Wales CVC
Circuit Riders

How to Set up a Circuit Rider Service

Wales CVC Circuit Riders
West Wales and Merthyr Tydfil

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Introduction

The CVC Circuit Riders project provides developmental support to voluntary and community groups on a range of information and communication technologies (ICT).

This **How To… Guide** is designed to assist anyone who is setting up, or taking part in, a Circuit Rider project or any other similar ICT support and development initiative in the Third Sector.
The guide is based on the experiences of the CVC Circuit Rider team in a mainly rural environment and in a restricted delivery area of high deprivation in Communities First wards in Pembrokeshire, Ceredigion, Carmarthenshire and Merthyr Tydfil.

The Regional Partnership consisted of Pembrokeshire Association of Voluntary Services (PAVS), Ceredigion Association of Voluntary Organisations (CAVO), Carmarthenshire Association of Voluntary Services (CAVS) and Voluntary Action Merthyr Tydfil (VAMT).

Other How To guides

The team has also produced the following How to Guides to support their work:-

How to Facilitate Group Website Creation (Published December 2008)

This **How To… Guide** is for ICT workers to take a group or organisation through the process of planning and creating a website. The process is called ***123-communicate*** and leaves the groups with a live website that they are able to maintain themselves.

How to use Adobe Contribute (Published June 2008)

This guide is given to groups taking part in the ***123-communicate*** process (see above) if they choose to use Adobe Contribute to maintain their websites.

Acknowledgements

The following people have contributed to the development of the project:

Catherine Palmer, ICT Project Development Manager, PAVS	PAVS Phil Perry, CVC Circuit Rider, PAVS
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Funding

The CVC Circuit Rider service has been developed with financial assistance from the Communities @One project - a Welsh Assembly Government initiative that helped people in Communities First areas make the most of new technology.

The programme was jointly funded through the European Union's Objective 1 and 2 programme and the Welsh Assembly Government and administered by the Wales Co-operative Centre.

Contents

ICT support in the Third Sector

The Third Sector is a wide and diverse collection of large and small local voluntary groups, community based groups, local charities and branches of national charities, covering a multitude of activities including health support, information provision, sport, art, etc. Some are social groups and some can be social enterprises.

Our daily experience as a local County Voluntary Council working across Pembrokeshire is that, although many of these groups use ICT to the best of their capacity, there is a huge need for further support to allow groups to confidently and efficiently use Information and Communications Technologies to their best advantage.

This experience is mirrored by our colleagues in the CVC network across West Wales and also through extensive research into the use of ICT in the sector across the UK.

We have found that any ICT support project, whether it be helping with computers and printers or assisting with the development group websites, is enthusiastically welcomed by groups and the feedback is always, 'we want / need more help'.

Providing a consistent and coherent service across such a wide range of activities and needs can be a challenge and the Circuit Rider model of providing ICT support and development goes a long way to meeting it.

What is Circuit Riding?

A Circuit Rider is a mobile worker who provides ICT support and development to a caseload of third sector organisations and who works in collaboration with other Riders.

This **How to…** guide has been developed to record the outcomes of our experience in applying this concept to the ICT support and development we provide in West Wales.

Stages in setting up a Circuit Rider Service

Feasibility Stage

A Circuit Rider Service may not necessarily be the best approach to delivering an ICT support and development support. A lot depends on the time available, budget or funding constraints and the nature and location of the groups you are planning to support.

A feasibility stage is needed to determine vital answers before a Circuit Rider Service can be set up. The following questions need to be considered.

- What kind of service will deliver the best results in your region, for your organisation and for your community's particular needs?
- What services (third sector as well as the private and public sector) are already in existence?
- Where are the biggest skills / knowledge gaps?
- What resources will be required to deliver the project, in equipment, personnel and running costs?
- What amount of time will be required to deliver the results you are aiming for? (This information will be vital to feed into the resource planning.)

To get the answers to these questions, it is important to have a dialogue with everybody involved, such as stakeholders within your organisation, groups that are likely to benefit from the service and feedback from projects already running within your locality.

