Circuit Rider Project:

Experiences and insights into running a developmental ICT project

Foreword

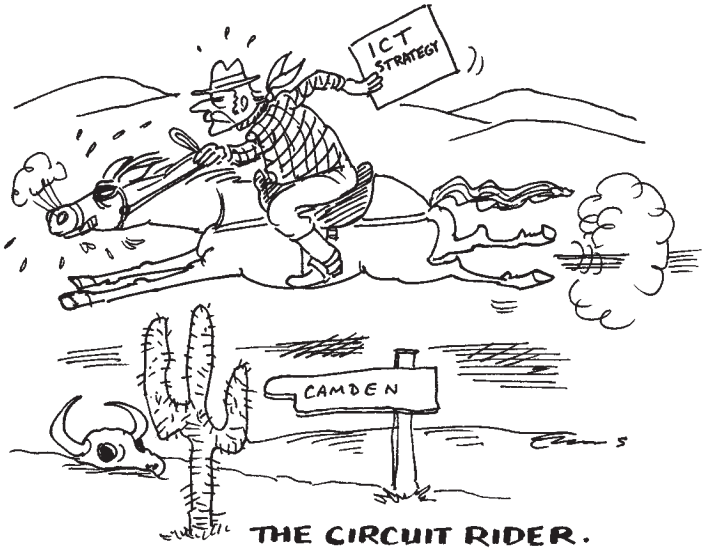
This report is an evaluation of the Lasa Circuit Rider project that also offers insights into solving or avoiding some of the difficulties we experienced.

Evaluations are often either too optimistic and wildly enthusiastic about the project under scrutiny or else concentrate solely on those elements of the service that didn't work as well as they might have done, identifying problems or areas of under performance.

Before we look in more detail at various elements of the Lasa Circuit Rider project it is important to say that overall the project has been deemed a major success and of great value by the majority of those participating.

Throughout the course of the project the various phases of evaluation showed high levels of satisfaction with the project team and the services they delivered. Seventy-five percent of groups achieved at least seventy-five percent of their target ambitions, with many managing to fully complete their plans. Groups were able to demonstrate increased levels of confidence and improved strategic management skills for dealing with technology in their workplace.

We hope when all put together it will provide a useful insight into some of the design and delivery issues anyone might face when offering their own Circuit Rider project. The lessons learnt and mistakes made during the Lasa Circuit Rider project were all ours, please feel free to make your own.



"I now have the confidence to question any advice to test if it is appropriate. I now know that ICT problems have different possible solutions and will now analyse what is being offered. If a problem had happened before and I was faced with multiple options I would have stalled making a decision."

Contents

Key

Mistakes, difficulties and issues that arose during the project

Insights or observations about how we might have done it differently

Quotes from the project members' evaluation

Thank you

The Lasa Circuit Rider project team would like to thank the Community Fund, all the groups, Project Board members and everyone else who participated in the project for their active involvement and for helping to contribute to the overall success.

The Lasa Circuit Rider Project is funded by the Community Fund

COMMUNITY FUND
Lottery money making a difference

INTRODUCTION & BACKGROUND

Circuit Riding is a way of ensuring that small voluntary and community sector organisations who are often unable to afford their own Information & Communication Technologies (ICT) support have access to an expert resource. The Circuit Rider moves around a number of groups (around 20 in this case) providing them with assistance and helping them develop a strategic plan for the delivery and maintenance of their ICT.

The Circuit Rider is not primarily a roving technical support person fixing a printer here and upgrading a computer there and then waiting to be called back when it goes wrong some time later (although in some Circuit Rider projects the emphasis may be more on technical support). Their purpose is to raise awareness and develop the strategic planning skills necessary to enable groups to manage and maintain their own ICT and to do so in a way that is sustainable and within the resources available to the group.

An individual Circuit Rider may work with a number of agencies helping them:

- identify their ICT needs
- determine strategies for improving their ICT usage and practice
- develop and implement ICT projects (e.g. networks, websites, databases etc)
- manage existing ICT resources more effectively

More specifically the Circuit Rider may be involved in some of the following activities:

- assisting with the tendering process for system installations
- training for groups on using applications
- researching and drawing up a database requirements specification
- assistance with various grant applications
- helping draw up server and network requirements documents and budgets
- advice on website design and strategy
- practical help with keeping PCs healthy, backing up files, updating anti-virus etc.
- defining and sourcing support contracts
- resolving various technical issues
- general strategic advice and Action Plan discussion.

Lasa received a grant from the Community Fund to develop a Circuit Rider service and then evaluate whether such a model would be an effective way to increase the capacity of small organisations to make effective use of their ICT. The project started in September 2002 and ended in August 2004.

To assess the effectiveness of the project it was evaluated throughout and the evaluation findings were used to help shape services as it went along. The ongoing evaluation had three major phases:

- "Starting Up" – looked at selection, initial visits and the creation of the Action Plan

The Lasa Circuit Rider project model

This was the model of service provision we tested with the groups.

The program consists of:

- Initial Healthcheck (to determine baseline competencies, current ICT usage, agency development requirements etc).
- Development of an Action Plan following the Healthcheck. The Action Plan is constructed in a way that enables it to become a tool for future development by incorporating a work plan / key action list and target dates.
- A series of follow up visits (an average of 6 visits per group was envisaged) by the Circuit Rider consultant enabling the review and re-assessment of the Action Plan. The Action Plan is a "live" document that should respond to any changes in the group's circumstances e.g. receipt of new funding.
- A limited amount of technical support, where necessary, as part of the agency visit. The main purpose of follow up visits is to concentrate on development and management issues arising from implementation of the Action Plan.
- A series of training & information seminars arising out of any identified shared need or interest across a number of groups.

In addition to these direct services, the groups had access to a number of other resources:

- a listserv (a one to many email discussion group) to keep members informed,
- a website to share views and information,
- telephone support to meet individual consultancy needs.

The various activities are intended to encourage knowledge sharing and problem solving amongst a community of groups with similar development needs.

The model seeks to build sustainable improvements in groups' use of ICT and not to create a dependency on Circuit Rider interventions.

Sustainability is defined as the level of knowledge and understanding of their own ICT needs sufficient to enable groups to:

- plan effectively for the delivery and maintenance of systems to meet those needs
- use or manage the available resources strategically
- update plans over time as needs or circumstances change.

- "Consultancy and Deliverables" – followed service delivery and agency progress
- "Impact & Outcomes" – identified what difference the project had made to the participating groups.

Some of the information from evaluations has been presented in a summarised format, with figures and charts relating to all three different evaluation datasets.

A copy of the evaluation reports can be found at *http://www.lasa.org.uk/circuitriders/index.shtml*.

