

**Lasa Circuit Rider Conference 2009**  
**Riding the crest of a slump – surviving in tough times**  
**9 June 2009, IBM, Bedfont**

**Conference Report**



**Conference supported by IBM and CTX**



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## Introduction

As part of our continuing work to develop Circuit Riding as the de facto method of delivering high quality ICT development and support to the voluntary and community sector, Lasa organised and ran the 5th National Circuit Rider Conference at IBM Bedfont on 9 June 2009. We brought delegates together to learn from each other by sharing ideas, information and experience. The conference was designed to be practical and accessible so participants could take the knowledge they gained and apply it to their work in the voluntary sector.

This is a compilation of the session notes taken by Lasa staff and showcase session facilitators. Presentations have been uploaded to Slideshare and can be seen at [www.slideshare.net/ukriders](http://www.slideshare.net/ukriders) and are individually referenced in this report. We hope to have a video of the fishbowl debate online soon – keep an eye on [www.lasa.org.uk/circuitriders](http://www.lasa.org.uk/circuitriders) or <http://ukriders.lasa.org.uk>

Photos in this report were taken by Ian Runeckles and Marc Osten (and possibly others using Marc's camera) – more can be seen on the UKRiders Flickr site <http://www.flickr.com/photos/ukriders/sets/72157619585940024/> To view all tagged photos on Flickr from the conference have a look at <http://www.flickr.com/photos/tags/crconf09>

This event was different from other ICT conferences. We are interested in technology because we believe it can help voluntary organisations achieve their missions – not for its own sake. So this was an event where people:

- spoke in plain English and avoided jargon
- offered solutions which are relevant to small voluntary organisations
- discussed issues and learnt from each other rather than passively listening to "ICT experts"
- celebrated the independence and diversity of the voluntary sector

Thanks to all who ran sessions, those taking part in the fishbowl debate and the delegates who participated and entered into the spirit of the conference.

**Lasa is grateful to IBM and CTX for their support of this Conference**

## Conference Programme

9.00	Registration	
9.45	Welcome	
10.00	<b>The Great Fishbowl Debate &amp; Spectrogrammes:</b> Collaboration & Funding for ICT Support (Richard Cooper, Julie Harris, Terry Stokes, Mark Wakefield, and Kate White, facilitator Marc Osten)	
11.15	Break	
11.45	<b>Breakout sessions 1:</b>	
	Web 2.0, Social Media & Hard Economic Times (Marc Osten & Laura Whitehead)	How free is free? Best practice for working with IT volunteers (Anne Stafford)
13.00	Lunch	
14.00	<b>Showcase sessions:</b> <ul style="list-style-type: none"> <li>• CiviCRM (Michael McAndrew)</li> <li>• ICT Flashcards (Mark Walker)</li> <li>• Working with Cloud Computing and non-profit groups (Barney Haywood &amp; Robin James)</li> <li>• SIP to Win – How VoIP Can Work for You (Rob Stead)</li> <li>• Accessing Technology Donation Programmes (Richard Cooper)</li> <li>• The Lasa Learning Programme (Sarah Lord Soares &amp; Marc Osten)</li> <li>• Lotus Symphony (Paul R Band)</li> <li>• Using Ubuntu LTSP in small organisations (Paula Graham)</li> </ul>	
15.00	Break	
15.15	<b>Breakout sessions 2:</b>	
	Risk management (Paul Ticher)	Healthchecks, Handbooks and Helpdesks (Mike Veitch & Mark Walker)
16.30	Closing session	
17.30	Drinks (provided courtesy of CTX)	
18.30	Close of conference	

## Conference attendees

<b>Name</b>	<b>Organisation</b>
Aba Maison	Lasa
Alyson Moore	London Voluntary Sector Council
Andy Fairhall	Sussex Community Internet Project
Andy Gregg	Lasa
Andy Keen	Keen Systems
Anne Stafford	Worshipful Company of Information Technologists
Barney Haywood	Consultant
Cath Padfield	Wales Co-operative Centre
Colin Cregan	Superhighways
David Geliher	MK Women and Work Group
Doly Garcia	Sussex Community Internet Project
Hilary Garner	Kingston Voluntary Action
Ian Goodman	Lasa
Ian Runeckles	Lasa
John Paul Jones	Novas Scarman Group
John Postlethwaite	i-trust/ Advice for Life
Julie Harris	COSMIC
Kate White	Superhighways
Laura Whitehead	Popokatea
Lewis Atkinson	Community IT Academy
Linda Stephenson	SaaS520
Louise Brown	NCVO
Louise Wilkinson	Pembrokeshire Association of Voluntary Services
Maher Ugaily	Superhighways
Marc Osten	Summit Collaborative
Marcus Otite	Superhighways
Marcus Pennell	Sussex Community Internet Project
Mark Walker	Sussex Community Internet Project
Mark Wakefield	IBM
Mashahid Ali	Wales Co-operative Centre
Michael McAndrew	Third Sector Design
Mike Veitch	The Helpful Helpdesk
Miles Maier	Lasa
Paul Allen	Superhighways
Paul R Band	IBM
Paul Ticher	Consultant
Paul Webster	NAVCA
Paula Graham	Hackney Voluntary Action
Peter Saunders	Cressy I.T Solutions CIC
Richard Cooper	Charity Technology Trust
Richard Yates	Superhighways
Rob Gentles	Sussex Community Internet Project
Rob Stead	Consultant

Robin James	Consultant
Sarah Peverell	Community Action Hampshire
Sarah Lord-Soares	Lasa
Sean Kenny	VOSCUR
Seyi Madariola	Community Action Southwark
Sharon Stainsby	London Voluntary Sector Council
Sue Blantern	Pembrokeshire Association of Voluntary Services
Terry Stokes	Lasa
Tim Watkins-Idle	Lasa
Yaarub Aisa	Superhighways

## The Great Fishbowl Debate & Spectrogrammes

With facilitation by Marc Osten, Richard Cooper (CTX), Julie Harris (Cosmic), Terry Stokes (Lasa), Mark Wakefield (IBM) and Kate White (Superhighways) were the “fish” debating collaboration and funding for ICT support. Views from delegates outside the bowl are asterisked. Following the debate, there was a chance for conference delegates to state their position through the spectrogrammes (a line down the room which delegates were invited to stand either in complete agreement or disagreement to a statement (or somewhere in between) and asked why they were where they were).



