

**REPORT ON A SURVEY OF  
CHARITABLE ORGANISATIONS'  
USE OF  
INFORMATION TECHNOLOGY**

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Worshipful Company of Information  
Technologists



Charity Technology Trust



LASA



IT4Communities



Adapta



# REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

## REPORT SUMMARY

This report is based upon an online survey conducted by a consortium of organisations providing pro bono and paid for advice into the charitable sector.

The survey was available for completion online during November 2012.

The survey was completed by 140 organisations who met the survey criteria.

The key findings of the survey are:

- 67% of the organisations (94) employed no IT staff.
- 42% of the organisations (58) had no IT staff at all, volunteer or employed.
- 58% of the organisations outsource some (or all) of their IT to suppliers and 64% take advice on their use of IT from Suppliers, leading to a risk of a possibly high cost 'lock in' to a specific supplier.
- Organisations seem to implement IT systems which are of greater benefit to the individuals within the organisation rather than benefitting the organisation as a whole.
- Expenditure on IT seems to be at the low end of the range reported by organisations in the commercial sector.
- The cost of IT and the ability to access suitable advice seem to be the biggest barriers to increased utilisation of IT by these organisations. This is despite the increasing number of solutions which have the potential to reduce IT costs significantly, e.g. IT service delivery over the 'cloud'.
- A variety of sources have been approached (mostly apparently informally and possibly without adequate due diligence) for help and advice on IT capabilities. However, there is a surprisingly low take up of appropriate pro bono advice and a surprisingly high dependence on advice from existing IT Suppliers.
- Whilst there is a wide range of IT applications being used by the organisations, there is still a long 'wish list' for investment in IT.
- The adoption of an IT Strategy to manage business change seems to improve the chances of aligning the organisation's investment in IT with the achievement of its Strategic Aims as well as better meeting the need of the individuals working in the organisation.
- Shared IT expenditure approval and shared IT Project Management is common, albeit risky.
- Organisations seem resigned to inadequate resource allocation (e.g. training).

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## INTRODUCTION

The term 'IT' is used in this report to mean the computer equipment, network infrastructure and software used in the management of an organisation. The term software includes any commercially available packages (e.g. MS Office, Raiser's Edge, etc) as well as any internally developed bespoke software.

In the current economic climate many charities are not only faced with a declining income but also an increasing demand for their services. The successful implementation of IT should provide a variety of benefits to an organisation, e.g. improved service delivery, reduced costs, etc. However, there is a commonly held view that charities are unable to achieve all of the benefits that successful IT implementations can deliver.

This survey of the usage of IT in the charities sector has been undertaken by a consortium of organisations that provide services (pro bono and paid for) into this sector. The organisations involved are:

**Adapta Consulting**, providing charities with tailored advice to help them to become more successful. ([www.adaptaconsulting.co.uk](http://www.adaptaconsulting.co.uk)).

**Charity Technology Trust**, connecting charities to technology. ([www.ctt.org](http://www.ctt.org))

**IT4Communities**, helping charities to find volunteers to help with their IT needs. ([www.it4communities.org.uk](http://www.it4communities.org.uk))

**LASA**, helping charities across the UK to deliver efficient, high quality services. ([www.lasa.org.uk](http://www.lasa.org.uk))

**Worshipful Company of Information Technologists**, working with charities with the aim of helping them to gain the maximum benefit from their IT. ([www.wcit.org.uk](http://www.wcit.org.uk))

The survey was designed to:

- Examine how charities viewed the effectiveness of their IT.
- Identify any common factors which were impacting their cost effective utilisation of IT.
- Explore how charities approached the management of their business change and associated IT projects.
- Determine the source and effectiveness of the advice charities received on how best to use and manage IT.
- Explore the linkage between an investment in training and the success of business change projects.

The survey was:

- Developed with the help of four charities who attended a workshop held at the Worshipful Company of Information Technologists.
- Constructed using the open source survey tool, Limesurvey, and was made available via an Internet URL during the month of November 2012.

A total of 149 respondents representing 149 different organisations completed the survey. These organisations can be classified as follows:

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- One start up organisation
- Eight organisations who are not registered with the Charities Commission and which do not appear to publish any financial accounts
- Two organisations who are registered with the Charity Commission but have not provided any financial information
- Four charities registered with the Scottish Charity Commission who have provided financial information
- Five 'Not For Profit' (NFP) organisations who provide financial information on their web sites
- 129 charities registered with the English Charity Commission who have provided financial information.

This analysis of the responses received excludes the first two categories of respondents, i.e. the single start up organisation and the eight organisations who are not registered with the Charities Commission and do not appear to publish any financial accounts.

The number of organisations in the following analysis is, therefore, 140, 138 of which have provided financial information.

In the following analysis the full 140 organisations are included in the sample where no analysis by income is required. For analyses by income the number in the sample decreases to 138.

The confidence interval of this sample size is +/- 8.6% for charities registered with the Charities Commission in England based on a confidence level of 95%, a sample size of 135 and a population of 162,000 registered charities

(<http://www.charitycommission.gov.uk/showcharity/registerofcharities/SectorData/CharitiesByIncomeBand.aspx>) using the sample size calculator provide by Creative Research Systems (<http://www.surveysystem.com/sscalc.htm#one> )

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## SURVEY RESULTS

### ORGANISATION DATA

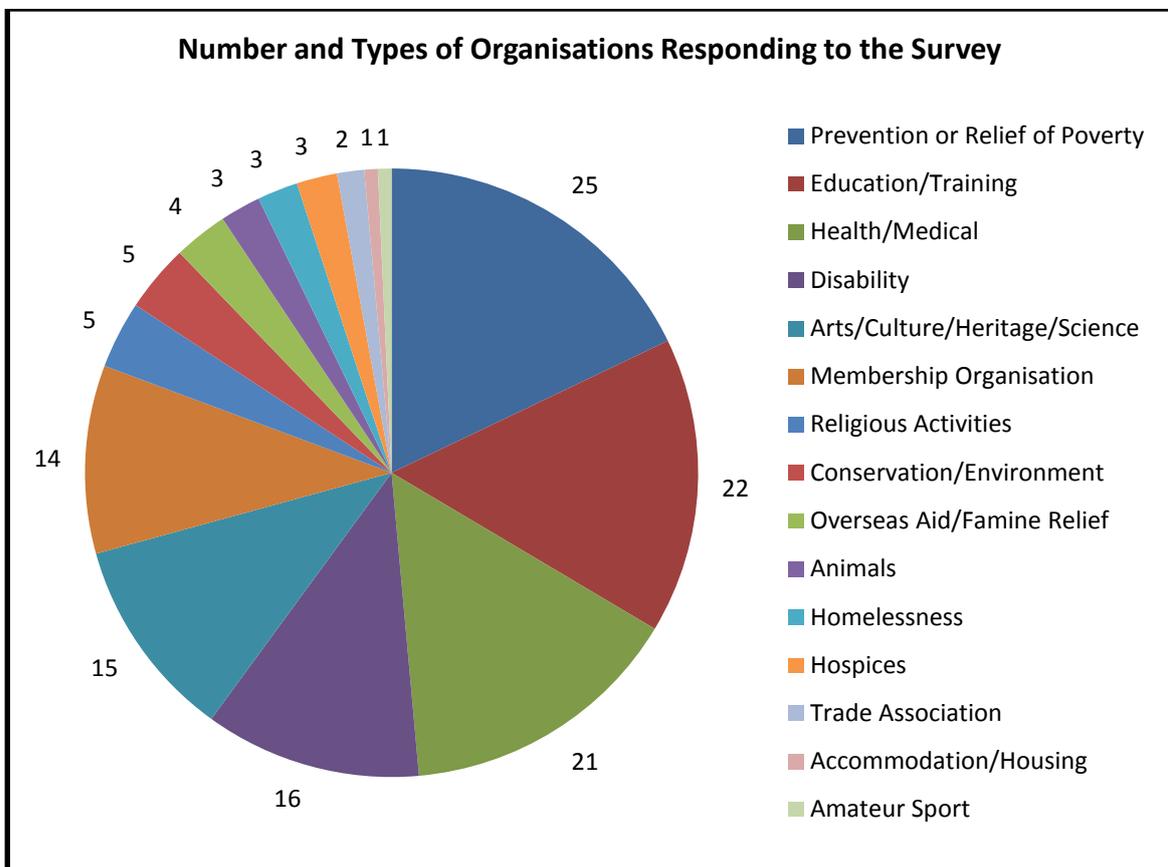
Respondents were asked about

- The sector their organisation operated in
- The size of the organisation measured in terms numbers of employees and volunteers
- Their organisation's use of suppliers to provide IT services.

### SURVEY QUESTION 1

Respondents were asked to classify their organisations in line with the Charity Commission's groupings:

Respondents had to select from the list of predefined categories.



### SURVEY QUESTIONS 2 to 5

How many FTE work for your organisation in VOLUNTEER positions?

How many FTE work for your organisation in PAID positions?

How many FTE work for your organisation to support your IT in PAID positions?

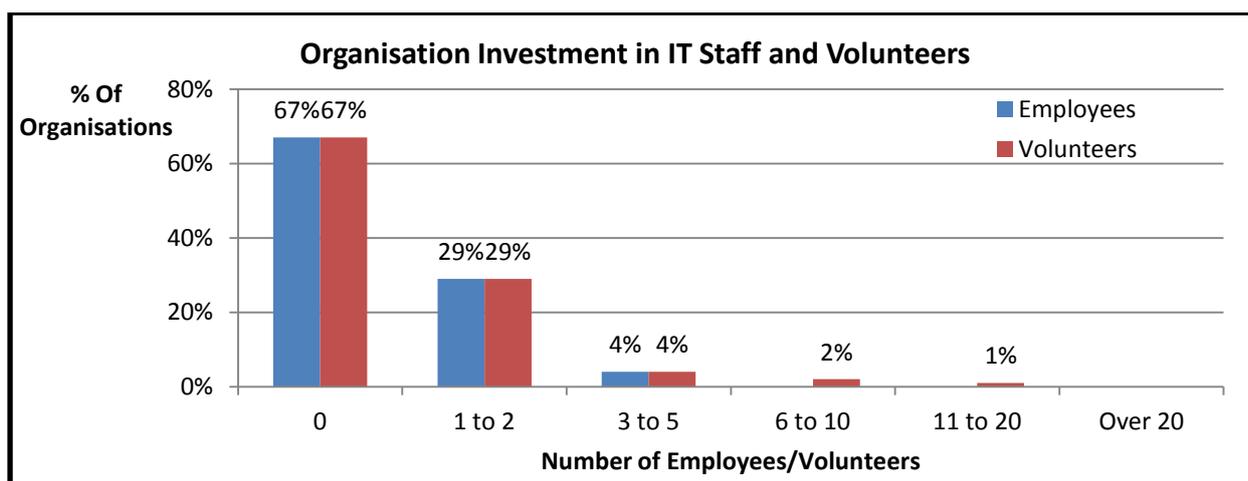
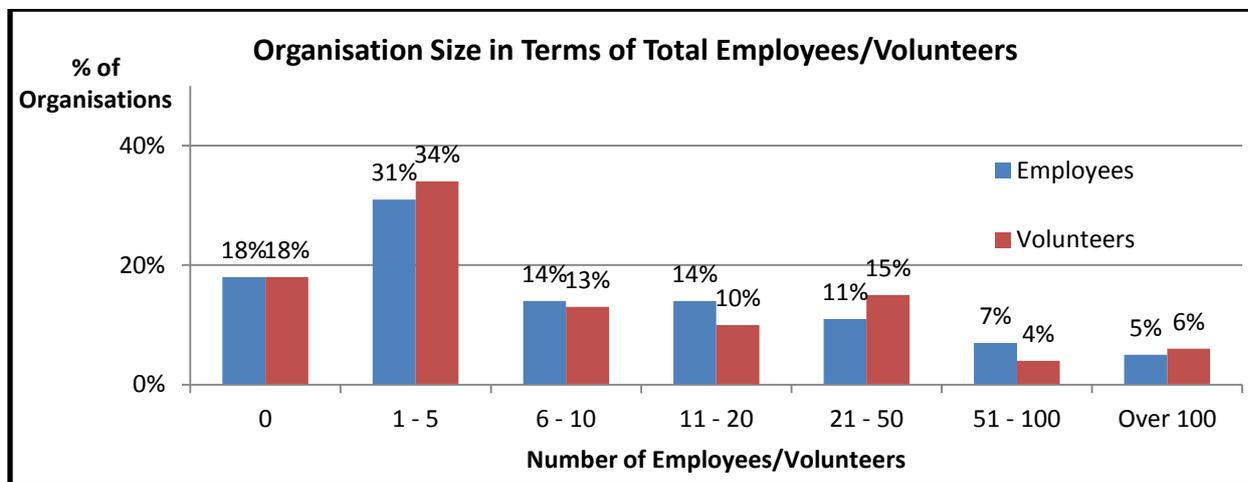
How many FTE work for your organisation to support your IT in VOLUNTEER positions?

Respondents had to select from a number of predefined responses.

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There were two striking findings:

- 67% of the organisations (94 out of 140) had no paid IT staff.
- 42% of the organisations (58 out of 140) had no paid or volunteer IT staff.



The responses also show that whilst the organisations differed in total paid employee size from 0 to over 100 the variation in paid IT employees was significantly less with 95% of the organisations reporting that paid IT employees numbered two or less. The numbers of volunteers in IT showed a slightly bigger increase but overall there is a consistent response that the investment in paid IT skills decreases as a proportion of the organisation's total employee base as the size of the organisation increases.

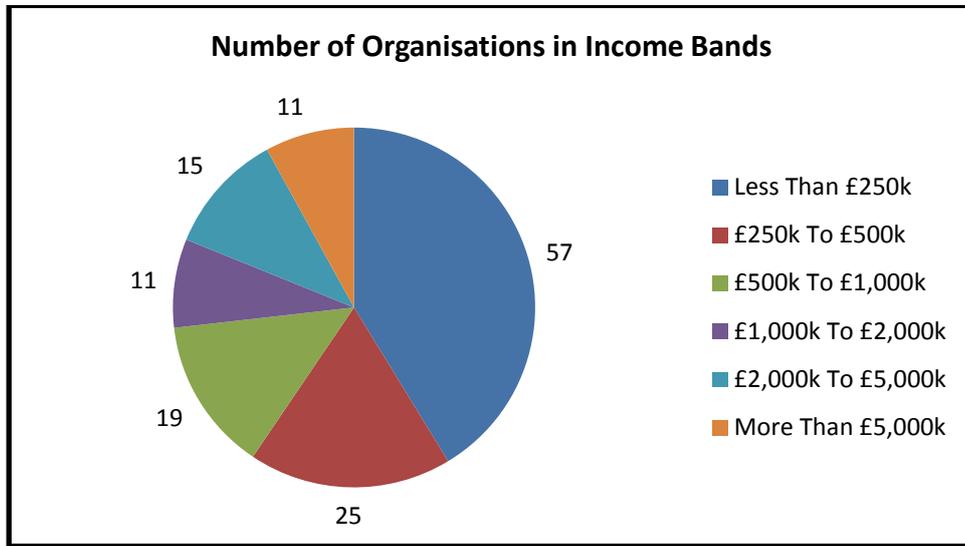
The responses were also analysed against the organisation's income as reported on the Charity Commission's web site or (for NPF organisations only) on their own website. Note that it has not been possible to obtain the income data for two charities registered with the English Charity Commission.