STARTING THE PROJECT

Lasa was well placed to run a Circuit Rider project, with 20 years of experience in voluntary sector ICT support, in addition to a wide range of other services. It is well known by most London agencies. This helped ensure participating groups trusted us as the service provider in an area of expertise (ICT) where they normally felt vulnerable and lacked confidence.

The project team comprised one four-day per week Circuit Rider and a two-day per week project manager, who also worked with groups providing consultancy and training. The project was able to utilise other Lasa teams e.g. a capacity building project or the AIMS database team, for additional information relevant to the sector.

"I trusted Lasa and the Circuit Rider not to have a vested interest, not to be selling us something. We had a large grant that needed to be spent quickly and the input from the Circuit Riders was invaluable".

"The consultant was able to imagine the obstacles we may face and helped us to solve them".

To support the team a Project Board was formed from representatives of the various advice networks, other ICT experts and a senior manager from Lasa. The Project Board had a number of distinct roles, and different members brought different skills.

Circuit Rider Skill Set

"The Perfect Circuit Rider?"

A Circuit Rider needs to have at least some of the following skills and qualities:

- flexible
- non patronising but able to communicate at appropriate level
- technically competent
- technological interest
- voluntary sector background/awareness
- financial awareness
- mentor/teacher/trainer
- cultural & political awareness
- don't have to know everything but know where to look!

The roles included:

- Detailed knowledge of groups participating in the project
- Experience of organisational capacity building work
- Experience of running a Circuit Rider project
- Project Management & corporate governance.

The Project Board met approximately every three months, slightly more frequently at the start of the project when their input was needed on selection and recruitment matters. Subsequent confusion over individual members roles and the type of input they were able to provide following the recruitment phase of the project meant the Project Board was not as useful as it could have been.

Ensure the Project Board have a clear remit, perhaps even job descriptions, to avoid conflicts of interest e.g. having project beneficiaries as board members.

Board members may need to be replaced over the life of the project as different skills or knowledge sets are needed at different phases.

Our first mistake? With so few staff the Lasa project team was vulnerable to sickness or loss of key personnel. However the project did have the benefit of potential backup from members of Lasa's Information Systems Team. Two years is also a short duration for project initiation and sustained development work with that many groups.

RECRUITMENT & SELECTION

Initially, up to 24 groups were to take part, drawn mainly from the Black Minority Ethnic & Refugee (BMER) advice sector, and all coming from the Greater London area. The groups were mainly members or affiliates of Advice^{UK} or MODA (Migrant Organisation Development Agency) but there were also some members of the Youth Access and Council for Voluntary Service networks. Advice^{UK} and MODA were given a quota of groups they could recommend from their membership. The majority of the groups were under 10 staff and had no dedicated ICT support workers.

Selection criteria

- Network membership
- Able to identify a need for ICT support and development
- Needed the size and capacity to join in
- Commitment from Management Committee and senior management
- Attendance at the project launch meeting
- Signed contractual undertaking with obligations on both sides outlined
- Groups had to identify a "Key Worker" who would be the main contact and conduit for all Circuit Rider related matters
- Be willing to agree to and implement an Action Plan as a result of the Healthcheck.

Out of the 26 organisations that applied, four were not selected. One was over committed in another project, one had no computers, and two came from networks that had filled their quota. The project started with 22 participating – one left during the course of the project, 3 organisations never started because of various internal issues.

Even with the selection and recruitment safeguards, including the briefing materials and presentations, it became apparent that several groups had not understood the extent of the commitment they were being asked to make. Groups who had not previously undertaken any organisational development activities with outside consultants had not appreciated the full extent of the time and staff resource commitments that would be required.

Participants should have sufficient internal resources to be able to cope with the complexity of their Action Plan. Initial selection procedures should ensure their plans match their organisational structure's ability to deliver.

Other groups were so focussed on gaining access to free ICT consultancy that they joined the project for this purpose without really "signing up" for the additional capacity building aspects of the project.

Projects often go wrong in the very early stages, but this doesn't become apparent until much later on.

Selecting agencies that are ready and able to take part in the project and who have accurately understood the purpose and design of the project is essential for later successful participation.

During this initial phase the majority of contacts between the Circuit Rider and the groups were with the key worker and/or manager. It became apparent later on in the project that if more time had been available it would have been useful to meet more staff and Management Committee members to explain the nature and purpose of the project. This could have helped counter misconceptions about the role of the Circuit Rider (i.e. they were not free technical support), as well as improving the commitment of staff and Management Committee members to the Action Plan proposed for their organisation.

The Management Committee and staff should be included in a further post-selection presentation by the Circuit Rider team. Such a presentation could be used to promote understanding and commitment to the project, confirm Healthcheck findings, validate Action Plan proposals and identify key factors for the successful implementation of the project.

DEVELOPING THE ACTION PLAN

Initial work

The project spanned a very short time scale (effectively only 18 months of service delivery) so it was important to get groups started as quickly as possible. Even so, groups' initial visits were staggered into three tranches spread over a six month period. The last of the groups to receive their Healthchecks still had twelve months of project time remaining in which to implement them.

The initial work with groups involved the Circuit Rider and the key worker completing an organisation ICT Healthcheck, (an overview of the current usage of ICT within the group), with a discussion about their future plans and aspirations.

Both the Healthcheck and the Action Plan that flowed from it should have been informed by the group's current business plan (where they had one), or in its absence by the overall aims and objectives of the organisation. This then formed the basis of the Action Plan and all subsequent development activity.

The process of developing the Action Plan was very important in the overall model. The Circuit Rider's role was not to tell groups what they needed, but rather to assist each group in identifying and evaluating the various options and develop plans that met their strategic needs.

Where some private sector, profit led IT consultancies would aim for on-going client relationships based on dependency, or might opt for complex IT solutions requiring on-going support, the Circuit Rider model often leads to different technical solutions being adopted. The Circuit Rider input into the development of the Action Plan may include challenging overly complex solutions or under ambitious targets.

Contract between Circuit Rider and Group

Lasa Circuit Rider Project Agreement

Project timeframe: January 2003 – July 2004

Below is an agreement that we would like your agency to sign. The purpose of this agreement is to outline the commitment that Lasa will make to your organisation and in turn the commitment that we expect from your organisation.

In our experience it is important to be clear at the outset about our relationship with an organisation. Our success in this work will depend on our ability to work jointly towards our agreed objectives and our commitment to this agreement.

If you are unsure about any of the details in this letter please contact Lasa so that we can discuss them.