In addition to the following notes, the fishbowl debate was videoed and will soon be available to download.

### **Marc Osten (MO) Question 1 – Is collaboration in the best interests of organisations and is true collaboration possible?**

Takes time and work to achieve, let go of organisational point of view. Financial crunch, needed now more than ever – mergers, shared grant procedures. Should we be looking at replication of successful programmes? Is this possible?

**Mark Wakefield, IBM (MW)** – Yes, cannot survive without. Organisations should use shared ideas and experiences to create new ideas. Common factor across all sectors is not enough resources to do what you want to do. Collaboration allows for more effective and efficient use of limited resources – small. Infrastructure and culture is needed to achieve this.

**Terry Stokes, Lasa (TS)** – There is a desire for groups to work together but should raise question of who is driving this? Is achievable if driven by the organisation(s) but can be driven by other factors. VCOs are being swept into collaboration – Lasa has good track record of collaborating. Often led by funders – restricting funds available to sector. It is essential there is recognition of cost and resource implications of collaboration. Role of funders is changing and may damage collaboration.

**Julie Harris, COSMIC (JH)** – Need to decide when it is right to collaborate. To work there needs to be trust, clear values and honesty between organisations. Social benefit / return is not always there so answer is not always yes to collaboration. It is

also important that organisations walk away if collaboration not working. This takes courage – fallout can result in conflict - need to manage why decisions are taken. Is growth always right for organisations and / or the only reason to collaborate?

### **Marc Osten (MO) - Why do we want to grow organisations?**

MW - Small organisations spend huge amounts on back-office systems rather than goal. Confused between ownership and identity, needs to be worked on to enable good collaboration

**Kate White, Superhighways (KW)** – Important to fully cost resources for all partners. Collaboration does not always reduce costs – dialogue with funders is needed to acknowledge hidden costs of collaboration.

JH – Should funders be expected to foot the bill for costs of collaboration?

**Richard Cooper, CTX (RC)** – Collaboration needs to be embraced at grass roots level. Many mergers have had support at senior management level but have failed due to lack of buy in at grass roots level. Good communication is key. Messy collaborations and mergers abound.

JH – All collaboration will involve some level of conflict. It is important that this is managed appropriately and ownership of the process is vital.

KW – If collaboration is going to succeed the driving force behind this has to be the organisations themselves. But if driver is coming from funder then they should be prepared to fund costs.

\* Lewis Atkinson, Community IT Academy – Are we not just creating bigger fish? – funders make bigger fish that are then easier for them to fund

### **MO – what happens if the money is not there?**

JH – Organisations need to be clear where they want to go and not led by funders

TS – There is a distinction between funder led desires for collaboration and organisation mission led. Organisations will invest but need to see a return on that investment, hard nosed business decisions about taking route and what will happen are needed.

MW – Funders are legitimate stakeholders and are therefore entitled to say what they want to purchase from organisations. No organisation has a god given right to exist – funders entitled to impose conditions.

\* Alyson Moore, LVSC (AM) – Internal investment is fine if organisations are social enterprise and can generate funds for this, VCO's do not have "spare" money to do this. Investment is needed in back-office, experience of many Circuit Riders shows that this is not taking place.

MW – How many organisations outsource back office to make savings so they can concentrate on their mission?

\* AM – Small organisations cannot afford to do this, outsourcing is the preserve of larger organisations.



**MO – There is an argument that more collaboration is needed during difficult times. Is there any evidence of increase in this happening?**

\* Rob Stead – Worked on a project of collaboration between 26 organisations, funder wanted to control this too much. Far too much management involvement in trying to foster collaboration needs to be worked out by organisations themselves.

KW – Needs to be the seed of relationship with collaborating organisations to begin with. Collaboration has been talked about for a number of years but not happening to a significant degree.

**MO - Is this the perfect time for innovation? Practices that we know don't work, should money be going in to collaborative working?**

JH – That would ignore a number of key factors - where organisations are based, Communities of Interest, social need, values – when knitted together means individuality of organisations is key.

RC – Collaboration is hard work, needs passion and drive to achieve. Those that work have been because individuals and organisations get together with trust to drive things forward. This is all on top of day job. A lot of what happens with sharing ideas and passing on.

**MO – Good networking can mean efficient application of best practice. Are we just sinking money in to programmes making same mistakes?**

JH – Should charities exist just because they have a history? Maybe need to innovate at a different level and engage in wider issues.

\* Mike Veitch, The Helpful Helpdesk – Haven't seen any evidence of effective collaboration. Organisations fighting for limited funding during downturn means that those with better management will survive. Many organisations failed to collaborate during good times so failure inevitable – good thing.

\* Paul Allen, Superhighways – When does collaboration become collusion? Grassroots service delivery being pulled in to providing services for bigger organisations and collude with their agendas. Is getting bigger and more political to be seen the way to go? Personally joined sector because of ideology of developing communities and not corporate development.

