

# How to cost and fund ICT

**Marc Osten and Beth Kanter**  
Summit Collaborative

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**Summit Collaborative** provides VCOs and foundations with strategic ICT planning, evaluation and fundraising support. You can learn more at [www.summitcollaborative.com](http://www.summitcollaborative.com).

## About this publication

This publication is one of the ICT Hub's range of resources to help VCOs take advantage of ICT:

**The ICT Hub** is a group of voluntary sector organisations that have come together to plan and deliver a co-ordinated framework of ICT guidance, good practice, advice and support for voluntary and community organisations that is accessible at a local level. The Hub is a partnership of 28 organisations, with a steering group that includes AbilityNet, IT 4 Communities, the London Advice Services Alliance (LASA), the National Association for Voluntary and Community Action (NAVCA) and the National Council for Voluntary Organisations (NCVO).





# Glossary



**Accidental techie** – Non-specialist staff member or volunteer responsible for an organisation's ICT needs.

**Capacity** – Number of staff and volunteers, skills and experience, time available and funds to invest in ICT initiatives.

**Case** – The detailed reasons, argument and rationale for your project. This 'justifies' the project to stakeholders, supporters and potential funders.

**Client** – someone your organisation helps or who uses your services.

**Consultant** – an expert with a specific skill who helps you with a project/activity

**Human cost of ICT** – The investment in time that staff and/or others have to spend to make ICT decisions, and to implement and support initiatives.

**ICT** – Information and communications technology or technologies

**ICT initiative** – An ICT-related project, or use of an ICT strategy such as revamping ICT infrastructure, technology training for staff or use of ICT, to improve programme or organisational delivery.

**ICT strategies** – The plans that VCOs draw up to meet certain ICT objectives, such as to improve the speed of advocacy actions, to build a stronger membership base, or to improve relations with donors.

**Listserv** – a system set up so that any email sent to one central email address is automatically sent to anyone who has signed up (subscribed) to receive emails from that address. Replies to the email are also sent to all subscribers. Also called 'discussion groups'.

**Personal digital assistant (PDA's)** – for example, "Palm Pilots." A handheld device that combines computing, telephone/fax, and networking features. A typical PDA can function as a cellular phone, fax sender, and personal organizer. Many PDAs incorporate handwriting and/or voice recognition features. PDAs also are called palm pilots, handheld computers, and pocket computers.

**Stakeholders** – Staff, trustees, volunteers, clients, partner organisations, members, funders and/or anyone else with a stake or interest in the organisation's success.

**Standardisation** – the same software set up either identically or in a similar way on all machines in the same organisation.

**Supplier** – A person (or an organisation) who supplies products or services (either with or without payment).

**Total benefits of ICT** – The assemblage of all benefits related to ICT, such as improved efficiency, service delivery, fundraising, collaboration, communication, knowledge building and public relations. Also known as total value of ownership (TVO).

**Total cost of ICT ownership** – The compilation of all costs related to ICT, including infrastructure-type expenses as well as the human-related costs of ICT decision-making and implementation.

**VCO** – voluntary and community organisation

**VCS** – voluntary and community sector





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# Foreword

Datek Solutions are proud to sponsor this important publication. We recognise that in an innovative and dynamic sector like the voluntary and community sector, ICT (Information Communication Technology) is at the heart of everything we do. Harnessed correctly, ICT has the potential to transform the way we work and enable you to support your beneficiaries, better.

We pride ourselves on working closely with voluntary and community organisations, like yours, to understand your needs. We realise how important it is for you to be informed and empowered when it comes to understanding and making decisions about ICT. *How to Cost and Fund ICT* is written with just that in mind. This step-by-step guide enables you to identify how ICT will help you work towards your mission, and then walks you through the key stages of costing and funding your organisation's ICT.

We hope you will enjoy this guide and we look forward to continuing to work and support you and the sector in achieving your goals.



**Darren Buckett**

Head of Technical Sales



[www.dateksolutions.com](http://www.dateksolutions.com)

# Why is this Guide needed?

Effective use of ICT allows organisations to operate more efficiently and underpins their long term sustainability. ICT can allow organisations to provide new and innovative services and enable them to reach groups they have not served in the past. For this to happen however voluntary and community organisations need to be able to understand how to cost and fund their ICT and be successful in securing funding.

This book aims to help voluntary and community organisations understand how to cost and fund ICT thus enabling them to explain these costs and benefits more successfully to funders. By finding out what an organisation needs to cost, in the first instance, they will find it easier to incorporate these costs into funding bids and thus be successful in securing funding.

The relationship between funders and voluntary and community organisations (VCOs) with regards to funding ICT, needs to be improved to ensure that the total costs of ownership of ICT are fully funded. This book will enable frontline groups to start this dialogue with confidence and to improve their skills in costing and funding ICT.

One of the ICT Hub's aims is that frontline organisations and funders will share a common awareness of the costs and benefits of ICT enabling them to make informed choices when either sourcing funding or being funded. This guide will walk you through some straightforward steps to enable a small organisation like yourself to feel like you can make more informed decisions about your ICT.

The book is made up of seven parts.

**Part One** will talk you through how to use the guide.

**Parts Two to Six** are a workbook. This workbook will enable you to ask the right questions, locate the right answers for your organisation and therefore as a result take the right actions to costing and funding ICT. Whatever type or size of organisation you are, the answers and recommendations in this guide have been categorised to meet your needs and be more relevant for you.

**Part Seven** advises organisations on how to prepare a successful bid.

This book has been developed for individuals within an organisation that find themselves with a responsibility for making decisions about their ICT even if they have little or no ICT experience. We hope you will find this book useful as you start on your journey to help your organisation realise the benefits of ICT.

by **Esther Gillespie**  
Development Officer  
ICT Hub

# Introduction

***“This technology stuff gets so frustrating. A supplier tells me to do this, a management committee member tells me to do that, admin staff want us to use more technology, and the staff on the ‘front line’ working with our clients want more money to deliver hands-on services. We spend too much on technology for too little reward, and funders tell us they can’t fund technology. I’m constantly faced with new technology issues and I don’t know how to take control of this situation!”***

Chief Executive, medium-sized VCO

Making effective use of information and communications technology (ICT) is one of the highest priorities for voluntary and community organisations (VCOs). Applied strategically and appropriately, ICT can enable organisations to increase the impact of their programmes and the efficiency of administrative operations.

## How this guide can help you

Choosing ICT initiatives in which to invest human and financial resources can be confusing and difficult. As a result, many VCOs end up making their ICT decisions based solely on the cost of the hardware (equipment such as computers, printers) and software (programs that produce spreadsheets, word processing, databases, and so on), at the expense of a more strategic, mission-based approach.

This guide will:

- walk you through simple ways to determine what ICT strategies, ideas and projects are most beneficial to your organisation
- help you make smart hardware and software choices that will improve the efficiency of your projects and your organisation
- help you identify what you need to invest (time, money, resources) when implementing, and sustaining your use of ICT
- offer you techniques to develop a successful funding strategy (and get the money).

## How to use this guide

A big challenge facing many VCOs is finding the time to deal with ICT issues. Don’t let this guide be another drain on your time. To get the most out of the guide, start by familiarising yourself with the tips, tools and techniques offered. Then, decide which worksheets and checklists will help you. You will find case studies and pointers to additional resources as you move through the guide.

You can use the icons in the guide to help you navigate, so you can quickly find the things you need most.



Stop



Things to do



Things not to do



Case Study



Resource

# Introduction

## Is this guide for you?

In the past, VCO ICT decisions were often the responsibility of consultants, suppliers or members of staff (and volunteers) with strong technical skills. This often led to decisions being driven by an interest in, and desire for, the tools themselves – as opposed to by the real needs, capacity and priorities of the organisation.

In recent years, things have changed. Today, many VCOs have a staff member or volunteer who is responsible for fixing, managing and/or overseeing the organisation's ICT needs – affectionately referred to as 'accidental techies'. This guide is primarily a resource for those who fall into this category. However, it is also aimed at managers and decision makers to help them make decisions based on the organisation's strategic priorities and needs and not the ICT tools themselves.

## Principles for effective use of ICT

ICT initiatives stand a far greater chance of being implemented successfully when attention is paid to a few simple rules. We have summarised these rules into the three principles shown in Figure 1.



### Principle 1: Respect the organisational culture

VCOs are different from other organisations in the ways they go about achieving their mission and carrying out their day-to-day work. This has an impact on the ICT tools and strategies they choose, and how they are implemented. Some VCOs are very hierarchical while others are less so. Some VCOs emphasise collaboration while others value a 'go it alone' mentality. Regardless of the specifics, make sure that the way you use ICT supports these values. Ask yourself:

- Who are we?
- What is our organisational culture?
- How might this affect the way we use ICT?





## **Principle 2: Align ICT activities with your organisational strategies**

Every VCO uses one or several specific strategies to attain its mission. Examples might include: raising public awareness, supporting individuals, direct action, organising forums, advocacy, providing support services to other organisations, building coalitions and media outreach.

When incorporating ICT into your current mix of strategies, we advise you to think through how these will, or will not, align with your current approach. Take for example, a website improvement initiative:

- An organisation focused on educating the public (for instance about a health issue) might look at ways to improve the content of its website, to make it easy to understand.
- Another VCO that uses advocacy as its central strategy might focus on providing tools online, to help its members generate pressure on public officials (e.g. forums and direct email/fax to MPs). It might also want to improve the way it collects and utilises data, through ICT database tools.
- A VCO that provides a direct service to clients might spend its resources on better tools to track clients' progress over time (e.g. outcome management for homeless persons).
- A VCO that builds partnerships as a core strategy might invest in database tools that enable members to post and share information online (e.g. shared document store, shared contacts/relationship management systems).
- Finally, an organisation that holds a number of forums may incorporate the use of web-based registration.

This is not to say that ICT tools should always be in direct synch with your existing strategies. In fact, ICT tools can often help you to be creative (to do better things), and to expand your mix of approaches. What we do emphasise, however, is that you need to be explicit about your mission and strategies and look at how ICT tools can support you in achieving that mission.

## **Principle 3: Work within your organisational capacity**

All VCOs have a limited capacity that they can invest in their work. This capacity includes:

- the number of staff and volunteers, and their skills and experience
- the time available for planning, implementing and supporting ICT
- the funds available
- the existing infrastructure.

Regardless of the type of capacity, when it comes to ICT initiatives, VCOs must look for ways to prioritise. This could mean spending a few extra pounds to buy a new computer that will last longer and ultimately cost less. If you are short staffed, it could mean you decide to hold off on the launch of your new email newsletter until you know you have the staff time or a volunteer who can respond to incoming queries. If you know you won't have the funds to invest in advanced software training for staff, it could mean deciding to buy a less complicated software package with limited functionality.

# Introduction

## Summing Up

- Making effective use of information and communications technology (ICT) is one of the highest priorities for voluntary and community organisations (VCOs) but it's difficult to find the time.
- ICT initiatives stand a far greater chance of being implemented successfully when attention is paid to a few simple rules.
- Respect the organisational culture – who are you, how does your organisation work and what is its purpose?
- Align ICT activities with your organisational strategies – what are you trying to do as an organisation and how can ICT help you do things better or do better things?
- Work within your organisational capacity – don't bite off more than you can chew (or sustain)

In the next chapter, we'll look at what you need and why – how does it all fit...

What do you need and why?

What will be the total cost?

How can you fund your effort?

*“I know we need to use technology (ICT). I’m aware that others use their technology to improve their programmes. That all makes sense to me but I have no idea where to get started deciding what to do. I’m not an expert and though I can obviously look at what others have done, I’m not sure how to figure out what is most important. We just don’t have a lot of money or time.”*

Chief Officer, small charity

Many VCOs complain that ICT decision making can be overwhelming and frustrating. In this first section of the guide, we offer you some guidelines and suggestions to address this challenge. By asking yourselves the right questions first, you will be better equipped to make informed decisions about what tools and ICT strategies you might invest in.

All sorts of things might motivate you to look at improving your use of ICT. You might have heard about a VCO doing something with ICT that interests you. It could be that your organisation is already doing a good job integrating ICT and you want to continue to build your capacity using ICT, or maybe you are just getting started with ICT and are not sure what you need or the right questions to ask.

Whatever path you are on, you will consistently and continually be faced with the need to prioritise your ICT decisions.