Lasa commits to:

- initial site visit consisting of an IT Healthcheck, consultation on strategy and project plans;
- assistance with immediate IT problems;
- developing recommendations and Action Plans;
- providing periodic follow-up visits;
- running training sessions and IT co-ordinator group events;
- providing a Computanews subscription including Guides;
- running a telephone and email helpline, dedicated website and email list;
- informing the organisation if there are to be any changes to the support provided; and
- keeping to agreed appointments or arranging an alternative.

Your organisation commits to:

- involving itself fully in the project and engage with other participants;
- having a named contact person to work with Lasa;
- attending training sessions and events;
- reading all documentation from Lasa and responding where necessary;
- undertaking tasks agreed together with Lasa;
- participating fully in the project evaluation exercises;
- informing Lasa if it cannot meet any of the above; and
- keeping to agreed appointments or arranging an alternative.

Both Lasa and your organisation are committed to treating each other courteously and respecting each others experience within the context of our respective Equal Opportunities policies.

Lasa may decide to withdraw assistance from an agency that cannot meet the requirements outlined above. If your organisation is unhappy about any aspect of the service that Lasa provides you are entitled to make a complaint using our complaints procedure.

The Healthcheck covered the following areas:

1. General (the organisation's mission, staffing, funders, physical environment, plans likely to affect ICT)
2. Support and development needs (three main issues)
3. Computer use (what work computers are used for, recent developments, problems)
4. Computers in the organisation (inventory of ICT equipment and peripherals, network topology etc)
5. Software audit
6. Internet (access, service provider, costs, website)
7. Managing IT(policies and practice, training, support, finance).

Examples of Circuit Rider challenges to complex or expensive solutions:

Many groups would identify the need for new computers or would be led to believe that their need was served by buying a new computer. The Circuit Rider instead might suggest the purchase of additional memory, with an expenditure of £60 rather than £600, which even after fitting is still a more cost effective solution.

Some groups identified a need for an internet identity, which they felt should be relatively sophisticated in order for it to project the image of the organisation they desired. Groups sometimes needed to be persuaded away from expensive and complex web solutions that they might otherwise have adopted, by being made aware of the resource implications of creating and maintaining a web presence.

Case Study

Latin American Women's Rights Service – Wireless network installation

Latin American Women's Rights Service (LAWRS) is an organisation based in Central London which provides various advice services for Latin American women on welfare benefits, education, and employment.

At the Healthcheck, LAWRS staff identified various problems with their existing computer system:

- Computers and peer-to-peer network frustratingly slow;
- Insufficient knowledge of the network;
- Internet access slow and unreliable and not accessible from all PCs;
- No knowledge of IT or how to administer the IT network;
- No network maintenance contract;
- Only one email account;
- No computer in reception area; and
- Lack of a central shared electronic diary.

The existing network had been put in place some time ago using a small hub and loose cabling to five PCs with two further PCs used as standalones. One machine was identified as a "server" and was being used to store some of the shared files for the organisation. PCs were Pentium 3 and Celeron based with 64Mb RAM running Windows 98 and ME. Two PCs could access the Internet using a dial up account.

LAWRS had a grant of £1,700 to help them improve their IT. Lasa consulted with the staff at LAWRS and concluded that the network needed upgrading to:

- provide improvements in network speed and reliability;
- allow the remaining two machines to be connected;
- share broadband access to the Internet; and
- share printers and files.

LAWRS occupies one floor of an office block with minimal partitioning which was suitable for a wireless network installation. In addition, the budget meant that fixed cabling would have eaten up too much of the money available. As one of the machines could be moving in the future to the reception area the flexibility that wireless gives also pointed in that direction.

Lasa drew up a network requirements specification for a contractor to:

- Initially survey the office to determine the feasibility of a wireless network solution;
- If feasible, install a wireless ADSL modem / router /access point with firewall and wireless network cards in all PCs;
- Install extra 128Mb RAM memory on all PCs;
- Upgrade PC operating systems to Windows 2000;
- Install an additional hard drive to the "server" machine;
- Set up broadband Internet access and register lawrs.org.uk; and
- Set up email addresses for all staff.

A budget was drawn up which came over the amount which LAWRS had been granted but they agreed to fund the difference. It was agreed that the Circuit Rider project would carry out the RAM installation and operating system upgrades to help save money on labour.

The requirements specification was sent out to four companies from Lasa's list of network contractors. One company declined tendering suggesting that the only way forward for LAWRS was to replace all their existing hardware immediately which there was insufficient budget to do.

After looking at the remaining tenders, a contractor was chosen to carry out the installation. A suitable Internet Service Provider was selected and contacted to arrange for broadband to be installed. Lasa's Information Systems Team then spent a day at LAWRS upgrading memory, cleaning and defragmenting disks and installing Windows 2000 and service packs.

A week or so later the contractor installed the ADSL and wireless network. The network was accessible from all PCs, wireless connections were stable, all PCs had anti-virus installed and updated, and all drives cleaned. Software was installed to combat spyware and adware, every PC could print to at least one printer, all staff were given personal email addresses, and miscellaneous issues with Office installations were resolved.

LAWRS's network has settled down and the staff are pleased with their new email addresses and the ability to print documents without having to walk around with floppy disks and disturb their colleagues. This was achieved by partnership working between the Circuit Rider, Lasa's Information Systems Team and the contractor, using minimal resources – and without having to purchase any new PCs.

Examples of the items which groups had in their Action Plan

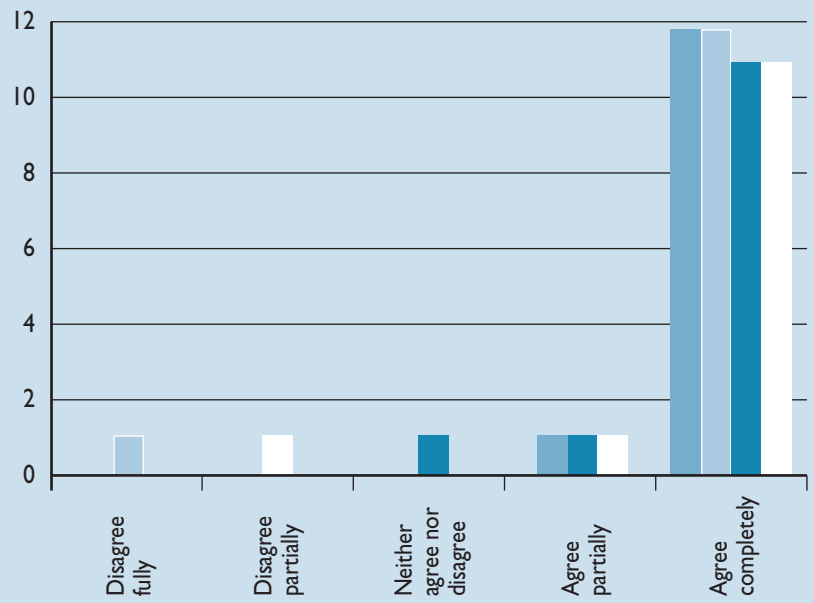
- Assistance with tendering for a client-server network installation (including evaluating quotes received from suppliers)
- Practical help with PC housekeeping and security
- Advice on website design and strategy
- Support writing an ICT funding application
- Installation of Broadband
- Policy development
- Training.