Income data for the remaining 138 organisations was obtained from these sources:

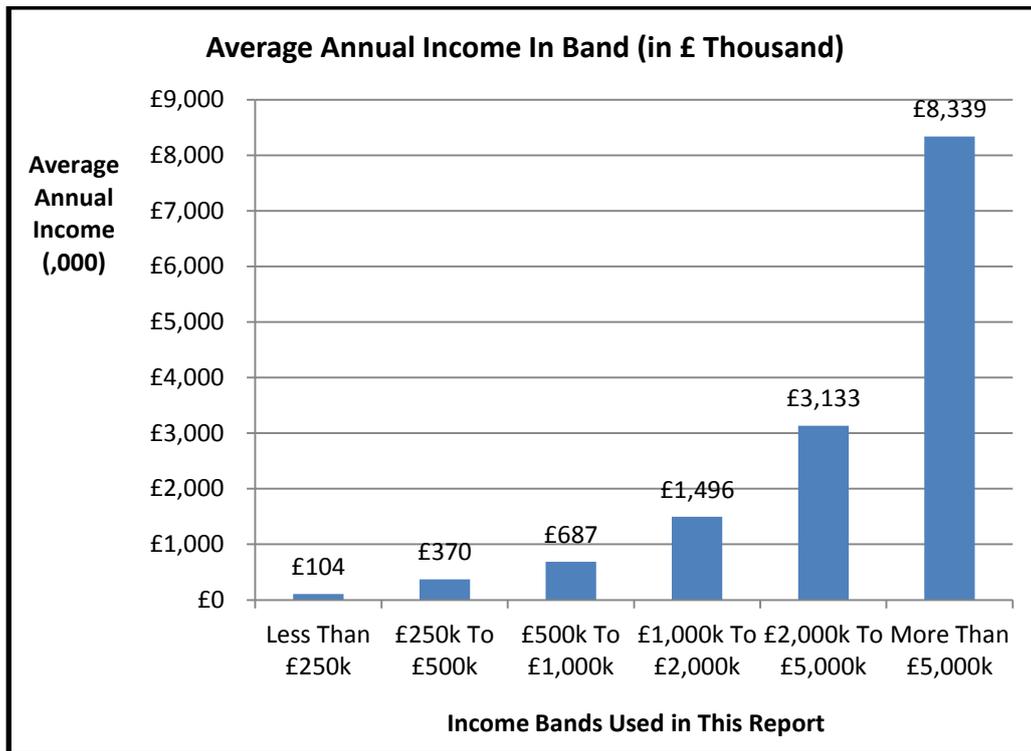
English Charity Commission:	129
Scottish Charity Commission:	4
Not For Profit (NFP) organisation website:	5

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Where the Survey result have been analysed by Income this has been done using the income bands shown below where the number of organisations in each band is identified.

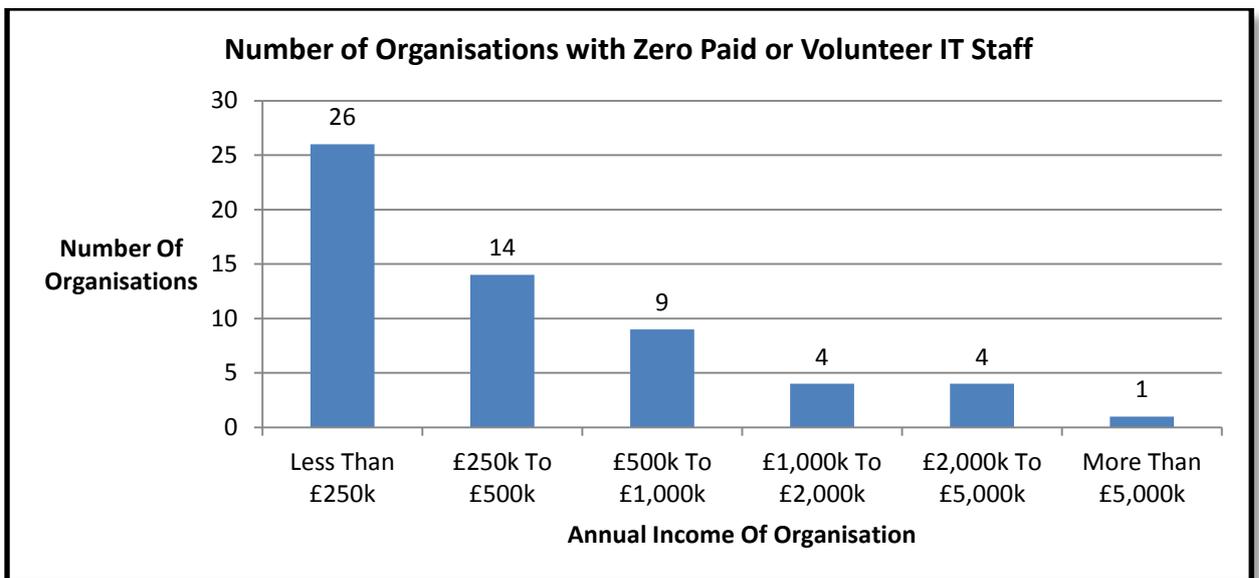
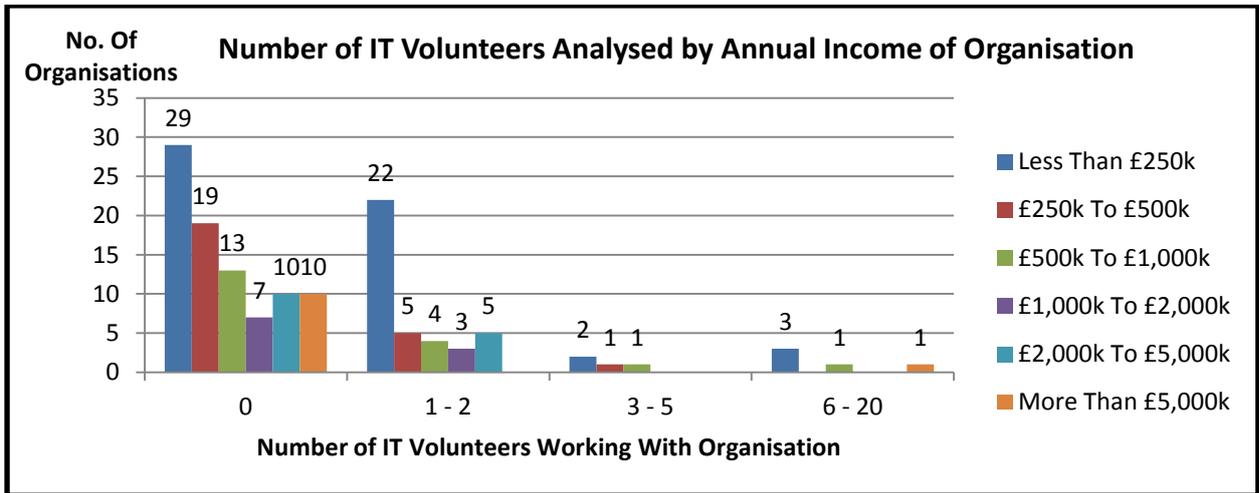
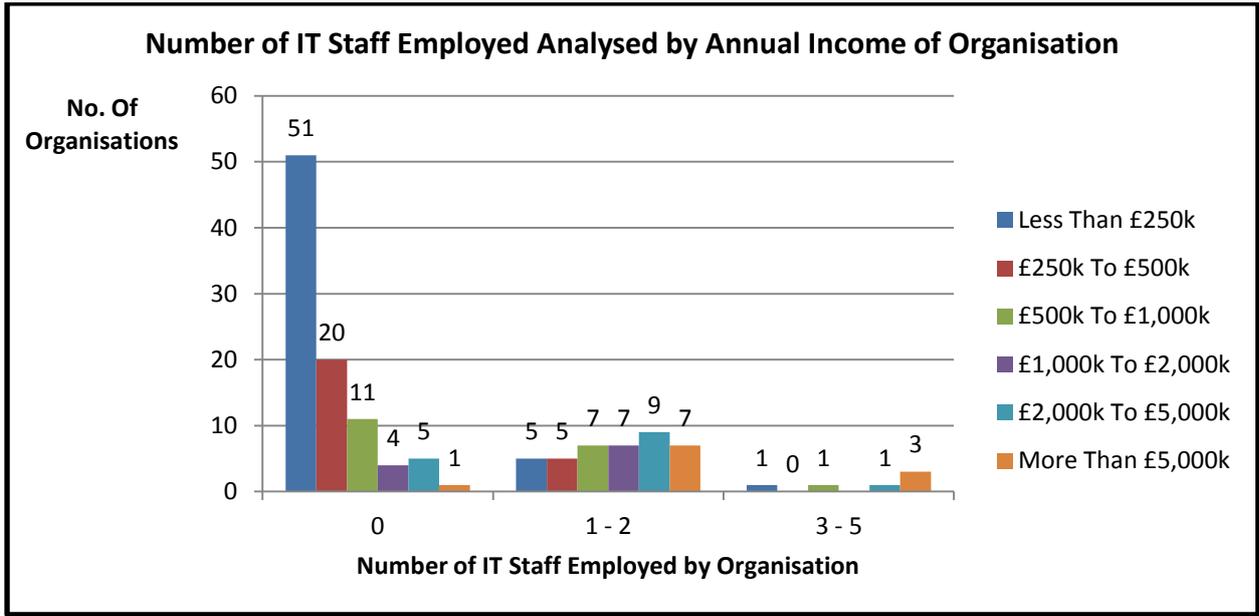


The following chart shows the average income in each of these bands.



As would be expected, the number of IT staff (paid or volunteer) does increase as the size of the organisation increases, but even for relatively large organisations (incomes in excess of £1 million p.a.) there are a surprising number who appear to have no staff at all with IT skills.

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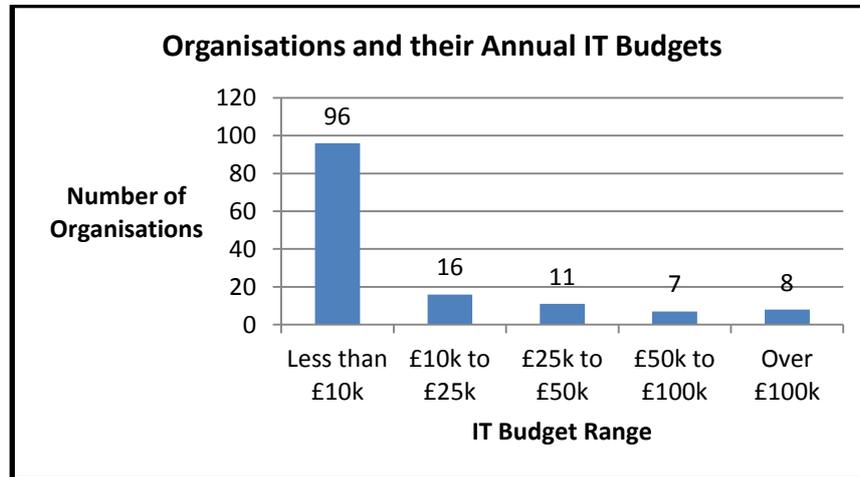


## REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

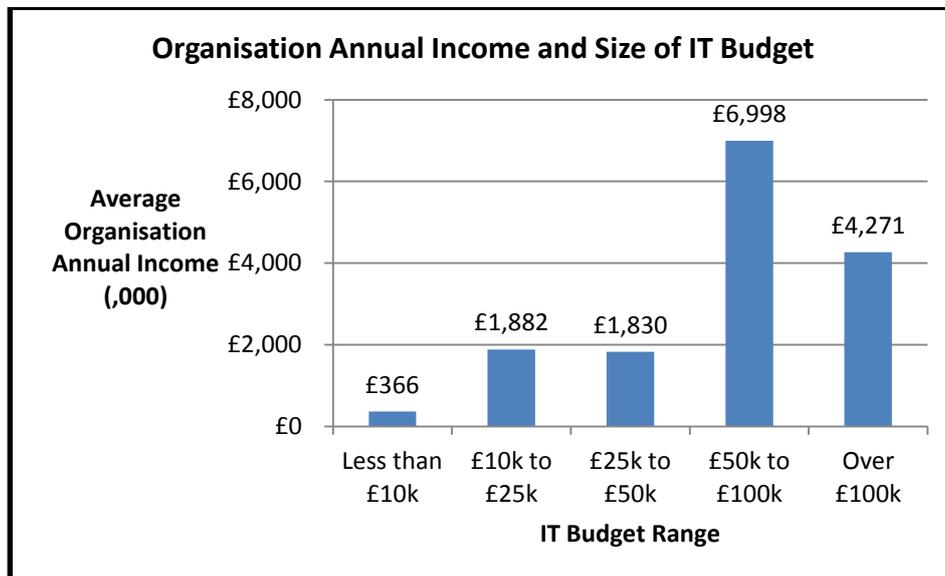
### SURVEY QUESTION 6

What is your organisation's current annual IT budget? Please provide an estimate if you are unsure of the exact amount.

Respondents had to select from one of five predefined responses.



A more interesting comparison is to compare the annual IT Budget with the income of the organisation.



However, it is difficult to draw any conclusions from this somewhat confusing picture.

A more detailed examination of the 37 organisations with an income greater than £1 Million shows the following IT spend as a percentage of organisation income:

IT spend less than 1% of Income:	15
IT spend between 1% & 2% of income:	17
IT spend over 2% of Income:	5

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This is at the low end of normal IT spend as a percentage of income. A Gartner report: <http://www.google.co.uk/url?sa=t&rct=j&q=&esrc=s&source=web&cd=9&ved=0CF8QFjAI&url=http%3A%2F%2Fwww.itsmf.co.uk%2Fnmsruntime%2Fsaveasdialog.aspx%3FIID%3D2284%26sID%3D1295&ei=9xrTUIDmPPSSOQX72oDoBQ&usg=AFQjCNHFtV6VtIVWwxCN2CQSwugfvdMwpw&sig2=gkp9BVhWuvfVhKkiHvzVIQ&bvm=bv.1355534169,d.ZG4&cad=rja> analysed 2008 IT spend and as page 6 of the presentation shows the average spend as a percentage of revenue across all industry sectors was 4.2%.

