers should be to give them opportunities to learn these skills, to understand the kind of decisions that managers need to make – and hence the relevance of technical possibilities – and to develop their relationships with the managers they are supporting.

Advisers must also recognise the limits of their own knowledge. They must be prepared to tap into other sources of more specialist expertise when required, and can play a vital role in translating this information into the manager's terms. The best advisers are often those who don't have a particular axe to grind but can draw on a wide range of contacts according to circumstances.

Finding the right adviser can be difficult for a manager. We have mentioned accreditation as one possible approach; another is brokering. There are already schemes where ICT professionals are encouraged to give their services pro bono to voluntary organisations. Experience suggests that it is important to ensure that the professional and the manager enter the relationship with common expectations, and that an intermediate organisation may be required. The benefits of this are shown by one user in the example (see right).

The circuit rider approach

Another approach to supporting the advisers is to organise ICT advice and support workers into teams. The ideal size of a team appears to be around six. Such teams, regionally or locally based, could be the basis of a UK 'circuit rider' movement.

The 'circuit rider' is a highly successful model developed in the USA. Circuit riders are mobile ICT workers, each supporting a caseload of voluntary sector agencies.[3] Circuit riding is a conscious movement driven by a collective belief in using technology to work towards 'social justice'. It is varied and diverse, but what holds it together is the determination to use technology to further progressive causes. The aim is to help 'non-profits' use technology more effectively to accomplish their mission. This is commonly done in 3 ways:

✤ Educating managers in the strategic use of technology.

A manager's view

"Turning Point needed to upgrade its IT and had some funds allocated for this. We wanted to make sure that we made the most effective use of the money available, but we did not have the in house expertise to feel confident about the best way forward.

To address this we approached an organisation providing pro bono support from IT professionals. This has been invaluable in helping us to develop an IT strategy which is now providing a framework for developing Turning Point's IT.

A key element in this relationship was the time taken at the beginning of this work to ensure that we were matched with someone with the appropriate expertise, that he understood our organisation, and we were clear as to what he was able to offer. This preparatory work was essential in developing what is now a very valuable resource for Turning Point."

Lord Victor Adebowale
Chief Executive, Turning Point

✤ Helping managers develop and implement an ICT strategy that supports the organisational mission.

✤ Providing a network of affordable technical assistance.

Within the movement there is a debate about whether support should be short or long term. Should circuit riders train staff, set up good local support and withdraw, or should they act as the main source of IT support for an organisation in the long term? Riders will often work with a network of organisations, providing periodic visits. Whether this is seen as developing capacity and having an end point, or as ongoing support is an important issue and different approaches may work best in different contexts. Either way the regular visits are likely to help organisations to be persistent in implementing their ICT strategy.

Experience with the P4 project in Lambeth argues for extended intervention. Lasa[4] provided a one-day training course on ICT management to twenty organisations, followed by a visit to prepare written recommendations as the basis for an ICT strategy. Follow-up research a year later found that very few organisations had made any progress. One of the main reasons was the loss of impetus following a relatively short burst of input; other reasons included an apparent lack of commitment to ICT from the organisations and their managers.

Compared to what's happening in the UK, the American movement is highly sophisticated. Learning and sharing of best practice takes place via email, online

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3   For further reference see the website of Ninthbridge, one of the main technology support organisations:
    www.ninthbridge.org/resources.html
4   P4 was a European funding scheme. Lasa (London Advice Services Alliance) have participated in the research and writing of this report.

resources and annual conferences. If a rider has a query, for example, they may post the question to a mailing list where scores of people will read it and have the opportunity to respond. In this way the riders use the expertise of the whole of the circuit riding community. A further difference from the UK is that American funders are firmly behind the circuit rider movement. Foundations have realised that they will save money in the long term by investing in ICT for organisations.

There are a number of examples of similar activity in the UK, albeit on a much smaller scale. One of the earliest was the support on ICT provided by the Joseph Rowntree Charitable Trust to organisations it funded, via vouchers which could be used to pay for part of the cost of advice and support from the IT Support Unit for Voluntary Organisations (ITSUVO), based in Bradford. What was important here was not just the financial contribution, but also the confidence engendered by having access to a service which had been vetted and endorsed by a major funder (as attested by one of the organisations we interviewed).

There is no one way of funding and managing circuit riders. Some approaches include:

✤ support from a funder (as described above), wishing to ensure that their money is well-spent.

✤ local networks raising the funds (external or by pooling their own resources), and taking advantage of geographical proximity to get reliable access to the support workers.

✤ communities of interest doing the same, but emphasising the special expertise that a support worker can develop in dealing with organisations facing similar problems and, quite possibly, using similar software.

✤ semi-commercial operations, perhaps with start-up funding, where users pay a fee for the service.

The Community Network Foundation established a circuit rider service for its members in 2000. BASSAC's 'Wired up communities' projects (www.bassac.org.uk/d-ict-wired.htm) and Kingston Superhighways project (www.kva.org.uk/superhighways.htm) provide two more examples. Lasa has itself recently gained funding from the Community Fund to establish a circuit rider service for members of the Federation of Information and Advice Centres and the Migrants Organisation Development Association. As part of any sensible overall strategy the UK clearly needs to develop its own movement of IT support and development practitioners working with voluntary organisations, drawing on the greater experience of our American colleagues. We believe this is likely to be a key building block to the improved use of ICT within the voluntary sector.