"The Circuit Rider was there when we interviewed the people about our new network. It was very useful. We got much better value because of his involvement".

"Itsy bitsy things on the Action Plan although they are quite small are worth having. You get a real sense of achievement and even small things can make a big difference, like sorting out the routing on our email."

The "getting started" phase of a Circuit Rider project is the most time consuming. Fitting in the initial Healthchecks, creating and agreeing the Action Plans needs to be done early so groups have enough time to implement the plan within the project timetable. However, rushing this phase, or not talking to all the right people could lead to problems later on.

Groups' evaluations of consultants' effectiveness



Circuit Rider effectiveness

The overwhelming response from groups indicated that they found working with the Circuit Rider consultant useful and confirmed that they trusted the ICT information, advice and recommendations provided because it emanated from a known and reliable voluntary sector source.

The Circuit Rider "has knowledge of the difficulties faced by voluntary organisations, i.e. small staff, limited IT skills, old and outdated machines. He advised us on the Data Protection Act which was good. Also he came down to my basic level of IT knowledge. As he is not selling, he is in a position to give objective advice".

Key:

- Understood your organisation
- Identified needs effectively
- Gave sufficient time/attention
- Had required knowledge-level

Extract from Action Plan

Action	Organisation *(named person)*	Lasa *(Circuit Rider)*	Date
Update anti-virus on all PCs on weekly basis	☑		Now!
Develop a policy and procedures to ensure that IT housekeeping tasks are carried out regularly	☑	☑	Ongoing to 22/1/04
Examine use of shared folders on the server and maximise use including training and advising staff on use	☑	☑	Follow up (7/8/03, 22/1/04)

Most useful aspect of working with the Circuit Rider consultant

Access to independent advice ___6

Practical support given _____4

Help structuring ideas _____4

Level of knowledge & expertise__3

Developing the ICT plan _____3

Specific knowledge/understanding of the VolCom Sector _____3

Too soon to say _____1

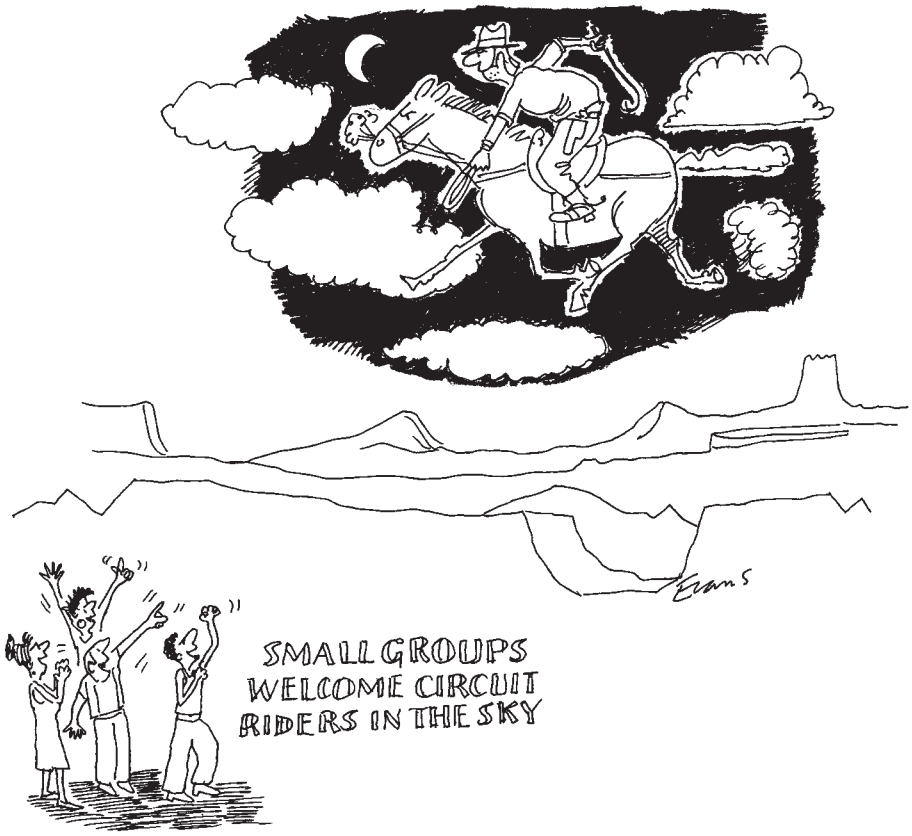
Other _____1

PROGRESSING THE ACTION PLAN

Following the Healthchecks and creation of the Action Plan, subsequent progress in delivering the Action Plan was in the hands of the groups themselves.

The size and structure of project members' organisations varied and this influenced how they implemented the plan within their group. The very small groups, with only two or three workers, often shared tasks and information relating to the Plan without difficulty. Larger groups faced more problems communicating the Plan to all interested parties. Key Workers could find themselves isolated from other staff. Regardless of size, groups reported difficulties progressing the plans due to pressure of time and changing organisational priorities outside of the project's control.

Management Committees had almost no input into the initial design of the Action Plans, and during the implementation phase were not actively involved in monitoring progress. In those agencies where they did express an interest, they were more concerned with fiscal oversight of the ICT budget than with the ICT strategy itself.



Once an Action Plan has been developed, larger agencies should be encouraged to instigate an "ICT team" or working group, to implement the proposals. The "team" should include the key worker, a manager and at least one other person. This will help ensure continuity of plans should the key worker leave, and provide a wider pool of people to undertake tasks arising out of the plan. This will help in the development of ideas and will give wider organisational perspectives on what is necessary and important.

Circuit Rider involvement

Throughout the implementation of the plan, the Circuit Rider made consultancy visits to provide assistance at critical moments or to provide general on going support. Frequently groups viewed these visits, which tended to coincide with important points in the delivery of Action Plan activities as important milestones. Several groups said the approach of a visit would prompt them into action and encourage them to make progress, which they otherwise would not have done.

When visiting groups the Circuit Rider model of intervention is designed to encourage groups to develop their skills and specifically tries to avoid the groups becoming dependent. To this end the Circuit Rider adopted a knowledge sharing approach when helping agencies with practical matters.