### SURVEY QUESTION 7

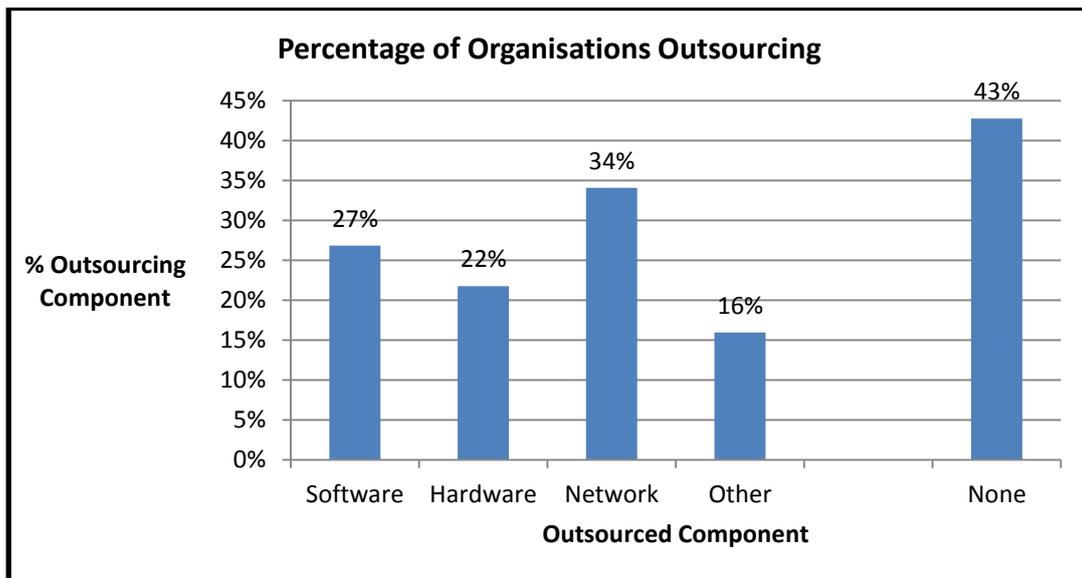
#### Is any of your IT outsourced, i.e. managed by a supplier?

There were a number of pre-defined responses to select from and the option to include free format responses. Organisations were not limited to a single response.

The majority (58%) of the responding organisations outsource some of their IT to supplier organisations.

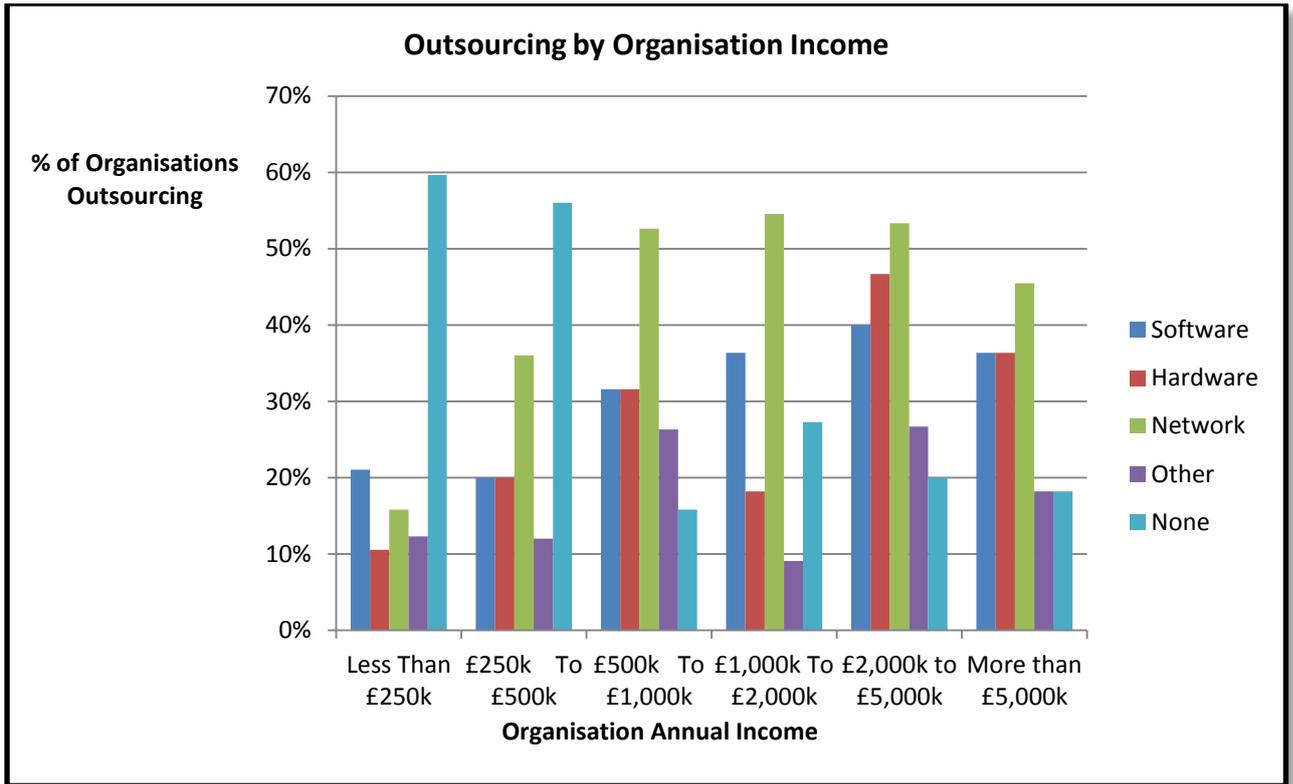
A majority of the organisations who outsource do so for more than one IT service component.

The free format comments are shown in Appendix 1.

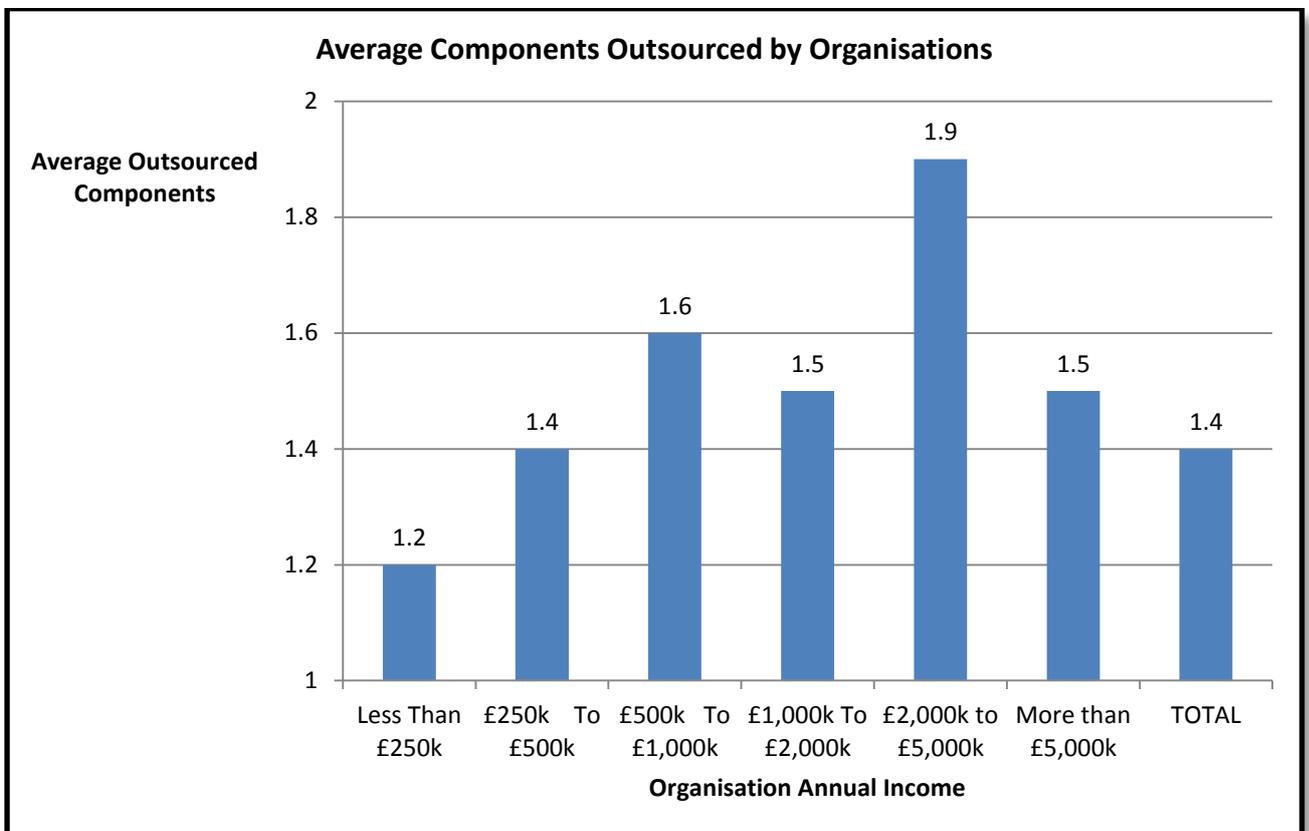


Analysing the data by Income band shows that the take up of outsourcing is fairly even across all income bands with the exception of the lowest income band where the organisations' use of outsourcing is significantly lower. This is possibly a direct result of the inadequate quality IT advice that the smaller organisations in the survey appear to suffer from (see Survey Question 15 later in this report).

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The poorer take up of outsourcing by the smaller organisations as a cost-effective way of obtaining IT services can be clearly seen in the next chart.



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## USE OF EXISTING IT SYSTEMS

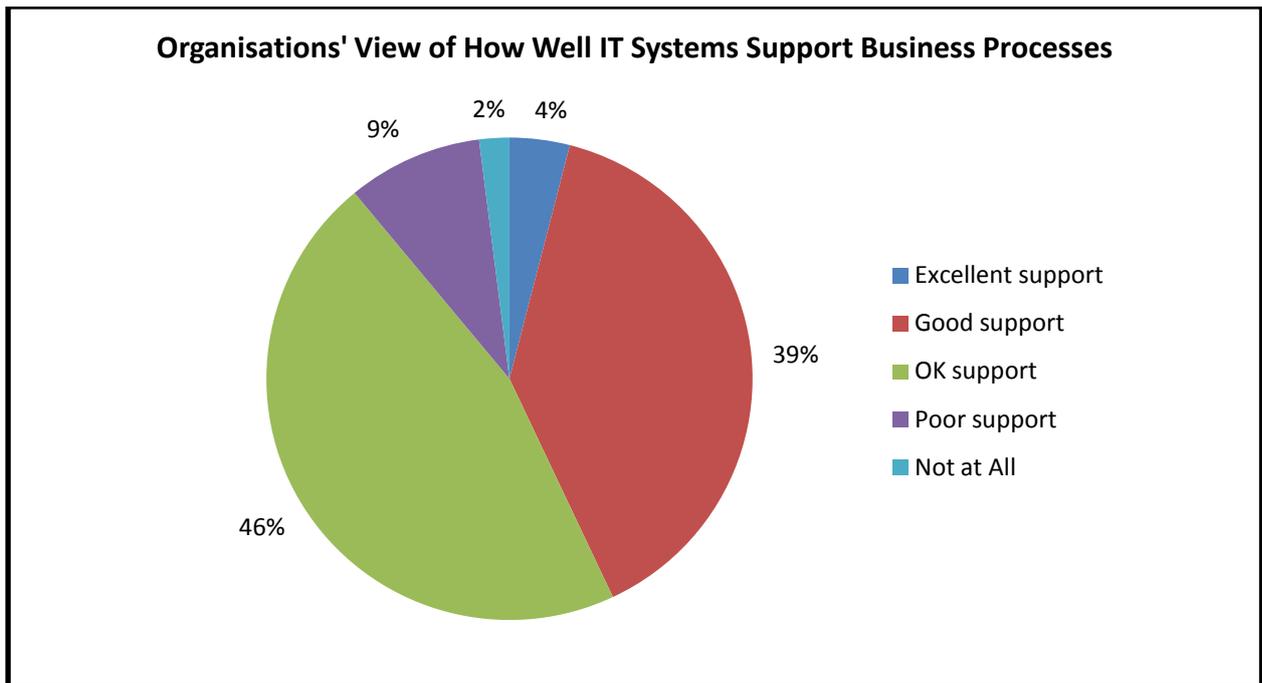
Respondents were asked for their views on the existing IT systems and infrastructure used in their organisations in terms of

- How they were supported individually and how the organisation's business processes were supported
- Whether they thought the organisation's IT would assist in achieving the organisation's strategic aims
- What challenges remained in using IT within the organisation
- Whether training was felt to be adequate to maximise the benefits of the IT used by the organisation .