Your organisation’s ICT needs will vary depending on your budget, your capacity and your resources. As you approach these guidelines, be very careful: when it comes to ICT for voluntary organisations, one size does not fit all. Every VCO is different, and so the ICT guidelines we offer should be adapted to your specific needs.

We suggest you use these guidelines to begin accurately answering the question “What is it that we need, and why?”

## ICT guidelines to get you started

### Putting ICT guidelines to good use

- 1 Use the guidelines as a jumping off point to decide what your ICT options and needs are.
- 2 Ask yourself, “Is this guideline appropriate for our size organisation? If so, why? If not, why not?”
- 3 Ask yourself, “Is this guideline appropriate for our type of organisation? If so, why? If not, why not?”



# Knowing what you need, and why

## ICT guideline no-nos

- 1 Don't decide to take on an ICT initiative just because it comes up in this guide as a common example.
- 2 Don't buy software or hardware just because a supplier tells you it's the right thing to do.
- 3 Don't put up a website just because a funder offers you £5000 to do so.
- 4 Don't feel that your organisation has to meet all the guidelines shared in this part of the guide.



The two tables listed below list guidelines based on your organisation's size and capacity, and on your mission and strategies.

**Table 1: Sample ICT guidelines, by size of organisation**

VERY SMALL ORGANISATION*	SMALL ORGANISATION**	MEDIUM-TO-LARGE ORGANISATION***
<b>Being online</b>		
<p>For a very small organisation an appropriate internet access guideline may be that volunteers can use their home-based internet connections to get work done.</p> <p>For a similarly-sized organisation with volunteers who travel a lot, the appropriate guideline may be for each volunteer to have web-based email access.</p>	<p>Same as for a very small organisation.</p>	<p>For a medium-sized environmental organisation, the appropriate internet access guideline may be for all staff to have high-speed access at the workplace.</p> <p>A medium-sized organisation working with disabled people in their own homes may need a more mobile solution and so a guideline could be wireless palm pilots or other personal digital assistants (PDAs).</p>
<b>Protecting data</b>		
<p>Important files are copied onto removable media such as CDs. Anti-virus protection exists on all computers and is updated automatically on a weekly basis.</p>	<p>Files are automatically or manually backed up onto a separate external hard drive, tape backup system or dedicated backup computer every week. Anti-virus software exists on all computers and is updated automatically on a weekly basis. At least one person knows how to handle these tasks.</p>	<p>All files are automatically backed up onto a dedicated networked hard drive. Every week the data is copied onto a portable hard drive for storage off site. There is centralised anti-virus software on a firewalled server. Staff back up their own workstation data onto a networked drive. One member of staff manages overall data protection.</p>

\* Usually a budget under £10,000. Run entirely by volunteers, usually from their homes.

\*\* Usually a budget of between £10,000 and £100,000. Most likely to employ a few staff and to have an office.

\*\*\* Likely to employ specialist support staff. May have more than one office. More likely to have multiple projects.

**Table I continued**

VERY SMALL ORGANISATION*	SMALL ORGANISATION**	MEDIUM-TO-LARGE ORGANISATION***
<b>Internal information sharing and communication</b>		
Computers are connected together in a peer-to-peer network, with files saved and shared through email attachments and/or disks. Email is used for electronic communications.	There is a peer-to-peer or client-server based network with a common file-naming system. Staff can access files remotely using a virtual private network (VPN). Free or low-cost web-based services are used for document and calendar sharing if needed. At least one member of staff has basic ICT network skills, and there is access to someone with advanced skills.	There is at least a client-server network with a virtual private network (VPN) if appropriate. File, data and calendar sharing and other forms of electronic collaboration are handled via an intranet and by email, depending on need. Network tasks are part of a single staff member's job description, and there is access to outsourced support for more complicated troubleshooting and problems.
<b>Database use</b>		
Simple spreadsheets and data management tools, such as MS Outlook, are used to organise and manage data.	There is a shared contact, client or member database accessible by all relevant staff members. Data can be imported, exported and easily shared and managed, to facilitate generation of reports, analysis and effective presentations.	In addition to the guidelines detailed for small organisations, there may be a need for a more robust networked, integrated data system for fundraising, contact, financial and other important data. It is possible to access the data from other locations through the internet, and to easily generate reports to facilitate easy analysis.
<b>Website</b>		
Information about the organisation resides on a VCO directory website or a simple 'brochure' website with an organisation-specific domain name, with the facility to update the website at least quarterly.	There is a specific domain name for the website, ability to update content at any time and several staff who know how to do so. There is access to in-house or outsourced skills to do more intensive changes to or technically manage the site.	The website has an organisation-specific domain name and staff with the access and necessary skills to update content any time. It is possible to integrate the site with existing databases to provide interactivity – for example, through e-commerce or discussion areas. Technical website management is part of a

# Knowing what you need, and why

**Table I continued**

VERY SMALL ORGANISATION*	SMALL ORGANISATION**	MEDIUM-TO-LARGE ORGANISATION***
<b>Website continued</b>		
		single person's job responsibility and/or is outsourced. Content editorial processes are in place, and the site's use is integrated with the fundraising, programmes, communications and marketing strategies.
<b>Internet connectivity</b>		
Basic broadband is available (or at least a dial-up connection)	Basic broadband service is available from all staff desktops, with remote access as needed.	Broadband is used in all sites, for all staff.
<b>Email</b>		
Free or low-cost email accounts are available for each person. Email addresses have similar names to identify the organisation (such as jogreenVCO@hotmail.com). A common email signature is used, and free or low-cost email list services are used to distribute e-newsletters. Multiple outgoing emails can be sent using spreadsheet or email software such as Outlook or Thunderbird.	Every person has their own email address. An email server resides on site, or is contracted for. An organisational domain name (producing email addresses such as jo.green@vco.org.uk) and a common email signature is used. There is a shared system for managing email contacts and for executing multiple emails.	There is a full email management system that integrates email collection and list management tools between the website with email list tools and other organisational databases, such as a client list. A common email signature is used, and staff can access email and email management tools remotely.
<b>Hardware and software</b>		
Hardware is updated every three to five years.  Software is updated as appropriate every three to five years.	Hardware is updated every three to five years. Software is updated as appropriate every three to five years.	There is standardisation and updating of software as appropriate and 30% or more of hardware is turned over every year with a full warranty.

**Table 1 continued**

VERY SMALL ORGANISATION*	SMALL ORGANISATION**	MEDIUM-TO-LARGE ORGANISATION***
<b>Technical support</b>		
Basic support is handled by volunteers.	Basic support is handled by a designated staff person as part of their job description. Advanced support options are available on an as needed basis.	Basic support is handled by ICT staff. All staff are trained on how to solve very simple problems at their own desktops. Formal contracts with outsourced providers are in place, for advanced support as needed. A technical support plan is in place and is updated annually.
<b>Training in basic productivity software</b>		
Training is provided if ICT use is essential for any particular role.	Training is provided for all staff on core ICT skills to do their work.	Training is provided for all staff on core ICT skills to do their work. A training plan is in place and updated annually.

Table 2 presents some of the guidelines that some different types of VCO might consider. We have not been able to include every type of VCO, so if your organisation does not fit these categories then please adapt these guidelines to the needs of your own organisation.

Your organisation's mission and strategies are equally as important to consider as you think about the guidelines that make sense for you to follow. Consider the following examples:

- An organisation that works with vulnerable young people must set a very high standard for the protection of their client data.
- A volunteer-run organisation working on domestic violence may prioritise the use of a very robust email management software package and easy to update website. This could fit with its primary strategy – to regularly encourage its growing supporter base to contact the government and advocate for policy changes that protect people from abuse and to support clients suffering from domestic violence.
- An environmental organisation might rely on ICT mapping tools to produce powerful visual images that raise public awareness.
- A second tier organisation might focus heavily on information management of key resources, distribution of email newsletters, a library function on their website and an up-to-date client relationship management (CRM) system.

**Table 2: Sample ICT guidelines, by type of organisation**

TYPE OF VCO	GUIDELINES TO CONSIDER
<b>Advocacy groups</b>	<ul style="list-style-type: none"> <li>• Client relationship management database to track and manage contacts and relationships</li> <li>• Email newsletter to help spread the message and raise awareness – functionality to allow easy management of subscribers</li> <li>• Ensuring website is clear, up to date and speaks effectively to the range of stakeholders and supports their direct action</li> <li>• Facility to allow stakeholders to directly contact MPs and councillors e.g. FaxYourMP.com</li> <li>• Effective ICT infrastructure to support sharing of information</li> <li>• Web-based email for staff members working outside the office</li> <li>• Remote access to ICT for senior managers or field workers working in remote locations</li> <li>• Building an intranet (and where appropriate extranet), where internal documents for use with clients can be easily managed</li> <li>• If appropriate, publishing tools that make it easy to convert print publications to the web</li> <li>• Maintaining a forum to promote, support and stimulate public debate</li> </ul>
<b>Children's and youth groups</b>	<ul style="list-style-type: none"> <li>• Implementing high levels of security within systems to ensure highest levels of confidentiality</li> <li>• Using a contacts management database to document and track relationships and activities with professionals in other sectors</li> <li>• Implementing a 'fun' element to the website (alongside the 'professional' persona for funders and officials) to encourage young people to use the resource</li> <li>• Providing facilities for clients to use ICT creatively and enjoyably</li> </ul>
<b>Community centres</b>	<ul style="list-style-type: none"> <li>• Supporting effective administration through room bookings, venue hire</li> <li>• Managing finances with a simple accounts package</li> <li>• Providing basic ICT with internet access for staff members and volunteers to use as needed</li> <li>• Supporting staff and volunteers with basic IT training to make the most of hardware and software</li> </ul>
<b>CVSs, volunteer centres (and other infrastructure agencies)</b>	<ul style="list-style-type: none"> <li>• Easy to use (and update) contact database which segments members into specific organisational types – helps provide information to those who need it most; opportunities to act as conduit or channel for others to communicate with specific groups (e.g. health groups)</li> <li>• Volunteer management database</li> <li>• Developing e-newsletter to inform local groups or engage volunteers</li> </ul>



**Table 2 continued**

TYPE OF VCO	GUIDELINES TO CONSIDER
<b>CVSs, volunteer centres (and other infrastructure agencies) continued</b>	
	<ul style="list-style-type: none"> <li>• Using website to recruit volunteers</li> <li>• Having a library-based resource function on the website to help groups access information better</li> <li>• Ensuring effective ICT infrastructure (including network) to help users share information easily and effectively</li> <li>• Robust email system with email addresses for each individual member of staff (by role) to support direct contact with client organisations or volunteers</li> </ul>
<b>Environmental organisations</b>	
	<ul style="list-style-type: none"> <li>• Using geographical information systems (GIS) mapping software to visually illustrate or track the impact of governmental policy or pollution on physical area</li> <li>• Producing e-newsletters for advocacy, public service and political campaigns</li> <li>• Investing in publishing software for print publications such as magazines or pamphlets to be produced in-house</li> </ul>
<b>Health and social care providers</b>	
	<ul style="list-style-type: none"> <li>• Setting up a client case-management database that enables staff to track and manage client services effectively and provides statistics for outcome evaluations</li> <li>• Ensuring that the client case-management database efficiently outputs documents and forms for easy referral of clients to other services</li> <li>• Making sure that email systems are robust enough to provide client confidentiality for sensitive client information or where regulated by law</li> <li>• Ensuring that the hardware, software and internet connection enables the organisation to submit funding requests or client services requests online</li> </ul>
<b>Homelessness agencies</b>	
	<ul style="list-style-type: none"> <li>• Developing an outcomes monitoring system to track relationships (and positive and negative developments) with service users</li> <li>• Providing ICT access in a day centre for homeless people</li> <li>• Running ICT training courses to help people develop key skills</li> <li>• Ensuring staff have easy access to ICT when they need it rather than having to queue to use a small number of office-based computers</li> <li>• Using a relationship management system to track relationships with other professionals, and referrals to other agencies</li> </ul>
<b>International development organisations</b>	
	<ul style="list-style-type: none"> <li>• Investing in translation software</li> <li>• Geographical information systems (GIS) mapping if projects need to be viewed visually</li> <li>• Providing technical support to those in remote areas in setting up satellite, microwave and wireless internet connections and solar power sources for running office or training technologies, if this is critical to the programme.</li> <li>• Providing international mobile phones</li> </ul>

**Table 2 continued**

TYPE OF VCO	GUIDELINES TO CONSIDER
<b>Legal services</b>	<ul style="list-style-type: none"> <li>• Developing the know-how to set up simple methods of online communications for groups of organisations or clients, to share information from remote locations in developing countries</li> <li>• Putting in place knowledge management systems that use appropriate technology and knowledge management techniques for the programme</li> <li>• Putting in place disaster/emergency planning, policy and technology to support implementation</li> </ul>
<b>Performing arts groups</b>	<ul style="list-style-type: none"> <li>• Investing in ticketing or box-office software that enables tickets to be sold online for arts performances and other events</li> <li>• Making sure the website and email are used to communicate effectively with clients, audience, or other stakeholders</li> <li>• Using ticketing database effectively and efficiently, to generate information for fundraising, financial reporting, and marketing campaigns</li> <li>• Managing music libraries effectively, with library database software</li> <li>• Running automated gift-shop inventory and sales systems</li> </ul>
<b>Training and educational organisations</b>	<ul style="list-style-type: none"> <li>• Setting up a student registration database that can be integrated easily with accounting, fundraising, alumni data and course offerings, to automate work processes related to activities such as preparing the prospectus/course lists, fundraising campaigns, student class lists and timetabling</li> <li>• If appropriate, setting up a computer lab</li> <li>• Ensuring appropriate educational technology is available in classrooms and library – this may include internet access, educational software and various software applications</li> </ul>

Additional information can be found in the ICT Hub Good ICT Management Guide at [www.ictHub.org.uk/publications/](http://www.ictHub.org.uk/publications/) due to be published in early 2007.