This did, however, lead to some confusion over the balance between the amount of technical hands-on support they could ask the Circuit Rider for and the strategic development support. This tension is inevitable, as the Circuit Rider will often teach staff how to "fix" things whilst also encouraging them to develop their own solutions.

By the end of their involvement with the project however, many key workers reported that working with the Circuit Rider had increased their confidence to deliver the Action Plan and to tackle basic technical ICT issues.

Project managing the "to do" list

The Action Plan comprises a "to do" list, setting out high level outcomes or requirements. Participants felt the list approach too easily disguised the relative weight and complexity of individual Action Plan items. Groups thought it would be more helpful to sub-divide larger tasks into their various elements, and to be clearer about how long actions might take. Many groups recognised the need to project manage their Action Plans but did not want the Circuit Rider to become more actively involved in driving their attainment of plan objectives. The groups' ownership of the plan effectively included their ability to make progress at the speed they found most suitable.

The Action Plan could be made more useful by ensuring that larger more complex elements are broken down into their constituent activities, that any priority activities are identified, and that groups are given guidance on how much time might be required to achieve particular goals.

Some groups viewed their Action Plan as a rigid, 'to do' list, that they needed to work through until all items were complete. Others saw the Action Plan as a more flexible tool, open to on-going review and revision as their organisation's circumstances changed. There is no 'right' approach and the circumstances of each group will determine the most appropriate usage. However, formalising a regular review and update of the Action Plan, will help ensure that ICT needs/strategy becomes part of the wider organisational planning agenda.

"Not sure how others have found it but as other work piled up here and pressures are great on time it has been frustrating to not spend more time on issues highlighted by this project".

Using the Action Plan as a catalyst for change

Managers and key workers used the Circuit Rider project to legitimise their existing ideas in the face of Management Committee uncertainty. Involvement in the Circuit Rider project acts as a catalyst for ICT change in organisations that have previously lacked an ICT champion.

Case Study

Waltham Forest MENCAP – Broadband and network installation

At the time of the Circuit Rider project Healthcheck in January 2003, Waltham Forest MENCAP had 6 standalone PCs of varying ages and levels of reliability along with a single dial up Internet connection.
They had already identified that their IT resources needed to be examined seriously and quickly because there were two important deadlines looming – three new staff were to be taken on and the management committee had said that money had to be spent before the end of the financial year in March.

Contact had already been made with a local telecoms supplier for a planned upgrade of the phone systems and they had made suggestions for wireless networking three crucial PCs so they could share a 500K broadband connection. Given the budget that WF MENCAP had this made sense in the short term, but as the Healthcheck also identified that Internet access and personal email addresses for all staff were desirable, a higher financial outlay now would result in lower costs over time.

So, after discussion with the telecoms specialist, a quote was obtained for a cabled solution which would be more cost effective and allow all PCs to be networked.

Working with the project contact at WF MENCAP, the Circuit Rider identified key items of expenditure which would enable them to:

- install a cabled peer-to-peer network;
- upgrade existing PCs with extra memory and network cards;
- buy some new PCs;
- standardise the Office software;
- purchase anti-virus software; and
- install broadband.

Budgets were put together for three options:

- Cabled peer-to-peer networking and Internet access for all PCs
- Cabled networking infrastructure but only 3 PCs having Internet access
- Wireless networking but only 3 PCs having Internet access.

Lasa also put together an accompanying briefing for the management committee (MC) explaining the advantages of the full, cabled solutions against the limited wireless network. The MC met to discuss it and the go ahead was given for the cabled solution, with a budget of around £9,000, with the proviso that the money was spent within 6 weeks before the end of March.

Using WF MENCAP's membership of NCVO (National Council for Voluntary Organisations) to full advantage, quotes for PCs and extended 3 year warranties at discounted prices, a hub and Office and anti-virus licenses were obtained. The telecoms supplier also helped out by providing a Cisco broadband router at no cost because it had been obtained for another client who then didn't need it. Coming in under budget, orders were placed and the work began. Lasa prepared the way for the network by helping to source memory and network cards and installing them. Two PCs were donated and these were upgraded and software installed. The cablers arrived and after a day or two of minor disruption the broadband connection was in and staff were happily emailing away.

By the start of April WF MENCAP's network was up and running. Although it wasn't all plain sailing various technical hitches were resolved with the help of the Circuit Rider.

Having the network meant that WF MENCAP were able to think about consolidating data. They also needed a solution to the back-up of their Quickbooks accounts, which was taking over 4 floppy disks to complete.
An external CD writer was purchased and shared folders were set up on the finance PC so that it would act as a file server. Questions over the security of data when using passwords are still ongoing, but now the system is being backed up regularly and anti-virus has been set to update on a weekly basis.

So the work isn't over yet – with the number of PCs that WF MENCAP now has they are stretching a peer-to-peer network to the limit, so their next target, when funds allow, is to install a server.

Additional information resources

In addition to the Circuit Rider consultancy visits, groups had access to a range of support services. These comprised an email listserv to facilitate information exchange, web based information materials, a telephone help line, training events and seminars.

The training and seminar events identified common information needs expressed across a number of groups and they were well attended throughout the project. Involvement in these events provided groups with both valuable information and, equally importantly, an opportunity to meet and socialise with other project members. This helped facilitate the creation of a wider community of Circuit Rider groups who were then better able to share ideas and support each other via the shared email lists and by direct contact.

Training/seminar topics

- ICT Strategy
- Security
- Troubleshooting
- Networks
- Websites
- Acceptable Use Policies
- Using ICT Volunteers
- File management
- Open Source software
- Support contracts
- AIMS Database demonstration
- Multikulti presentation
- AIMS Database training
- Microsoft Outlook Training.

Superhighways Partnership also kindly offered free or low cost training to project participants on ICT Housekeeping and various Microsoft Office applications.

Case Study

Migrants Resource Centre – Outlook training

Shortly after becoming networked and joining the Lasa Circuit Rider project, the Migrants Resource Centre conducted an IT skills analysis of staff members and volunteers to assess levels of IT knowledge. Staff and volunteers rated their skills and knowledge from 0 to 3, with 0 meaning 'no skills at all' and 3 meaning 'very skilled'. The questionnaires covered 5 main areas including general Windows skills, hardware and peripherals, Word, Outlook/email, and Internet and online activities.

When the questionnaires were returned it was apparent that, although most individual's basic skills were adequate, Outlook was only used at its most basic level. The majority of staff members used Outlook to send and receive emails only and were unaware or unskilled in the use of any of its other functions. The Circuit Rider provided a half day training session covering email, calendars, contacts, journal, tasks, notes, shortcuts, folders, and other people's calendars.