Recommendation:

Alongside specific suggestions made in the text above, our main recommendation here is that the UK should aim to develop a coordinated, nationwide, accredited ICT advice and support service, including services provided by umbrella groups, specialist agencies, independent consultants and a new cadre of circuit riders. In order to ensure that existing expertise and commitment are taken into account, a consultation exercise should be carried out – largely on-line, for obvious reasons, but possibly including a conference – to explore the ideas fully.

The decisions the board has to make

We were struck in our interviews by the number of chief officers who said they actively avoided involving their board or management committee in ICT decisions until the point where they had a fully-fledged plan and just needed the go-ahead to spend the money. Partly this was experience of previous inexperienced involvement, where well-meaning board members had proposed inappropriate solutions. Partly it was awareness that the board was likely to be reluctant to spend money on 'ICT', but could be persuaded to buy into the outcomes of a project with a high ICT content (just like many funders, in fact).

Board members themselves, on the whole, appear to take a similar view. We consider that it is a very reasonable position. Boards of trustees and management committees should be concerned with governance, not management. Their involvement should therefore be strategic.

This does not mean that boards have no responsibility for ICT decisions. For one thing, they are not necessarily made up of technically-incompetent luddites (our words, not those of any interviewee). Several interviewees commented on the positive effect from having a board member with genuine, professional ICT expertise, both as champion of ICT developments and also for specific advice. WCIT,[5] for example, is among the organisations that encourage people from within the industry to put themselves forward for such a role.

The board should recognise that ICT leadership skills are part of the repertoire of a senior manager nowadays. This means being supportive of the manager taking the time to reflect and explore options. It also means taking ICT into account when appointing the chief officer. It is in the nature of things for staff changes at the top of an organisation to lead to changes

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5   The Worshipful Company of Information Technologists, co-funders of this study.

in a number of areas, possibly including ICT. However, there are costs involved if each new chief officer or ICT manager is tempted to change the ICT direction completely. It may be appropriate for the board to explore these areas with candidates, to ensure that the changes that are subsequently recommended do not come as a surprise.

We also recommend that every organisation should have a written ICT strategy, taking up two pages, or less. It should be understandable by the Board and should be reviewed annually. The advantages include:

✛ board endorsement for changes that the chief officer is making.

✛ a framework within which staff within the organisation can operate.

✛ a basis for consistency even when there are significant staff changes (especially given the high turnover of staff in voluntary organisations).

✛ a framework on which funding applications can be based and justified.

The policy should set out, for example:

✛ Major investment plans, with a timetable, costings and the reason behind them.

✛ Allocation of responsibility, and how the organisation will keep abreast of ICT issues.

✛ Support arrangements

✛ Hardware purchase and replacement policy.

✛ Software policy.

✛ Budgeting arrangements.

✛ Training and skills.

✛ Data Protection, confidentiality, security and internet use.

Other material on strategic ICT planning is available. Well thought-of examples from the USA include www.summitcollaborative.com, and www.techsoup.org. These sites also provide more technical support.

Finally, the board must be prepared to back the chief officer up if things don't go as planned. At least two projects we interviewed had had to change their development in mid-stream, as they had either outgrown the original recommendation quicker than expected, or found that the technological options had changed in their favour. The board should not be so rigid in its decision-making that such changes cannot be made quickly. In both cases an important additional factor was that the funders were amenable and supportive of the change. One interviewee commented: 'If the process takes too long, be prepared to change, not get locked into something out of date.'

Example ICT strategy statement

Major investments: A network will be installed during the current financial year, costing £8,000, so that all staff can have e-mail and web access at their desks. Two digital cameras will be bought, costing £350 each, to record the work of the development workers.

Responsibilities: The Chief Officer will buy in one day of consultancy time each year to review the ICT strategy, and will report back to the management committee. Staff will be asked for their suggestions to feed into this process.

Support arrangements: The officer manager post will have one day a week reserved for ICT support, and specific tasks will be included in the job description. The organisation will also buy into the local circuit rider scheme for additional support and advice.

Hardware purchase and replacement: Hardware will be written off over four years. Each year a minimum and preferred specification for workstations will be decided. Every effort will be made to replace machines that fall below the minimum, as soon as possible, and new purchases will use the preferred specification. Donated machines will only be accepted if above the minimum specification.

Software policy: The organisation will not use illegal copies of software. Software for the major office tasks will be standard on every workstation.

Budgeting: Support salaries, consultancy, hardware and software maintenance and repairs will come from the core central budget. New equipment will be purchased by projects as and when required. Major developments will go ahead only when funds have been identified.

Training: All new recruits to the staff will be expected to have a minimum standard of ICT competence, which will be tested during recruitment, in addition to any skills required by their specific post. All staff will be encouraged to review their ICT training needs once a year, and the training budget will be sufficient to allow for ICT training.

Data Protection, confidentiality, security and internet use: All staff are expected to follow the organisation's policies in these areas, which the management committee will review at least every three years. This year anti-virus precautions will include staff training in procedures for handling incoming e-mails.

The likelihood of things not going as planned can, of course, be reduced if the board manages the risk (see project management, below) and the organisation's expectations, especially with inherently risky projects such as database development. Frustrations are often partly to do with the expectations people had in the first place: they did not expect it to cost so much, to take so long, to need upgrading or to have to be replaced by a better database five years later.

Staff resistance may also need to be overcome with support from the board. We suggest that there are some changes which should not be a matter of personal choice, if they are for the good of the organisation. Some of these may require training; others may just be a matter of habit – and people can quickly get used to new habits if they find them beneficial. It is said that one of the fastest switches to senior managers using e-mail came in the organisation (not one of our interviewees) where the edict went out that 'from next month expenses will only be paid if claims are submitted by e-mail'.