### Sharing ICT experience with your peers

The best way to learn about technology guidelines in your specific sector is to connect with umbrella organisations and resource agencies in your field and find out about any peer networks, working groups or online listings that focus on technology guidelines. You will find a directory of umbrella and resource agencies at: [www.ncvo-vol.org.uk/askncvo/directory/](http://www.ncvo-vol.org.uk/askncvo/directory/)

You could post a note on UK Riders, which lists many individuals who work with VCOs to find out what they see VCOs doing in different parts of the sector. You can subscribe to UK Riders at: <http://lists.lasa.org.uk/lists/info/ukriders>



## Are cool tools driving your decisions?

Who is controlling your ICT decision-making? Your ability to meet your mission must be the central factor in your ICT decision-making. In the past, however, VCOs often let suppliers, consultants, hard-core techies, enthusiastic trustees or others push ICT decisions based on their desire for cool hardware and software tools. Don't forget to use your mission, programmes, capacity and organisational culture as the primary touchstones when you make your ICT decisions.



## Summing Up

These ICT guidelines will help support you to make the right ICT decisions for your organisation.

Your organisation's ICT needs will vary depending on its budget, resources, types of services, and capacity.

Share ideas and experiences with colleagues in other organisations. Don't let 'cool tools' make your decisions for you – just because it looks smart, doesn't mean it is.

Regardless of what motivates you to look at ICT initiatives, you need to prioritise your decisions and choose the right project for your size and type of organisation. We've included a few examples based on types and sizes of organisation to help you.

Whatever your objectives, the key points are:

- Look at your mission.
- Think about the strategies you use.
- Set a high standard for those items that are mission-critical.

Before you move onto the next section, think about what projects would make a difference for your organisation and your clients.

Next, we'll look at the benefits of ICT and how to prioritise your projects.



## Identifying ICT benefits to help you prioritise

There are many ways that ICT can improve the work we do. The key is prioritise which ICT initiatives are most important and beneficial to your organisation. This section will help you find out what the benefits are of your ICT initiative and therefore help you create a stronger case statement for justifying your ICT initiative.

For example, for some organisations, increasing training on basic office software may be a major priority, while for others it may be monitoring their fund-raising activity more systematically. VCOs frequently say that they wish they could use the ICT tools they already have invested in better. For others, the priority is as simple as arranging for desktop and server upgrades.

In some cases, the main concern is not about training or the hardware or software at all, but is more strategic, focusing on activities such as developing better ways to generate powerful content for your website and emails, or immediately engaging your members through their mobile phones.

Keep in mind that different people – from staff or funders to trustees, partner organisations or volunteers – may support the ICT initiative for different reasons. So even though we urge you to focus on a few powerful benefits to justify proceeding with an ICT initiative, reserve all the benefits you may have come up with, in case they come in handy.

For example, imagine you have a funder who is very interested in building your capacity to improve your public awareness-raising work. You will want to be sure to include any specific benefits related to awareness raising. Alternatively, perhaps there are staff or volunteers who resist the idea of using a new piece of ICT. In this scenario, some very specific benefits related to how an ICT initiative will make people's work easier may be just the thing you need to turn them from sceptical to supportive.

If you have a sufficiently strong rationale to pursue the initiative from the start – whether it involves creating ICT policies, integrating multiple databases or providing staff training – it will be more likely to succeed if you are clear what the benefits are.

A lack of rationale often leads to confusion and a lack of focus as the project is implemented. This can also occur as a result of inadequate buy-in from staff, leadership or any others who will need to believe in the efficacy of the initiative to make it work. The good news is that it is actually quite simple to avoid these pitfalls.

We are all well aware that ICT can improve efficiency, but the benefits can go far beyond this. Your decisions about the use of ICT need to be based on the full range of benefits, as well as costs, in order to effectively prioritise which initiative to pursue – or indeed, whether any development is needed at all. Being more aware of the benefits will also strengthen your case to funders which will be picked up on later on.

## What are the benefits of ICT?

ICT can provide a range of benefits. These include:

- increased collaboration
- improved fundraising capability (more funders, greater diversity of funders, easy income collection)
- improved programmes and service delivery
- better communication
- more comprehensive knowledge building
- more effective public relations.

# ICT Benefits and priorities

Table 3 provides you with a list of benefits that may relate to the ICT initiative you are thinking about. Please note that there are certain benefits that could fall into several categories. For example, there are multiple benefits associated with training all staff to use your shared contact database – for example, the database will be used more efficiently by all staff but fundraising could also be enhanced due to improved relationship building throughout the organisation.

Don't worry too much about the overlap – just dive in, and start to list all the potential benefits that could result if you implemented a specific ICT initiative. The goal is to articulate the powerful benefits of ICT so that you can determine whether or not the initiative is worth investing in or not.

**Table 3: Possible benefits of ICT**

## Programme delivery

- Stakeholders are better informed
- Clients receive more in-depth attention and range of services
- Clients can access online resources at more convenient locations at hours more fitting to their schedules
- Increased security for client information
- Ability to better target programming to people who want or need it
- Easier and more efficient ways for staff to work in the field
- Faster turnaround time for stakeholder information requests

## Efficiency

- Less time spent on data input and redundant tasks
- More time for reporting and analysis
- More time working with clients
- Reduced spending on postage, phone, printing and paper
- Better usage of human resources
- Better usage of financial resources
- Increased staff morale
- Increased sense of accomplishment

## Fundraising

- More funds and more donors
- Increased credibility for the organisation
- Improved ease in gathering data for campaign reports
- Improved donor recognition
- Accurate tracking of donor history for improved fundraising campaigns
- Increase in donor communications and involvement with organisation
- Increased and more immediate giving by donors
- Greater longevity among givers
- Diversifying revenue sources and identify new donors, through online giving

## Knowledge building

- Access to trends data to inform decision making
- Increased ability for staff to delve deeply into issues and make decisions
- Enhance ability to report on accomplishments and areas for improvement
- Improved ability to contribute important experiences to the wider field of practice

**Table 3 continued**

## **Public relations**

- Improved communications with clients and audiences
- Stakeholders and service users (current and potential) more aware and informed about programmes, services and activities
- More people involved as donors, participants and volunteers
- Enhanced organisational presence
- Increased partnership development

## **Staff development**

- More competent workforce
- Improved job satisfaction, leading to a greater sense of accomplishment (and understanding of what impact they actually make)
- Fewer problems and less turnover due to untrained staff
- Staff members becoming proficient in the use of software programmes necessary for them to use in their daily job functions
- Increasing knowledge in the potential capabilities of the organisation's database
- Increased levels of comfort and proficiency in the use of email and the internet
- Continuous development of additional uses for technology to further the organisation's mission and increase its effectiveness

## **Collaboration**

- Improved staff skills transfer
- Quicker response to programme and other needs
- Better communication between staff
- Less isolation – more sharing
- Increased knowledge of others' jobs
- Increased connectedness among staff
- Better dispute resolution
- Increased creativity
- Collaborate more efficiently with staff, stakeholders and partners

## **Decision-making**

- More timely decision-making
- Better reporting for Chief Executive and programme directors
- Ability to monitor patterns and trends
- Ability to incorporate financial concerns into staff decision-making
- Improved interpersonal work relations
- Better use of resources

## **Financial management**

- More awareness among staff of their budgets
- Increased financial viability and the ability to respond more quickly to unexpected changes in the economy and state funding
- Ability to negotiate discounts with suppliers based on volume
- Increased budget accuracy and tracking

**Table 3 continued****Volunteer management**

- Staff will have easier access and retrieval of accurate volunteer information and activities for all reporting requirements
- The agency will improve recruitment and retention of volunteers
- Easier supervision of volunteers
- Better recognition of volunteers throughout the year, though volunteer database management

## A framework to help you identify your benefits

Many ICT initiatives start and proceed without a clear sense of what the ultimate benefits would be if the initiative were implemented successfully. However it is more likely to be successful if there is clarity about what the benefits will be. Even if you do not have the capacity to take on multiple ICT initiatives, going ahead with one carefully thought-out ICT investment has to be worth it if you have clearly identifiable benefits.

Organisations that take the time to identify the benefits will find the time and money spent in investing in ICT is worth it. Those that don't tell us their horror stories of wasted money on software, or of diminished morale among staff who have to change the way they work and see little reason why.

Ask yourself: if you only had the resources to take action on just one or two attractive ICT initiatives, which ones would you choose, and for what reasons? And then think about how you would present the benefits of this in a grant proposal to a funder – how will you convince them that they must support your project?

### Think through the benefits first

faithnetsouthwest ([www.faithnetsouthwest.org.uk](http://www.faithnetsouthwest.org.uk)) is a regional partnership of four organisations that supports faith groups engaging in social or community activity in the South West region. faithnetsouthwest decided to set up a web presence with basic information.



According to Simon Bale, Churches Regeneration Officer, "What didn't happen was a thorough, strategic conversation before we set out to launch the website. It would have been a better approach for us to have resisted the urge to launch." Today, Simon's advice is "If you must have a web presence, get people in your organisation together as a team to discuss the content, goals, and audience. It is important to involve key stakeholders – and especially the senior management team."

Simply put, the best way to know if an ICT initiative is worth pursuing is to see if you or others in the organisation can articulate what the organisation will gain if it is successfully implemented.

People often cite 'improvements in efficiency' as the primary reason to pursue ICT improvements but in fact, although this is an important benefit, it may not always be the most important, or the only, benefit to your organisation from a specific ICT initiative.



Now, for any ICT initiative that you are considering as a possible priority, use Worksheet 1 (p34) to articulate in your own words what the benefits are. When you have finished, take a look at the list, compare the priorities, and see which one it makes the most sense to pursue first. Even if you already know what your priority is, take five minutes to list the likely benefits. As you use the worksheet, keep Table 3 to hand. It will help you get ideas flowing. When you have completed the worksheet, return to this page. By now you should have a clear insight about how ICT will benefit your organisation.

## Worksheet 1: Identify the benefits of your ICT initiative

- Step 1** With your colleagues or on your own, review the example ICT initiative in the middle column below.
- Step 2** In the column 'Your ICT initiative', write a clear and concise sentence or two to describe what your ICT initiative is about. Don't worry about getting the language precise. Later in the guide we will walk you through ways to ensure that the objective and outcomes for the initiative are very clear and powerfully articulated.
- Step 3** Underneath 'Initiative benefits', list what you think could be the benefits if the ICT initiative were implemented successfully. You don't need to come up with all the benefits for now. Just do a quick brainstorm to see if there are some tangible benefits that make it worthwhile to pursue the initiative. Under the example we have listed a few of the benefits this initiative may bring, to help you think through what the benefits of your ICT initiative may be to you.