The information gathering phase can also double up as a way of gauging the level of interest in your proposed project and doing some pre-launch publicity.

If, after gathering all this data and deciding that a Circuit Rider Service is feasible, you can use the information you've gathered to inform the next stage – planning the project.

Planning Stage

Don't be tempted to skimp on the planning stage.

Spend the time to formulate how your service will be delivered and the processes you will use, and your project will run much more smoothly. It's a lot harder to change how your service operates once it's up and running than it is to get it right at the beginning.

Do make sure you build some flexibility into your procedures though. You won't get everything right, and every project is different, but if the framework is sound, you should be able to adapt without much of an impact on the results you deliver.

Important things to work out in the planning stage:

- **Scope**
  The most important thing is to map out the scope of your project.

  - What services do you intend to offer?
  - Will all the services be free, or will you offer paid for services as well?
  - Who will be eligible for the services?
  - Will your services be tailored to the group, or will you go through the same process for each group?
  - Are there other projects in your area doing anything similar? There is no point in duplicating existing services.

  Do some research. If you map out what your project aims to achieve, and the services it will offer you will be able to more effectively promote your project to potential groups, and ensure you are working with the right people.

- **Methodologies & Processes**.
  These will depend on largely on who the project is being run by. Is it a one man band set up by an IT officer; a Project Manager with staff within a voluntary organisation, a board of trustees planning to hire a team to run the project?
  The scale of the project will determine what level of formality is required, as well the level of reporting required.

  Things you should be considering at this stage are designing forms to be used for information management;

  - Project application forms,
  - ICT Review forms,
  - ICT Audit forms,
  - Skills Review forms,
  - Letter templates to groups,
  - Action Plan templates.

In our experience we found a formal process was useful to plan an overall service delivery, but it was important to scale the services to the needs and level of the individual group. A detailed process involving formal stage plans and strategy discussion is useful and necessary for larger organisations with existing strategy plans, but small groups had no need for such formality and in many cases were put off by overly formal procedure.

If you will be assisting with website development and online strategy what technologies are the most suitable? What processes will be required?

A good way to determine what needs to be worked out in advance is to design a timeline of how your service will interact with a group from beginning to end, and then work out what paperwork will be needed at each level of interaction.

- **Working practices**.
  Following on from the processes required, how are you actually going to put these into practice?

    - Will data be recorded on paper, and filed, or will things be done electronically.
    - What software will you use?
    - Will training be needed for the software?
    - Have you considered data security and are there backup procedures in place.
    - Who will be responsible for recording data, and following up on data received.

How you are actually going to run the project needs to be decided in advance, and documented.

Defining team roles and responsibilities is an important consideration to make sure a team works coherently together.

- Do you have any legal considerations when working with other groups, particularly if you are advising their strategy and providing IT support.
- Will you need people to sign liability waivers?
- Do you need insurance?

If the Service is being set up by a Voluntary Organisation, many of these working practices may already be in place. Assess if existing policies cover the project scope. Are there any gaps?

- **Resource planning**
  Planning resources for a project of this nature can involve a lot of variables.

  - **Staff –** Possibly the most important project cost will be your staff.
    In order to build the right team, and plan staff costs you first need a detailed understanding of the project you are planning**. See Building a Team below**

  - **ICT hardware –** The hardware you purchase will depend on the scale and type of project you are planning. A lot of research needs to be done to make sure the team has the tools they need to work efficiently. Cheaper equipment may look better on a tight budget, but there are other factors: How long do you expect the equipment to be used for? Is the equipment durable and portable? Circuit Riders tend to be on the move and equipment has to be able to cope with the rigours of a mobile workforce. Warranties and Support contracts should be an important factor in your purchasing decisions.

  - **Software –** As with hardware, the software you will use on your project and with your groups is all about research. Work out your priorities. What do you want the software to do? This can fall into two areas. Software to support the service (communications software, remote support software) and software to use with groups (website development software, demonstration software).