## SURVEY QUESTION 8

**How well do you feel that your organisation's processes are supported by the software available to you?**

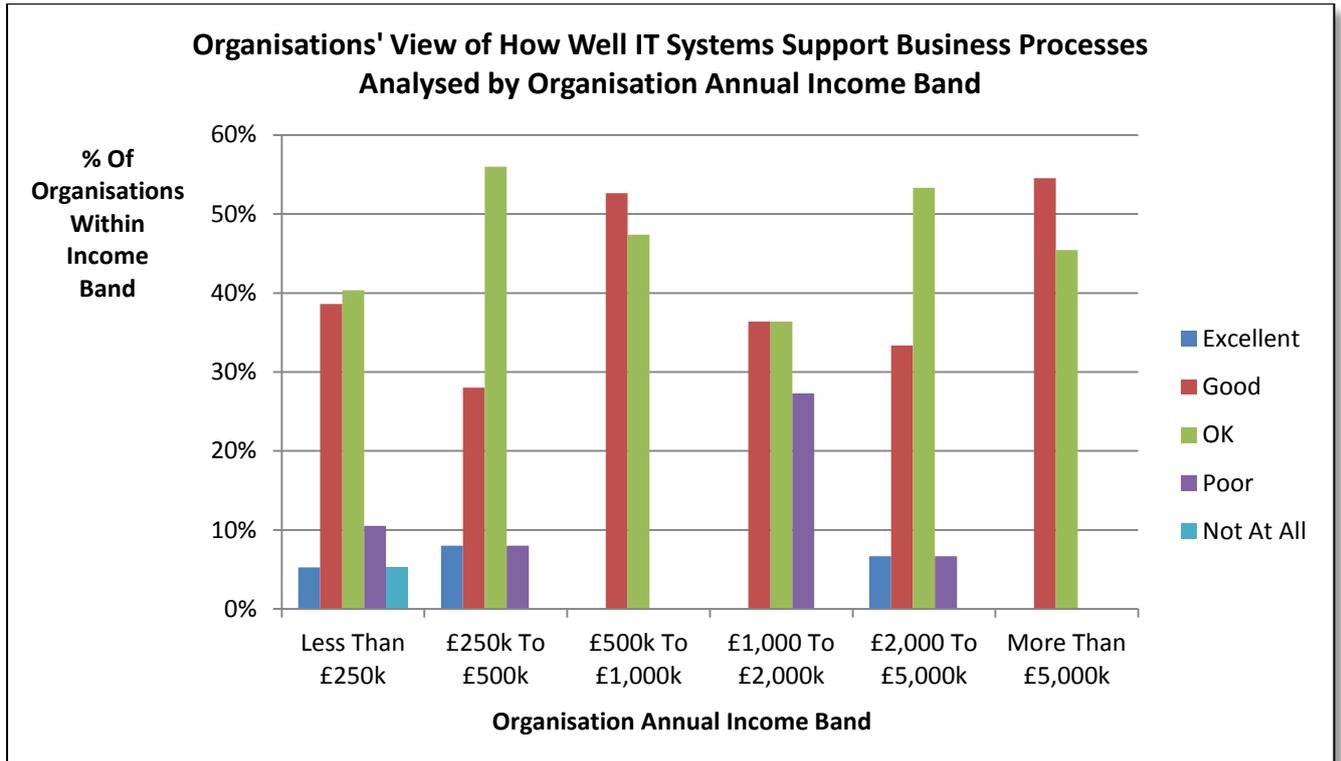
Respondents had to select from one of five predefined responses:



43% of respondents thought that their organisation's processes received 'Excellent' or 'Good' support from their IT. The majority of respondents (57%) classified the support they received as 'OK', 'Poor' or 'Not at All' indicating that there is significant scope for improvement.

Analysing these responses by organisation Annual Income Band shows no obvious pattern.

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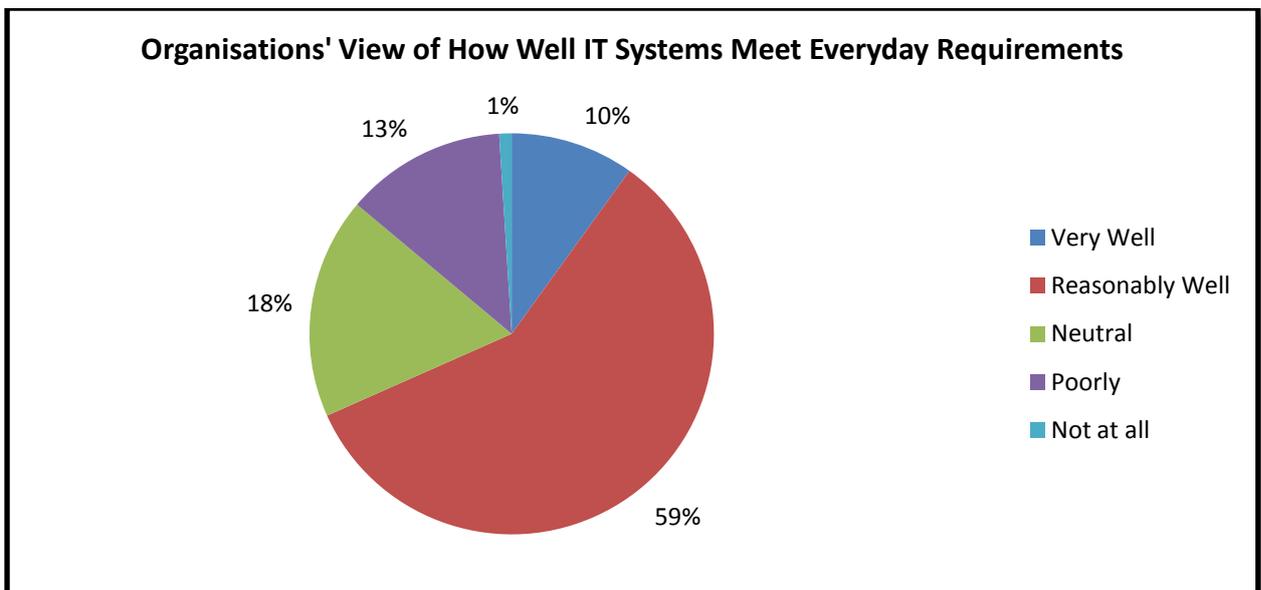
**SURVEY QUESTION 9**

**Overall, how well does the IT used by your organisation meet your everyday work requirements?**

Respondents had to select from one of five predefined responses with an option to provide free format responses.

A significant majority (69%) feel that their everyday work processes are supported 'Reasonably Well' or 'Very Well'.

The free format responses are shown in Appendix 2.

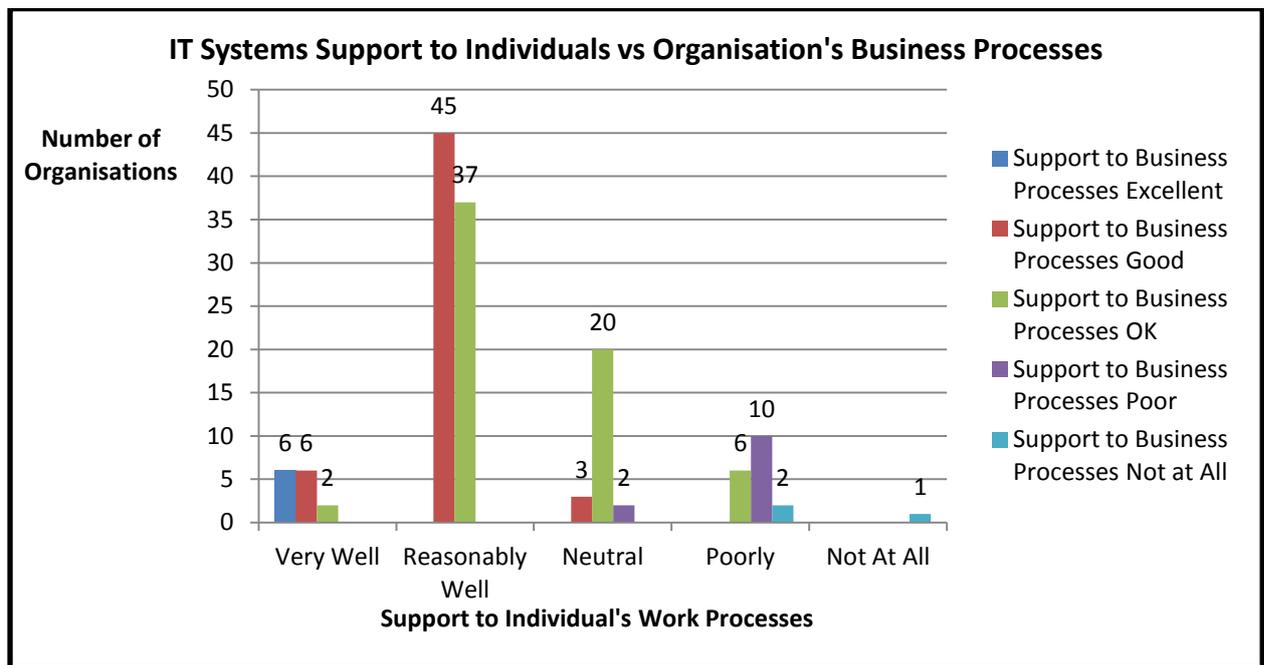


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It is interesting to note that 69% of respondents thought that the IT systems met their everyday requirements very or reasonably well, whereas only 43% thought that they provided excellent or good support to the organisations' business processes. The implication is that when IT systems were introduced the individuals in the organisations placed a greater priority on how well supported their own tasks were at the expense of the efficiency of the overall organisation.

A volunteer dominated organisation would obviously have to meet its volunteers' workday needs more than a commercial organisation would have to meet its employees' workday needs at the expense of the organisation's strategic aims. Consequently, a commercial organisation could more easily introduce IT systems which provided greater cost effectiveness for the organisation as a whole.

This can be more easily seen in the following chart:



As this chart shows, 82 respondents thought that their organisation's IT system supported their everyday requirements 'Reasonably Well', whereas of the same respondents only 45 thought that they provided 'Good' support to their organisation's business processes.

Reviewing the optional free format responses suggests that there is significant scope for improvement for a large minority of the responding organisations.

### SURVEY QUESTION 10

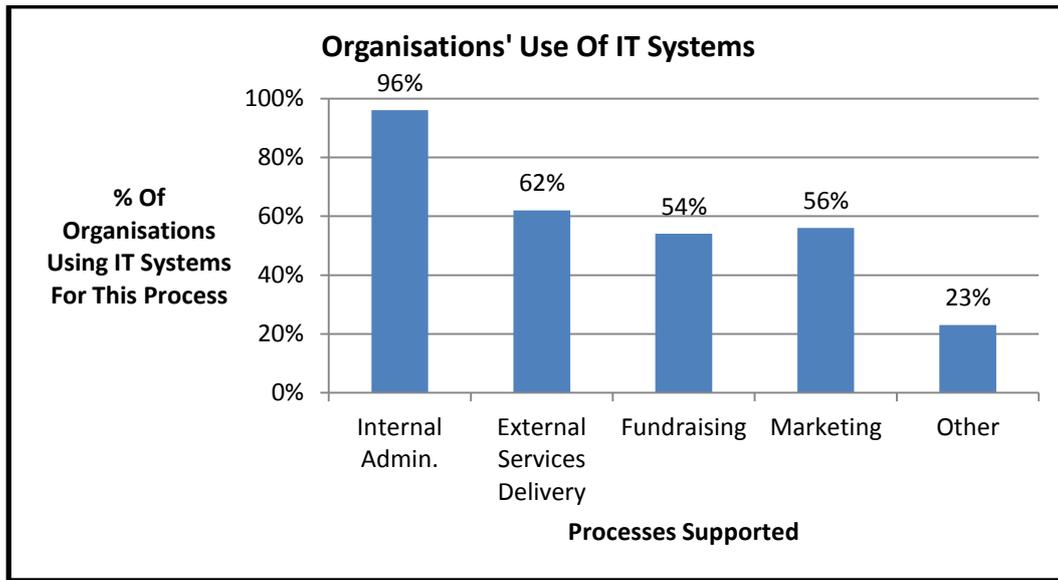
#### Which business processes in your organisation does your IT currently support?

There were a number of pre-defined responses to select from and the option to include free format responses. Organisations were not limited to a single response.

On average each organisation selected 2.9 options showing that IT is well embedded in the business processes of the survey sample.

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32 Organisations selected 'Other' and their responses are shown in Appendix 3.

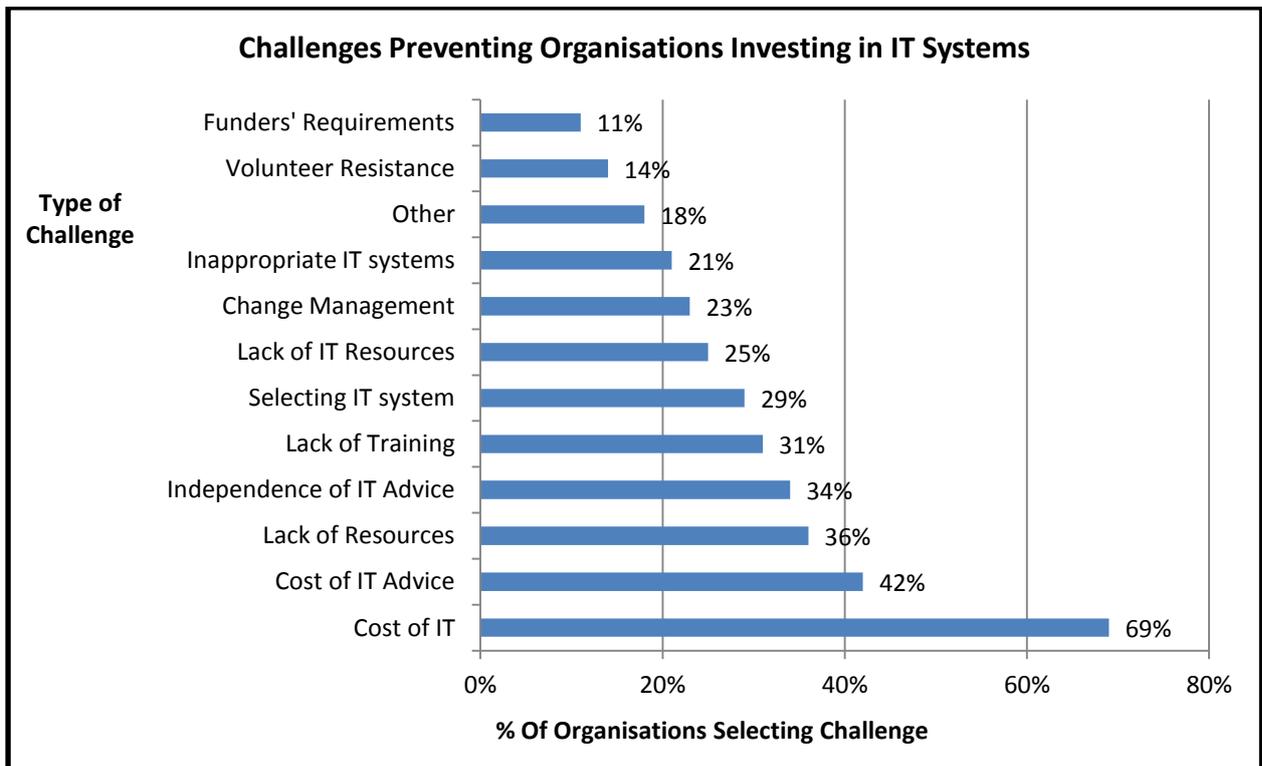


The wide range of business processes identified in this Appendix suggests a high degree of innovation amongst some of the surveyed organisations.

### SURVEY QUESTION 11

**How would you describe what you feel are the most significant challenges in using IT to support your organisation's goals?**

There were a number of pre-defined responses to select from and the option to include free format responses. Organisations were not limited to a single response.



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On average each organisation selected 3.5 options indicating a general view that there were a significant number of challenges for these organisations in their attempts to use appropriate IT investment to achieve their organisation's goals.