# ICT Benefits and priorities

## Worksheet 1

EXAMPLE	YOUR ICT INITIATIVE (YOU TO COMPLETE)
<b>Initiative outline</b>	
Purchase and use of a new client management data system. This will be combined with development of more efficient, documented, step-by-step procedures for staff to follow when collecting and managing client information	
<b>ICT benefits</b>	
<b>Programme delivery</b>	
<ul style="list-style-type: none"> <li>• Clients receive more in-depth attention and range of services</li> <li>• Increased security for client information</li> </ul>	
<b>Efficiency</b>	
<ul style="list-style-type: none"> <li>• Less time spent on data inputting and redundant tasks</li> <li>• More time working with clients</li> <li>• Reduced costs on items such as postage and phone</li> </ul>	
<b>Fundraising</b>	
<ul style="list-style-type: none"> <li>• Nothing major, unless the system facilitates better statistics that we can use for our reporting to funders</li> </ul>	
<b>Knowledge building</b>	
<ul style="list-style-type: none"> <li>• More accurate trends-type information to make programme decisions</li> </ul>	
<b>Public relations</b>	
<ul style="list-style-type: none"> <li>• Nothing major</li> </ul>	

## Worksheet 1 continued

EXAMPLE	YOUR ICT INITIATIVE (YOU TO COMPLETE)
<b>Staff development</b>	
<ul style="list-style-type: none"> <li>• Staff members will become proficient in their knowledge of how to serve our clients</li> <li>• Staff will be better prepared to use other computer-based systems for their everyday work</li> </ul>	
<b>Collaboration</b>	
<ul style="list-style-type: none"> <li>• Potential to collaborate with other agencies for referrals and co-ordination of services</li> </ul>	
<b>Decision making</b>	
<ul style="list-style-type: none"> <li>• Improved decision-making for caseworker to refer clients to best match of needed services</li> <li>• Ability to evaluate usage of client services and make adjustments</li> </ul>	
<b>Financial management</b>	
<ul style="list-style-type: none"> <li>• Nothing major</li> </ul>	
<b>Financial management</b>	
<ul style="list-style-type: none"> <li>• Volunteer management</li> </ul>	
<b>Financial management</b>	
<ul style="list-style-type: none"> <li>• Other</li> </ul>	

# ICT Benefits and priorities

## Developing your ICT priorities

Imagine an organisation that has many different contacts that are being maintained in a number of different Excel spreadsheets, Outlook, and an Access database, by four different staff members who need to share information but can't. Not an ideal situation! The organisation clearly needs to develop a better way of networking two offices to improve collaboration and save money – but what comes first? It would be impossible say without more time looking at which initiative will have more positive impact.

### Efficiency and beyond

You will find a wide variety of case studies that document the diverse benefits of ICT at the following websites:

[www.npower.org](http://www.npower.org)

[www.techsoup.org](http://www.techsoup.org)

[www.icthub.org.uk/cms/opencms/icthub/case\\_studies](http://www.icthub.org.uk/cms/opencms/icthub/case_studies)

[www.summitcollaborative.com/npq\\_tvo\\_.html](http://www.summitcollaborative.com/npq_tvo_.html)



So what about your organisation? Is there more than one ICT initiative that you'd like to pursue? You already know how to identify the benefits of your ICT initiative using Worksheet 1; now use Worksheet 2 (p38) to help you decide which to prioritise. Fill out one worksheet for each ICT initiative.

## Worksheet 2: Forming ICT objectives and outcomes

Follow steps 1 to 7 to help you determine which ICT initiatives to prioritise.

**Step 1** With your colleagues or on your own, review the benefits identified in Table 3.

**Step 2** Now, review the benefits which identified in Worksheet 1. Look at the benefits that you listed, and see if there is a thread that ties them together. Identify what you see as the primary objective of your ICT initiative. Focus on why it is important, rather than how you will accomplish it. Steer away from the use of technical terminology. Can you say why it is important without mentioning words such as 'database' or 'networking'?

**Step 3** Develop one or two clear, concise sentences that articulate the objective. Some good sentence starters are:

- We will...
- We intend to...
- This initiative will...

Write the sentences in the left-hand column below. These are your objectives. Keep it short, and at this stage avoid talking about how you will achieve the initiative.

**Step 4** Review your draft, and ask yourself if it is sharp and powerful. Look at the adjectives and verbs you use. Choose language that sounds authoritative.

**Step 5** Now, move over to the outcomes column. Again, review Table 3 and the benefits column in Worksheet 1.

**Step 6** Take your benefits list and develop fuller statements that articulate the actual results. For example, if one of your benefits in Worksheet 1 reads 'We will be able to expand our donor base,' then deepen it, to state: 'We will have more detailed information about potential donors, enabling us better to convince them to support our programmes.'

Start by brainstorming a list of outcomes that are likely to occur if the initiative is implemented successfully. Review these, and narrow them down to a few that are most powerful and representative of the type of results you expect to see. It is much better to have fewer outcomes that are really powerful. Focus on what you will see in the way of results. For each outcome, ask yourself, 'Can we really claim that the ICT initiative will be the primary reason for this outcome?' Strengthen what you have written by making sure that what you have said states clearly what the results will be, and how you might accomplish the objective.

**Step 7** Resist the temptation to go into the detail about how you will implement the initiative. The goal here is to develop a clear, succinct and measurable outcome. For more information on realistic indicators of success, see 'Measuring success' (p57).

## Worksheet 2

Now, with your completed copy of Worksheet 2 in hand, run through checklist 1 to determine if you are ready to make some final decisions about which ICT initiatives to pursue and which ones to prioritise.

If appropriate and possible, gather other staff or volunteers to look at the ICT initiatives benefits with you. Remember, it is very important to have programme and other non-technical-oriented staff and volunteers involved in these types of discussions.

## Checklist 1: Choosing your ICT priorities

- ✓ Look carefully at the benefits you listed for each possible ICT initiative in Worksheet 2. Ask yourself, is there one that jumps off the page as the obvious priority? If not, stop! Before you continue, work out where to get more information so that you can fully understand the full range of benefits you could realise if the ICT initiative in question was implemented successfully. Ask yourself, should these initiatives be phased in a certain order? Is it logical in some way that one initiative should come before another one?
- ✓ If it is clear which of the possible priorities is truly the MOST important, the next section of the guide will help you sharpen your list of benefits into a very clear objective statement. This statement will form the basis of any grant proposal or request for tender you develop to move your initiative forward.
- ✓ Before you go a step further, ask yourself a couple of final questions: can we pull this off? And, assuming we can get the money from our own budget or funder, will we be able to devote the time to get this implemented successfully?

## Did you jump to quick to a decision?

“On several occasions we started to get upset with technology and immediately went ahead to solve the problem,” comments Janis, a VCS director. “Most recently, we replaced our Access database with a very high-priced software package to manage our member lists. The results have been terrible. Staff hate the new system so they don’t all use it, it has too many functions that distract us from the basics of what we need and, well, I’m embarrassed to say we spent more than £3,000 on it.”



In Part 7 of the guide, you will find tips and tools to help you determine if you have sufficient financial and workforce capacity to put your plans into action. For now, if you are feeling slightly overwhelmed, we strongly urge you to:

- think about how you can break the project into stages
- consider a different initiative that you do have the capacity to implement
- brainstorm some ways in which you could build capacity.
- look at the ICT Hub knowledgebase ([www.ict hubknowledgebase.org.uk](http://www.ict hubknowledgebase.org.uk)) for advice and support on particular projects and initiatives

As will often be the case, you may not be able to figure out how to pursue some of the suggestions we make. But remember, there is help available. The ICT Hub website offers a helpline, knowledgebase, directory of circuit riders and consultants, volunteers and providers. Visit the site at: [www.ict hub.org.uk](http://www.ict hub.org.uk)

# ICT Benefits and priorities

## Summing Up

There are lots of ways that ICT can improve the work we do but we need to prioritise!

Do we need to do things better, or do better things?

Developing ICT outcomes is about building a strong case statement to justify an ICT initiative. Different people may support the ICT initiative for different reasons – keep all the good reasons at hand!

Without a sufficiently strong case at the start, the ICT initiative will be more prone to fail. A lack of rationale often leads to confusion and a lack of focus as the project takes shape and is implemented.

Your decisions about the use of ICT need to be based on the full range of benefits, as well as costs, in order to effectively prioritise.

If there is one characteristic that sets effective VCOs apart from others, it is that they take the time to ensure that the time and money they spend on ICT is truly worth it. The best way to know if an ICT initiative is worth pursuing is to see if you or others in the organisation can articulate what the organisation will gain if it is successfully implemented.

You should have completed Worksheet 1 to articulate the benefits of your proposed initiative.

You completed Worksheet 2 to identify the objectives and outcomes of your initiatives – and reviewing this against Checklist 1 will have helped you work out which initiative will have the most impact and greatest benefits.

Now let's look at making a case for your project.



At the core of any successful fundraising effort is your ability to articulate in a very powerful way why the funder must support your effort. In this section we will be looking at some effective strategies to raise funds for your ICT initiative. We will be developing a case statement based on the work done in previous sections of the book. The process of justifying the initiative needs to start long before you seek funding – first to yourself, and then to any other staff member or volunteer who will need to be on board. To begin this process, we have already seen how to develop a list of benefits, in Worksheet 1 and a list of objectives and outcomes in Worksheet 2.

## Outcome-based thinking

The Women's Resource Centre ([www.wrc.org.uk](http://www.wrc.org.uk)) is a membership-based organisation providing infrastructure support, information and capacity building to VCOs working to improve the status of women. When it came to redesigning their website, they used a 'total benefits of ICT' approach. Rather than rushing to launch a new site, the organisation brought together a team to identify the full range of benefits that could be achieved if the initiative was implemented successfully. According to Information Coordinator Nicole Aebi, "We agreed that efficiency was key – we really need to reduce the time it takes to maintain the content. But we also want to improve the experience for our users – particularly the navigation. From that, we articulated a series of results that were clearly worth the effort." Nicole emphasises, "It is worth taking the time to have the conversation about results."



## The case statement

There should be no mistaking what the objective of your ICT initiative is and what the outcomes would be if the initiative were to be implemented successfully. This is set out through a case statement. The statement will set out what you need, for yourself and staff, to justify why it is important to dedicate staff time and money to the initiative.

You can use the case statement to convince sceptical board members to support the budget for the initiative, to get funders interested, and to keep consultants and suppliers focused on your goal and desired outcomes.

There are basically two parts of the case statement that must be tightly woven together:

- **the objective statement** – a clear, concise (one or two sentences long at most) and potent articulation of what your basic goal is for an initiative. Put simply, a description of what you are doing and why
- **the outcomes** – specific results that occur if the objective is reached. These ultimately form the basis of why the initiative is important to pursue.

The following table shows sample objective statements and possible outcomes from ICT initiatives in three different types of organisation. How might they apply to your organisation and what could you do?

# Making the case for your ICT initiative

**Table 4: Objective statements and possible outcomes**

SAMPLE OBJECTIVE STATEMENTS	POSSIBLE OUTCOMES
<b>Environmental organisation</b>	
<p>The proposed ICT initiative was to set up an email and web-based communications network with policy makers, activists and others active on environmental issues. This included upgrades to their website, new email-management tools and training.</p> <p>Objective: 'We will improve our tracking of environmental policy proposals and changes made on the local and national level to provide our stakeholders with the ability to more quickly and effectively advocate for environmental protection policy changes.'</p>	<ol style="list-style-type: none"> <li>1. More of our members will take action to advocate for the policy changes they support.</li> <li>2. Our members will be better prepared to encourage their friends, family and colleagues to support certain policy change efforts.</li> <li>3. Supportive policy makers will feel more empowered to take a firm stand on certain policy issues.</li> </ol>
<b>Disability organisation</b>	
<p>The proposed ICT initiative was to hire a consultant to provide in-depth training to staff and volunteers on basic office productivity software.</p> <p>Objective: "We will implement an agency-wide staff and volunteer training effort to help us improve staff effectiveness, retention and morale?"</p>	<ol style="list-style-type: none"> <li>1. Staff will be more productive.</li> <li>2. Staff and volunteers will stay active with the organisation longer.</li> <li>3. The workplace will be a more enjoyable place in which to work.</li> </ol>
<b>Older people's support programme</b>	
<ul style="list-style-type: none"> <li>• Supporting effective administration through room bookings, venue hire</li> <li>• Managing finances with a simple accounts package</li> <li>• Providing basic ICT with internet access for staff members and volunteers to use as needed</li> <li>• Supporting staff and volunteers with basic IT training to make the most of hardware and software</li> </ul>	<ul style="list-style-type: none"> <li>• Supporting effective administration through room bookings, venue hire</li> <li>• Managing finances with a simple accounts package</li> <li>• Providing basic ICT with internet access for staff members and volunteers to use as needed</li> <li>• Supporting staff and volunteers with basic IT training to make the most of hardware and software</li> </ul>

If you look at Table 4, you'll notice that the three objective statements and related outcomes are very different from one another. The first one focuses on policy, while the second deals more with the operational end of a VCO. The third deals with the direct delivery of the organisation's core service. Note that the ICT initiatives are not necessarily written in a way to tug on your heartstrings. What is important is that they are clear, and can be used to make a strong case as to why the ICT initiative matters. Now it's your turn. Gather the following

# Making the case for your ICT initiative

items (take a photocopy or download new copies from the Publications section of the ICT Hub website) and spread them out in front of you:

- Table 4
- your completed Worksheet 1
- your completed Worksheet 2.