  - **Travel –** If you are planning a mobile technical support aspect to the project, travel can be a significant cost. If your travel budget is limited you may want to consider making on-site support limited to only a finite number of visits, so you can accurately plan your expenditure. Will public transport be used for some or all of your travel? Will the Circuit Riders need their own cars? If so, you need to make sure you hire people with cars!

- **Research –** Collect information on what is ICT services are available in your area and your potential market. It will benefit you to accumulate information at this stage both to inform your project strategy and to enable you to distribute information to the groups you wish to work with.

  Examples of information you should be gathering are: Local ICT suppliers (hardware, software and support), ICT Training available, other ICT initiatives and groups, grants that may be used for ICT funding.

  You will want to make **a comprehensive list of local groups,** filtered according to your criteria for eligibility.

  These are the groups you will be promoting the project to in the next stages.

Building a Team

Your team of Circuit Riders is what will make your carefully planned service succeed or fail.

The essence of a Circuit Rider service is as much about working with groups as with their technology. The right mix of ICT skills and third sector savvy is key.

Your feasibility studies and research should give you a good idea about the kind of groups you'll be working with, and the kind of service you are going to offer. Now you need people who can deliver the service to the groups over the course of the project.

It is important to break your project requirements down into specific responsibilities, and make estimates regarding how much work will be involved for each aspect of the project. Once you have done this, you will have a reasonable estimate as to how many people you will need, what roles they will need to fill, and what kind of people you need to fill those roles.

- Start by listing the essential skills each team member will need, and then map out desirable knowledge areas that you would like the team as a whole to cover.
- Make sure the team isn't just about technical know-how.
- Working with groups requires a lot of people-skills, and explaining technology to people is a different skill altogether than just being able to use technology.
- You can have team members who specialise in technical skills and others who will be more group development focused, or try to find people with the right balance.

ICT is a wide field. It is unlikely you will find Circuit Riders who know everything they need to know to deal with every situation.

The Circuit Riders in the Wales CVC Circuit Rider team had good all round knowledge and particular experience in certain fields. The team complemented each other very well and were able to call on each other when required. Not only did this team's skill balance benefit the groups we were helping but it also enabled the Circuit Riders to learn from each other and increase their own skills.

Awareness Raising

A successful Circuit Rider service is all about helping groups and organisations.

To do this successfully the groups need to know you exist and you need to convince them that they can benefit from your service. Many non-profit groups are a bit scared of technology, they may not understand the uses of the internet, they may have limited time and/or money, or they just don't like change!

This stage is about making connections with the groups in your area, encouraging them to see what ICT can do for them, and drumming up interest in your project.

Here are some suggestions for how you can do that:

- **Offer a taster service.** A free basic ICT healthcheck such as they internet connection. This kind of taster service can build confidence in the service without too much commitment from either side.

- **Local ICT drop-in days** to offer advice, information, free software, and of course, project application forms.

- **Fun one-off events** for local groups that introduce them to using technology in an engaging way. Activities like demonstrating the use of mobile phones for taking photos and video of community events or uploading to a community blog so everyone can see how easy and effective it is.

You can also use this stage as a testing bed for your new gadgets and equipment.

Try things out, experiment and get your team comfortable with the technology and processes you intend to use.

Any problems should show up, and you can make changes before you launch into project delivery proper.

Many small groups are daunted if you try to offer the full service to them immediately. Mention Action Plans and ICT Strategy and they might bolt for safety. We found some small groups with little ICT knowledge needed a more step-by-step approach, starting with basic IT support, and gradually leading up to thinking more about ICT as a part of their future strategy.

Marketing & Project Applications

Hopefully your feasibility study, research and awareness raising will have generated a good few leads on potential applicants and interested parties. You'll need a good idea of who you are marketing the project at, and what your criteria are for participation. Once you have those criteria, you need to figure out the most effective way of reaching those groups and attracting them to your project.

Try to keep your approaches simple, and explain your service in easily understood and engaging ways. Utilise existing networks you may have access to, such as voluntary action centres, community meetings, mailing lists and existing voluntary projects that can distribute your promotional materials and refer people to you.