**MO – Question 2 - Where should the money flow? Should it go directly to front-line service-delivering VCO's or to second-tier organisations and support providers**

TS – No. Second-tier organisations are needed to capacity build. If funding goes to front-line it will be spent (understandably) on immediate needs rather than organisation efficiencies. Creates false dichotomy between front-line and development organisations. Never will be enough money, how priorities are set. Small organisations need more funding so look to fundraising needs, still same cake to cut.

KW – We work with many organisations who don't know what ICT can achieve so second- tier key in promoting.

**MO – Can funding second-tier organisations skew the marketplace as organisations are not aware of the real cost of ICT support?**

MW – There is not enough money **not** to fund both. Want organisations to do what they were set up for and not re-inventing/developing ICT systems. Concentrate on delivering core services.

JH – Organisations should be left to make their own decisions and pay the price for them if they go wrong.

MW – This would waste already scarce funds and affects communities that they are seeking to serve.

JH – Some organisations need strategic advice but should have space to make their own decisions.

\* Andy Gregg, Lasa – Term market is a false one as organisations do not operate in a true market. VCS are set up not to compete in market but driven to respond to need.

JH – Social enterprise take responsibility for service delivery, based on social benefit.

\* Marcus Otite, Superhighways – Charities become SEs to try and make themselves sustainable. With experience of delivering services to the sector and as they come from the sector they have a good understanding of it.

AM – Open market for small organisations, very much like the Conservative manifesto – sounds nice but groups who are most disadvantaged will not be able to compete. Compromise – funders use expertise of vetted second tier organisations to help their funded groups — so VCO's don't have to waste their resources looking for trusted sources. There is a drive to get rid of infrastructure organisations – most disadvantaged groups will not be able to compete on this agenda. There are other models / compromises that could work.

RC – Services such as HR, ICT, small organisations need to be able to get trusted advice. Don't know questions to ask or what's available or the benefits or who has the right ethos, attitudes etc. Open their eyes up to issues and technology that enables collaboration. Then choose the best fit solutions for their organisation – need to open organisation's eyes up in the first place, help organisations to know what works well and doesn't, help to know where to start, demystify the decision making. The VCS need people / infrastructure] organisations / intermediaries in the sector to provide unbiased info. If you don't know that you are inefficient then you don't know how to make things better.

**MO – Do we need so many intermediaries?**

MW – This would be limiting. We only know what works at present, needs change and so new solutions are needed.

\* Maher Ugaily, Superhighways – If you give 10 organisations £1,000 each for ICT and the shopping list will probably be a laptop and an projector without appropriate software or anti-virus - or give one second-tier organisation £10,000 to spend on them appropriately.

\* Yaarub Aisa, Superhighways – They will spend on immediate needs, second-tier helps in identifying needs, this is key.

**MO – Funding of social enterprises distorts marketplace that VCOs are trying to access.**

Marcus Pennell-SCIP - Need both to stop some organisations being exploited by sharks.

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## SPECTROGRAMME



**Should a serious push be made by funders to increase collaborative efforts?**

Even split of people throughout the range of opinion. No one really at the *extreme* “yes” end

Comments from delegates:

### Yes

- Organisations needs to consider collaborating
- All organisations should at least be thinking about collaboration. Collaboration can work well for organisations, not always right but orgs should at least think it through and reject it if not right for them
- Outward facing to investigate possibility of collaboration, they may be just networking
- Only do it if it is mutually beneficial – it doesn't have to be forever

### Centre

- May mean organisations can develop reach.
- Is collaboration and centralisation always a good thing?

- If it is good go ahead, if not don't
- Centralisation – smaller organisations might be doing some of the best work – collaboration can mean getting bigger but growth isn't always desirable – sustaining a larger organisation can be a problem
- Does not always save money– little fish may flounder ☺ in the current climate which would be a real shame
- Organisations may be in competition with each other and may not wish to collaborate

## No

- Should not be driven by economic downturn
- What does collaborate actually mean? Are we talking about co-operation?
- Shotgun wedding to funders agenda?
- Danger of unequal partnerships – can be a bad experience for smaller organisations. Funders give very specific outputs at times – this can cause restrictions on whether / how orgs are able to collaborate with each other

## Summing up

Collaboration is a complex issue. It is probably not being talked about enough and a sector-level of discussion needs to be raised. Outcome will have a profound impact for the sector.

## Morning breakout sessions

### Web 2.0, Social Media & Hard Economic Times.

**Marc Osten, Summit Collaborative** <http://sc.blogs.com/about.html> and **Laura Whitehead, Popokatea** [www.popokatea.co.uk](http://www.popokatea.co.uk)

The media keeps reminding us about 'credit crunch, economic downturns and more doom and gloom'. Flip over the coin and on the other side it's an opportunity for our sector to shine and innovate (as it always has done). We'll be running an informative session looking at how we can support groups to become more effective and efficient, ways to help them to network, share, collaborate and market themselves more effectively and how to support strong leadership in these tough times as well as a few tips to make sure that you stay in the saddle as a Circuit Rider!

For 25 years **Marc** has worked as an activist, educator, community organizer and consultant, entrepreneur for charities and foundations. Many hats but one goal...to make the world a better place by helping those who make the world a better place. He spends most of his time working to help organisations develop and implement their Internet and Web 2.0/social media strategy. He is not a tool builder but focuses on the best strategies and tactics that non-profit organizations, foundations and networks can use to meet the need of their stakeholders.

**Laura** is a creative web and print designer, trainer and enabler specialising in the use of new and innovative technologies to further the development of effective communications for the non-profit/third sector. She is passionate about participation, inclusion and accessibility for all. Before focussing on Popokatea full-time, Laura worked in the sector for over 15 years, and supported a wide range of organisations

and communities with their knowledge and information development, and their collaborative partnership working.