Recommendation:

The board or management committee of every voluntary organisation should, from time to time, ask itself:

+ **Is there an ICT strategy, and have we reviewed it within the past year?**

+ **Do we encourage our chief officer to take the time to explore future ICT possibilities?**

+ **Do we ask searching questions to test out the chief officer's ICT proposals?**

+ **Do we have anyone among our members with an adequate background in ICT to help us formulate our questions and advise the chief officer?**

+ **Once we have agreed to a new ICT project, do we back up the chief officer with financial commitment and moral support, even when things don't go to plan?**

+ **Do we take the ICT needs of the organisation into account when recruiting senior staff?**

+ **Do we take the ICT needs of the organisation into account when allocating the budget?**

Project management

Having decided what to do, the successful manager then needs to ensure that it happens. This requires a package that includes:

+ a solid technical plan,

+ an implementation plan that will carry the staff with it,

+ staff training,

+ support arrangements,

+ funding.

The voluntary sector has no great tradition of using formal methods of project management. This may be a reflection of a reasonable record of success: we haven't suffered from the succession of high profile project failures, especially IT project failures. A string of troubled projects has plagued the commercial and statutory sectors and driven the adoption of a more systematic approach. However, voluntary organisations do have experience of projects that drag out for far longer than they should. The dangers of this have already been alluded to: by the time the system is in place, it has been overtaken by events.

As voluntary organisations' projects grow in size and complexity it becomes all the clearer that they too can benefit from the established body of knowledge that exists on effective project management.

Project Management isn't rocket science. A lot of it is common sense and anyone who has been involved in running a project informally will find much that is familiar. But established methods provide a more complete and systematic framework for defining and controlling a project as well as helping with the less tangible but vital areas like establishing good communication, clarifying roles and building strong teams.

Our belief is that voluntary organisations can learn from this body of knowledge and that our ability to manage the growing number of technical projects can be improved by the adoption of these techniques. Our projects may tend to be smaller, the process of making funding applications can be an added complication, but we can still use these techniques to our advantage.

A more detailed paper on this area is available in the 'Managing IT' section of the Lasa Knowledgebase.[6]

Recommendation:

Any voluntary organisation embarking on a major ICT project should consider using – or buying in – an appropriate level of formal project management techniques.

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6   www.lasa.org.uk/knowledgebase/index.shtml

models for successful introduction of ICT

We have argued for managers exploring options, becoming inspired and taking technical advice. Lest this seem too daunting, we also believe that there are certain decisions which can be made confidently by any manager, with relatively little advice. Since these are based on tried and tested ideas, it is worth recapping on a little past experience.

Voluntary organisations' use of ICT can be described at three levels:

✚ **Personal productivity**, typically using stand-alone machines to automate existing tasks – word processing and accounts are classic examples.

✚ **Information sharing**, using standard documents, shared databases and, in larger organisations, internal e-mail – for this a network is essential.

✚ **Inter-networking**, using the internet for external e-mail, and making increasing use of web sites – for this, also, a network is essential.

Within each level, some applications relate to internal efficiency (doing things better) and others to new areas of work or different kinds of service delivery (doing better things). Also, within each level, some activities are 'core'. Unless you are doing those, it is likely that you are not working effectively. Others are optional: their use depends on whether they are appropriate for you or not.

Early adopters of technology have frequently moved through these levels in the order shown: starting with stand-alone computers, then getting a network for internal use, and now enthusiastically exploring the possibilities of the internet.

It now appears that the emphasis has shifted. In the past, organisations shied away from installing a network because they were not convinced that they could take full advantage of the benefits of information sharing. Now, the internet means that a network has become part of the fundamental infrastructure. Most of those we spoke to saw the benefits of e-mail at each desk, and access to the web, as far more of a priority than more 'traditional' information sharing.

Many of those we interviewed had at some point got stuck over their network. Some had not yet even attempted to install one. Usually this was because they could not reconcile the cost and the reputation of

network installation being a nightmarish experience with the benefit that they would achieve.

Others had taken the plunge but met difficulties along the way. In a few cases these had proved so serious that the project had, in effect, been a failure – or had had to be restarted on a new basis. In most of the organisations we interviewed, however, the network was now functioning effectively and delivering substantial benefits.

There is no doubt that getting a network is the biggest jump after getting a computer in the first place, and it requires a clear head to see it through. However, it is now much more routine than it used to be. Very few organisations we interviewed had had any problems at all; where they did, it was generally a minor management or support issue.

We recommend that a network should be seen as a cornerstone of ICT for any organisation with more than one or two staff.

Network access to e-mail and the internet is relatively routine, while the apparently simple objective of a shared database is very much more difficult. Many organisations find it daunting or have had bad experiences. We therefore recommend that internet access be seen as 'core' while a database is an option to be carefully considered.

We recognise that every organisation is different. There may be occasions when it makes sense not to follow the recommendations below. However, we suggest that where a development is being proposed which is not recommended, non-technical managers, should be particularly careful to get the proponents to justify it fully.

Recommendation:

All but the very smallest organisations should by now regard a network as being no less important than a telephone on each desk – for internet access if nothing else.

Personal productivity

At this level the organisation is making use of applications on stand-alone machines, such as word processing and spreadsheets, and any that are relevant from among: DTP, information resources on CD, accounts, and stand-alone databases such as personnel. These are used by individual staff or small teams, with very little requirement to take account of what is happening elsewhere in the organisation.