The biggest issues seem to be cost related as the most selected options were:

- The cost of a new IT system 69%
- The availability of affordable external IT advice and support 42%

The fact that cost is still such a major factor suggests that these organisations are not yet benefitting from the cost effectiveness of IT solutions, e.g. cloud based IT service delivery.

The next most selected options also seem to reflect the problems associated with an under investment in IT:

- Lack of resources to take advantage of the available features/capabilities 36%
- The availability of independent and trusted IT advice 34%
- Lack of appropriate training 31%

The issues concerning 'The availability of affordable external IT advice and support' and 'The availability of independent and trusted IT advice' are an indication that the respondents are not aware that there are reputable organisations providing pro bono advice to the sector (Charity Technology Trust, IT4Communities, Lasa and the Worshipful Company of Information Technologists).

The comments provided by organisations selecting 'Other' are listed in Appendix 4. It is difficult to extract common themes from these but there do seem to be a number of comments around the general areas of

- Training
- End User resistance to change
- Keeping up to date with changes in IT
- Communication problems between technical and non technical members of the organisation.

Analysing the responses within the organisations' Annual Income Bands reveals no specific dependencies between the type of challenge faced by an organisation and its Annual Income as shown in the chart overleaf.

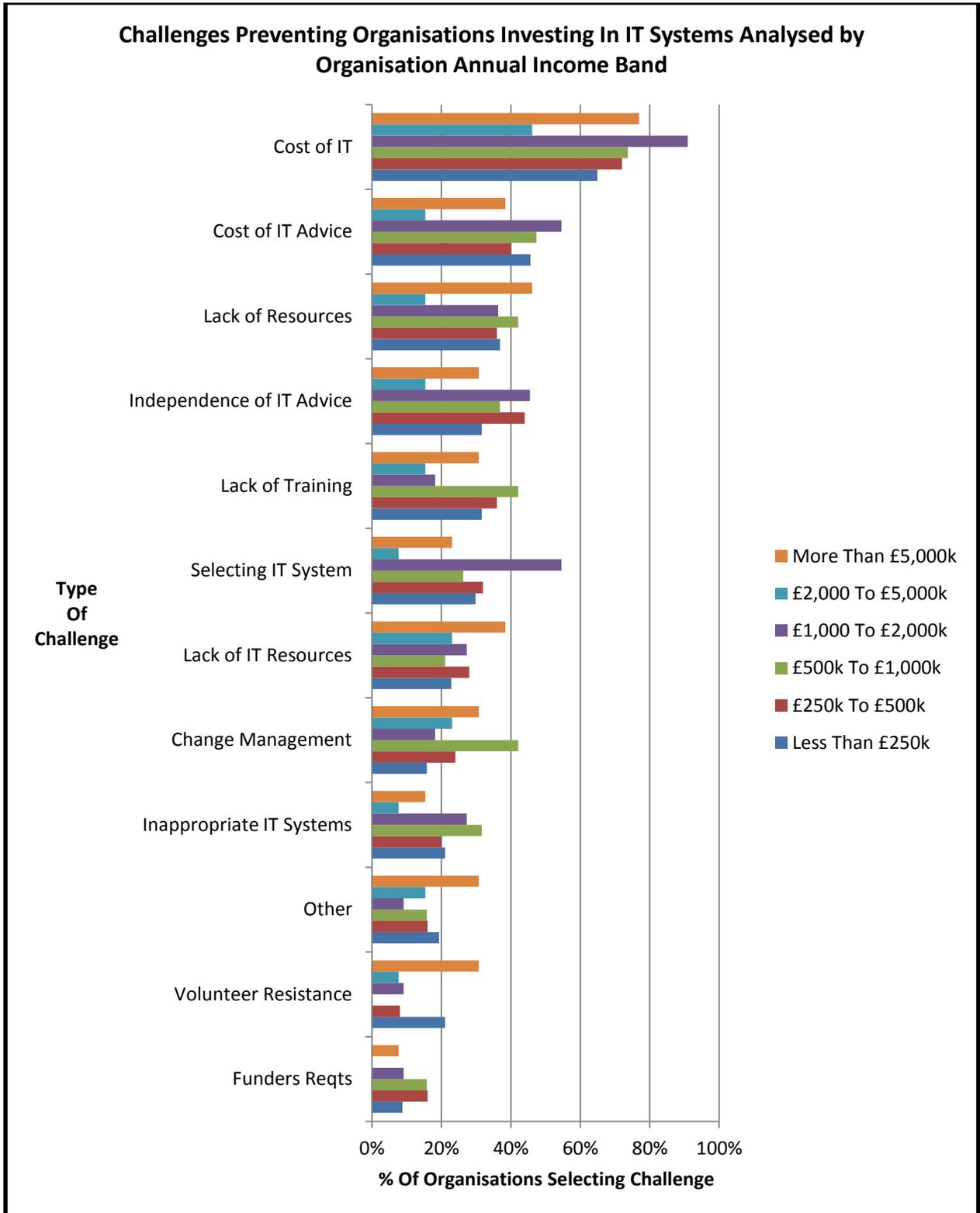
### SURVEY QUESTION 12

**If your organisation had unlimited budget and resources which of the following would you invest resources into?**

There were a number of pre-defined responses to select from and the option to include free format responses. Organisations were not limited to a single response.

On average, each organisation selected 4.2 options indicating a general view that there were a significant number of IT investment opportunities that would assist their organisations. This is in line with the response from Question 8 where only 43% thought that IT was providing Good or Excellent support for their organisation's business processes.

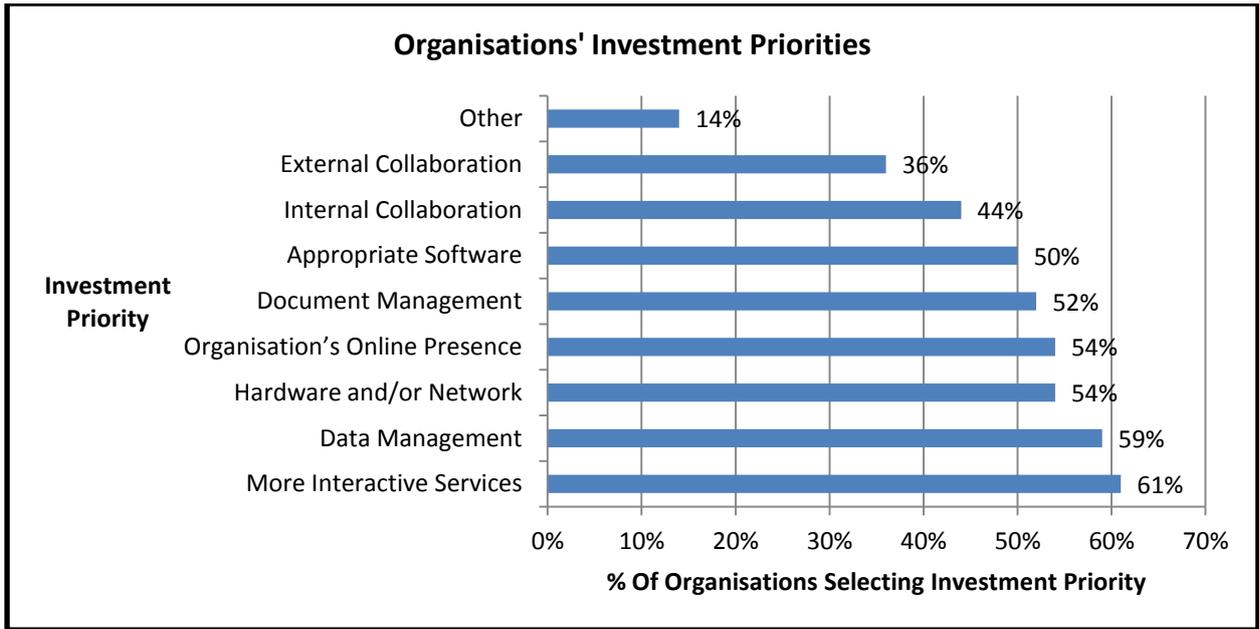
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The biggest opportunities seem to relate to providing better interactive (on-line) systems and also systems which manage the organisation's data more effectively, with a hardware/network upgrade and the organisation's website also being high priority.

The comments provided by organisations selecting 'Other' are listed in Appendix 5. It is difficult to

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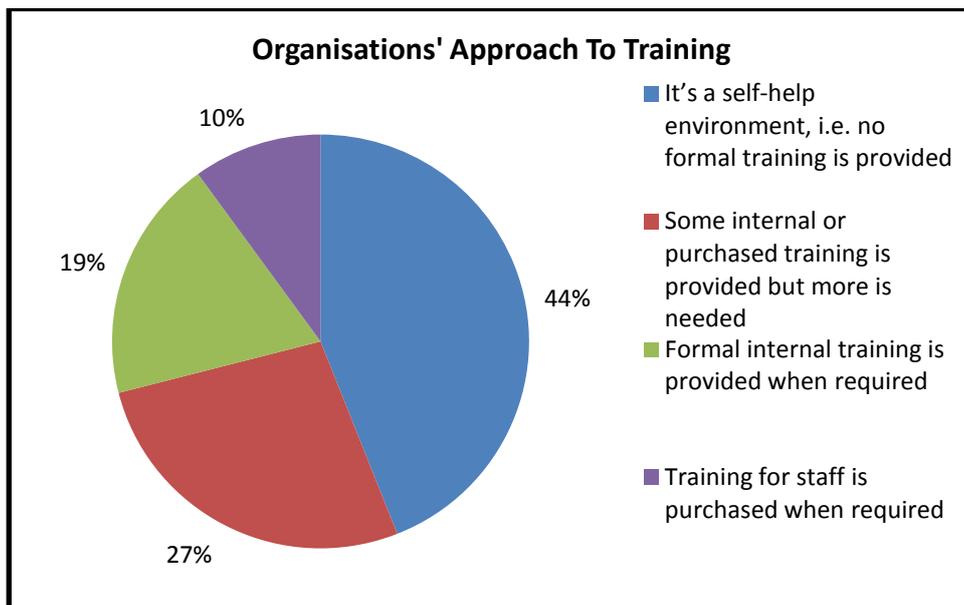
extract common themes from these but there do seem to be a number of comments around the general areas of training and the availability of IT skills in the organisation, issues which have already been commented on.

### SURVEY QUESTION 13

**Which one in the list below do you think best describes the training of staff to use your organisation's IT?**

Respondents had to select from one of four predefined responses.

The responses show that there is a clear view that the training provided is inadequate and, inevitably, this will be a barrier to obtaining the best return from an organisation's investment in IT. Comments about the need for improvements in training have been mentioned in responses to other questions.



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## OVERALL GOVERNANCE OF BUSINESS CHANGE

Many case studies suggest that there is a strong correlation between the successful implementation of Business Change (and its necessary IT project components) and the overall Governance applied to the Business Change projects. Respondents were asked about their general management approach to Business Change and the associated IT Projects.

### SURVEY QUESTION 14

**Do you feel that your IT is successfully supporting your organisation's strategic aims?:**

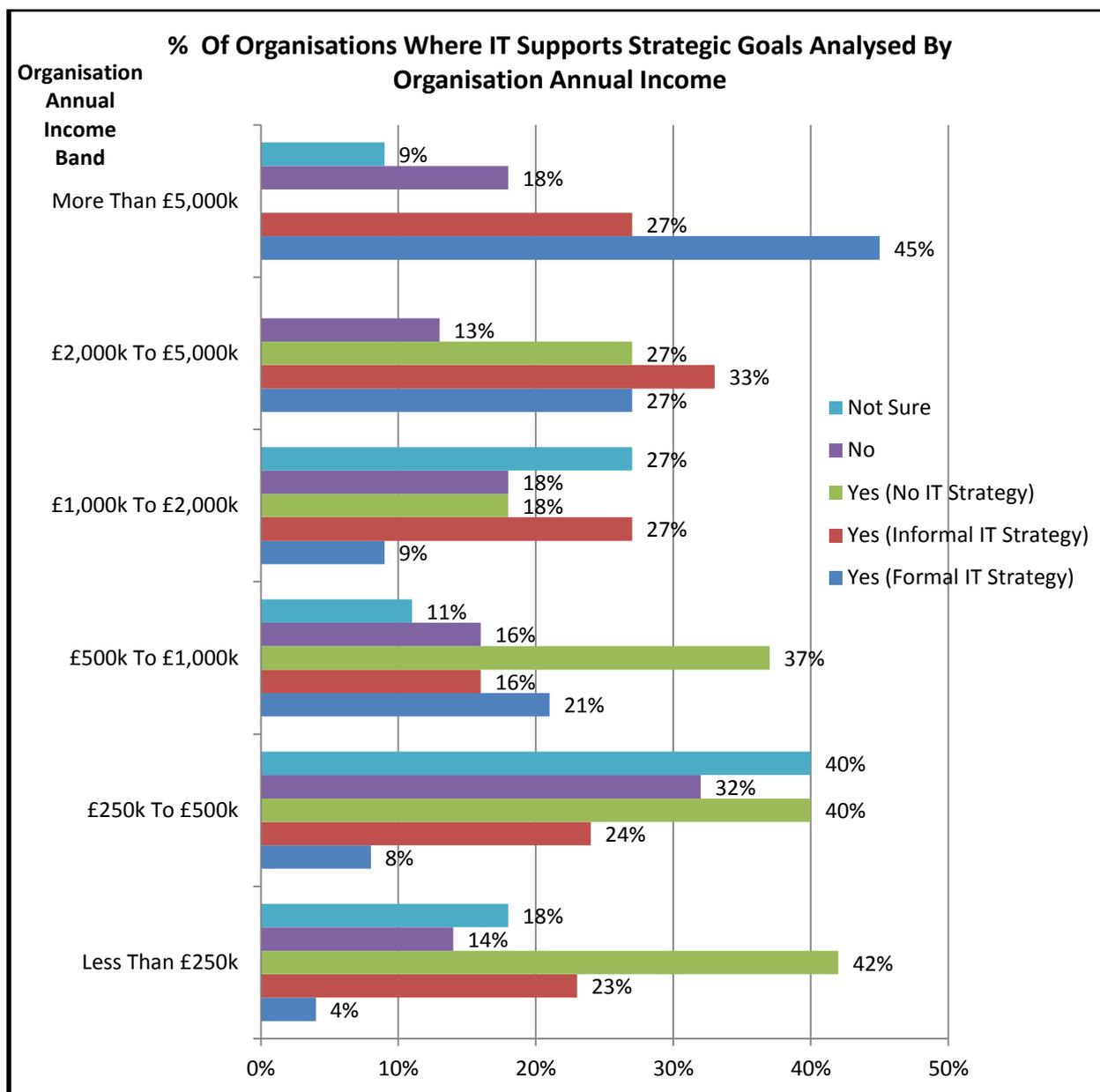
Respondents had to select from one of five predefined responses.