Take a look at the benefits you listed in Worksheet 1. Review the objective statements and outcomes you have in Worksheet 2 and in Table 4. Use Table 4 to help you form very clear, concise and powerful language that justifies pursuing your initiative. Now rework worksheet work for each ICT initiative. As mentioned earlier, if it is possible for you to involve others we encourage you to do so. Ask yourself who would best be suited to identify the possible outcomes if we implement this initiative successfully.



## A planning toolkit to bookmark

For tools and examples of ICT objective and outcome statements, go to the Summit Collaborative toolkit, at: [www.summitcollaborative.com/cwpm.html](http://www.summitcollaborative.com/cwpm.html)

Now, with copies of Worksheet 2 in hand, run through Checklist 2 to determine if you have a case statement that is clear, concise and powerful.

## Checklist 2: Forming ICT objectives and outcomes

- ✓ Look carefully at the objectives and outcomes you listed.
- ✓ Ask yourself if it is clear what you are trying to accomplish and why.
- ✓ If not, ask yourself who you need to talk to, and/or what information you need, in order to develop a case statement that will convince you, staff, trustees, funders, and any other stakeholders that you are on the right track and have justified an investment of resources for this initiative.

## Summing Up

At the core of any successful fundraising effort is your ability to articulate in a very powerful way why the funder must support your effort. Before that you need to justify it to yourself, and then to any other staff member or volunteer who will need to be on board.

Bring together different groups and people within your organisation to help get the ideas together. Focus on outcomes and particularly look for those who aren't convinced by the initiative. Winning them over will help you make the clearest case and provide better supporting evidence for your fundraising proposal.

There should be no mistaking what the objective of your ICT initiative is and what the outcomes would be if the initiative were to be implemented successfully. This is set out through a case statement – what you need, for yourself and staff, to justify why it is important to dedicate staff time and money to the initiative. It will be vital to win people over.

There are basically two parts of the case statement that must be tightly woven together:

- **the objective statement** – a clear, concise and potent articulation of your basic goal – a description of what you are doing and why

## Making the case for your ICT initiative

- **the outcomes** – specific results that occur if the objective is reached.

Working through Worksheet 1 and 2 whilst reviewing Table 4, you should now have a case statement for each ICT initiative you want to pursue. Is it clear what you are trying to accomplish, and why?

Now let's look at what you need to invest.

# What do you need to invest?

5

What do you need and why?

What will be the total cost?

How can you fund your effort?

Anyone with a stake in your organisation will want to ensure that any projected investment in ICT is worth it. The best way to do this is to understand what the true total cost of ICT ownership (TCO) is. To do this, you need to look beyond the hardware and software costs to determine the combined financial and human resource costs associated with ICT.

## Setting up technical support that builds staff knowledge

**Humberside Learning Consortium** ([www.hlc-vol.org](http://www.hlc-vol.org)) supports the learning and training needs of VCOs. They set up a local area network, budgeting approximately £10K per year for hardware, software and technical support. They designed a technical support option that built staff knowledge and organisational capacity by outsourcing a small number of hours per month for staff training. To resolve more complicated issues, the staff 'accidental techie' shadowed the system engineer and learned from practical experience.

Communications Manager Les Braim notes: "The end result was that we gradually developed the basic housekeeping and more technical skills to manage our network. You must find a flexible support provider so it benefits staff responsible for ICT. It's no good allowing the mechanic to bury his head in your server cupboard and not know what he is up to. This will cost you more in the long run."



**RedR** ([www.redr.org](http://www.redr.org)) provides training courses, technical support, and other co-ordination services for aid and relief workers from the UK and overseas. The organisation has approximately 50 staff in UK, and the same number overseas. The in-house technology was sufficiently complex to justify the expense of a staff member to manage it, but finding someone with all the required expertise was difficult and outsourcing was too expensive.

Using the TCO process, RedR developed different options, and came up with an approach that works. Facilities and IT Manager Orlando Hughes explains: "I'm a one-person IT department. I solve the easier and simpler tasks for our staff members, and I call in the contracted outside expertise when needed. This way we have the knowledge in-house, and we have a method for resolving technical issues." Hughes emphasises the need to budget in time for the staff member to build a good relationship with the outsourced technical support, as to be trained on how to solve the simple issues.



In the earlier sections of the guide, we have seen the many options available for ICT improvements (Table 1 and Table 2), and how to prioritise which ICT tools and/or strategies to invest in. In this section, you will find out how to determine what investments you will need to make – both in terms of finance and staff time – to successfully implement the ICT initiative.

## What do you need to invest?

Regardless of the benefits, every VCO has its capacity limits. That's why it's essential to balance those benefits with a sense of the total cost of ICT ownership. This will help you to determine if an initiative is just too costly to pursue, or which of several initiatives offers the best possible return on investment.

### What are the costs?

In many – if not most – situations, the cost of hardware and software runs at below 30 per cent of the total costs associated with preparing, launching and sustaining an ICT initiative. As we will see in Table 6 and the examples of ICT initiative budgets that follow, a project of this nature involves many line items that have nothing to do with the actual hardware or software tools.

For example:

- What is the total cost of staff time, when staff have to spend more time training other staff on ICT? Some of the salary time you previously allocated to the programmatic work of that staff person shifts, and is now a direct ICT expense.
- What is the cost of getting comfortable with using a new system, or the time it takes to integrate the use of a new system into your everyday job tasks?
- What is the cost of staff time to develop a good relationship with your technical support or network consultant?
- What is the cost of switching to a new database or information system? There is a point where you will probably run the old and new systems in parallel before switching to the new system. There is an added cost of time in doing so.

### Ongoing maintenance and your changing ICT needs

The organisation **Albanian Youth Action** ([www.albanianyouthaction.org.uk/](http://www.albanianyouthaction.org.uk/)) helps young Albanian-speaking refugees adapt to life in the UK. The organisation invested money in setting up a local-area network but forgot to consider the costs of maintenance and replacement. They are now faced with a crumbling infrastructure. Their programmes have changed, and staff are increasingly working out in the field and have a greater need for mobile laptops and wireless internet access. "It's really important to think of technology planning as a mechanism where you can adapt your technology as your programmes change," comments one member of staff. "It's also really important to have a replacement strategy in place and not think of new computers as a one-off purchase."



Regardless of the type of ICT initiative, it is important to understand the full cost of the projected scheme. It could be that you are pursuing a very simple and straightforward ICT initiative, such as upgrading all your basic hardware. On the other end of the spectrum, you might be implementing a complicated initiative, such as integrating all your current database systems into one comprehensive system. Whatever the scale of the initiative, when it comes to ICT there are always hidden costs – both in terms of finance and other resources.

Go into the project with your eyes wide open, so that you and others have the right expectations about the time and costs needed to successfully implement the initiative. Look at Table 5 to see what you need to consider and work through before you can begin to calculate cost. Once you know what all your needs are and all of the associated costs, it will be easier to cost the project.

**Table 5: Items to cost**

ICT COST AREA	SPECIFIC EXPENSE ITEMS
<b>Assessing need, planning, implementation and evaluation</b>	
	<ul style="list-style-type: none"> <li>• Consultants' fees and/or staff and volunteer time to develop and implement assessment, planning and evaluation-related activities</li> <li>• Time spent by internal stakeholders (such as staff, trustees or volunteers) who provide information</li> <li>• Fees for any tools or suppliers related to surveying, web tracking or other data-gathering activities for assessment and/or evaluation</li> </ul>
<b>ICT training</b>	
	<ul style="list-style-type: none"> <li>• Fees related to hiring a consultant, a trainer or staff time to assess skills of staff and volunteers, prepare and/or purchase training materials, and conduct training</li> <li>• Staff and volunteer time away from regular work to go through ICT assessment and training</li> <li>• Staff time to manage any training-related consultants or suppliers</li> </ul>
<b>ICT technical support (networks, hardware, advanced software tools and so on)</b>	
	<ul style="list-style-type: none"> <li>• Consultant and/or technical support fees and/or staff time</li> <li>• Staff time to manage any technical support consultants or suppliers</li> </ul>
<b>Software</b>	
	<ul style="list-style-type: none"> <li>• Cost for off-the-peg software and/or subscription fees for online software applications</li> <li>• Software licensing fees</li> <li>• Consultant and/or supplier fees and/or staff time to set up or customise software</li> </ul>
<b>Hardware</b>	
	<ul style="list-style-type: none"> <li>• Purchase or lease of hardware (workstations, printers, networking equipment, and so on)</li> <li>• Warranty costs to replace or provide new equipment or parts</li> <li>• Insurance</li> <li>• Indirect costs, such as electricity and toner</li> </ul>
<b>Connectivity</b>	
	<ul style="list-style-type: none"> <li>• Costs for dedicated hardware (excluding email server) and/or fees for website and email hosting</li> <li>• Wiring</li> <li>• Internet access fees</li> </ul>
<b>Managing organisational change</b>	
	<ul style="list-style-type: none"> <li>• Staff time related to decreased efficiency while adjusting to new or changed business systems</li> </ul>

What could professional IT volunteers do to help you with these projects? Find out more about how to make the best of free ICT consultancy and how to find support for your project at [www.ictclub.org.uk](http://www.ictclub.org.uk).



# What do you need to invest?

## Developing a budget for your initiative

In this section you will find a number of example ICT budgets, to illustrate the total cost of ownership. As you would expect, the larger and more complex the project gets, the more difficult it is to untangle the total cost of ownership (TCO). It is very important to remember that these examples will not coincide exactly with what you need to do. They are only meant to illustrate the various diverse budget line items to consider and will vary depending on supplier and geographic location. The financial prices we quote will fluctuate and will vary depending on the suppliers and companies with which you work.

The time estimates provided here will vary depending on the skill of your staff, volunteers or teams assembled to tackle ICT initiatives, as well as on other variables. We strongly advise that you use these TCO budgets as a starting point to help you consider and start thinking through the costs for your own specific ICT initiatives.

You may also wish to consider whether you could share resources with another organisations to help you meet these costs?