### **Session report**

This workshop covered two main areas:

1. using web based tools to aid fundraising
2. using web based tools to achieve gains in efficiency and effectiveness

#### ***Efficiency – using a blog platform to create a shared online workspace for an environmental network***

The Skidder Online (skidder = vehicle used in tree logging)  
<http://blandinfoundation.typepad.com/skidder/>

The Skidder Online is built around a blogging platform for ease of use – and is designed to centralise shared resources and be very low capacity to learn.

The workspace was introduced in carefully managed stages to help introduce members of the community gain familiarity with the concept of shared online space.

Stage 1: Focus on using audio and video tools to build relationships amongst a geographically dispersed community. With just four face to face meetings per year, using audio and video tools was vital in building trust and creating a sense of community.

Stage 2: Next step is that members are beginning to populate their own audio and video content.

Efficiency: Major efficiency gains achieved building relationships online to reduce travel costs.

Web 2.0: User generated micro content, mashing up audio, video and a blogging platform to create a richer user experience.

#### ***Efficiency – using online mapping tool to free up staff time from public enquiries***

Background: Community Partners ([www.compartners.org](http://www.compartners.org)) campaigns on behalf of health care reform and is an intermediary linking public health care providers in the Commonwealth of Massachusetts, USA.

Community Partners also spent considerable time and energy maintaining a directory of local public health centres and signposting public enquiries to health centres.

Stage 1: Community Partners used the Community Walk ([www.communitywalk.com](http://www.communitywalk.com)) Google mapping tool to transfer their directory onto the web.

CommunityWalk provides an accessible front-end to the Google maps API and is an easy way of mapping addresses from Excel spreadsheets, Access databases and so on. Health care centres were given access to edit the map and update their own contact information – a considerable time saving for CommunityPartners. The service costs Community Partners around £150 per year, plus a few hours of staff training.

Stage 2: Considering allowing public comments to review and recommend health centres.

Efficiency: moving the directory online has resulted in huge time savings in Community Partners not having to handle calls from the public and health centres. This has freed up staff time and capacity to concentrate on awareness raising and promoting the map as a first point of contact.

Web 2.0: This example uses a web based mapping tool to improve a current business system and increase staff and organisational capacity to concentrate on other priorities. Community Partners will also monitor how much traffic the map drives to health centres.

However, as with all web based services it pays to regularly back up your data – CommunityWalk allows data export at any time.

### ***Efficiency – using virtual/online meetings to reduce travel costs***

Background: RSPB ([www.rspb.org.uk/](http://www.rspb.org.uk/)) is a national organisational working to protect birds and the environment. RSPB has a geographically dispersed team of trustees, staff and volunteers.

RSPB created a virtual meeting area on its Intranet. It has around 15 users, with RSPB estimating that it has saved around £3,500 on travel costs. There was also an investment in staff time to learn the new tool. Feedback from staff has been very positive.

Web 2.0: This is an example of using web based tools to improve an existing business process – team meetings, and save money on travel costs.

### ***Efficiency - internal knowledge management***

Bolton CAB identified a problem with managing internal information.

Solution: Bolton CAB used the free and open source WordPress content management software to create an Intranet, centralising information. This led to reduced internal email and reduced duplication of information. WordPress was easy and quick to learn, and has the Intranet has quickly become the first port of call for staff to locate internal information. The ICT worker keeps the Intranet up to date.

Organisations have also used Wikis in a similar way to manage and centralise information. However, an effective Intranet does rely on trust, openness and being kept up to date.

### ***Audience discussion:***

Q: How do we decide on which tools to use?

Marc Osten (MO): It's up to the user to understand their organisational culture and think about mapping the right tool to the task.

Kate White, Superhighways: There's also scope to experiment with internal pilot projects before unleashing it on the world.

Rob Gentles, SCIP (RG): web based tools need to be phased and explained if they to be successfully implemented.

Alyson Moore, LVSC: it's also about overcoming internal resistance to new ways of working. In LVSC's case, it can point internal staff to how its own CASCADE network is using web based tools, as a way of overcoming fear of change.

RG: it's less about the tools and more about understanding how people and organisations work, and encouraging them to change. Badly managed change can be toxic.

MO: exactly, new ways of working need to be carefully managed, keep expectations in alignment and demonstrate the pay-off to end-users.

Laura Whitehead: new projects also need to be realistic about the time taken to introduce and streamline new tools. Examples shown here were low level, low tech, and small scale to reduce the fear factor.

MO: the key is to have a strategic hook for using new tools to improve existing processes. Think about a hooking into a new programme, working with a new member of staff or even how using new tools could benefit the organisation's strategic plan. Don't do add on – build off.

## **How free is free? Best practice for working with IT volunteers**

**Anne Stafford, iT4Communities** [www.it4communities.org.uk](http://www.it4communities.org.uk)

How can we best prepare an organisation to work with an IT volunteer? When can/should IT support be free? What preparation is vital and how can risks be minimised? What are the pros and cons of pro bono work from both points of view? A workshop of answers as well as questions! Tools and experiences shared.

**Anne**, who is Programme Manager of iT4Communities, has a Masters in Information Systems. She has nearly 10 years of professional experience supporting the use of IT in the VCS, including running community IT projects, volunteer programmes and delivering accredited training. Anne is a committed IT volunteer herself.

The iT4C programme has IT requirements analysis at its core and Anne speaks to many hundreds of VCS groups looking for volunteer IT support every year. The iT4C best practice guidelines have been developed over its six year history in conjunction with TechSoup; to keep these updated they are looking to share information at this session.

### **Session report**

Presentation online at <http://www.slideshare.net/ukriders/how-free-is-free-best-practice-for-working-with-it-volunteers>

What did people want from the session?