Somewhat surprisingly, 71% of all of the organisations think that their IT is successfully supporting their organisation's strategic aims. This is despite the earlier view (Question 12) that there were a significant number of IT investment opportunities if the funding was available. To a certain extent these are obviously contradictory and probably arise from the absence of a formally reviewed and maintained IT Strategy in 87% of the organisations.

Analysing the responses by income band shows that a greater percentage of higher income organisations feel there is a value in having an IT Strategy underpinning their organisations' strategic aims.

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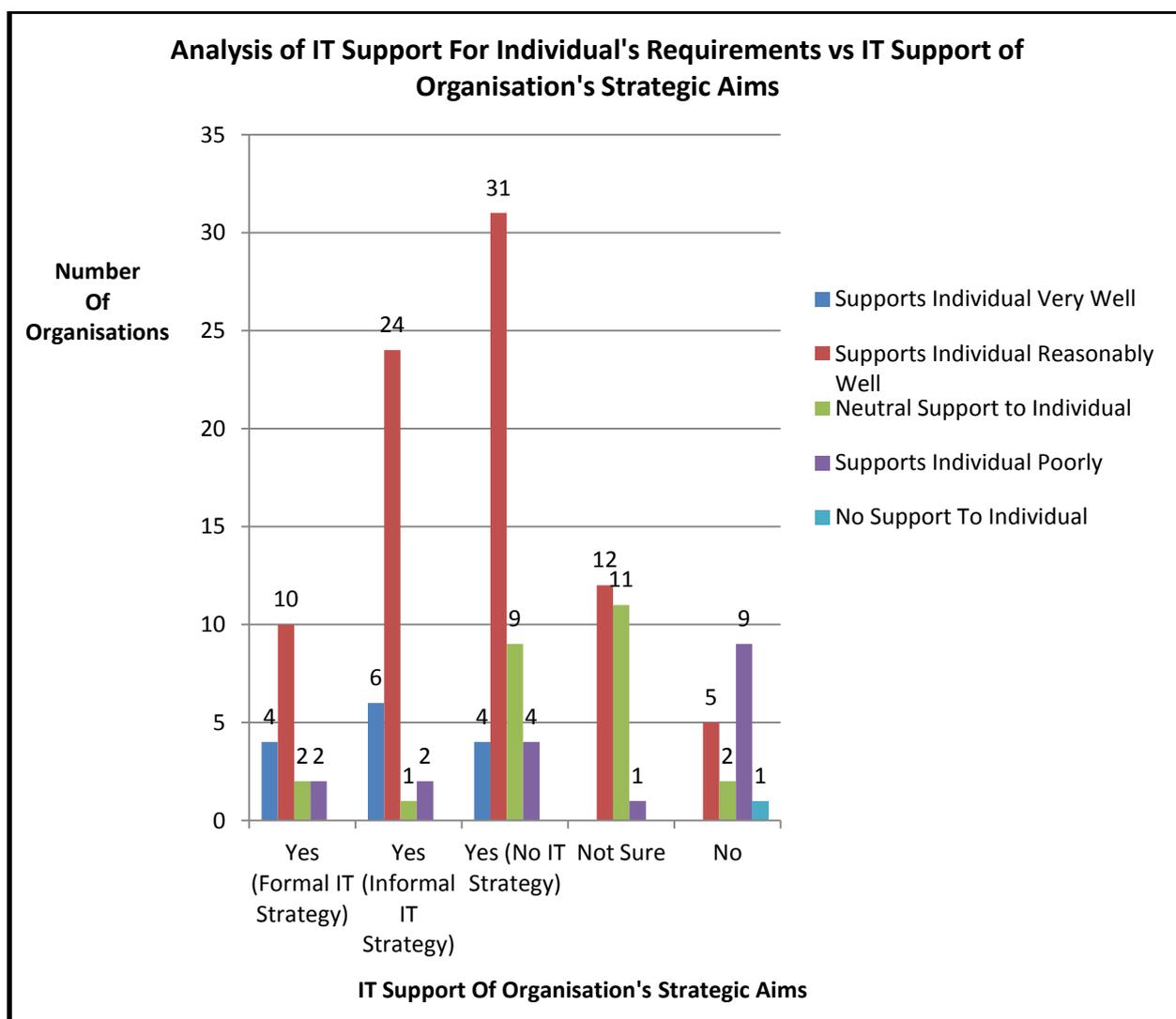
Cross referring this question to question eight (IT support to everyday work requirements) suggests that having an IT strategy could also be a positive factor here. Although the correlation is not definitive it shows that 44 organisations with some form of IT Strategy achieved support of their organisations' Strategic Aims as well as supporting the Individual's workday requirements either Very or Reasonably Well. However, 35 organisations achieved the same support of their organisation's strategic aims as well as supporting the Individual's workday requirements either Very or Reasonably Well without an IT Strategy.

It is possibly worth noting that 41 organisations (29% of those responding) did not have an IT Strategy and were also not supporting their organisations' Strategic Aims with their IT systems.

Only seven organisations with an IT Strategy (14% of those with an IT Strategy in some form) were failing to support their staff's individual workday requirements whereas 37 organisations without an IT Strategy (43% of those without an IT Strategy) were failing to support their staff's individual workday requirements.

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This data does suggest that those organisations that have an IT Strategy are more likely to have IT systems which both support their organisations' strategic aims as well as supporting their staff's everyday work requirements.



### SURVEY QUESTION 15

#### Where do you think your organisation obtains advice and guidance on its use of IT?

There were a number of pre-defined responses to select from and the option to include free format responses. Organisations were not limited to a single response. The responses received were:

Interestingly 62% of the respondents identified their own employees as a source of advice and guidance on IT. This is despite the fact that only 34% of organisations identified that they employed any IT professionals. Consequently there is scope for expensive mistakes and inadequate IT support.

41% of the respondents identified their volunteer IT staff as a source of advice and guidance on IT. This is more in line with the number of organisations identifying that they had access to volunteer IT skills (49%).

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Relying on suppliers for advice is an obvious high risk strategy as suppliers will typically only be able to advise on their core expertise, which is in the services that they provide. This has an obvious potential for 'supplier lock in'.

Relying on 'Friends and Relatives' for advice is also an obviously high risk approach unless these are treated as independent third parties and the appropriate references and due diligences checks carried out.

Using external Consultancies on either a 'paid for' or 'pro bono' basis (assuming the appropriate references and due diligences checks have been carried out) will be the best route to learn about relevant successful applications of IT but is only used by one third of the respondents. The fact that organisations prefer to take advice from suppliers rather than from properly qualified pro bono consultancy sources is rather surprising.

On average each respondent identified that advice and guidance was sought from an average of 2.4 sources.

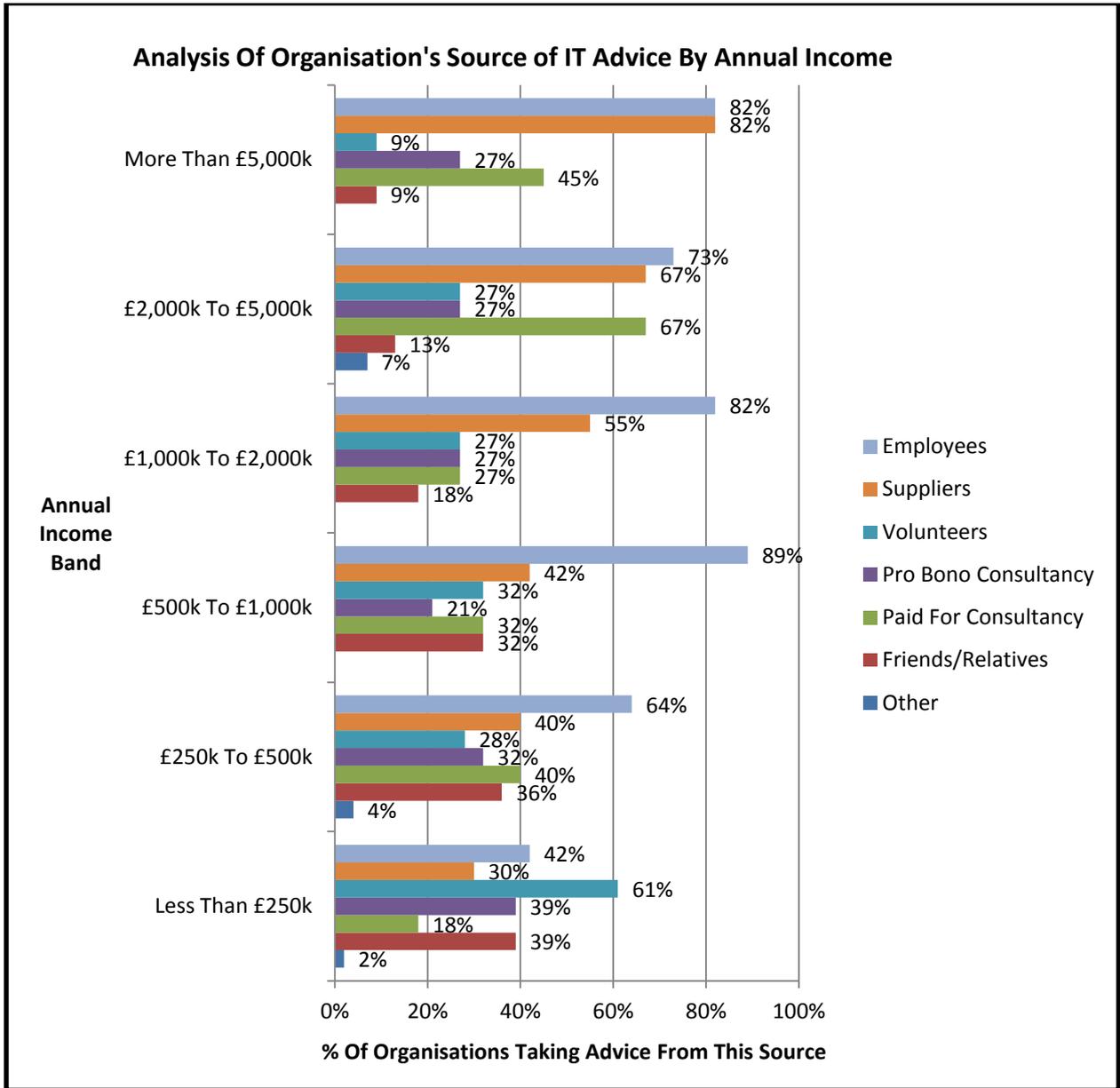
The small number of free format responses are shown in Appendix 6.

Analysing these responses against the organisation's Income Band reveals the greater dependence of the smaller organisations on volunteer advice and the relatively low take up of Pro Bono professional advice.

The dependence of larger organisations on advice from their IT suppliers is somewhat surprising as this could result in a degree of 'supplier lock in' which may, in the long term, be detrimental to the organisation.

Advice from external organisations (pro bono or paid for) is reasonably consistent (and surprisingly low) across all organisations.

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**SURVEY QUESTIONS 16 & 17**

**Who is responsible for the approval of expenditure on IT in your organisation?**

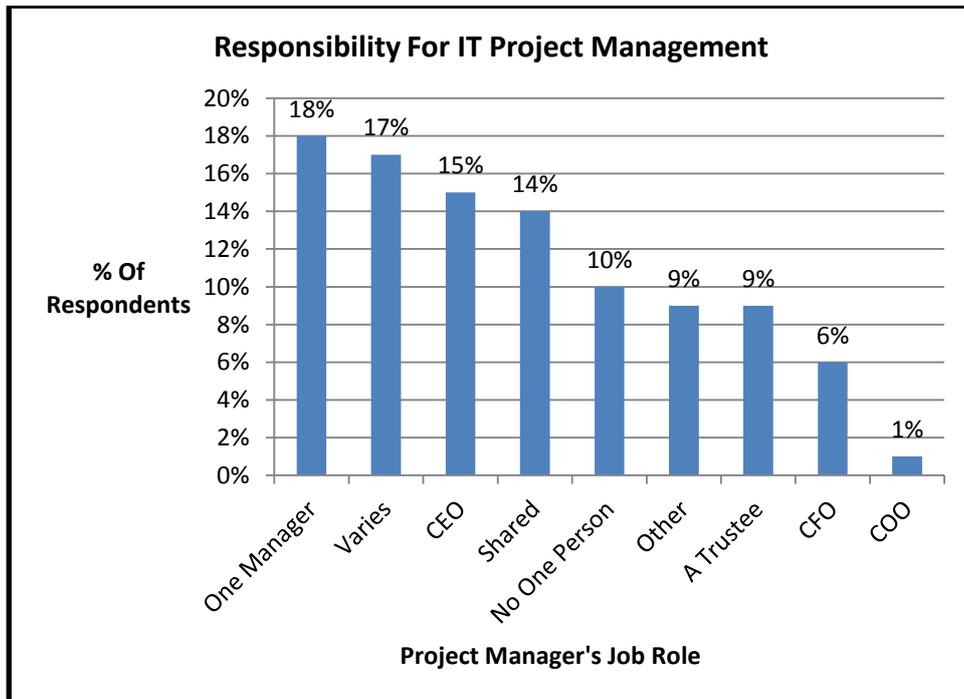
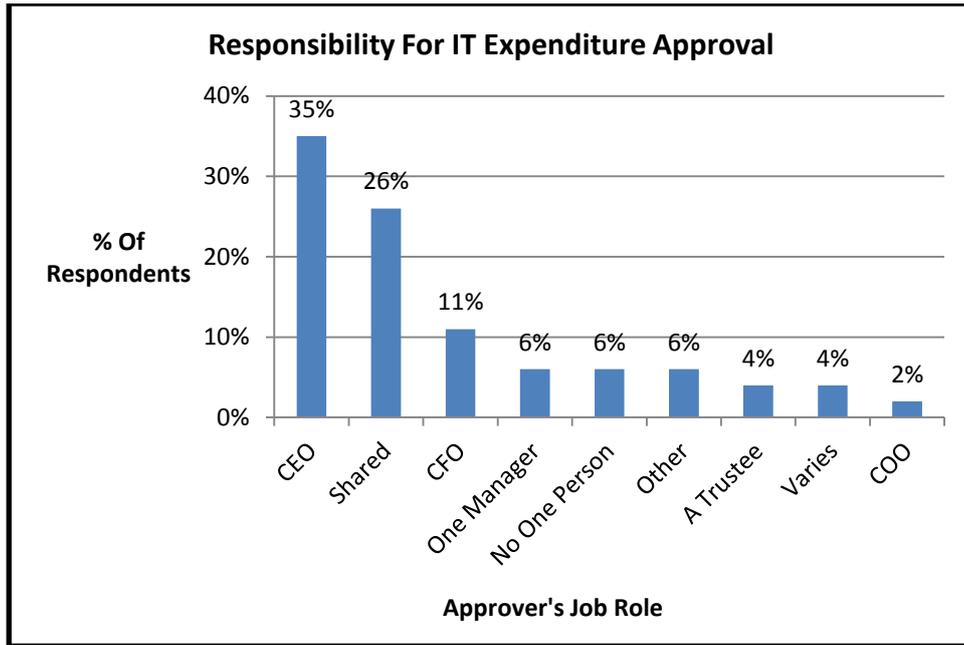
**Who is responsible for the project management of the IT projects in your organisation?**

There were a number of pre-defined responses to select from and the option to include free format responses for each question. Organisations were limited to a single response for each question.