Make sure you have a simple and transparent application process.

You will require basic information about the groups you work with so set up a simple application process. Too many questions can put people off, and drastically reduce the likelihood of groups applying. A good way to sign people up is to attend local events and have a stand so you can meet people and answer questions about the service. Getting the team/person out and about in the community will work much better than firing off letters or sticking up posters.

- Focus your marketing on the benefits to the groups.

- What can you offer them they really need? Free workshops? Free Technical support? Free websites?

- The end goal may be to upskill groups to the point that they have a fully fledged long term ICT strategy, but they probably won't like the sound of that. It sounds like hard work. Sell them the fun stuff first, and they'll warm to the rest over time!

IMPORTANT:

Follow up project applications quickly to keep enthusiasm going. If you can, schedule an initial meeting as soon as possible to do an ICT review.

Service Delivery

Obviously this depends on what you have decided is your particular service – this is what CVC Circuit Riders implemented.

1. ICT Review/Healthcheck
2. ICT Audit
3. Action Plan
4. ICT Support
5. Future Planning

1. ICT Review/Healthcheck

The ICT Review serves many purposes:-

- To raise awareness of the use of ICT in general
- To baseline the knowledge and skills within a group
- To get to know the groups and what they are trying to achieve

Sometimes the full ICT review is not appropriate to the size or type of organisation you are working with and should therefore be scaled and used selectively.

Use it as a tool to facilitate conversation. Don't just rattle off a list of questions that the group may not even understand. However you achieve it, there needs to be some method of gauging where a group is, to inform how you will work with them, what their needs are, and to help measure how the project helps them.

The Review process is also an opportunity to give the group more detailed information about what your Circuit Rider service can offer them.

Following the ICT Review, feedback should generally be given to the group, outlining next steps following the conversation:

- Recommendations as to what the Circuit Rider service can offer to that particular group and priorities identified.
- Signposting to other initiatives/training/suppliers
- Specific information and resources, such as Information sheets and free software.

2. ICT Audit

An audit of existing software and hardware should be carried out with the group if possible.

A folder or book should be created that holds information in one place for the group, unless the group already has an ICT file or folder. This documentation will become vital as you work with the group and build information about their ICT and processes.

Things the ICT folder should contain:

- The audit information
- A list of work carried out, e.g. installations or repairs.
- Usernames and passwords
- Licenses and guarantees.
- Policies
- Support Contact information
- Funding information
- Training and information resources

3. Action Plan

This should have a plan of work for the group and the Circuit Rider with clear timescales and responsibilities. Basic ICT policies should be a part of this. The action plan is informed by the initial ICT review conversation, but can be developed over time as the group becomes more aware of its needs.

Action planning includes things such as

- ICT training that staff need,
- projects that the group would like to initiate,
- software that would be useful to purchase,
- improvements in ICT infrastructure required and the benefits these improvements would bring.

One of the main aims of the action plan should be to help the group move towards taking charge of its own ICT strategy. Even realising the need for an ICT strategy is a good step in the right direction for many groups.

It can be very helpful to a group to provide a modular template that they can work with a Circuit rider to develop an action plan from. Many groups are nervous about ICT planning or do not see the need, so it can be introduced as a good way to secure ICT funding (which it is).
Once an action plan has been developed it needs to go to the board of trustees for signing off.

4. ICT Support

The aims and scope of your project will determine what kind of support you offer, but can include the following:

- Telephone/email/online Helpdesk
- Technical support visits
- Networking/demonstration events
- Workshops and training
- Information resources/Tutorials
- Free software

A coherent first point of call like an ICT Telephone Helpdesk can be very important, and it can help reduce the workload of mobile workers. Common questions can be answered over the phone, reducing time and cost. It also helps the groups feel more secure about asking for help than they would if a Circuit Rider had to drive out to visit every time they wanted to ask something.

Having some manner of online resource where groups can access common ICT solutions can be very useful, and further reduce the workload of a Circuit Rider. This can be a comprehensive website with tutorials, video guides, and articles, or something as simple as a knowledgebase of frequently asked questions and answers.