The training went well although it was difficult to ensure that all staff members were present. Most staff members were surprised at how many applications Outlook had and what they could be used for. All staff members had basic IT skills so it wasn't difficult for them to pick up the broader workings of Outlook. Most staff felt that the calendar and task applications would be most useful, if used properly, and that it would also be useful to see other staff members' calendars electronically. This will enable meetings and other training sessions to be co-ordinated more efficiently and hopefully cut down on absenteeism because of prior arrangements.

However, there have been some problems with the implementation of both individual and service area calendars set up subsequent to the training session. Most staff members have two diaries, one for work and one for personal appointments. It is difficult to ensure both diaries are kept up to date, so to add yet another seems daunting. In addition, if staff decide to get rid of other diaries and use the Outlook calendar alone then it is worth remembering that it isn't portable. After initially using the diaries to a limited extent it seems most people have gone back to the paper based option, and unless staff use the electronic version consistently then the original objectives cannot be met.

Nevertheless, although the initial incentive to have Outlook training was to make staff timetables, meetings and appointments more co-ordinated, other aspects of the training have been extremely helpful. Staff now know how to keep their inbox tidy, create folders to keep important information, and add addresses to their contact lists. A list of objectives for the day can be input into the Task application and reminder notes can be placed on the desktop. Sending and receiving emails has become more sophisticated, automatic 'out of the office' messages are now being used and staff have a much better understanding of the tool bar in general. Overall the training has proved both useful and effective. It was definitely worth taking the time to ensure staff members attended, although no training can be considered a complete success unless the trainees take the opportunity to put it into everyday practice.

Sorcha Daly
Office Manager
Migrants Resource Centre

"The possibility to network with other organisations has been very useful".

"After being involved with the project and going on training I realise now that organisations cannot function without proper IT".

The Circuit Rider team made considerable amounts of information available to the project members through the Circuit Rider project and Lasa Knowledgebase websites and via email information digests. The team was also available at all times to answer email or telephone enquiries. Groups greatly appreciated the ease of access via telephone or email to the Circuit Rider project, citing this as a major benefit over other ICT support services they had experienced. The ready availability of the Circuit Rider team gave groups greater confidence to progress issues, knowing they could "double check" their thinking at any time.

"The Circuit Rider project has given me the confidence to tackle IT problems and to share this knowledge with staff. As a team we are much more aware of our computer systems and how to keep them running".

Groups' use of the other information services was less successful. Eighty percent of the listserv communications were initiated by the project team. During the evaluation groups showed little awareness of the Circuit Rider project and Knowledgebase web resources, and they complained of "information overload" when discussing the two or three news and information items sent by the project team each month.

Groups would benefit from having more support on how to access and make effective use of the various electronic information resources available. The skills and confidence required to use various information resources should be assessed as part of the original Healthcheck and should form part of every Action Plan if it is found to be missing or inadequate. An introductory seminar should also help address this issue and enable participants to meet face to face. This may make groups feel more confident about using resources, such as communicating with each other via the listserv.

Groups demonstrated a considerable need for additional support when accessing the information offered from the web and email services. This was both a technical need for training and support on how to use those services, as well as the need for information to be specifically targeted to their level of understanding. Given the time restraints many groups worked under, and their lack of familiarity with ICT specific topics, any overly complex or superfluous information easily deterred them from developing their use of materials.

As a result, over the course of the project, the Circuit Rider project team began sending project groups a monthly "digest" of project information supplemented by one-off emails on important issues (e.g. serious virus alerts, short notice training dates etc).

The listserv and other materials should be reviewed to ensure they are in a digestible and accessible format. Information could be differentiated into various types, e.g. factsheets, news items, policies etc. Summary extracts could be made of longer pieces.

Knowledge management

How groups manage the wide variety of information and strategic skills imparted during the project was felt to be an important determinant of the longer term success of the Circuit Rider project. Groups need some mechanism by which, once the project has finished, they "institutionalise" the knowledge gained during the consultancy to ensure its continued use.

Because the participating groups ranged in size and organisational structure from a two person project to a twenty person, multiple team structured hierarchy, how the information was "institutionalised" varied considerably. Smaller groups tended to hold the information informally, (policies and procedures were "known"), larger groups said they intended to write them down. All groups found it difficult to find the time to put this information into formally agreed and shared procedures. Therefore much of the knowledge gained throughout the project was at risk of being lost or dissipated by key staff moving to another job.

Barriers & aids to success

Three quarters of the participating groups made significant progress in implementing their Action Plans which ensured their organisations were much better placed to deliver the services required by their clients. Some of these groups went even further and demonstrated that their awareness of ICT strategic planning was now integrated into their operations management.

However, the picture that emerged from the evaluation, regarding how these successes were achieved, was complex and sometimes contradictory. What might have been a barrier to successful implementation for one organisation posed no problems when experienced by another group.

How successfully groups managed to implement their Action Plan and achieve their objectives was influenced by a number of factors.

The factors that appeared to be associated with a less successful experience for project participants were:

- **Insufficient time or resources:**
  Some groups experienced funding crises during the project and had to concentrate on that as their priority activity. Others felt they were unable to allocate the amount of time they would have wished to implementing the Action Plan as other work objectives were deemed more pressing and immediate.
- **Single issue sole purpose:**
  The Circuit Rider's identified four groups, who having enrolled with the project and agreed to the overall framework and model of intervention subsequently failed to engage with the process. These groups had a single dominating ICT issue they wished resolved, and once this sole purpose was achieved, were not interested in further involvement or developing their strategic skills relating to the wider use of ICT in their organisations.
- **Loss of key worker:**
  Where the organisation had only one person liaising with the Circuit Rider project and that person left, groups were either unable to manage the transition to another worker or the resulting break in continuity was too disruptive to continue on the project.

The factors that appeared to be associated with a successful experience for project participants were:

- **Shadow key worker:**
  Having a shadow key worker who is informed about the Action Plan and takes joint responsibility for elements of the implementation proved useful to several groups. Not only did it assist groups where the key worker left, but it also helped provide impetus to implement the Action Plan, as often tasks were shared and therefore more achievable.
- **Working with appropriately placed decision makers:**
  An important success factor for groups was ensuring that someone involved closely with the Circuit Rider project, or the person implementing the Action Plan, was a suitably placed decision maker within their organisation. This was important for two reasons. Firstly it ensured they were able to progress agreed actions arising out of the Action Plan, e.g. purchasing equipment etc, which helped minimise delays and impediments to progressing the plan. Secondly, it ensured that they were also well placed to know of other organisational objectives and planning decisions, and how these might change and what impact that would have on the Action Plan.