In Question 16 (Expenditure Approval) the lack of a central management of the IT Budget in over one third of the responding organisations is an obvious area of concern, both in terms of potential overspends as well as in terms of maximising the benefits from any IT investments.

The free format responses received for Question 16 are shown in Appendix 7.

**REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY**



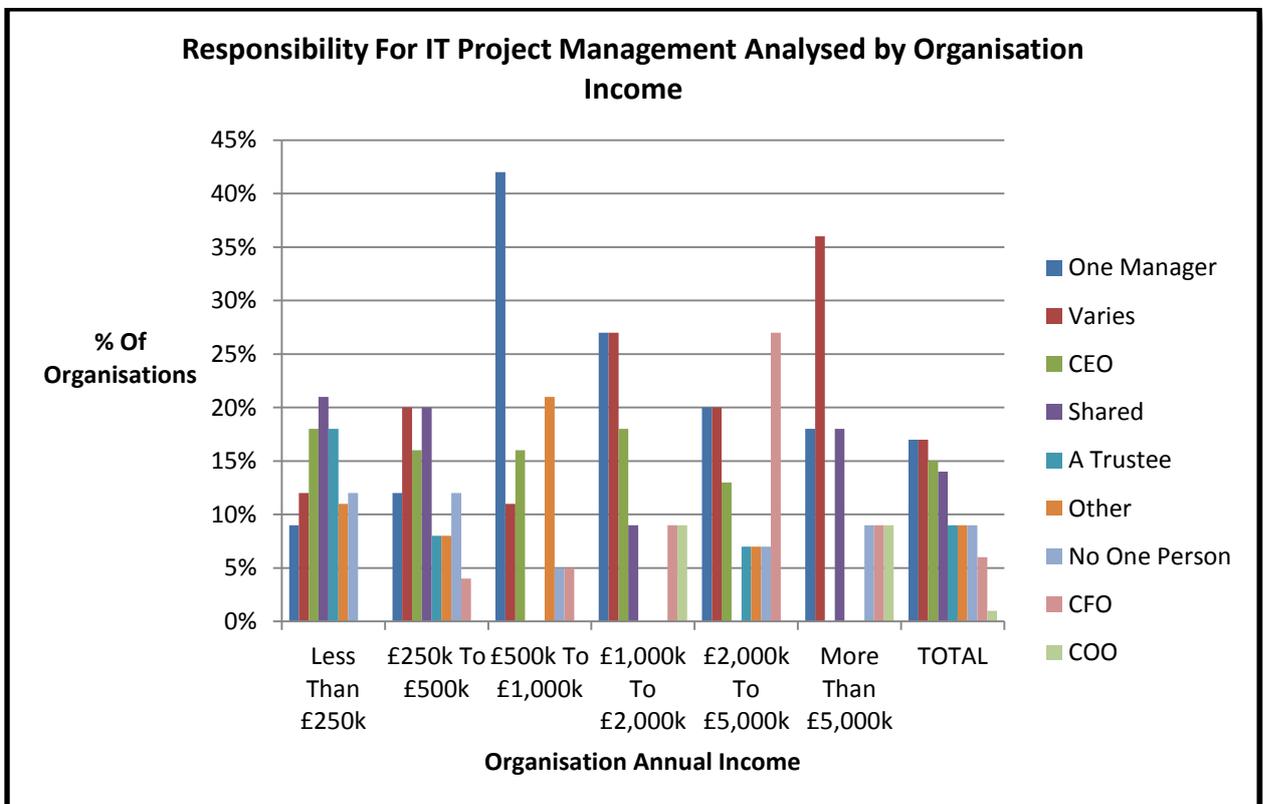
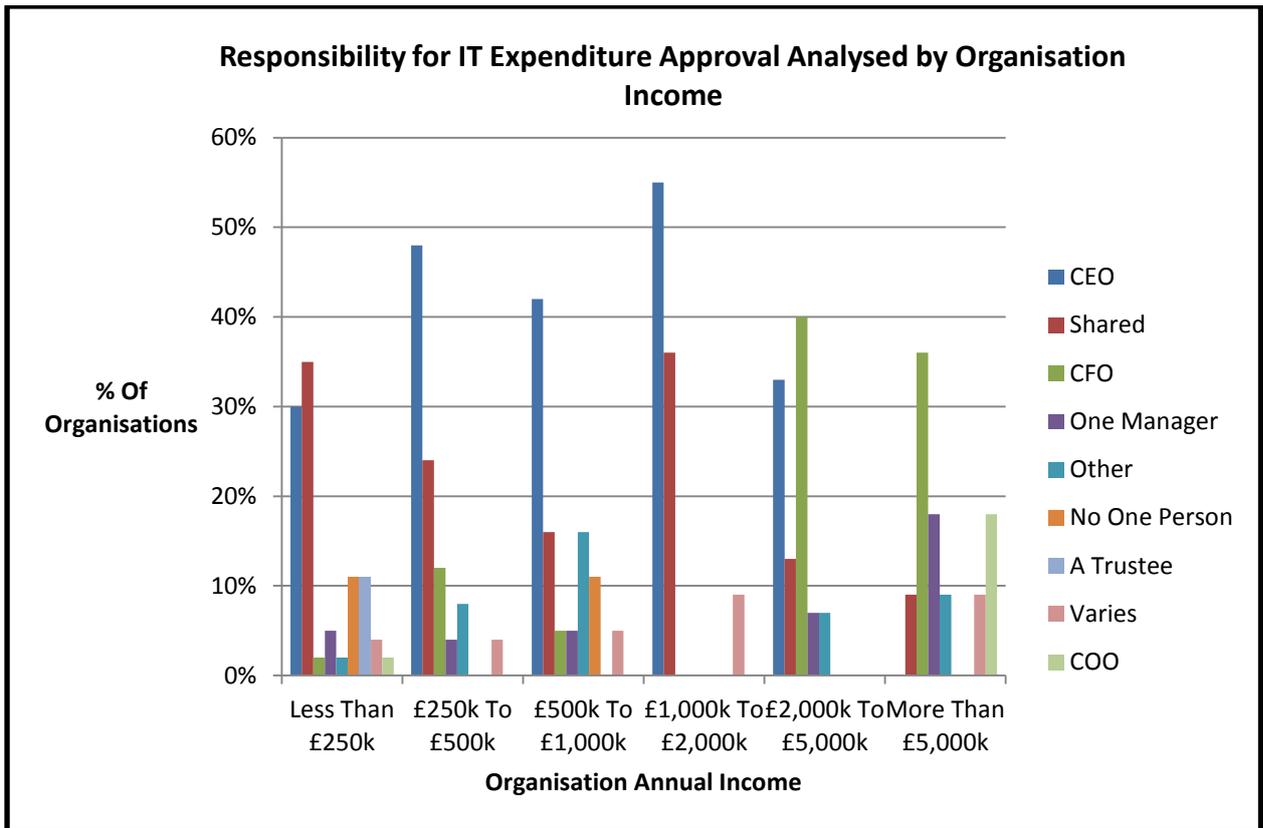
In Question 17 (Project Management) the lack of clear accountability which is inevitable with a shared responsibility will create difficulties with the implementation of the IT projects.

The free format responses received for Question 17 are shown in Appendix 8.

Analysing these responses against the organisation's income band suggests:

- Approval of expenditure on IT becomes more structured as the organisation size increases, presumably because more people are employed in the organisation and a more defined allocation of responsibilities is required.
- The responsibility for the management of IT projects is not really affected by organisation size.

**REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY**



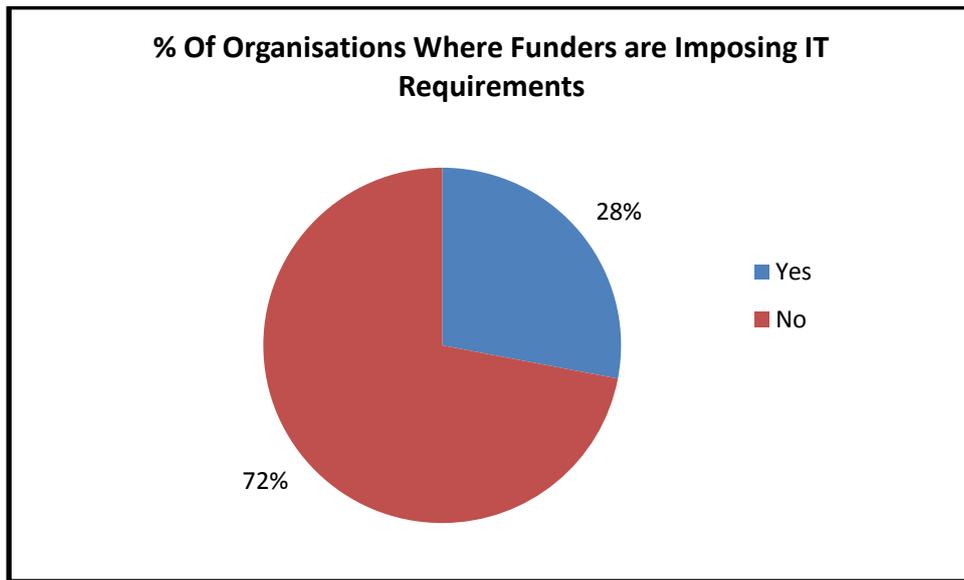
## REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

### SURVEY QUESTION 18

**Do you feel that any of the conditions attached to any of your funding sources are imposing IT requirements on your organisation?**

Respondents were asked to select from 'Yes' or 'No' and, if they answered 'Yes' to provide further details.

101 respondents (72%) stated that their funding sources were not imposing any conditions whilst the remaining 39 (28%) stated that they were. The further details provided are listed in Appendix 9.



These imposed IT requirements are a governance concern as, by definition, they will be outside of the business change/IT project scope that the organisation would otherwise consider. Such 'out of scope' requirements are normally associated with project cost overruns and incomplete implementations.

## REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

### APPENDIX 1

'Other' responses to the question:

#### Is any of your IT outsourced, i.e. managed by a supplier?

IT Support comany installed server and supply hardware, and they trouble shoot any technical problems for a fee.

email hosting some cloud backups

We are part of a network of charities delivering "FareShare" projects. Our stock control system is outsourced (and online which can be an issue when the internet goes down).

Paritally outsourced to supplier, though in-house team deals with most issues. External applies to all issues where internal cannot fix.

We have an external supplier who hosts our website and email server and does significant development of our Drupal site although we plan to become more self sufficient in the development arena.

Website

Routine maintainance & support is delivered by a volunteer

VPN and bespoke software supplied by National Body via subscription

The main server is covered under a maintenance agreement with local IT company

Not sure what you mean by "managed by" - we have an external IT support company who purchase IT on our behalf, support it and engage in discussions about changes needed

ISP

Our IT support is provided by an external company

Our network is outsourced (which we receive free of charge) but our hardware & software is paid for by Lifelites. Any equipment has to be compatible with the external server. Sometimes this limits our options for software and hardware etc.

Hardware and some software support

All support is outsourced. Hardware and software is purchased.

Our booking system is partly managed by the suppliers who created it, although it may be passed back to us once the project is complete.

Our IT support including obtaining software and hardware is outsourced, together with any liaison with Microsoft for Office 365 queries/technical issues

web development and hosting

SUPPORT FOR OUR INFRASTRUCTURE - NETWORK CONNECTIONS AND SERVERS.

SOFTWARE SUPPORT IS PROVIDED BY SUPPLIERS OF SOFTWARE BUT CURRENTLY LIMITED WITH THE EXCEPTION OF SAGE, WHO HAVE AN EXCELLENT SERVICE DESK WHICH I DEARLY WISH CRM SYSTEM PROVIDERS WOULD ASPIRE TO.

We pay a retainer to an IT company to manage overall hardware / software issues and upgrades but are not currently happy with the support we get as it is not reliable and does not seem to offer value for money in the services they recommend.

Web and email set up, sorting hardware, installing software where relevant,

We have external IT support for e.g. hardware breakdown, server problems etc

Waste metal and CRT

MS Cloud; CRM by a supplier for support

## REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

### APPENDIX 2

'Other' responses to the question:

#### Overall, how well does the IT used by your organisation meet your everyday work requirements?

Too busy keeping software and hardware up to date to go the extra mile.

There is definitely room for improvement.

It works and people get things done.

it would be great to have 1 person dedicated to a role in IT

We are a geographically dispersed organisation in remote spots by and large. We are also young (15 years) and still rapidly expanding. The membership and management is only now beginning to realise what can be achieved using IT.

Requires more systems development

With all voluntary staff there are sometimes gaps or 'double-doing'. We actually need a good office/IT manager.

As part of our strategy we regularly review what's available

need better broadband, need WiFi, need all computers to use the same software!

One key piece of software is not up to requirements currently

We have difficulties mainly with efficient use of existing software - i.e. coming up with efficient databases that can be used internally by all/any employees.

our IT systems enable us to do so much more, with less funding than ever. but it is a struggle to keep up to date at a time when funding is severely limited, or non-existent

We have very few skills to support IT in the organisation

Continually changing IT environment makes it difficult to see the best way to use emerging technologies.

There are many functions that could interact better, helping link up the client experience in the process.

Also, a great deal of work is duplicated because we don't have the resource to streamline our service.

Not applicable

When it works well it is very good - longer term issues regarding our database though which is our most precious resource

Considering our IT hardware and software are 'long in the tooth' it does a reasonable job

So long as it is working OK it's very helpful but we could possibly apply it in a smarter way

Old server and software

Our system relied on remote VPN which constantly is slow. We are moving to cloud services in the next few weeks.