- CIC, make money but put money in to community initiatives – awareness raising and finding feet and find out what is going on.

- Interested in how volunteers can be used and technology can help the process.
- New bit of work with volunteer bureaux developing support system for volunteer managers, looking for how technology can help
- What is being done around LSC Train to Gain who will support volunteer training, train accidental techie in organisations
- (Pembrokeshire – training Circuit Riders) Looking at how organisation works with volunteers
- SCIP – active volunteer in personal life
- Offer technology and appreciate support needed (often use volunteers)
- How to best work with volunteers, training Accidental Techies (SCIP)
- Approached by potential volunteers, also how to do more pro-bono work and utilise skills for under-funded organisations.
- Consultancy for VCO market but also doing some pro-bono work
- Work for iT4C, how best to balance voluntary work and best practice – manage expectations and not become reliant
- Do volunteer work and understand how to be a good volunteer
- How to manage people who think they are better than they really are, how to manage expectations
- Use volunteers to support resources (Lasa), best practices for other than direct support
- Recruitment process for ICT volunteers, accessing capabilities and managing organisations expectations

### **What role do ICT volunteers play?**

- Small organisations – will be someone who comes and fixes occasional problem, larger scale will be people who develop projects (database/website). Often have to come in and fix at a later date. Documentation/mapping is key.
- Sometimes have to use paid for service after initial volunteers
- There are risks with using volunteers, organisations need to think about how these risks can be minimised.

iT4C developed processes for getting organisations ready for working with a volunteer. Key points that organisations need to be alerted to:

- Using a volunteer for ongoing support is not sustainable
- Volunteers need to be managed and have named contact, organisations need to own the work of the volunteer
- Do not underestimate the internal support needed when organisations take on volunteers.

### **Best practice:**

- Responsibility of organisations to ensure that volunteering projects don't fail
- Organisations have a responsibility to volunteer that they will be treated effectively
- Importance of communication needs to be recognised, especially in small organisations.



### **Experiences from group:**

- definition of need and setting boundaries is really useful and honesty about risk.
- A lot of time was spent developing the project plan; student volunteer was disengaged once element of college course was completed. Important to understand motivation of volunteer.
- Main experience is dealing with issues after volunteer has gone, important for volunteers to document work done to aid organisation in long-term.
- Matching service works well, important that organisations treat ICT volunteers as they would any other volunteer.
- Common problem is organisations not able to update website done by volunteers.

### **When should IT support be free?**

Depends on how “free” is defined. There is always a cost in terms of time at the very least. ICT support should not be free by volunteer alone.

### **Summary**

- Planning ICT project is key
- Managing volunteer and expectations of the organisation is vital
- Volunteers should not be used for ongoing ICT support

Visit – [www.it4communities.org.uk](http://www.it4communities.org.uk)

## Showcase sessions

These were 20 minute sessions which ran three times during the hour, delegates were free to attend whichever they wanted to. Session facilitators were asked to provide a brief overview of what happened at the session.

### The Lasa Learning Programme

**Sarah Lord Soares, Lasa [www.lasa.org.uk](http://www.lasa.org.uk) and Marc Osten, Summit Collaborative**

The Lasa Learning Programme aims to provide a route for Circuit Riders to both develop their skills and to provide an environment for those wishing to become Circuit Riders. This speedy session will give an overview of the way the Programme will be delivered; the topics in the initial phase of delivery and a quick look at the online learning platform. There will be a short time for questions.

**Sarah's** primary role in Lasa's Information Systems Team has been to develop the Circuit Rider movement and concept. She is currently project managing the Learning Programme.

Presentation online at <http://www.slideshare.net/ukriders/circuit-rider-training-project>

### Lotus Symphony

**Paul R Band, IBM [www.ibm.com/uk/en](http://www.ibm.com/uk/en)**

This session aims to give you the knowledge you need to start using Lotus Symphony now. You will discover the power beyond Office!

**Paul** is a Messaging and Collaboration Consultant with IBM Software Service for Lotus. Paul has worked with Lotus products for 9 years and has extensive experience in Lotus Domino and Sametime implementations.

#### Session report back by Paul:

"Lotus Symphony is a free to download, productivity tool that gives you the ability to open, edit and save Microsoft format documents, spreadsheets and presentations. The session on IBM Lotus Symphony gave delegates a quick overview of what Symphony is now, what's coming in the near future, some prototypes in the lab and an overview of a deployment services engagement.

The session highlighted that Symphony is aimed at meeting the needs of the majority of Microsoft Office users. IBM does not aim to match Microsoft Office feature like for like, but rather provide the capabilities that most users require. We saw some exciting prototypes in the lab including Slide River and Coral. Slide River gives presentation creators the ability to cherry pick the most appropriate slides from a library. Users upload Symphony presentation slides to a web site and tag them. Next time you create a new presentation, you can search for content based on tags. Furthermore, the Coral project associates subject matter experts (SME) to a slide. So, with Sametime integration you can see if a SME is on-line and chat to them about their slide you are now working with.

The latest version, Symphony 1.3 was released 11 June and included the ability to open Microsoft Office 2007 files and improved pivot table support in spreadsheets.

Most delegates were surprised to hear that Symphony is free (did I mention Symphony was free?). Visit <http://symphony.lotus.com/> to download your copy today.”

## **Working with Cloud Computing and non-profit groups**

### ***Barney Haywood and Robin James***

The goal of this session will be to introduce the collaborative and responsive working styles made possible by Cloud Computing. Barney and Robin will run through the various stages of development and quickly show just how easy it is to work with these new technologies and the real benefits that non-profits can gain.