As well as an ICT Telephone Helpdesk, consider an online ticket support system.
Queries can be logged and tracked much easier than email. Live chat support can work very well also.
For more difficult problems, it is possible that remote desktop support would be more effective and more efficient than an actual visit by a Circuit Rider.
If travel budgets are tight, remote support can be a great time and money saver, and has the benefit that the user can see what is being done on their screen, so is a potential learning experience as well.

For some disengaged groups it was found useful to drop by for a visit. It also helped to arrange regular visits even if there was no apparent work to be carried out.
Some groups were reluctant to ask for help, but when a Circuit Rider visited, it often turned out that there were numerous issues that the group had not felt comfortable requesting help over, even business-critical issues such as a printer having stopped working!

5. Future Planning

Many Circuit Rider Projects are of a finite nature, due to funding limitations. As well as that, the aim of a project should be to encourage groups to embrace ICT and to take charge of their own ICT strategy.

As such, the end goal of a project should be to help a group develop a strategic plan from progress that has been made and issues that have arisen during the project. Hopefully, by this stage a group will have learned a lot more about what ICT can do for their group, and the importance of planning.

Things to consider in future planning could be:

- Action points for the next five years
- A draft ICT strategy to be included in the business plan, if there is one
- Sustainability. Can ICT be made to pay for itself? Can ICT be used to make a profit for the group?
- ICT funding strategy. What are the important considerations when funding ICT, and how can a group plan long term ICT funding?

Circuit Rider Principles/Accreditation

As a Pilot study of the Circuit Rider methodology of providing support and development, an important theme of our activity has been the identification of Circuit Rider key skills and standards of working.

ICT Hub Circuit Rider Training and Standards Project

In July 2007 the CVC Circuit Rider Project Manager attended an initial meeting of the *lasa* Circuit Rider Training and Standards Project which was funded to start the process of developing CR principles and standards with the following aims:

- publishing an updated list of Circuit Rider principles
- updating and seeking consultation on a set of ICT standards for organisations upon which to build a skill-set for Riders; and
- establishing a training path for Riders based on peer exchange, collaborative online resources, mentoring and partnership;

The Advisory Group was set up by *lasa* to steer the process and the CVC Circuit Riders Project Manager was accepted as a member along with five other organisations from around the UK. Working collaboratively, the Advisory Group produced a set of Circuit Rider Principles which were published to the wider Circuit Rider community in Feb 2008.

Signing up to the Principles is voluntary and is seen as a first step in the long process of making the Circuit Rider activity into a profession.

The CVC Circuit Riders signed up to the Circuit Rider Principles as a team.

The Advisory Group then worked with consultants to develop a set of tools for the next *lasa* project and other initiatives to work with based around skills assessment and development.

These tools were published to the wider Circuit Rider community in July 2008 and will be further developed in the field by the new London Region ICT Infrastructure project.

In West Wales, the Tools and Skills set will be used for future recruitment and personal development of the CVC Circuit Rider team.

Circuit Riders Principles
http://www.ukriders.info/principles
We would urge all those working in the sector to show their commitment by "signing up" to the principles.

Circuit Rider Training and Quality Standards
Improving Circuit Rider Service to Voluntary and Community Organisations ~ Tools To Build Circuit Rider Competencies

Resources

http://www.victorwales.org.uk

This resource was created by the CVC Circuit Rider team to highlight ICT information, good practice and resources relevant to the third sector.

http://www.lasa.org.uk/circuitriders/

The lasa website is designed for organisations providing advice and information services. These pages give background information on lasa's development of UK Circuit Riders, as well as current activity.

http://www.ictknowledgebase.org.uk/lasacircuitridercasestudy

Ian Runeckles of Lasa's Information Systems Team reflects on Lasa's first funded Circuit Rider Project which ran from 2002-2004.

http://www.ukriders.info/

UKriders.info has been established by Lasa as a resource and meeting place for UK-based Circuit Riders and other ICT development and support workers in the voluntary sector.