Most voluntary organisations are already coping reasonably well with this stage, but there are still some gaps, e.g. with training. Obsolescence doesn't matter so much. The cost is relatively manageable, because new machines can be added without too much impact on the existing ones (although this then raises issues of software version incompatibility). There are still some new developments in this area (digital imaging, for example), but much software is at, or rapidly approaching, a functional plateau.

The case for adopting this stage for administrative workers, most managers and heavy users of specific systems is largely made, but there are still organisations where the debate goes on for light users (e.g. for case workers recording their notes). Does this matter? Is it personal choice?

● **Relevance to front-line work:** The main benefits are time-saving so that organisations can devote more time and effort to front-line services. The quality of output of printed materials improves; new products are available to information-based organisations. Potentially, the quality of management information can be dramatically improved. Changes in work patterns can result, as it allows an organisation to make front-line staff and managers self-servicing and to reduce or change the role of administrative staff. Direct service delivery is possible at this level; for example in one of our interviewed organisations case workers are using stand-alone PCs to encourage and enable teenage boys, in particular, to talk about and explore issues they find it difficult to raise directly.

It is relatively straightforward to deliver support for stand-alone systems provided the managers take the need seriously. When problems arise they can persist and become a drain on the organisation if the managers do not regard their ICT as strategically important, and therefore do not pay attention to the need to keep it operating properly. When we interviewed staff who were neither managers nor ICT specialists, very few reported significant problems in the operation of their computer equipment. In a variety of ways, the organisations, because of the commitment of the chief officer, had made provision to resolve any problems that arose.

Recommendations:

In most areas it is possible to identify industry standard packages, and the costs and training requirements are easily determined. For peace of mind we recommend using standard software (which often means Microsoft products) unless there is an exceptionally good reason not to. See the Managing IT guide from Lasa[7] for more on software standardisation and other aspects of managing stand-alone systems.

In some areas specialist advice may be needed because there is no clear market leader. The choice is rarely between more than two or three packages. In accounts, for example, Sage has long been the voluntary sector standard. It is now – from our interviews – clearly under assault by QuickBooks at the lower end and Access Accounts (not Microsoft Access) at the higher end.

We would recommend against stand-alone bespoke databases or encouraging the use of Microsoft Access by users who need their own sets of data. These inevitably lead to trouble when the organisation starts to share information. If the organisation is ready for a database, it is ready for a network first and then a multi-user database.

Networking

The Hall Aitken report finds that only 17% of voluntary organisations expect to have any type of internal network by the end of 2002. This feels about right.

Traditionally an organisation would install a network in order to make use of one, or occasionally a few, common databases, as well as standard documents, reference materials, diaries and internal messaging. Unfortunately, many organisations have struggled with this. Information management is not highly regarded in many voluntary organisations, and there appears to be staff mistrust of centralised systems. Database projects which go wrong – as many do – only serve to deepen that mistrust.

Communications, on the other hand, are readily seen as important and, what is more, infrastructure is largely standard; everyone can use a phone and, with little training, e-mail. Information infrastructure is non-standard and more technically complex. This is an additional reason for recommending that e-mail to the desk should be the first priority for a network.

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7   www.lasa.org.uk/publications

Table of core technologies

Personal productivity

Essential: this is the core	Good practice	Optional
Word processing	Standard software	Accounts, using a recognised business accounting package
Staff skills (trained or recruited)	ICT strategy approved by board or management committee	Desk-top publishing, but only if someone on the staff has the need and the skills for it
ICT strategy – at least in the head of the chief officer	Day to day ICT responsibility allocated to a member of staff	Genuinely stand-alone database for a specific purpose, such as membership records
Spreadsheet for those staff working on figures	Hardware replacement/upgrade strategy	Information resources bought in on CD
Reliable computers, capable of handling the software in use		Individual e-mail and web access on a single computer, for a specific purpose
Reliable, cost-effective peripherals – printers, etc.		'Brochure-only' web site
Identified source of maintenance and repair		Limited peer-to-peer network (for example between two or three finance staff)

Networking and internet access

Essential: this is the core	Good practice	Optional
Well-managed client-server network	Domain name used as part of the organisation's 'brand'	Centralised key databases
E-mail and web access from every desk	Policy on internet use by staff	News-based or interactive web-site
Standard software across the organisation	Support and maintenance logging	Centralised diaries and other resources or management tools
Central back-up and security, including anti-virus, firewall and power supply	Disaster recovery/business continuity strategy	Remote access – staff able to access their work from outside locations
Shared file management – all staff using the central, backed-up storage arrangements	Hardware replacement/upgrade strategy	'Hot-desking' – staff able to use any computer to access their work
ICT strategy approved by board or management committee		
ICT support system, including internal and external resources		

Additional immediate benefits of a network include the advantages of centralised back-ups, greater security and greater flexibility – including the ability to 'hot-desk' if required.

Network technology and internet access should no longer be seen as cutting edge. The issue for most organisations is not about being innovative in the technology that is used, but about continuing to find additional innovative ways in which what is now fairly reliable, established technology can be used to provide new services or deliver services in new ways.

Our findings are that the simplest kind of network ('peer-to-peer') is a false economy and may only lead the organisation into a dead-end. (Explaining this demonstrates very clearly the need for intermediate language. Network concepts have not yet become mainstream – unlike, for example, the major components of a system: no one nowadays needs an explanation of what the keyboard or monitor are.) A peer-to-peer network does not have a central control point. For any but the simplest tasks, this makes it difficult to manage and inefficient; and the problems grow exponentially as the number of people on the network increases. Something you might get away with for three or four staff just doesn't cut the mustard when there are eight or ten.

Several of the organisations we interviewed had attempted peer to peer networking as the cheaper option, but eventually concluded that they needed a fully functional client-server network.