### Sample budget 1: Networking initiative

Purchase and install a new server, develop policies around effective use, train staff and ensure effective administration and operation

ITEM	COST
Server	£2000–£4000
Consulting fees to install the server and connect it with existing workstations	£750
'Accidental techie' staff time to shadow consultant	8 hours
Developing shared network folders on the server and migrate and organise workstation files to server	20 hours staff time or £1000 consulting fees
Preparing written policies related to network privacy, proper file naming, file-saving locations and other issues related to network data management	20–30 hours staff time or £1000 consulting fees
Training staff on how to log in, save files and troubleshoot basic network problems	18 hours staff time or £900 consulting fees
Half-yearly cleaning of network files	16 hours staff time or £800 consulting fees
Ongoing network administration	One-eighth time of staff person or £4000 as a technical support contract



## Sample budget 2: Training initiative Improve staff ICT skills

ITEM	COST
Develop or identify appropriate ICT skill surveys	2–5 hours
Time for staff to fill out the survey	1 hour+ per person (total this for organisation resource needed)
Time to prepare a training regime that matches up with the trainee's learning styles and skill development needs, or to identify and engage a training supplier or to work directly with your staff on-site, or payment for a training lab or other venue	6–10 hours of staff time or £800 in consulting fees
Purchase of curriculum materials such as online courseware or self-paced tutorials.	£250 for training materials license
Volunteer, staff or temp time to cover the responsibilities of those at training and not working.	20 hours staff time and £500 for trainer for whole day
Time for six-monthly and yearly review of skills improvement	12 hours of staff time and/or £800 for trainer

# What do you need to invest?

## Sample budget 3: E-newsletter initiative

Develop, write content and publish an e-newsletter

ITEM	COST
Review current communication practices related to newsletter type communications Develop audience survey Collect and analyse data Make decisions about new e-newsletter project	24 hours staff time and/or £1,500 consulting fees
Email list management tool	£25–750
E-newsletter content publishing tool	£25–750
Training on use of tools for all relevant staff	20 hours staff time
Development of revised publishing system to generate the content	12 hours staff time
Content development	8–12 hours per issue
Preparing email and related management per issue	2–4 hours per issue
ADSL connection (if not already available)	£25
Dedicated PC	£1000 (total cost of ownership) – does this need to be dedicated? Could you use an existing PC and save money?
Digital camera	£150

## Sample budget 4: Data protection initiative

Implement a new security, back up and data protection system

ITEM	COST
Identify critical documents and other data that needs backup on a defined schedule (daily, weekly, monthly)	6–10 hours staff time
Develop written data protection policies	3–4 hours
Review options for backup and virus protection and pick one that best matches needs	6–10 hours
Firewall Backup hardware Backup media	£100–2500, depending on need, size and so on 4–5 hours staff time
Buying virus protection software with subscription update and back-up software	£25–500 – software, depending on the number of licenses needed and whether there is a server.
Installing, configuring and testing virus protection and backup software	1 hour per workstation 3–6 hours for server
Training staff on importance of virus protection and back-up policies	2 hours per staff person
Identifying and training administrative level staff on virus protection and backup	4 hours
Ongoing maintenance.	1–2 hours per week

Sample budgets 1 to 4 illustrate the diverse types of costs related to ICT initiatives, as well as how to properly place them into your organisation's budget. As they show, costs may relate to financial or staff-related resources, and may represent one-off purchases (such as a new printer or piece of software). However, in other situations they may require ongoing charges (such as broadband internet fees or annual virus protection subscriptions).

Sometimes, the costs are specific to one single ICT initiative, such as training materials for an in-house web content manager. In this case, the cost could be placed directly within a specific programme budget. Another example of assigning costs to a programme budget might be the cost associated with hiring a specialist to train staff in the use of hand-held mobile devices for treating homebound patients. Whichever way you choose to allocate expenses, the key is to remember that the total cost of ICT usually goes far beyond hardware and software.

# What do you need to invest?

## Who can you trust?



**The Travelling Light Theatre Company** received a grant to purchase computers and a server, but suppliers urged the company to purchase more equipment than they really needed. Luckily, a consultant who did not sell equipment analysed their everyday workflow that related to ICT and linked this to equipment needs. He identified the total cost of ownership, including maintenance, training, and support. As the theatre is very small with no technical staff, hardware leasing and hosted services made the most sense.

The lesson from this case study is to plan ICT needs to fit your business processes. It often makes good sense to hire a consultant or use a volunteer, rather than a supplier, to help you figure out your ICT needs if you don't have expertise on your staff.



Use sample budgets 1 to 4 and Worksheet 3 to begin costing your ICT initiative.

## Worksheet 3: Developing your total cost of ownership budget

- Step 1** With your colleagues or on your own, review the total cost of ownership (TCO) categories and line items listed in Table 5, as well as sample budgets 1 to 4. If you are stuck, and have no idea where to start then visit, the following website for a free technology budget calculator:  
[www.ictclubknowledgebase.org.uk/calculatingtechnologybudget](http://www.ictclubknowledgebase.org.uk/calculatingtechnologybudget)
- Step 2** In the left-hand column, list all the possible costs associated with your initiative. If you do use the technology budget calculator detailed in Step 1, transfer the results to this worksheet, and go further by including any additional items from your own assessment.
- Step 3** Pay careful attention to the second column, related to 'human' costs. It is in this area that VCOs most often fail to adequately budget for ICT initiatives. If possible, try to calculate the actual salary-related equivalents for the hours you estimate that staff will have to spend on the scheme.
- Step 4** Fill out the third column as best you can
- Step 5** Talk to colleagues, consultants and anyone you can to specify more detail in the budget. For example, we strongly encourage you for example to post a note on the UK Riders listserv (mailing list management) site at <http://lists.lasa.org.uk/lists/info/ukriders> to get information. Your message will make its way to many of your colleagues who have extensive ICT experience and can tell you the real cost of many items.

## Worksheet 3: Developing your total cost of ownership budget

<b>All possible costs associated with your initiative</b>	<b>Human costs</b> Include things like time for: <ul style="list-style-type: none"> <li>• meetings</li> <li>• training</li> <li>• material development</li> <li>• managing projects</li> <li>• managing people</li> <li>• research</li> <li>• decision-making.</li> </ul>	<b>Financial costs</b> Include things like costs for: <ul style="list-style-type: none"> <li>• hardware</li> <li>• software</li> <li>• connectivity</li> <li>• consultant support</li> <li>• online services</li> <li>• training materials</li> <li>• service contracts.</li> </ul>

If you need to, do continue this list onto a separate sheet.

# What do you need to invest?

With your completed Worksheet 3 in hand, run through the following checklist to determine whether you are ready to allocate funds and staff time from your existing budget, and/or to research new funding sources.

## Checklist 3: Total cost of ICT ownership

- ✓ If appropriate – and possible – gather other staff and/or volunteers to look at the costs, both human and infrastructure related to the particular ICT initiative. At this point, it is a good idea to have some people with technical skills at the table to assist in determining the cost of the ICT tools.
- ✓ Look carefully at the cost line items you listed. Is anything missing? Don't forget to pay very careful attention to the time that staff will need to spend implementing the ICT initiative.
- ✓ If you are having difficulty costing an item, we suggest you refer to the boxes on Sharing ICT experience with your peers and technology budget calculator (pp26 and below) as well as consulting the ICT Hub site ([www.ichub.org.uk](http://www.ichub.org.uk)), which offers a helpdesk (**0800 652 4737**), knowledgebase ([www.ichubknowledgebase.org.uk](http://www.ichubknowledgebase.org.uk)), directory of circuit riders/consultants (<http://directory.ichub.org.uk>), volunteers ([www.it4communities.org.uk](http://www.it4communities.org.uk)), and providers, at [www.ichub.org.uk](http://www.ichub.org.uk)
- ✓ Ask yourself, again and again, “Can we truly fund this initiative adequately, and even if we have the funds, will we be able to devote adequate staff time?” If the answer to either question is “Maybe not”, then we suggest you look at the initiative to see if it can be broken down into smaller parts that can be implemented in phases.
- ✓ Review this against the objectives and outcomes that you listed in your case statement. Does this seem like value for money, is this investment in time and resources going to be worth it? What are the risks?

## Technology budget calculator

A calculator is available free of charge at:  
[www.ichubknowledgebase.org.uk/calculatingtechnologybudget](http://www.ichubknowledgebase.org.uk/calculatingtechnologybudget)



## Summing up

You need to understand the true total cost of ICT ownership (TCO) is – going beyond the hardware and software costs to determine the combined financial and human resource costs associated with ICT. This will help you determine which initiative will be most practical and deliver the best return on investment for your organisation's capacity.

In many – if not most – situations, the cost of hardware and software runs at below 30 per cent of the total costs associated with preparing, launching and sustaining an ICT initiative.

Time is a major budget cost from training through ‘getting comfortable with the system’ and in building and maintaining a relationship with a supplier.

Whatever the scale of the initiative, when it comes to ICT there are always hidden costs – both in terms of finance and other resources. Table 5 helped you consider some of these hidden costs and the sample budgets will give you a rough indication of what your initiative might cost.

# What do you need to invest?

Remember, prices vary and you should get formal quotes before making a funding application. Some costs will be one-off and others (such as broadband connectivity) will be ongoing. Could some 'time' resource be met by external volunteers or partners?

Ask yourself, again and again, “Can we truly fund this initiative adequately, and even if we have the funds, will we be able to devote adequate staff time?” If the answer to either question is “Maybe not”, then we suggest you look at the initiative to see if it can be broken down into smaller parts that can be implemented in phases.

Let's start to look at monitoring and evaluation – how will you measure success?





## How do we measure?

There are many ways to measure your ICT initiative's success ie have you realised your benefits? The core question we encourage you to ask is whether the indicators you describe are a realistic representation of the work that you did. Being able to measure the success of your ICT initiative will not only help you state your case for future funding more powerfully but also help you assess your future ICT investment strategies.

Let's begin with an example. If an environmental charity set up a website to include a 'worst polluters' list of corporate pollution of rivers, then a decline in the actual level of pollution in the year following the web launch could not be attributed directly to the website. A number of factors could have influenced this outcome.

As another example, consider a VCO that starts distributing a new e-newsletter about teenage pregnancy to students. Here are the specifics:

The VCO targets distribution of the e-newsletter to students in three communities. Several other VCOs are also part of the project, and offer support to under-16s in the same three communities, as well as in four surrounding communities.

Data gathering confirms that:

- More than 25 per cent of the young people who receive the e-newsletter do read it.
- One year later, teenage pregnancy rates show a greater drop in the three communities than in the four surrounding communities.

What is realistic for the VCO to claim?

- Their e-newsletter was the primary cause of the reduction in teenage pregnancy.
- Their e-newsletter was a contributing factor to the reduction in teenage pregnancy.
- Their e-newsletter had nothing to do with the reduction in teenage pregnancy.

*Answer: The second point is probably a fair claim to make as long as the basic factors were the same in the three communities and the four surrounding communities.*

A simpler way to assess the success of an ICT initiative is to focus less on the ultimate beneficiaries and more at other types of results. Take for example some of the outcomes described in Table 6. See how you do as we challenge you to identify the indicators that are realistic to measure.

**Table 6: Possible indicators of a successful ICT project**

TYPE OF ICT PROJECT	POSSIBLE INDICATORS
An environmental organisation launches a new email action network. The desired outcome is that more of their members will take action to advocate for policy changes.	<ol style="list-style-type: none"> <li>1 At least 75% of policy makers surveyed indicate that they receive more pressure from the organisation's members than they did before the email network was established.</li> <li>2 Several new environmental laws are passed in the three months following launch of the email network</li> <li>3 At least 30% of members who get the action network emails click through to the Web page where they can send a policy maker an e-postcard and actually send an email.</li> </ol>

*Answers: Indicator 1 is measurable and would be fair to claim as an indicator, as it directly relates to the ICT initiative. There are just too many variables affecting Indicator 2 to claim that the network was responsible for the passage of new environmental laws. Without a reliable baseline to measure the 30% figure, it is impossible to determine that more of their members take action in Indicator 3.*

# Measuring success

Table 6 continued	
TYPE OF ICT PROJECT	POSSIBLE INDICATORS
A health and social care agency ICT initiative focuses on providing in-depth training to staff and volunteers on basic office productivity software. The desired outcome is improved staff efficiency in getting day-to-day work done.	<ol style="list-style-type: none"> <li>1 More than 85% of staff and volunteers self-report that they are getting computer-related tasks done more quickly than before the training.</li> <li>2 Discussions with managers indicate that they observe that three important business processes in the organisation (newsletter production, sending email invitations for events, and development of end of the month progress memos) are getting done more quickly.</li> </ol>
<p>Answers: Both 1 and 2 are realistic indicators that can be measured, and could be claimed as directly related to the initiative.</p>	
An older people's support programme trains workers to use tablet PCs and other mobile communication devices to communicate with each other, and to access their client data records. The desired outcome is that the workers are able to give their clients the support they need more quickly.	<ol style="list-style-type: none"> <li>1 Six months after distribution and training on how to use the mobile devices, fewer older clients die in the care of the programme workers.</li> <li>2 More than 75% of programme workers report that the mobile devices improve their ability to deliver care more quickly.</li> <li>3 A survey of older patients indicates that more than 85% of them are very happy with the services that the workers are providing.</li> </ol>
<p>Answers – Only number 2 is a realistic and measurable indicator that could be claimed as directly relating to the initiative.</p>	

## Summing up

There are many ways to measure your initiative's success but how realistic are they? How many other factors could have influenced this outcome?

The examples on environmental pollutants and teenage pregnancy help demonstrate the pitfalls and what you can, and can't, reliably claim as success.

A simple way to assess the success of an ICT initiative is to focus less on the ultimate beneficiaries and more on other types of results – Table 6 helped you review this.

What are your indicators of success? You'll need these to support your monitoring and evaluation component of your proposal. Remember, you can't manage what you can't measure.

Now let's look for the money!