**Barney** has worked with Cloud Computing applications for over 3 years mainly for large financial institutions. He has become increasingly interested in how these technologies can be applied to the non-profit sector enabling these groups to use enterprise-scale applications with little or no investment. The main application he works with is Salesforce.com which he has implemented for several non-profit groups including the Foreign Press Association. Barney is also taking a very interested and active role within the iT4Communities group.

**Robin** has many years IT experience including exposure to a variety of Customer Relationship Management (CRM) systems. He has been working with Cloud Computing, and in particular, Salesforce.com for several years. One of the main drivers for his interest is around Green IT and how Cloud Computing helps to make this more of a reality.

### **Session report back by Barney:**

“I hope that everyone found the session interesting and useful! If anyone would like to get in touch then I'd be more than happy to discuss cloud computing in general or database needs in particular - [barney.haywood@gmail.com](mailto:barney.haywood@gmail.com)

I'd suggest also having a looking at [www.youtube.com/watch?v=ae\\_DKNwK\\_ms](http://www.youtube.com/watch?v=ae_DKNwK_ms) “

## **CiviCRM**

### ***Michael McAndrew, Third Sector Design [www.thirdsectordesign.org](http://www.thirdsectordesign.org)***

CiviCRM is contact relation management software designed for non-profits. The session will give an idea of what CiviCRM can do and how your organisation can best make use of it. We'll also give a flavour of the CiviCRM community by taking part in a practical session to provide feedback on upcoming functionality.

Michael helps non-profits use information and communication technology to be more productive, communicate better and make better decisions. He has been working with non-profits since 2002, focusing on contact relation management since 2005, and CiviCRM since 2007. As part of this, he has organized a series of CiviCRM user meet ups around the UK and also helped write and edit the book *'Understanding*

*CiviCRM*. He is currently working for Third Sector Design in partnership with Voluntary Action Westminster and a number of non-profits on CiviCRM and Drupal implementations. He is also organizing the UK / Europe CiviCRM developer camp in London this June 23 and 34.

## **Accessing Technology Donation Programmes – an introduction**

**Richard Cooper, Charity Technology Exchange [www.ctxchange.org](http://www.ctxchange.org)**

Microsoft, Cisco, Symantec and a number of other companies donate their technology to a wide range of charities in the UK. This session will look out how charities can access these donation programmes and some of their “quirks”.

Richard is Development Manager for the CTX Programme which manages the Microsoft Software Donation Programme in the UK along with similar programmes from Cisco, Symantec and number of other technology companies.

Presentation online at <http://www.slideshare.net/ukriders/accessing-technology-donation-programmes-an-introduction>

## **SIP to Win – How VoIP Can Work for You**

**Rob Stead [www.robstead.co.uk](http://www.robstead.co.uk)**

VoIP is a viable alternative to the traditional phone system bringing flexibility, reliability and substantial cost savings. In this session an overview will be given, terminology explained and a practical demonstration given using Trixbox ([www.trixbox.org](http://www.trixbox.org)), an Open Source phone system. This presentation is online at [www.slideshare.net/ictchamp/sip-to-win-voip-telephony-presentation](http://www.slideshare.net/ictchamp/sip-to-win-voip-telephony-presentation)

Rob has been a database developer and Circuit Rider for the past twenty years. Prior to this he worked for Shelter and various rock bands. He's passionate about making ICT work for the voluntary/charity sector and promotes Open Source solutions when appropriate. His session of on using VoIP (making phone calls over the internet) is based on three years practical experience.

Presentation online at <http://www.slideshare.net/ukriders/sip-to-win-how-voip-can-work-for-you>

### **Session report back by Rob:**

'Nine people sat in on the three sessions and I quickly went through my slideshow; encouraging interventions and passing around VoIP related gadgets. There were expressions of interest that Trixbox could be used as a replacement for their ageing telephone systems, and whilst they could see some of the benefits - home working for example -, I sensed none of them would take the risk and give it a try.'

## ICT Flashcards

**Mark Walker, SCIP** [www.scip.org.uk](http://www.scip.org.uk)

Mark has recently produced a boxed set of 50 cards that answer frequently asked questions about ICT. These are now being sent to managers and development workers in the third sector, to help them offer better support with ICT when advising the people they work with. Mark will explain what he set out to do, show you what he produced and ask for suggestions about what he can do next.

You can order ICT Answers In A Box from [www.ictchampions.org.uk](http://www.ictchampions.org.uk)

**Mark** is ICT Champion for South East England and a project manager at SCIP, which is a social enterprise based in Brighton that delivers IT services to the third sector. He helped set up SCIP in 1996 and has been using computers and the web with not for profit organisations ever since. He runs a variety of community-based projects, including a large Lottery funded programme that is embedding IT skills in other third sector training courses and, as an experienced trainer, is currently delivering workshops on using WordPress, running a community website, fundraising and better budgeting for IT.

## Using Ubuntu LTSP in small organisations

**Paula Graham, East London CVS** [www.elcvnetwork.org.uk](http://www.elcvnetwork.org.uk)

Paula will be demonstrating how the open source Ubuntu's thin client LTSP application can be used in small voluntary organisations.

Paula is the e-development worker for the East London CVS Network providing advice and IT management support to VCS organisations in City, Hackney, Newham and Tower Hamlets. She is also active in FOSS advocacy with Fossbox CIC and Technology & Social Action.

Presentation online at <http://www.slideshare.net/ukriders/ltsp-for-grownups>

## Afternoon breakout sessions

### Risk Management

#### *Paul Ticher*

We take risks all the time because we judge that the reward is worth it. But in our professional lives we have to be professional about how we make that judgement – for ourselves and our clients. This session will look at how to do risk management properly without getting hung up on it, as well as presenting practical tools.