Installing a network is not cheap. For the organisations we interviewed it typically meant identifying funds from reserves or saving up specifically for the network. Very occasionally it had been possible to persuade funders to provide the wherewithal (in some cases as part of a separate project which set up a framework that allowed network infrastructure to be extended to the rest of the organisation).

● **Relevance to front-line work:** Almost all our interviewees mentioned the communications potential of ICT as its main benefit (hence the use of Information *and Communications* Technology – ICT – throughout this report). A network giving e-mail and web access can benefit both practitioners and administrative staff, allowing them to save time, draw on contacts with a wider range of people (including people abroad), access far better information resources and hence provide a better service.

Beyond that, for relatively little extra input the technology allows the development of electronic services (such as information products or on-line user involvement) and electronic access to services (such as bookings and purchases). It also allows efficient decentralisation of staff, and effective networking between staff in different organisations, and possible work-planning benefits (such as scheduling and the use of common diaries).

The organisations we interviewed which operate or support activities in other countries were particularly keen to stress the revolution in working practices – and in many cases a substantial saving in international phone costs – that internet access allowed.

For some organisations a network is a necessary component of service delivery. For example, most of those in our sample which offer ICT training to their client group found an efficiently-networked training room to be essential.

Recommendation:

We recommend that organisations should not be tempted to save money with a peer-to-peer network, but should identify the funds to pay for professional installation of a fully-fledged client-server network, with robust internet access (being prepared to pay for a commercial level of service, for example).

Further developments of inter-networking

Once an organisation has across the board access to e-mail and the web, other things become possible. These include remote access to the network, and integration between, for example, the database and phone (allowing calls to be made from the database or logged to it), or between paper and electronic publishing.

There are other technologies which are still under development, and which might become relevant. Some of these are discussed later in this report, but for most organisations they are a step too far. Unless the organisation wants specifically to be a technological pioneer, there is still plenty of mileage in the current crop of emerging technologies (and this will continue to be the case, even as the 'current crop' evolves).

Databases: a special case

One of the hardest areas for managers is buying or commissioning a database. These are probably the least standard of any ICT application, and past experience has given many people the (correct) idea that it is possible to waste a lot of money and/or end up with an unsuitable system that causes more problems than it solves. Yet the benefits of being able to pool information across an organisation are so great that this particular bullet needs to be bitten.

We found many managers (but not all) unaware of what other organisations in their sector were doing, and therefore unable to benefit either from the ideas they were using or the actual software packages. While collaboration can be problematic, use of a common package or shared development costs are always worth considering. We recommend that more

umbrella bodies make a special effort to identify examples of success to share among their members (see the discussion on publicising good practice, above).

A database allows a more client-centred approach to client information (known commercially as 'customer relationship management' or CRM), where any member of staff dealing with a particular client can see the whole picture of their relationship with the organisation (subject, of course, to confidentiality restrictions). This is especially useful where the clients are organisations, or where individuals are served by multiple services or agencies.

Shared databases also allow more efficient fundraising, and better management of membership records (including better Data Protection compliance).

Recommendations:

Organisations should not underestimate the potential problems of commissioning and installing organisation-wide client, member or fundraising databases, but should also look carefully at the potential benefits once they have a network up and running efficiently.

Networks of similar organisations, despite many having run into problems in this area, should continue to encourage their members to share their experiences with both packaged and bespoke databases and possibly – provided sufficient funding and project management skills are available – to commission the development of database packages for their sector.

Support and maintenance for ICT systems

We have argued that the first requirement for the successful introduction of ICT systems is for the chief officer and other managers to have a clear idea of what they are trying to achieve, and then to ensure that they have the confidence to implement it. The next requirement is technical support.

We recommend that organisations should, in general, use a mixture of internal and external support. Almost all the organisations we interviewed had come to the conclusion that it was necessary to have someone on the staff with enough technical interest and skills to support their ICT day to day. In the smallest organisations this might be as little as a few hours a week, incorporated into a wider job description. Larger organisations might have several full time ICT support staff. All of them were remarkably close to a ratio proposed in the Lasa guide to *Managing IT*, of one full-time support person for every 50 users. We are confident in recommending this as a benchmark that all organisations should adopt.

For the tasks of such a support person see, for example, the Lasa Knowledgebase. Their key roles are to identify problems, solve those they can, and locate the most appropriate source of support for those they cannot resolve.

Support for the idea of a worker with ICT responsibilities comes from Simon Pavitt's report on a survey conducted by NACVS into ICT in CVSs, *Taking IT seriously* (December 2001). His responses demonstrate the ad hoc arrangements that are often made. Many of the quoted comments are echoed by responses we received. For example we were told that '[Our one day a week ICT worker] is not cheap, but it's worth it'. Simon's report states that 'although the need for a dedicated ICT worker was occasionally disputed, generally the benefit of having one was recognised if the funding could be found'.

In all but the largest organisations, the support person or team is unlikely to have all the skills necessary for major developments as well. We recommend that organisations should almost always buy in specialist support for, at least: staff training, network installation, database development and anything other than the most basic web site design and development. These require skills that even the best ICT support person is unlikely to have sufficient experience of. We did come across examples where a full-time ICT support person was receiving intensive training and external support to enable them to undertake perhaps one of these specialist activities. Even here, the external support, albeit at arms length, was crucial.

Additional external support may well be required in smaller organisations for tasks such as hardware maintenance, software installation, trouble-shooting and the management of security (especially if a virus takes hold).