We fulfil our needs but need to overhaul everything to make it smoother and use IT to fuller potential

Need a data base for information for funders

Neutral. Whilst we receive good IT support in terms of back-up, network coverage & advice, we fail in terms of appropriate software to help us raise funds & manage all of our data effectively. As a result, this takes up a lot of our time on tasks that, should really, be completed very quickly.

cannot get all trustees to use it

Staff and Volunteers need more training on IT

WE have old and tired equipment but it does function

TCM stands for Total Company Management and means it

We are a very small charity at the moment and although we are working well that is more due to the environment. When we expand there will need to be IT strategies in place

We can't afford bespoke software, so the off-the-shelf package we use has to do. It meets some aspects of our work very well, but other aspects very poorly/not at all.

I think there could be better software available but have no knowledge

We hate Microsoft Outlook and the contacts database - it makes our life difficult and it's not easily transferred. Exchange is too big a sledgehammer to crack a nut for us yet there's nothing simpler which seems effective and simple.

Outdated hardware and software, cannot afford to purchase new.

Office 365 means using SharePoint to store our data. Maybe because we've only just started using it, it seems like it's a very advanced tool which we're using only a fraction of its capabilities, but it seems at the moment to be a needlessly complex process if we are to make more of it

## REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

### APPENDIX 2 (Continued)

WE ARE IN THE PROCESS OF REPLACING OUR EXISTING CRM SYSTEMS AND AT THE END EXPECT SYSTEMS TO BE MUCH IMPROVED

Staff and volunteers use productivity applications: Word, Excel, PowerPoint, Access and Outlook only. Our most important systems, including e-mail and room bookings are web based. If the internet connection is lost we are unable to access e-mails or view room bookings for example.

AVERAGELY

As mentioned at 9, this is soon all destined to change thanks to our stroke of luck. I have answered according to our immediate (and long-standing) IT inefficiency

We have a poor internet connection

Website is good, but done using Dreamweaver by myself - not efficient as in CRM. Database is very old software but we make it work.

It is rare for IT to completely fail us.

Virtually all items are reused

Need better Database, Emails, Document Management.

Our IT presence is up to date but the computers & software we run it through (the County Council) is out of date

# REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

## APPENDIX 3

'Other' responses to the question:

### Which business processes in your Organisation does your IT currently support?

Case management  
Clinical.  
clinical care linked with NHS  
clinical records and stats  
Communications with our Tanzanian partners.  
Point of Sale  
User contact and information  
Flexible working and working from home  
HR, nursing care  
encouraging engagement with local communities and groups, and volunteering  
mainly communication with other partners and the outside world  
Desk top publishing  
Case working and client information recording.  
We are providing info to all countries in the world who have people who suffer from an intolerance to  
Gluten.  
Info about support to our users  
info storage  
Statistics for funding organisations website  
Human Resources, Finance, Retail EPOS & Gift Aid & Remote Working  
rota, allocation, wages, invoice interlinked system  
CRM - Accounts - Sales - HR - Mobile Comms - automated web reporting  
Influencing government policy  
Website  
Ticket buying, course buying  
Book shop and merchandising  
AWARENESS RAISING  
TRAINING  
Membership  
connecting to interested parties  
Membership  
Project monitoring and communications with partners  
Research - benchmarking surveys amongst members  
Tendering for contracts  
Recycling IT and furniture now represents over 50% of our charitable activities  
just MOVED FROM AN INTERNAL TO EXTERNAL PROVIDER

## REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

### APPENDIX 4

'Other' responses to the question:

#### **How would you describe what you feel are the most significant challenges in using IT to support your Organisation's goals?**

Lack of suitably skilled staff

Buy in from the operational areas. They can be reluctant to accept IT. Once imbedded, they want IT to make things better but are not sure what better looks like.

User resistance. often related to lack of understanding of reasons for wishing to use IT facilities.

The cost of maintaining/upgrading existing IT equipment

Technical implementation issues.

We have 2 members of staff (1.5 FTE) who both work remotely, making us reliant on "the cloud" for sharing of information, document authorisation, etc. We occasionally want to bring in a consultant or trustee on a specific item, but the cost of additional licences (as often they are priced at "under 5 staff) makes this prohibitive. Also the fact that we generally need web-hosted solutions, not server-based means we pay for additional licences that are rarely used to make sure we have continuity and disaster-recovery options.

Over ten years we have sent around 400 computers to Tanzanian schools. Now they have a shortage of teachers, due to an ambitious plan for building new schools

IT largely used by users of the project, plus staff. Small charity with finance as our main obstacle meaning that CTT / CTXchange is a great help.

Interfacing with ITC systems of others.

Integration of legacy software with new technology

The cost of replacing elderly equipment, such as PC's and printers

Time to train staff

Difficulty in non technologically minded staff understanding and articulating what the IT could do and what they want it to do.

Training a distributed network of users

Trustees understanding of IT and their perceptions of it in a small charity compared to a large multi national. We get stupid comments like "develop a new website" "You should have an intranet we're in the 21st century" "Go and ask the large businesses for their old IT equipment" The list goes on and none of it is helpful as we already know where the shortcomings are.

Managing organisational growth and anticipating future needs in data management/security.

Differing IT skills of those using a system

All members of our organisation are unpaid including the officers and any funds we have are provided by the members contributions both annual membership and weekly £1 charge for meetings. Also the average age of our retired membership is around 70, and there are not enough younger retirees with IT knowhow willing to help.

maintianing existing complex systems

Ability of staff to take time out of the day to day work to learn new IT systems. The different capabilities within a staff team to be able to pick up new IT skills.

Keeping pace with rapid changes within the IT sector

OUR PRINCIPLE ISSUE IS THE LACK OF SUITABLY QUALIFIED PERSONNEL WITHIN THE CHARITY. IT SKILLS COVER A VAST RANGE OF AREAS AND FOR SMALL/MEDIUM CHARITIES IT IS DIFFICULT TO EMPLOY SUFFICIENT STAFF WHO CAN COVER ALL AREAS. AT THE SAME TIME OUTSOURCING DOES NOT APPEAR TO BE COST EFFECTIVE/PROVIDE A SUITABLE SOLUTION

Lack of understanding by staff and trustees. Reluctance to embrace IT functionality. Low level of in house IT skills.

## REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

### APPENDIX 4 (Continued)

Managing IT support that is bought in freelance takes a lot of time - and freelance staff have other projects so takes ages to get tasks done. We would love to have an IT member of staff for specific hours each day

Continuity. Volunteer-led charities can find non-completion of a project, or onward management of the work, by volunteers. IT is such an important area of infrastructure, you really need to have one person carrying through long-term.

We have no-one within the organisation, or via our 3rd party IT support, who properly understands the future IT needs in order to plan appropriately.

Question 3 should be multiple choice Answer to Question 4 - overreliance on IT and virtual systems represents a failure of human beings to interact usefully and constructively

## REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

### APPENDIX 5

'Other' responses to the question:

**If your Organisation had unlimited budget and resources which of the following would you invest resources into?**

Pay salaries for IT staff

Cloud, Exchange, Apps, better DR & Backup systems

provide tablet's to all our ruraly located staff to cut down on travel and inaffectivness

More computers for Tanzanian schools, and a technician to spend some time there setting up and teaching teachers.

Disaster recovery

A dedicated IT support person to support & develop systems, provide training, use IT for marketing & publicity, mange & develop data collection systems.

Formal support arrangement

Strengthen our Customer relationship management systems

New Library Management Software.

Improved support services

We have huge problems with our website capability at the interface with our data management system.

We provide childcare services and it is an imperative that we have a consistent, reliable system but we have no budget to raise the £20k the website company say is needed to resolve the issues. It is actually a contractual problem that we are at stale mate with despite help from IT4C

Formal training for staff and volunteers and acquire an IT support package

Training for staff in how to get the very best from all the current capabilities of our IT

OUTSOURCE THE LOT. WE ARE IN THE PROCESS OF UPGRADING ALL OUR SYSTEMS SO RESOURCES OF ONE OFF NATURE NOT AN ISSUE. OUR ISSUE IS THE ONGOING LONG TERM MAINTENANCE OF THEM.

Generate management information and statistical summaries that we could use to evidence the outcomes our organisation creates.

Would buy all the staff macs and ipads if the money was available

Develop an IT renewal strategy in line with best practice recommendations.

On top of above list - with unlimited budget.... Train staff and volunteers at induction and on an ongoing basis. Remove uncertainty of volunteer IT provision by hiring an IT member of staff to implement / maintain / train and with programming expertise to build bespoke databases and interactive surveys etc.

More efficient collation and analysis of research

Increased general resources including expansion and replacement of existing recycled computers with replacement recycled computers and pass on redundant stock

**REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF  
INFORMATION TECHNOLOGY**

**APPENDIX 6**

'Other' responses to the question:

**Where do you think your organisation obtains advice and guidance on its use of IT?**

We do not get any

Directors

Internet

Browsing the web!

Have just signed up a consultancy for big CRM/CMS project

The internet

## REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

### APPENDIX 7

'Other' responses to the question:

#### **Who is responsible for the approval of expenditure on IT in your organisation?**

The operational and capital budgets are both ultimately approved by the Board of Trustees.

It falls top the Office Manager within the budget limits.

Head of Finance, administration and Support Services which includes IT. These decisions will be discussed by small senior management team.

It's me.

Me!

I develop proposals with help from other members and then it is approved by the board of trusttes.

small purchases - internal manager larger purchases have to be agreed by a finance committee

Facilities Manager & Chief Exec

Executive Committee

although i have a board of trustees, for smaller items it is just myself, but where a case needs to be made i do so in consultation with out treasurer.

The IT person identifies the equipment required and I authorise once I'm satisfied of the need.

Management Committee/Trustees ultimately

While the CEO has day to day management responsibilities for ICT, procurement is a joint responsibility of FD, CEO and Treasurer

Trustee Board

Also Treasurer who is a volunteer

The approval level is dependent and the amount being spent and the overall impact of the project  
IT Manager

Requests from myself or other volunteer IT users are decided upon in committee based on the overall priorities and the amount of usage by members.

Two committees are involved with IT projects.

ALL MAJOR CAPITAL PROJECTS ARE APPROVED BY RESOURCES COMMITTEE, BUT IN ESSENCE THIS IS ON RECOMMENDATION BY DIRECTOR OF FINANCE

Trustees and staff have not given any consistent strategic thought to expenditure.

me

Should be multiple choice answer including shared and project by project

Our director of development has overall say but the day to day running is left to us to be responsible for.

## REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

### APPENDIX 8

'Other' responses to the question:

#### Who is responsible for the project management of the IT projects in your organisation?

Office Manager

Head of Finance, administration and Support services.

Also me.

Me again!

No such role

In reality actually me and any co-opted members

We do not have project management as such

Me

Facilities manager

meself, Director.

The IT person supported by a volunteer undertakes all the project management relating to IT.

The CEO

It's everyone's and no-one's responsibility!

This is a small Trust, all run by the six Trustees. I do the IT work as well as being Chair.

Me, Tim Gates

CEO & Office Manager

A wholly IT led project will be manager by the Systems Co-ordinator, however, other projects with IT elements within them can be led by different managers

Admin staff member

Shared between myself and the other IT team.

There is no project management

That is a small part of my part time post

No clear management with individuals frequently becoming involved.

I HAVE EMPLOYED A PROJECT MANAGER FOR THE MAJOR PROJECT WE HAVE IN HAND, BUT THE RESPONSIBILITY ULTIMATELY LIES WITH DIRECTOR OF FINANCE

Trustees and Staff do not have the skills to manage IT projects. We tend to simply respond to emergencies.

me

Should be multiple choice answer including shared and project by project

Same as above. Different areas fall to different departments

## REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

### APPENDIX 9

'Other' responses to the question:

#### **Do you feel that any of the conditions attached to any of your funding sources are imposing IT requirements on your Organisation?**

Reporting requirements to funders

Since we have a legal aid contract we have to have an approved client database. This is separate to our general client database.

Contact database to provide data to match reporting requirements.

We have to meet Information Governance Standards set by NHS. Data protection standards

Managing personal data on certain goven't contracts can impose tight regulations around IT security

Broadband access can be critical to provide our services.

recent LA framework agreemetns insist on a specific package (still not in place) which we will have to purchase and use for their ease

Ability to report on outputs and evidence outcomes

I would like to implement google apps, but I cant afford the price. And Ggogles rules for UK charities are frankly difficult to understand and do allow us to have free usage unlike in the USA. I need at least 200 users.

We are moving to a greater need to provide accounting & reporting to Charity Commission on Line and also to Child protection agencies

Some funding was specifically to upgrade old systems

Client management statistical recording

Requirement to set up a shared website with other community organisations

record keeping, financial info

We receive very little funding so not relevant

only that the level of reporting on aspects of our work has increased, and it is the best way of delivering the stats that we need.

Not sure if you mean general funding or IT funding. For general there is not imposing, but as for IT funding - there isn't any!

Monitoring of funders conditions of grant

Many funders ask for detailed database information but ask for their own interpretation instead of what can be offered from our existing national database.

We have lots of ideas to improve the Website but do not have any funds.

not appropriate yet-in startup

Nor currently but will do in the future

Control of children's information

database management, use of a specific database E-Bulletins website, social media

We got a specific donation to pay to get our website developed and made accessible.

Do need a data base for statistical information

Quantity required: number of bus journeys; clients' location, ethnic origin, disabilities, etc. Now they are requiring qualatitive data, how confident were clients before their outing, then after.

returns have to be made on-line

Little funding available to buy new kit

Accurate and timely reports of activity

We have limited funds to maintain & replace IT hard/software as only a small part of a bigger organisation in terms of its other learning, recreational & social activities.

Effective primary purpose trading relies heavily on email as we cant man our office every day for phone and we also need to send out FAQs contracts and deal with problems by rapid return to our beneficiaries. Accounting protoclrs have become so complicated and detiled nwo for chairties that reasonably we need It solutions to accounting

Without an online presence our work would be entirely unknown

Secure data

No budget for replacing old hardware

## REPORT ON A SURVEY OF CHARITABLE ORGANISATIONS' USE OF INFORMATION TECHNOLOGY

### APPENDIX 9 (Continued)

Collecting data on attendance, and monitoring young people and reporting to funders on that data and changes over time.

We are required to use certain systems by funders

Data Protection very important

for tracking website visits / google analytics type info

website updated, email management

Impact reporting Efficient data-capture, compilation and analysis / interpretation of stats

Email documents and training plans etc. Secure electronic storage of data. Financial records management.

We need to provide evidence gathered from partners in Kenya that can only be provided via the internet & IT

external online marketing

unpredictable and inconsistent demands for reports about our clients and our work

"Imposed" is wrong - we need metrics to know how we're doing anyway. No funder imposes daft metrics on us.