# Funding your ICT Initiative

7

In this final section of the guide we offer you tips and techniques to help you prepare a grant proposal to raise the funds necessary for proper implementation of the ICT initiative.

***“As a funder, if we’re going to fund technology for an organisation, not only do we need to know that the VCO knows what they need and can make good use of it – we also do need to see plans for how the continuous upgrade and continuous training pieces are integrated into the operating budget of the organisation.”***

Chief Executive, a medium-sized trust and key ICT funder

What do you need and why?

What will be the total cost?

How can you fund your effort?

## Meeting funder expectations and the value of partnerships

Blackpool, Fylde and Wyre Society for the Blind provide a range of services for visually impaired people including audio tape-based ‘Talking News’. However, the increased difficulties (and costs) of getting parts for the tape duplicators were causing problems.

The local society met with the John Rudkin, eCommunity Manager for Blackpool Council ([www.blackpool4me.com](http://www.blackpool4me.com)), with the idea of trying new technologies, around the time that iPods were becoming more common. This led to the development of blueIRIS ([www.blueiris.info](http://www.blueiris.info)), where clients can download ‘Talking News’ through web streaming and podcasts.

The charity and council brought together an innovative partnership including Apple Computers, Anglia Ruskin University and local specialist suppliers Rural Surround and Interface IT Services to jointly bid for innovation funding through the Lancashire Digital Development Agency.

Working with the funder’s aim in ‘improving broadband connectivity’ as well as the ultimate goal of streaming ‘Talking News’, helped to develop a great solution with free computers and broadband connections for clients in addition to the streamed media. The project is now sustained as part of the Society and is infinitely scalable (having gone from 15 pilot users to over 500).

Additional benefits to the charity include being able to monitor content (who listens to what) to tailor content, increased profile to the local charity and more up to date resources for clients. Apple are also now bundling free screen readers with all Mac computers.



# Funding your ICT Initiative

When it comes to ICT decision-making, there are certain characteristics that are particularly common among the successful VCOs highlighted in this guide. When you look at funding practices, VCOs that are serious about sustainable integration of ICT into their organisations do the following:

- embed financial costs of ICT into all their organisational and/or programme budgets
- incorporate non-financial ICT costs into job descriptions and/or workplans
- cover their core ongoing ICT costs through their operating budget
- reach out for supplemental funding support very carefully and thoughtfully

As far as this final point goes, funders are more prone to support you under certain circumstances. This part of the guide will help you as you approach sources of funding outside your own VCO.



As far as where to get funding goes, the good news is that there are many different funding sources available to help you finance your ICT implementation. You can approach trusts and foundations, the national government, local government and philanthropic companies. You can find out more about sources of funders from the ICT Hub's Sources of Funders guide and at [www.icthub.org.uk/funders](http://www.icthub.org.uk/funders).

The less positive news is that most of these funders are unaware of the total cost of ICT ownership. Research confirms that funders are often more willing to make capital payments, so you may find yourself with funding for new hardware but little or no financial support to train staff or handle other costs related to ICT sustainability. There is also fierce competition for the limited funds that are available, so it's important to write a good application. For this reason, in this section you will find some practical tips to help you prepare funding proposals that are persuasive and clear. Use the work you've done in Worksheet 1, 2 and 3 including your case statement to strengthen and argue your case.

## 'Selling' your idea

You are unlikely to write a really good proposal if you are unclear about what your organisation does, how it does it, and what you want to accomplish and improve with the ICT tools and strategies that you are seeking. Having clear objectives and outcomes is essential, as we discussed in Section 2 and you worked up into Worksheet 2 and in your case statement. All of this preparatory work will help you make your case to funders. Being able to identify the full benefits of ICT, including how it will improve programmes, collaborative working, marketing or fundraising, is very different from articulating what you want to buy. These points are essential to the strength of your proposal.

This brings us to the first rule. Focus on what a specific ICT tool and/or strategy might help you accomplish, rather than the technology itself.

Next, look at the language you use to describe the project and the ICT you want funded. Ask yourself whether the descriptions are persuasive and clear. Does your proposal address real needs in the context of your organisational goals? Does it give the reader the sense that you have clear direction and the knowledge of where you've been and where you're going? Review the following two examples, which describe the same project in different ways. Which one do you think is more compelling and likely to be funded?

## Grant proposal: Example 1

In our strategic goals for 2007, we will develop and support advisory boards of our stakeholders. In the past, this communication was ad hoc and anecdotal. We want to develop a systematic approach that will let us track how the community's needs change over time. This will help us document our growth and better anticipate future needs. Because our stakeholders are spread out over a large geographic area, an extranet will allow us to effectively and efficiently communicate with our advisors and board. In addition, the extranet is part of an overall communications strategy to improve our record-keeping and decision-making processes.

## Grant proposal: Example 2

We rely on our advisors to help us stay in contact with and better understand the community we serve. We have always strived and struggled to gather their input to guide our programming. In our strategic goals for 2003, we clarify that this is an area where there needs to be a lot of improvement. We will respond to this reality by formally developing and supporting two new advisory boards of our stakeholders. In the past, this communication was ad hoc and anecdotal with community advisors. We want to develop a systematic approach that will let us track how the community's needs change over time. This will help us document our growth and better anticipate future needs.

Both examples are fair attempts, but look carefully and you will notice a subtle but important difference between the two. In the second narrative you get a much better sense of why there is a need for the extranet and how it might help the organisation... and, by the way, notice that in the second statement the word 'extranet' isn't even used. Can you describe your aspirations without referring to the tools you will use and avoiding technical jargon? We don't mean you shouldn't mentioned the word 'extranet' if that's what you're applying for but that the benefits and impact must outweigh the jargon.



You should also make sure the proposal is spelt correctly, clearly mentions the strategic aims of your organisation, how you're developed and where you're going and presents a sound argument for the project.

# Funding your ICT Initiative

## Demonstrating impact = funder support

1. Look carefully at the outcomes you decided on in Worksheet 2.
2. Review Table 6 and sample budgets 1 to 4.
3. Identify no more than two or three truly measurable indicators that you will be able to rightfully claim as directly related to your work on the ICT initiative.
4. If you are working alone, review these with others to see if they seem reasonable. Ask yourself, “Will these be of interest to our funder?” Even if they aren’t, they still may be appropriate for you to measure anyway for your needs. But do try to identify some measures that may interest your potential or existing funder. At the very least, it is important that you show them you are serious about the investment. Believe it or not, this one little thing can be the factor that decides whether your proposal is funded or not.
5. For each indicator of success, determine how you will get the data you need and from whom. Will it be through a survey, interviews, review of web statistics, or through some other means?
6. Finally, figure out at the outset of implementation what date in the future will be a logical time to collect data. Put it into your calendar and do it!

Now, let’s take a look at another set of examples – this time, looking at three objective statements for the exact same ICT initiative. How would you rate these? Which is the weakest? Which is the strongest? Which says more about what the VCO does and why they need ICT tools? Notice that a very subtle shifting of words and a few simple additions can result in a major change in emphasis from the technology tools to the programme results. Believe it or not, this simple shift can change the way a funder views your entire proposal. Using well-chosen language in your cover letter could move your application to the top of the pile.

### Objective statement: Example 1

*“Our new database system will make it possible for us to better gather and analyse information about our clients. This will result in us being able to better serve them.”*

### Objective statement: Example 2

*“Understanding our clients means we can better serve them with the care and medication they need, when they need them most. To augment our personal contact and knowledge of our clients, we need more efficient and better ways to analyse data about them and trends in our service-delivery approaches. This means better service to individual clients and improvements in our overall client care system.”*

### Objective statement: Example 3

*“Our new integrated database system will make it possible for us to gather and manage data about our clients more quickly.”*

Number 3 is weakest because it focuses on the ICT itself and is vague about the benefits. Number 1 is better because it tells you more about what will be done with the data and what the results might be. Number 2 is by far the strongest. Can you see why? The focus is on the beneficiaries: the clients. The ICT itself is not mentioned but what it will enable the organisation to do.

## Speaking the funders' language

Look at the benefits of a specific ICT initiative to your organisation. Think about the funders you will be approaching. Ultimately, you need to connect the things you are seeking funding for to the funders' interests and priorities. However, be clear that we are not suggesting that you inappropriately tailor your proposals: the reality is that your interests are often theirs. Remember, you are the vehicle through which external funders meet their agenda for community improvement. Be proud of this connection, and make it obvious to them how your use of ICT fits into their goals. For example, is the funder interested in funding programmatic work or overall organisational effectiveness and capacity building? Does it have any special initiatives that it is exploring or funding? What has it funded in the past? What do its guidelines say?

Funders are quick to spot ICT that appears to be an 'add-on' – for example, the healthcare clinic that suddenly decides to open a community technology centre that conveniently coincides with the funder's new funding programme for community technology centres. Contrast this to the healthcare clinic with a track record of community education and outreach. This latter clinic might present evidence showing that patients would use an ICT centre to research their treatment options. In the latter, ICT is a logical enhancement of work that the voluntary organisation is already doing.

If possible, meet with the funder to discuss your needs. Then, as you draft your proposal, put yourself in the funder's shoes. Ask yourself, how does a contribution to your initiative help meet the funder's needs? Will the grant further their own objectives? How? When you have begun to write up your proposal language, look at the case study (below) and see if you are doing as good a job at speaking to the funder's interests.

### Proposal for a funder interested in child care

2007 is shaping up to be one of the most contentious years in recent times regarding childcare policy and government funding for childcare programmes. Our objective is to improve our ability to motivate and empower our members so that they are able to inform MPs and local councillors about forthcoming childcare initiatives. Timely response by our members will be critical to influence policy, as we learned in last year's debate on two different childcare resolutions. We need your funding support so that we can invest in an improved membership management system that will enable us to empower members for maximum impact on childcare policy in the critical upcoming and future parliamentary sessions.



If you want programme officers to support your proposal, make it easy for them to understand why. Remember that your proposal is in competition with other proposals, and your grant officer may be competing internally for limited funds within their organisation.

More information on funding can be found at:

- ICT Hub Sources of Funders Report - [www.icthub.org.uk/research](http://www.icthub.org.uk/research)
- ICT Hub website Funders Section - [www.icthub.org.uk/funders](http://www.icthub.org.uk/funders)
- ICT Hub Knowledgebase - [www.icthubknowledgebase.org.uk/fundingict](http://www.icthubknowledgebase.org.uk/fundingict)
- Finance Hub - [www.financehub.org.uk/?Resources](http://www.financehub.org.uk/?Resources)





# Funding your ICT Initiative

## The ICT budget

It is generally considered good practice to avoid making your ICT initiative budget an add-on to your regular organisational budget (unless it is a specific, time-bound project). We strongly suggest that you find ways to integrate your ICT budget into your regular organisational budget (both administrative and programme budgets). Seriously think about how ICT can be supported on an ongoing basis through your operating budget.

As one funder told us, “We would never dream of making a grant to an organisation that has no mailing address or telephone number. Having a space and a phone is just a part of the cost of doing business. Likewise, we have to think about ICT in the same vein, and support is a regular cost of doing business.” We urge you to reinforce this idea by better integrating ICT into your operations during the budgeting process.

For most other funders, your proposal should attach ICT costs to a project or programme. For example, let’s say that you need to upgrade your computer network so that three of your sites can communicate. You need ten new computers, high-speed internet access, training and support. If you need these ‘infrastructure’ improvements, send proposals to funders that are already supporting your programmes in the community – they may support this initiative simply with the understanding that it will improve your efficiency as an organisation.

Ask yourself how your improved infrastructure will help you programmatically. Maybe the high-speed access will make it easier for you to transfer data you collect to the database where you do community mapping. Possibly some of the new computers will be used by staff who are looking at the data or writing up the results into policy papers. Find a way to make the connection between infrastructure funding and specific programmes.

Finally, remember that your budget should speak clearly to the total cost of ownership (see ICT initiative budgets, p48).

### Don’t forget the total cost of ownership

- Review the work you did to determine your total cost of ICT ownership.
- Ask yourself, “Did we cover training and ongoing support costs for our initiative?”
- Ask yourself, “Are we showing the funder the enormous organisational investments we are making in staff time that we are asking them to boost with their financial support?”



## Recurring expenses

Many funders will want to know where will the money come from after their grant runs out and how you propose to sustain the ICT next year and the year after. We recommend you address these two common questions by using one of two simple approaches:

**Approach 1:** Increasing the integration of ICT support into your operations and clearly articulate this plan to your funders.