One of our interviewed organisations had used ITSUVO. They found the provision of both professional advice and technical support to be helpful; the main problem was their distance from ITSUVO's Bradford base when it came to support. We suggest that this is positive support for the idea of circuit riders – but with a more local focus.

Commercially-based external support companies do exist. For many organisations it's just a matter of finding the right one and paying them for the right level of service. A majority of the organisations we spoke to used commercial companies for hardware supply, network installation and support, and a degree of – often informal – technical support and advice. A few did not, but these often depended on the specific skills of a particular individual with a high level of enthusiasm for, to be unkind, tinkering. We were not convinced that this model provided a realistic option for most organisations. A significant number of organisations did report having had less than satisfactory experiences with external support, either because they felt they were being over-charged or getting a poor service.

This had not put them off the idea completely, however, and many, by contrast, reported good relationships with local commercial suppliers.

There remains the question of how to keep the experts up to date. Several interviewees commented on the rate of technological change, and the fact that it is very hard for an isolated person with ICT responsibilities to know everything they need to. A rough consensus started to emerge during the interviews that the ideal minimum size for an ICT team is around half a dozen. Members of the team can bounce ideas off each other, specialise in different areas, and provide mutual support. Few voluntary organisations on their own can justify such a large team, but a circuit rider base could well support that number.

For those who are left on their own, the sources of support that were mentioned most often included:

✤ Support sites on the web, either for specific products or linking particular communities of support technicians.

✤ Technical magazines.

✤ Networking with people in other voluntary organisations: although our impression is that the available networks are under-developed, and that the sector would benefit considerably from a more concerted effort to establish a small number of effective networks.

✤ Picking the brains of support engineers during their visits.

✤ Attending occasional industry conferences or exhibitions.

Relatively few mentioned formal training or any type of professional development that was provided explicitly by their organisation. Most had to fend for themselves. We would recommend that where an ICT support person is employed, the organisation should give more attention to keeping their skills up to date and relevant.

Skilled ICT support, particularly in specialist areas, is in short supply and therefore expensive. (This has been recognised by the National Computing Centre in a report on recruitment and retention of IT staff.) Most of the organisations we spoke to could not afford the market rate for ICT support staff and had therefore, more or less independently, hit on the same strategy: to recruit would-be technical staff from within the voluntary sector and pay lower wages while the people train. It was accepted that in some cases the staff would eventually take their new skills elsewhere for more money. In the meanwhile, however, the organisation benefited from having an enthusiastic person, learning the latest, most appropriate skills and who, because they came from the sector, actually understood their colleagues' needs and could talk to them in their own language. We recommend this approach.

Overall the charity sector pays up to 20% less than the national average for comparable posts (Charity Rewards 2001/02, The Reward Group), but within the sector, finance/computing/legal pays the highest rates, especially lower down the organisation.

Recommendations:

All staffed voluntary organisations should be moving towards having the equivalent of an ICT support worker working one day a week for every ten computer-using staff.

The voluntary sector needs to address the issue of skill development in ICT support for the sector. Paying people from within the sector less than the going rate while they train in ICT support skills appears to be a realistic approach both to recruiting suitable people affordably and increasing the pool.

For smaller organisations, and for the problems which are beyond the capacity of the internal support worker, circuit riders are likely to be among the better solutions.

Volunteers as providers of ICT support

Although the voluntary sector has a long history of using volunteers creatively, we would actively discourage the use of volunteers as ICT support people, unless there really is no alternative. One problem is availability. Many interviewees stressed that, even where ICT support was not someone's full-time job, it was preferable to have someone who was present most of the time. Problems could then be solved when they arose, rather than stacked up for a once-a-week blitz.

A second problem is continuity. There is a serious knowledge management problem in any voluntary organisation where ICT support is provided by a single person. As several of our interviewees pointed out, when that person leaves, it is very hard to ensure that their accumulated knowledge of the system, and its (inevitable) foibles and inconsistencies, gets passed on. Use of volunteers runs increased risks that this will happen more often and less predictably.

We recognise, however, that having volunteer ICT support is better than none at all. If this is the only option available, it is important for the organisation to:

✤ be clear about what it wants the volunteer to do.

✤ check that the volunteer has the necessary skills and experience.

✤ set priorities as an organisation, not letting the volunteer choose the most interesting technical areas to explore.

+ ensure that the volunteer documents what they are doing, so that someone else can pick up where they leave off if required.

+ not expect a person with technical skills necessarily to have training skills as well.

It is also worth considering whether the volunteer's input could more usefully be employed in a different role – as a source of ideas, perhaps, rather than a technician.

The cost of volunteers can be under-stated. Dr. Katherine Gaskin at Loughborough University calculated that volunteers provide the organisation with inputs worth between two and eight times the cost of their recruitment, training, support and management. The lower return applied where volunteers were required to be more skilled and more intensively managed.

A less risky option is to have – as some of our interviewees did – a formal or semi-formal relationship with a local higher education institute, which can provide supervised students or trainees on a regular basis. In ideal circumstances the tutor may also be prepared to provide informal consultancy services and other advice (including, in one case, playing a major role in the recruitment of an in-house ICT support person).

Recommendation:

While the value of volunteers must not be underestimated, we suggest that ICT support does not lend itself particularly well to the use of volunteers. Voluntary organisations should use paid for support whenever possible.

Finance and budgeting for ICT

Organisations which are successful at fundraising, generally, did not report special difficulties in raising the funds for ICT developments. However, ongoing funding of ICT, and developments with no immediately obvious benefits to service delivery, such as installation or upgrade of a network, can be a big problem, as can finding money in the core budget for the salary of an ICT support worker.