**Paul** is well known to many circuit riders for his Data Protection expertise, as well as his research and evaluation activities. He was the founding editor of Lasa's Computanews and is still a contributor, as well as being the author of several books and influential reports on ICT in the voluntary sector. Paul has been self-employed for nearly 20 years, as a trainer, consultant and author, covering many aspects of information management, ICT, Data Protection, and more recently risk management in a broader sense.

#### Session report

Presentation online at <http://www.slideshare.net/ukriders/risk-management-1559539>

Individuals and organisations have a different attitude when it comes to risk. It is a matter of judgement and need to fit with organisation and people within it.

Everyone has a "risk thermostat" determining the level of risk that they are comfortable with...people not generally good at estimating risk.

For example using Anti-virus and firewall to protect computers may make people less concerned about individual risk so actual risk level remains the same.

Risk management cannot be exact and will always be an approximation of how risk is perceived.

In terms of technology the constant changing environment brings bring new risk, for example, if new technology is introduced into an existing system then it is important as well as measuring the benefit of that technology to also look at the risk.

It is also important to examine external relationships when thinking about risk. For example if using an external organisation for data back-up examine the risks associated with relationship with that external provider e.g. provider starts charging a lot more for the service, stops offering the service etc

One of the things that many organisations do is base risk purely on previous experiences. It is far more valuable when looking at risk and developing policies it is vital to consider more likely risks rather than focussing on what has happened previously.

Examples of some of the thoughts of people in the room and their experience of risk in relation to ICT:

- Most organisations with ICT support contracts simply transfer the risk to that company without making a realistic assessment of risk
- Difficult to get organisation to recognise trade off between different risks, for example the associated risks of data back-up and then taking that data off-site.
- Many organisations concentrate on the risk associated with technology and not the risk involved with individuals and their use of technology.
- Voluntary and community sector is not exempt from individuals acting inappropriately
- Experience has show that the risk of internal ICT staff breaching security is higher than anticipated, this can be associated with their understanding of technology influences their perception of risk.
- People are always the weakest link, numerous examples of voluntary and community sector staff giving out passwords over the phone without verifying who they are giving passwords to

## **Healthchecks, handbooks and helpdesks - Slash your support costs by buying a pencil**

**Mike Veitch, The Helpful Helpdesk [www.helpfulhelpdesk.org.uk](http://www.helpfulhelpdesk.org.uk) and Mark Walker, SCIP**

Circuit Rider: “OK. It’ll take a couple of minutes to fix this. All I need from you is the router password” User: “What’s a router? I didn’t even know it had a password”. Thus begins a typical morning...

This workshop will introduce simple but effective paper based tools that will help small organisations effectively manage the information required by support providers. Mark will lead the discussion from a support provider perspective and consider best practice in the use of healthchecks. Mike will introduce and demonstrate the ‘IT Handbook’ and explain how it can be used to assist support delivery.

We are keen to develop these tools and the workshop exercises will encourage the contribution of ideas and suggestions. We shall consider the problem from both the support providers and the customer’s point of view.

**Mike** has extensive knowledge of ICT support acquired from over 25 years working in the public, private and voluntary sectors. He is currently involved in the development of a pay-as-you-go support model to be delivered through a community interest company.

He has worked as ICT development worker in West London, a freelance ICT Consultant and Microsoft Trainer, a University Helpdesk and Training Manager, Office Systems Manager, Internet Business founder and a Special Adviser to a political party leader. Mike maintains an interest in business process and development and has an MBA from Edinburgh University.

For **Mark’s** biography, see the ICT Flashcards report in showcase session.

### **Session report**

Presentation online at <http://www.slideshare.net/ukriders/health-checks-and-handbooks>

## ***Working with clients – the SCIP model***

About quality of support – whether paid or funded  
Clients of different sizes = different support needs

- Find out - outreach visit, healthcheck or audit
- Reporting – report back to client on issues, costs, timescales
- Deliver support - about holding, sharing, using information

### ***Some health-check issues:***

- Different modes of healthcheck - self assessment, audit, etc
- Longer or shorter forms dependent on size of client organisation
- Smaller orgs want you to fix stuff, not plan or manage their ICT
- Health-checks often are a foot in the door for getting orgs to think about managing their ICT
- Health-checks also vary style depending skills of those delivering them
- Lack of back-up and licence compliance – sorting these are easy 'wins'
- Orgs with ICT support more likely to buy into health-check - they understand the importance and have the capacity to engage
- Whichever mode of health-check, the client needs to clearly understand the benefits.

## ***Whatever Happened To The IT Handbook?***

Presentation online at <http://www.slideshare.net/ukriders/know-it-1567778>

Background: Working with smaller organisations can be difficult because important IT information (passwords, router settings, etc) is not written down or kept in one place. The IT handbook was conceived as a way of overcoming this:

- Solution is simple to use and accessible by anyone in the organisation
- Paper based
- Product is supported
- Low cost and sustainable

IT handbook will come in two flavours and be available as a download from [www.knowit.org.uk](http://www.knowit.org.uk)

- WEknow IT – aimed at paying tech support companies
- MYknow IT – a free PDF download for unsupported micro orgs

### ***Target audience:***

- VCOs
- Circuit riders
- Individuals
- IT support vendors
- Social enterprise support providers



**Questions from audience:**

Q: sounds like Techatlas?

Mike Veitch: yes. Didn't say it was original. Innovation is to centralise the info on paper in a binder.

Mark Walker: is anybody collecting info like this already? Other models?

Sue Blantern, PAVS: PAVS has a similar idea, but not this organised. Would like to evaluate an electronic version if possible.

Rob Stead: the real problem is organisational disorganisation!

Mike Veitch: this handbook provides structure – it's impossible to get tech help without crucial bits of information. The handbook will also prompt orgs to ask questions about their own IT.