**Approach 2:** Diversifying funding for projects so they come from several sources over time, and each source of support builds logically upon the prior.

The following comment from a funder might clarify these points:

“If we’re going to fund technology for an organisation, not only do we need to know that the



# Funding your ICT Initiative

VCO knows what it needs and can make good use of it – we also need to see plans for how the continuous upgrade and continuous training pieces are integrated into the operating budget of the organisation. Most of us who fund the start-up programmes want to see the long-term plan for this programme being integrated into the organisation's core, because we can't fund core operations or programmes in perpetuity. If we see you undertaking those tough decisions, then I think we have greater insurance that our investment is well spent."

## Presenting your proposal

Be sure to present your proposal professionally. It may sound like the basics but do follow the funder's guidelines to the letter; grant officers tell us again and again that many proposals do not make the first cut because they don't adhere to the guidelines. Look at your proposal carefully and critically before you send it out (and within the deadline, of course).

Ask yourself:

- Is it written in a positive tone, focusing on solutions rather than problems?
- Is it easy to read and organised in an eye-pleasing way?
- Is it logical in its structure and organisation?
- Does it avoid jargon and excessive acronyms?
- Is it free from spelling and typing mistakes, inconsistencies, messy formatting and grammatical errors?
- Does it look professional?
- Does it meet all of the guidelines in terms of style, length, and sequence?

Finally, be sure that your narrative, budget, and evaluation plan all tell the same story. If you are requesting funds for computers for an after-school programme and your goal is to increase test scores, you need to measure test scores, not just attendance or student satisfaction.

### Checklist 4: Fundraising

- ✓ Are your objectives and outcomes are clear, concise and powerful? Do you emphasise programmatic and operational improvements in our organisation, rather than the ICT itself?
- ✓ Of the funders you will approach for support, do you know what they are interested in and have you revised your proposal accordingly?
- ✓ Does your budget emphasise the total cost of ICT ownership (TCO), and is it embedded into your programme, project or broader organisational budget as appropriate?
- ✓ Does your proposal articulate how you will deal with recurring ICT expenses so the funder's investment is not wasted?
- ✓ Are you prepared to present your proposal in a way that aligns with the funder's interests and guidelines?
- ✓ Can you articulate ways that your funding can trigger other positive consequences, such as acquiring funding from others?
- ✓ Do you receive support from a diverse set of funding sources, and will you help your funders understand that you will not rely solely on them to fund your ICT needs over time?
- ✓ Have you taken the time to build some relationships with the funder that you plan to approach, and others who can put in a good word for you?

# Funding your ICT Initiative

## Checklist 4 continued

- ✓ Does your proposal discuss how you will pay attention to lessons learned through your efforts, and how you will incorporate those lessons into your ongoing decision-making?
- ✓ Do you describe in your proposal how you will manage implementation as well as ongoing sustainability of the effort?
- ✓ Do you have a clear plan for evaluating your ICT initiative? Can you identify to yourselves and the funder what success will look like? Have you developed a baseline from which to measure your success?



## Sources of funders' research

55 funders of ICT have been sourced. Contact information and details of previously funded awards is available.

[www.icthub.org.uk/research](http://www.icthub.org.uk/research)

## Free sources of help

If your initiative requires time and support rather than actual hard cash, had you thought about getting volunteer help? the ICT Hub has a wealth of resources on identifying good ICT projects for volunteers and making the best use of the volunteer resource. You can find out more at [www.icthub.org.uk](http://www.icthub.org.uk).

Don't think your time on developing a proposal was wasted. IT volunteers will want to know why you want to do your project, what difference it will make and how you will sustain it. Be prepared!

## Summing Up

***“As a funder, if we're going to fund technology for an organisation, not only do we need to know that the VCO knows what they need and can make good use of it – we also do need to see plans for how the continuous upgrade and continuous training pieces are integrated into the operating budget of the organisation.”***

Well, who wants to pay for something that doesn't make an impact and won't be around in two years time?

VCOs that are serious about sustainable integration of ICT into their organisations:

- embed financial costs of ICT into all their organisational and/or programme budgets
- incorporate non-fiscal ICT costs into job descriptions and/or workplans
- cover their core ongoing ICT costs through their operating budget
- reach out for supplemental funding support very carefully and thoughtfully.

Funders are more likely to support you under certain circumstances

There are many sources of funding available but few funders support total cost of ownership – many will only pay for a computer, not the all-important support costs and training but the ICT Hub is working to improve this situation.

# Funding your ICT Initiative

You are unlikely to write a really good proposal if you are unclear about what your organisation does, how it does it, and what you want to accomplish and improve with the ICT tools and strategies that you are seeking

Being able to identify the full benefits of ICT, including how it will improve programmes, collaborative working, marketing or fundraising, is very different from articulating what you want to buy.

- Focus on what a specific ICT tool and/or strategy might help you accomplish, rather than the technology itself.
- Make sure your descriptions are persuasive and clear – describe your aspirations without using technical jargon.
- The focus must be on the beneficiaries: the clients.

Working through this chapter you'll have used your worksheets to develop two or three truly measurable indicators of success and planned how you will collect the data.

Ultimately, you need to connect the things you are seeking funding for to the funders' interests and priorities – don't make ICT an 'add on'. Try to integrate your ICT budget into your organisational budget. It's not an optional extra. Remember that your budget should speak clearly to the total cost of ownership. Identify how you will manage the recurring expenses of ICT.

Put yourself in the funder's shoes. Ask yourself, how does a contribution to your initiative help meet the funder's needs? Will the grant further their own objectives? How? If you want programme officers to support your proposal, make it easy for them to understand why. Remember that your proposal is in stiff competition.

Be sure to present your proposal professionally. Follow the foundation's guidelines to the letter. Look at your proposal carefully and critically before you send it out. Be sure that your narrative, budget, and evaluation plan all tell the same story. Check spelling and presentation.

Finally, consider how much free resource you could identify through the use of IT professionals as volunteers.



Well done. You've finished all the worksheets and are at the end of the guide! Now we want to prompt you to develop a clear strategy to raise the funds you need to successfully implement your ICT initiatives.

Throughout the guide we have asked you to go much further than just thinking about how to fund your ICT needs. We encouraged, urged, maybe even pushed you a bit to ensure that you are very intentional in the way you approach ICT decision-making and use.

ICT is business-critical to the majority of voluntary and community organisations and you now will have a list of benefits and a strong case statement to go and approach and negotiate with the funding community. This, coupled with an accurate assessment of the total costs of ownership of this initiative and the likely outcomes, and you will have undoubtedly increased your chances of success.

Whatever the size of your organisation, ICT has the power to transform the way you and your organisation works. Following our step-by-step guide to plan, cost and fund your ICT you have the skills to avoid making costly mistakes and plan, cost and fund your initiative innovatively yet realistically.

Don't forget to pay close attention to your and your organisations capacity to implement ICT initiatives and to your organisational culture, mission and strategic priorities. It will only be by understanding the full range of ICT benefits, which goes beyond efficiency improvements, and by understanding the total cost of ICT ownership, which goes beyond the cost of computers and software, will you realise these benefits.

We never claimed that convincing funders to fund the total costs of ownership of ICT was going to be easy but equipped with these new costing and funding skills you will be able to argue more strongly, confidently and successfully to ensure these costs are funded. We aren't going to change funding behaviour overnight but by presenting funders with well thought out costs and rationale for funding is certainly a step forward!

Even if you are not planning a small or a major ICT initiative tomorrow or next month, or maybe you are in the middle of a project which isn't going quite as well as you had hoped – use this guide. Dip into it as and when you need to help you help funders to help you take control of your ICT future!



## Resources

### Databases

Planning a database

<http://www.ict hubknowledgebase.org.uk/planningadatabase>

Buying a database: An overview of three main types of databases used in the VCS

<http://www.ict hubknowledgebase.org.uk/buyingadatabase>

### Basic Web Site

Does your organisation need a website?

<http://www.ict hubknowledgebase.org.uk/websitewhy>

Do you have more questions than answers about planning your organisation's website?

Check list FAQ about building websites for VCS organisations:

<http://www.ict hubknowledgebase.org.uk/yourwebsite>

### Hardware/Software

Computer Buying Guide

<http://www.ict hubknowledgebase.org.uk/buyingacomputerpriceguide>

VCS Software Guide

<http://www.ict hubknowledgebase.org.uk/software>

## Technical Support

### ICT Hub's supplier's directory

The ICT Hub is collating a list of local suppliers of ICT products, services and support for the voluntary and community sector called the Suppliers' Directory.

This online directory will enable you to search by postcode for your nearest organisation who has experience of supplying ICT-related products and services to the voluntary and community sector. This directory will be available for users in early 2007.

[http://www.ict hub.org.uk/suppliers\\_directory/](http://www.ict hub.org.uk/suppliers_directory/)

Tools to determine your current situation and needs

<http://www.summitcollaborative.com>

## Total Cost of Ownership Resources

LASA TCO Calculator

<http://www.ict hubknowledgebase.org.uk/calculatingtechnologybudget>

From Now On: The True Cost of Ownership

<http://fno.org/mar03/truecost.html>

Open Source: Look at the Numbers

[http://www.dwheeler.com/oss\\_fs\\_why.html#tco](http://www.dwheeler.com/oss_fs_why.html#tco)

Calculating Your Online Community Costs

<http://www.fullcirc.com/community/communityroi.htm>

## Funding and fundraising

UK Fundraising Site: Fundraising Information and Resources for Fundraisers

Technology Forum: <http://www.fundraising.co.uk/forum>

A place to ask questions from peers about basic database packages that can track members, fundraising, and contact info.

## Sources of funders for ICT

ICT Hub research to locate more funders of ICT projects or initiatives.

<http://www.icthub.org.uk/research/>

You will also find a useful resources document that forms part of the Sources of Funders report at this address (Appendix E).

## Useful websites

[www.trustfunding.org.uk](http://www.trustfunding.org.uk) – a subscription based service

[www.governmentfunding.org.uk](http://www.governmentfunding.org.uk) – a free registration service

[www.companygiving.org.uk](http://www.companygiving.org.uk) – a subscription based service

[www.grantsforindividuals.org.uk](http://www.grantsforindividuals.org.uk) – a subscription based service

## Access funds

[www.access-funds.co.uk](http://www.access-funds.co.uk) - This site aims to provide the latest funding information from Central Government, National Lottery, devolved governing bodies, EU and quangos. Subscription service from £50 per annum. Offer a seven day free trial.

## Guides on how to apply for funding

**The Association of Charitable Foundations** [www.acf.org.uk](http://www.acf.org.uk) has a six page guidance note on 'Applying to a Charitable Trust or Foundation' that is available as a down-loadable PDF file.

**Charities Information Bureau** website provides help and advice for community groups and voluntary organisations who are seeking funding. CiB also publishes a subscription-based monthly e-bulletin on funding: [www.cibfunding.org.uk](http://www.cibfunding.org.uk).

**NCVO's Sustainable Funding Project** <http://www.ncvo-vol.org.uk/sfp> has a wealth of guidance if you are new to fundraising and want some helpful tips to get you started.



# Notes





# Notes



"Through our membership of NCVO we were directed to Datek Solutions. They quickly suggested an appropriate package for us at a very reasonable price. We have been impressed with the speed and efficiency of their sales team and (most importantly for small voluntary organisations) the professional after sales service."

Richmond Youth Partnership

# HELP IS AT HAND

The decision to buy technology for your organisation is one of the most important that you will make. Get it right and everything will run smoothly. Get it wrong and it can be a frustrating, costly and time consuming exercise to rectify.

**DATEK** has a wealth of experience in the charity sector, enabling you to maximise your budget, ensure you receive value for money and have the right technology for your organisation.

#### Hardware

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Software for Local and Remote monitoring of your network, so we can spot problems before they happen. (This module is included FOC with the MSR)

To find out how DATEK SOLUTIONS can help you, why not call us, and we will ensure you achieve the best results for your IT system and support.

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Helpdesk: 0800 652 4737

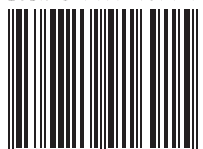


**The ICT Hub is a partnership  
of national voluntary and  
community organisations that  
provide services to help  
organisations in the voluntary  
and community sector benefit  
from ICT.**

**For more information about the  
ICT Hub, visit our website  
[www.icthub.org.uk](http://www.icthub.org.uk) or call our  
free helpdesk on 0800 652 4737.**

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