This is not an issue which chief officers and boards can ignore. A 'typical' strategy from our interviews is something like:

+ New workstations are built into project funding bids. Every time a worker is bid for, a computer goes into the bid automatically (almost regardless of whether they need one). This then becomes a source of new machines for the organisation, allowing existing machines to be re-deployed. The new worker doesn't always end up with the new machine.

+ Maintenance and support (including salaries) are treated as core costs, paid for by the management fee each project contributes. (Simon Pavitt suggests a useful analogy with finance. No one would object to each project contributing to the book-keeping and accounting expenses of an organisation.)

+ Major upgrades to the system – a database, a network, a web site – are projects in their own right, funded from reserves or specific fundraising.

+ ICT is often piggy-backed onto other projects. A new building might include networking costs; a client-focused web site might also pay for an intranet.

It has been argued in the past (for example in *Managing IT*) that replacement costs for obsolete machines should be budgeted for. Unfortunately it seems that this almost never happens in practice. The organisations we interviewed typically write off their hardware over three, four or five years, but do not set aside specific money for replacements. New and replacement machines are funded in a much more *ad hoc* way.

We would still argue that replacement costs should be part of the core budget. Money for hardware may not seem like a priority if obsolete machines are still functioning, and it is true that voluntary organisations may be able to extend a machine's useful life. Ultimately, however, especially with a network, machines do have to be replaced. There has to be as much standardisation as the organisation can afford. We were told of problems arising, for example, from client workstations having different versions of Windows, and an application which everyone has to use must run at an acceptable speed on everyone's machine.

The most important point is that the organisation should know what it needs, and should have a clear minimum specification for its computers. If there is an operational need for new equipment, then every effort should be made to obtain it.

Another advantage of a clear specification is that recycled or donated equipment can be assessed against the specification when it is offered. If it does not meet the need, experience suggests that it is likely to be more trouble than it is worth.

It is, we suggest, even more important for an organisation to budget for ICT support, both internal and external, and for training. This is good practice even at the level of ICT use for personal productivity and mandatory once a network is installed. At the same time the organisation should be clear about how it is going to handle hardware replacements and upgrades, and should cover this in its ICT strategy.

Other costs which typically get over-looked are the consumables for printers – often part of the stationery budget – and the costs of hosting and maintaining a web site. In both cases decisions made at the outset –

which type of printer to buy, or how the web site is set up – can have significant long-term effects on costs.

Most of our interviewees knew instantly, or could easily find out, how much their organisation actually spends on ICT. We feel this is indicative of the importance they give it, and of their close involvement in budgeting or raising the money. In many organisations the costs of ICT are buried in many different corners of the budget. If you don't know the true costs of what you are doing, you cannot plan sensibly for the future.

Recommendations:

We recommend, based on our interviews, that:

✤ **ICT running costs, including upgrades and ICT-related staffing, should be part of the organisation's core budget.**

✤ **The budget for hardware maintenance, repairs, software upgrades (including anti-virus updates) and ongoing costs such as software support can be fairly modest. We suggest as little as £250 per workstation per year if the equipment and system are fairly new. This figure should, however, be seen as a minimum.**

✤ **Taking a round figure of £20,000 a year salary costs for someone to support 50 users, the budget for each user must therefore be £400 towards ICT salaries.**

✤ **Organisations should be prepared to pay a minimum of £1,000–£2,000 a year for network support (obviously more for larger organisations). If they can get a satisfactory level of service for less, well and good, but before installing a network it is important to be sure that the money for support will be available if necessary.**

✤ **The organisation must have a realistic training budget, in which ICT training for individual staff is an option, and with training costs built into major developments.**

✤ **Before bidding for major ICT projects, organisations must have their budget checked. We were told of organisations that had received money for projects, then found that because they had under-estimated the costs they had to revise their spending plans after the event.**

Staff skills for successful ICT use

It is a familiar litany, but one that bears repeating, that organisations cannot expect to make the most effective use of their investment in ICT unless they ensure that their staff have the necessary skills. The best chief officers and boards will recognise this implicitly; we can only encourage others to do the same.

At any one time, the voluntary sector carries a disproportionate number of vacancies. The labour turnover in the community and voluntary sector during 2000 was found to be 32.3% (only retail, leisure and communications were higher). Even in the IT industry, regarded generally as having a high turnover, it was 22.6%. (Chartered Institute of Personnel and Development, reported in *IRS Employment Review*, 3 December 2001.) This was reflected in our interviews, where we frequently found that one or other of the people we would have liked to interview was unavailable because the post was vacant, and we ended up interviewing one person in two roles.

This is relevant to ICT, because it means that a typical voluntary organisation is frequently recruiting new staff, and must have a strategy for ensuring that they have the ICT skills required. We came across two approaches: to recruit for the skills or to offer training after recruitment. The first of these is increasingly becoming an option. There has been an enormous change over the past 5 to 10 years. People coming into the labour market now have a far wider range of ICT skills, and people who change jobs are likely to have picked up ICT experience already. Younger new recruits may find it quite possible to give ICT support to older colleagues who do not see themselves as an expert – if they're willing to take it. Younger people may take this for granted and not recognise it as a skill that the sector needs.

Most of the organisations we interviewed now expect administrative staff – and often managers – to have ICT skills, and make this a mandatory requirement. Many test the ICT skills of job applicants, usually with a test devised in house, but in at least one case with a formal test they had bought in. We would recommend this for all voluntary organisations, provided the test is well designed and relevant. There may be scope for developing a freely-available model for testing ICT competencies, to avoid the cost to voluntary organisations of buying one in or the time for developing their own. It is also possible to ask for qualifications; one interviewee stressed that recent qualifications were more important than the level. CLAIT and ECDL seem to be about equally prevalent.