  Where the key worker was not appropriately placed, the strategic decision making around the ICT elements was removed from other operational planning. The plan could become out of date and there was insufficient involvement or commitment from the real decision makers.
- **Effective communications:**
  Effective communication within the organisation concerning the original design and subsequent implementation of the Action Plan was an important factor associated with success.

  Groups identified the input and involvement from the staff team as contributing to the successful implementation of the Action Plan. One group talked about the "goodwill" that was felt towards the Circuit Rider project by staff members who as a consequence felt less threatened of the change process implicit in the introduction of new ICT infrastructure.

  In the absence of good lines of communication, groups identified problems where Action Plan priorities were challenged and blocked by management committees some time after the Action Plan had been written. Another problem occurred when a management team developed parallel plans without informing the Circuit Rider key worker.

OPERATIONAL IMPACT

The respondents were asked to consider what difference their involvement with the Circuit Rider project and implementation of their Action Plan had made to both the day to day running of their agency and to the service clients received.

Impact in the office

One of the most important changes related to the impact that a new network had on their ability to use their office space more productively. The use of old, poorly laid out properties as offices is very typical for the sector, and respondents reported major improvements in their ability to utilise the space, improved communication, easier shared access to information, and an enhanced ability to include volunteers in their operations.

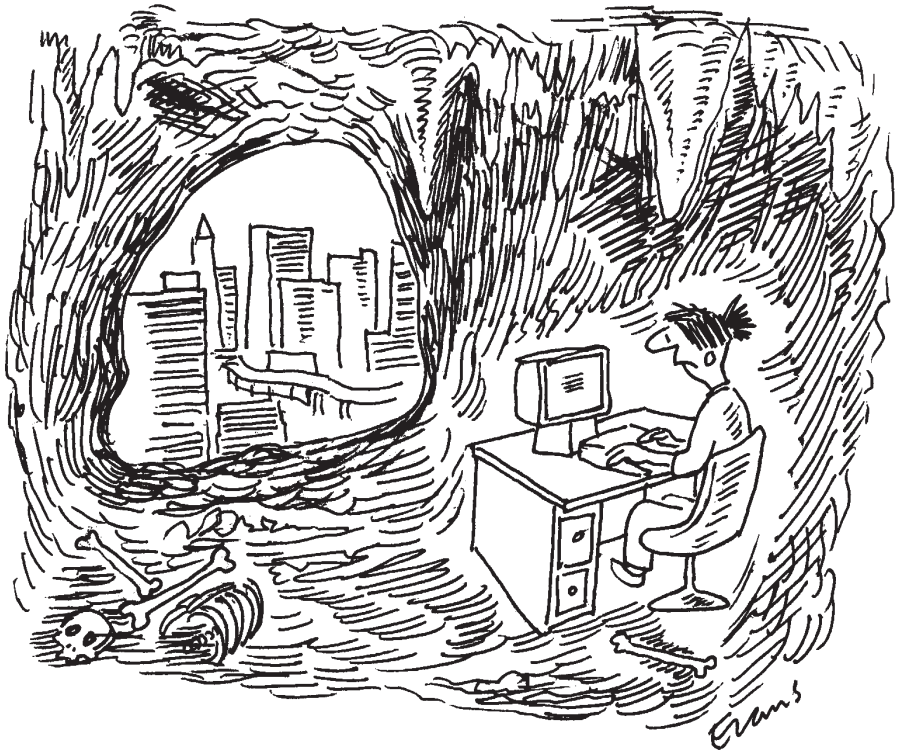
More efficient ICT infrastructure

For several of the medium sized groups (6–12 full-time equivalent staff plus volunteers), the introduction of a new network had radically changed the way they worked and communicated both across teams and with volunteers. For the first time these groups were experiencing working in a networked office environment with email and Internet capabilities.

As one respondent put it, "We had previously used our computer as a typewriter. Now we understand its potential to communicate with other groups and our funder".

Greater involvement of volunteers

Groups identified volunteers benefiting from access to the new ICT infrastructure. For some it helped ensure the more productive use of the volunteers time, (i.e. not just paid staff having access to a computer) as well as providing a means of more effectively communicating with volunteers who only spent a short time in the agency each week (e.g. through email messages).



Others felt that volunteers benefited by improving their ICT skills whilst volunteering, helping them to gain additional work based experience when looking for work.

Consideration should be given to the impact on groups once they have successfully achieved their original Action Plan objectives and what new support needs this might expose, e.g. networked offices and access to the Internet leads to greater file management and systems navigation skills from users.

Impact on clients

The impact on clients or service users was less obvious and less direct. Groups identified that the increased access to information afforded them by the Internet had improved client services. Others said that they were dealing with client cases more efficiently and therefore more speedily. One group said that the new network allowed them to use more volunteers and this increased client access to services.

Despite respondents identifying in general terms improvements in their access to information and speed of response to clients, the linkage between implementing the Action Plan and any more direct impact on the client is weak and tangential.

SUSTAINABILITY

An important question for the evaluation is the assessment of whether the involvement with the Circuit Rider project has left a sustainable improvement in the groups ability to manage their ICT. A series of questions were used to determine to what extent groups had adopted a strategic approach to managing their ICT during the project. These included questions relating to: their ICT financial awareness, how many policies and procedures were in place, whether they had identified an on-going source of ICT technical support, and whether they were developing any future ICT plans.

Changes in ICT strategic awareness

All groups completing the programme demonstrated an increased awareness of ICT planning and management issues. However, the range of this improved understanding and how firmly embedded it was in the organisation varied.

Around a third of groups appear to have fully integrated their new ICT awareness into the overall organisational planning processes. This means that ICT needs assessments, ICT financial budgeting and future support and development plans were being discussed alongside all other organisational development issues.

A third of groups demonstrated a significant improvement in their awareness of ICT planning issues, identifying increased financial awareness and changing operational practices as examples of this. These groups talked about an increased level of confidence when discussing ICT issues that had previously been missing, and as a consequence meant ICT had been absent from any planning discussion. Over time they may well use this increased confidence to ensure ICT planning becomes more central to their operational decision making.

The remaining third of groups although able to demonstrate awareness of the importance of ICT to the delivery of their service, were far less strategic in their approach to planning and future development. These groups saw the completion of the original Action Plan as their main goal. They tended to be smaller, and because of their more precarious funding position were less interested in longer term planning.

Action Plans predominantly based on the acquisition of new ICT infrastructure or highly dependent on the receipt of funding should be balanced by additional goals not funding dependent. Identifying how to get the most out of existing resources by implementing small and inexpensive changes can significantly improve the effectiveness of available resources.

"The project has encouraged us to face the problems and try to find out different solutions".