Aba Maison, Lasa: is there any way to record date last updated?

Mike Veitch: coming in the next version. The handbook can also act as a reference point – showing where information is held, like insurance policies, original install CDs, etc. Haven't answered the fireproof question yet.

Mike Veitch: need to figure out licence arrangement to maintain some version control. Not sure how peer review and testing process will work.

To find out more or help peer review the IT handbook, contact Mike Veitch at: [mike@helpfulhelpdesk.org.uk](mailto:mike@helpfulhelpdesk.org.uk)

## Closing session

With the Lasa Circuit Rider Conference only taking place once a year, the main method of communication between Riders is through the UKRiders list. In the closing session, delegates broke into small groups and were asked to come up with topics that they would like to see discussed on the list during the next few months. In addition to coming up with ideas, someone had to put their name to it so as to initiate and maintain the conversation on the list. They were then put onto the whiteboard for all delegates to vote on. These were the results (in order of popularity)

1. What will (UKRiders) list 2.0 look like? (Michael McAndrew and John Paul Jones)
2. Success stories with examples (Louise Brown)
3. Top ten free software tools for VCOs (Yaarub Aisa)
4. How do we sustain Circuit Riding in the current climate? (Paula Graham)
5. What do you charge for your services? (Mark Walker)
6. Circuit Rider conference, the future (Ian Goodman)
7. Supplemental forum to bring together best content of the UKRiders list (Rob Gentles)
8. Why you should pay for IT support (Mike Veitch)
9. If it ain't broke, don't fix it (Marcus Pennell)
10. IT or no IT (Paul Allen)

Topics 1-7 each received over ten votes and will be appearing over time on the UKRiders list (<http://lists.lasa.org.uk/lists/info/ukriders>) .

## Conference evaluation results

The following is based on the results of evaluations from **26** participants (about **55%** of the attendees excluding Lasa staff). Figures are shown as actuals and percentages – note that some percentage totals in each section will exceed or not reach 100% because of multiple or unnecessary responses.

	No.	%age
<b>(a) How was the event as a whole?</b>		
(1) Exceptional — it's unusual to attend anything as good as this	0	0
(2) <b>Good - I'd be happy if I was the organiser</b>	<b>25</b>	<b>96%</b>
(3) OK - worth coming, but could be improved	1	4%
(4) Not very good — a few good bits, but not really worth it	0	0
(5) Very disappointing — almost nothing good about it at all	0	0

Any comments?

*"A bit thin on technology this year"*

**(b) What were your main aims or expectations in attending the event?** Please tick as many as apply.

(1) <b>To network with other people</b>	<b>21</b>	<b>84%</b>
(2) To promote our own work or share an experience we have had	4	15%
(3) To deliver a workshop or showcase session	3	12%
(4) To find out about a specific idea or technology on the agenda	11	42%
(5) To learn about circuit riding, or setting up a circuit rider service	8	30%
(6) Other. Please specify:		

*"Better understanding of the voluntary sector"*

**(c) How far did the event meet these aims?**

(1) Wholly, or nearly	5	18%
(2) <b>Mostly</b>	<b>19</b>	<b>70%</b>
(3) Partly	2	8%
(4) Not much, or not at all	1	4% (wanted to find out about how to set up a CR programme)

**(d) How good did you feel that the facilitators were overall?**

(1) <b>Experienced, knowledgeable and good at communicating</b>	<b>13</b>	<b>50%</b>
(2) Generally worth listening to, with few exceptions	12	46%
(3) A mixed bag, some good, some not	1	4%
(4) On the whole disappointing	0	0

Please add any additional comments on the quality of the event in general:

*"IBM Lotus Symphony presentation was too rushed"*

*"More choices for workshops, 3 rather than 2"*

*"Bit hurried at times"*

*"More time needed, 2 days?"*

**(e) Is there any way in which the practical details were unsatisfactory?** Please tick any area you were unhappy with, and explain the problem:

(1) The booking arrangements	1	4%
(2) The information sent out before the conference	0	0
<b>(3) The location, accessibility or parking arrangements</b>	<b>6</b>	<b>23%</b>
(4) The arrangements at the venue and provision for workshops	2	8%
(5) The refreshments	0	0
(6) The temperature or any other environmental factors	1	4%
(7) Other problem:		

*"Three workshops in one room"*

*"Pain to get to"*

*"More central location, easier to get to in one day"*

**(f) Please tell us what you will be able to do differently or better as a result of the conference**

*"Handbook/tech manual improved"*

*"Better understanding of technology ideas"*

*Understand what a CR does"*

**(g) How do you describe your job role?** (Please tick all that apply)

<b>(1) ICT technical support, advice or training for other organisations</b>	<b>15</b>	<b>58%</b>
(2) ICT support for your own organisation (main role)	3	12%
(3) ICT support for your own organisation (subsidiary role, e.g. accidental techie)	0	0
(4) ICT development work or consultancy	14	54%
(5) Management (trustee, chief officer, coordinator, manager)	5	19%
(6) Technical work on ICT (e.g. web site or software development, in-house ICT support)	7	27%
(7) Other please specify: Social enterprise – development officer	1	4%

**(h) What is your organisation's main role?**

<b>(1) ICT support or training (funded, or mainly funded)</b>	<b>10</b>	<b>38%</b>
<b>(2) ICT support or training (social enterprise)</b>	<b>10</b>	<b>38%</b>
(3) ICT support or training (commercial)	0	0
(4) Regional, sub-regional or local infrastructure organisation	8	31%
(5) Software or hardware development and/or sales	2	8%
(6) Other please specify:	0	0

(Note that 4 people ticked 2 boxes each in this section)