Recruiting people with skills is, however, never the whole answer. Some staff who don't have ICT skills may have other skills the organisation desperately needs so will need to be retained and skilled up. The organisation must be prepared to identify these training needs, either on general-purpose packages that the new

staff member will be required to use, or on packages specific to that organisation, such as a database.

From our interviews it is clear that there must be two complementary approaches to on-going training. It must be built into any major development or change of system, for all staff affected. Other than that, organisations should see on-going training as part of staff development and fund it from the training budget. A routine part of staff appraisal, assessment or development interviews must be to identify training needs, and there must be a sufficient training budget to meet the needs.

We were unable to find any support for on-line learning. It appears that the drop-out rate can be as high as 80% (Forrester Research, quoted in *Computing*, 29 Nov 2001), and none of the organisations we interviewed had made successful use of it for ICT skills. Its future potential should not, however, be ignored. If online learning is to be an effective tool it needs to be supported, for example through mentoring by a super-user and allocation of work time to do the training. Staff would not normally be expected to attend a training course in their own time – why should it be any different of online learning? Nor should online learning be seen as a 'cheap option'; it needs to be supported appropriately and is not suitable for everyone but can be very effective (as attested by one of the researchers for this study).

We also suggest that it is important to plan ICT strategies based on achieving benefits from average competencies that are realistically achievable. There will always be super-users and the majority. However, super-users can be creatively tapped into for building in-house skills by cascading training down. Organisations should build in time to do this on a group basis rather than repeatedly showing different individuals the same sorts of things, which currently seems to happen in too many cases.

During our research it did appear that security – and security training in particular – is a major gap. We suggest that organisations must have a suitable security policy statement which all staff, including temporary staff, must read and sign. It must cover not just confidentiality but also, most importantly, e-mail security discipline. The policy must be kept up to date. Lapses must be investigated and ideally spot checks should be carried out. For material on the human aspects of security see, for example, www.humanfirewall.org.

additional information

Background and methodology

This study was given the task of looking at how to overcome barriers to successful use of ICT in the voluntary sector. The primary intention was to interview organisations that are doing well-regarded work and to find out how they make and implement their decisions on the role ICT will play in their service delivery and administration. The underlying assumption was that if they are getting other things right they may well be getting their ICT right; other voluntary organisations could then learn from their methods.

This was never intended to be a large-scale statistical study. It is based on in-depth interviews with around 30 organisations. By coincidence, just as the work was starting, the government's 'e-envoy' was also carrying out a study, commissioned from Hall Aitken, which reported in November 2001. This was a large, statistical, telephone and e-mail survey. In many ways it neatly complements this current study, and its conclusions are referred to where relevant here.

Because of the small size of the sample, and the detailed information provided, we have not mentioned participating organisations by name anywhere in the report. Where we have quoted instances, they may be able to recognise themselves, but we have altered identifying details where necessary to preserve confidentiality. Despite the lack of public acknowledgement, those who participated have our enduring gratitude for giving up their time so enthusiastically and giving us, without exception a warm and hospitable welcome.

In all the organisations we interviewed, we included at least one senior manager, often the chief officer. These interviewees are referred to as 'managers' in the discussion above. Some of the IT specialists and other staff we interviewed also have management responsibilities. However, the focus of the interviews with the less senior staff was more practical and less on the decision-making issues.

The organisations interviewed were diverse, chosen as examples of good practice in their field, largely on the basis of recommendation from their network or from others who work closely with them. Some key variables that were explicitly taken into account were:

✧ **Size**. The organisations ranged from one with no paid staff to a small number with 30 or more. The large majority had between five and twenty paid staff.

✧ **Type of service**. We interviewed a broad mixture of direct support or care organisations, service providers, information providers, campaigns and second-tier organisations.

✧ **Area of service**. The sample ranged from organisations with an international focus extending over several countries around the world, to those working within a borough or district, with national and regional organisations in between. Some of the sample had a specifically rural area of service.

✧ **Location**. We deliberately restricted London-based organisations (including several in outer London) to just half the sample. The remainder were based in small cities and towns, mainly in the midlands.

✧ **Level of ICT use**. Some of the organisations were known to be pioneers, or to have adopted forward-looking ICT strategies. The majority, however, were not chosen for their level of ICT use. Most had a full network (making them unrepresentative of the wider voluntary sector), but in a good few cases its acquisition was a recent (and sometimes bitter) memory.

✧ **Social/cultural factors**. The sample included organisations specifically run by and for women, black people or ethnic minority communities, and disabled people.

acknowledgements and references

We have not set out to compile a comprehensive list of relevant literature or material on the web. We apologise to anyone who has contributed to this topic and thinks they should be included here. We would be delighted to be informed of material that might be relevant to future work in this area.

Material referred to in the text is available as follows:

Hall Aitken Associates with Ashbrook Research & Partnerships Online, *E-enabling the voluntary and community sectors: final report, November 2001,* commissioned for the Active Communities Unit and the Government's e-envoy, available from www.e-envoy.gov.uk/publications/reports/e-enabling/

Joe Saxton, Future Foundation & Stephen Game, Horwath Consulting, *Virtual Promise: are charities making the most of the internet revolution?,* published by Third Sector, 2000?, available from www.virtualpromise.net

Lasa (London Advice Services Alliance), *Managing IT*, May 1998, £5, can be ordered from www.lasa.org.uk/publications

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