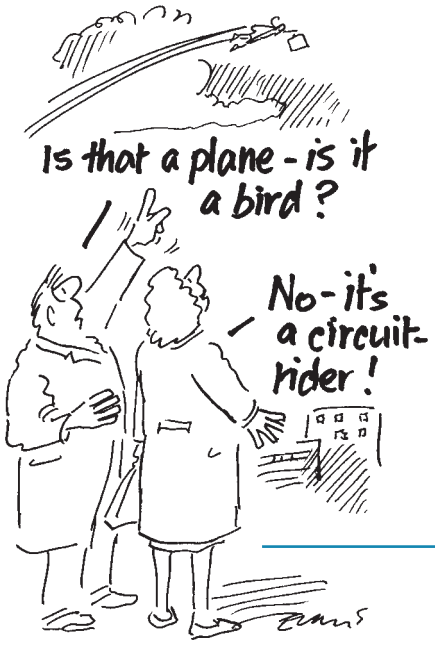
CONCLUSION

How sustainable the improvements in the ability of each agency to manage their ICT will only be known some months or even years after the Circuit Rider project has finished. Some groups viewed their Action Plan as a fixed document which detailed what they needed to do to meet their current ambitions. For these groups achieving their Action Plan may well be sufficient to provide them with a stable platform from which to develop their services for a number of years to come. Eventually they will have to make another Action Plan as their ICT lags behind their operational requirements. Although this "stop go" cycle is not ideal, the Circuit Rider project has helped them secure their current position and so improve their service delivery as a consequence.

Others saw the Action Plan as the start of a more dynamic process requiring on-going review and amendment in light of changing circumstances and organisational aims. These agencies had put in place policies and procedures for reviewing ICT regularly, had improved their ability to monitor and report on usage and need and had placed ICT decision making at the appropriate level within their organisation.

Regardless of which of the above two scenarios had been adopted, the vast majority of Circuit Rider project participants have moved a great distance in their awareness and ability to manage and use ICT. The differences in size, structure and capacity of participating project member organisations demonstrated that no single factor could be identified as being associated with "successful implementation". Very small projects, groups losing a key worker, groups with access to funding and others with no additional funding all made significant progress.

The common factor between all these groups was the model of intervention operated by the Circuit Rider which ensured that groups participated in the learning and decision making process, and were encouraged to take ownership of the decisions they made relating to their organisations ICT infrastructure, and were supported throughout by accessible and independent consultancy.



APPENDIX

Agencies that participated in the project:

Carila – Latin American Welfare Group – *www.casweb.org/carila/*

DIAL Waltham Forest

Ealing Racial Equality Council

Kalayaan

Kurdish Cultural Centre – *www.kcclondon.org/*

Latin American Disabled Peoples' Project

Latin American Women's Rights Service – *www.lawrs.org.uk*

Merton Oasis – *www.mertonoasis.com*

Migrants Resource Centre

Migrant Organisation Development Agency – MODA – *www.moda.org.uk*

Off Centre – *www.offcentre.org.uk*

Shaping Our Lives – *www.shapingourlives.org.uk*

Sierra Leone Women's Forum – *www.slwf.org.uk*

Sutton Racial Equality Council – *www.suttonrec.org.uk*

Tamil Welfare Association – *www.twan.org.uk*

Turkish Cypriot Women's Project – *www.tcwp.org.uk*

Voluntary Action Waltham Forest – *www.voluntaryaction-wf.org.uk*

Waltham Forest MENCAP – *www.wfmencap.org.uk*

Waltham Forest Somali Welfare & Cultural Centre

Lasa Information Systems Team Services

www.lasa.org.uk/it

- **IT HEALTHCHECK – www.lasa.org.uk/it/healthcheck.shtml**

  The Healthcheck is an independent assessment of how IT is helping you achieve your organisation's goals, or getting in the way. Each Healthcheck includes a consultation on your agency's work, your plans for future development and how IT can help you realise them. We provide a full report to help you develop your strategy including technical options, how much you should spend, and where you can get good value technical support.
  For more details call us on **020 7377 1226**, *or email us at* **ist@lasa.org.uk**.

- **CONSULTANCY AND PROJECT MANAGEMENT SERVICES – www.lasa.org.uk/it/consultancy.shtml**

  Lasa IST (Information Systems Team) provides bespoke consultancy services around IT strategy, e-services development, procurement, organisational infrastructure and IT management issues. For example, if you need advice and support to make your IT strategy a reality or to commission bespoke work such as database or website development, Lasa IST can allocate you a team member who will provide you with help including:
  - drawing up a strategy
  - advising on funding bids
  - requesting and scrutinising quotations
  - liaising with suppliers and developers on your behalf
  - project definition and costings for funding applications
  - technical specification

  For more details call us on **020 7377 1226**, *or email us at* **ist@lasa.org.uk**.

- **IT HELPLINE**

  If you need access to high quality, one to one ICT advice call NCVO's helpdesk free on **0800 2798 798**. This service is provided in partnership with Lasa and supported by Poptel.
  For further information about NCVO please contact their helpdesk or website at **www.ncvo-vol.org.uk**. *London voluntary agencies can phone our ALG funded helpline on* **020 7377 1226** *to speak to a member of the Lasa Information Systems Team.*

- **KNOWLEDGEBASE – www.lasa.org.uk/knowledgebase**

  Our award-winning comprehensive database of IT information and advice online.
  The Lasa IT knowledgebase provides expert advice on IT queries and IT management issues. Written in clear, plain English by the voluntary sector for the voluntary sector, the Lasa knowledgebase provides information on Buying IT, Databases, Equality issues, the Internet, Managing IT, Project Management, Software, and Troubleshooting resources.

- **COMPUTANEWS – www.lasa.org.uk/computanews**

  Our magazine **Computanews** provides clear information on the use of information technology for advice and information providers. **Computanews** is full of informative and entertaining articles including:
  - The latest IT developments in the advice world
  - Choosing and setting-up a database
  - Managing IT
  - The internet, world wide web and email, IT training, new software and much more.

- **CIRCUIT RIDERS – www.lasa.org.uk/circuitriders**

  Lasa supports the development of a movement of Circuit Riders – mobile IT support workers. A Circuit Rider supports a caseload of organisations, each too small to have their own IT staff. Circuit Riders are part of a movement through which they can support each other, and work with funders, networks and policy makers to ensure the voluntary sector is making the best use of IT. We have set up a Circuit Rider discussion forum, are involved in organising meetings of Circuit Riders around the UK and the first national Circuit Rider conference in September 2004.
  For more details see our website at **www.lasa.org.uk/circuitriders** *or phone* **020 7377 1226**.

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