



A review of Tech Surgeries performed by The Charity IT Association in 2015 and 2016

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Introduction

We are grateful to KCOM for their support in the production of this report.

KCOM

“At [KCOM](#) we work with organisations of all sizes to make their lives easier and better through the application of flexible technology solutions.

Our aim is to help our customers navigate their way through the convergence of IT and comms with straightforward solutions and sound advice. Our customers are our lifeblood and, in the charity sector, include the RNLI, RSPB and Terrence Higgins Trust, who rely on us to provide a single managed service experience and trusted support for their changing technology needs.

We implement robust technology infrastructures that provide enhanced collaboration, greater productivity and flexibility; we bring together connectivity, communication and cloud solutions that support business growth; and we provide support and a trusted partnership throughout our relationship.”

Charity IT Association

The Charity IT Association (CITA www.charityithelp.org.uk) has been formed to assist charitable organisations in their use of Information Technology (IT) to improve their effectiveness and efficiency in providing their services to their clients and the general public.

Five organisations have partnered to form the Association:

AbilityNet

[AbilityNet](#) exists to change the lives of disabled people by helping them to use digital technology at work, at home or in education.

LASA

[LASA's](#) social welfare law and technology support services help thousands of third sector and public sector organisations across the UK to deliver efficient, high quality services.

Reach Volunteering

[Reach](#) enables the voluntary sector to flourish by connecting professionals with charities and non-profits that benefit from their skills. Small, local community groups as well as larger more established charities across the UK use Reach to find talented volunteers with a variety of skills; all generously offered for free.

Technology Trust

[Technology Trust's](#) mission is to share their expertise in technology and the third sector to help good causes achieve more – for less money. TT can help your charity or social enterprise access low-cost

IT, donated software and digital services that are right for you, giving you the support you need to fulfil your potential.

WCIT

[The Worshipful Company of Information Technologists](#) is a Livery Company of the City of London, and has extensive charitable and volunteering interests based on its IT focus.

CITA was formally constituted in early 2016 following a prototype phase in the latter half of 2015. Currently there are three free service offerings:

- Tech Surgery
- IT Consultancy (launched mid 2016)
- IT Project Delivery (launched mid 2016)

CITA provides these services using suitably experienced pro bono (free) volunteers with a minimum expenditure on professional administrative staff.

Scope of Review

This paper analyses the Tech Surgery services provided during the pilot phase and the first year of formal operation, i.e. 2015 and 2016.

The Tech Surgery service has an objective to provide independent advice on effective IT to charities with an income up to £5 million p.a. This service:

- Is a free and independent consultation (usually by phone) lasting for up to 2 hours
- Provides a short summary report identifying opportunities for improved use of IT
- Identifies further resources that the Charity can use/approach

This analysis identifies those areas of IT which were discussed during the Tech Surgeries and where Charities were directed for further help.

35 Tech Surgeries were analysed from the 2015 pilot period with a further 83 from the first year of operation in 2016, making a total of 118.

Review Findings

The key subject areas which were discussed during the Tech Surgeries and the number of Charities raising this area for discussion are summarised in the table overleaf.

As can be seen the issues of cloud based systems and IT infrastructure were the areas of most interest. Looking at 'Office 365' (a specific cloud based application) and 'Cloud based applications' together reveals that 67 charities (57%) raised one or both of these areas. A large proportion of the Charities raising 'IT infrastructure' as an issue were, in fact, looking for advice on moving to a cloud based IT infrastructure. There is no doubt that the feasibility of migrating to a cloud based system/infrastructure was the most common issue raised at the Tech Surgeries over this time period.

Subject Area	Number of Charities	Percent of Charities
Cloud based applications	55	47%
IT Infrastructure (incl. Broadband)	55	47%
Office 365	47	40%
Web Site	31	26%
CRM systems	30	25%
Database systems	27	23%
Document/File Sharing	11	9%
Third Party IT Support	10	8%
Sharepoint	9	8%
Google Apps	4	3%

In 82 of the reports generated from the 118 Tech Surgeries (i.e. 69%) there were recommendations for further sources of support for the Charity. The table below summarises the sources of support that were identified by the Tech Surgery consultant.

Source of Further Support	Number of Charities	Percent of Charities
CITA	47	40%
Technology Trust	19	16%
Reach	18	15%
WCIT	10	8%
Lasa	3	3%
AbilityNet	1	1%
Other	54	46%

The size of the 'Other' category probably reflects the number of competing organisations in the IT marketplace and the lack of a recognised independent source of genuine advice.

Charity Feedback

Following up each Charity where a Tech Surgery has been performed is not possible within the current resource levels of CITA. However, a number of case studies have been undertaken and some of the feedback obtained is shared below. The detailed feedback from all Case studies is available on the CITA web site at:

www.charityithelp.org.uk/case-studies/

Lanarkshire Carers' Centre

Lanarkshire Carers Centre applied for a Tech Surgery, looking for a second opinion as they considered potential upgrades to their IT infrastructure, and in particular the options around moving to a cloud based solution. The CITA volunteer discussed the 'pros' and 'cons' of cloud-based systems, including the ability to extract information in the future, functionality of the web-based applications and data protection issues.

"This was a really beneficial surgery. The IT consultant was very knowledgeable and was able to advise on the pros and cons of the different options we were considering – a number of things were highlighted that we had not considered before. Would highly recommend to anyone, especially if you are considering a number of options and are not sure which is the best long term solution for the organisation."

Accessible Arts & Media

The CITA volunteer provided Accessible Arts & Media with a spreadsheet to assist with auditing their IT estate in preparation to migrate to a cloud platform and also advised them to tackle one project at a time rather than trying to upgrade their office applications while introducing new services. The CITA volunteer also suggested that Accessible Arts & Media consider joining [IT4Arts](#), a programme run by the Arts Panel of the Worshipful Company of Information Technologists and also mentioned that they would be able to request more support from CITA in future to assist with their change projects and advised them to develop a Digital Strategy in line with their business plan.

"The advice and support provided by the Tech Surgery has helped make the previously overwhelming task of overhauling all of our IT systems into a manageable process, clearly linked to our strategic objectives for the next 5 years."

Grantscape

After the Tech Surgery GrantScape commented: "As a small charity, with no in-house IT specialists, it can be really difficult to get independent advice on the best way forward when all suppliers want to promote their own solution. Tech Surgery gave us the chance to spend some time talking through the issues and clarifying our thoughts on the various options open to us. Not an instant solution, but we now have some documented 'next steps'."

While the Tech Surgery didn't provide an instant solution, it gave GrantScape the confidence to investigate alternative connectivity options. As a result they moved to a 4G connection (keeping the leased line for 6 months as a backup). This has resulted in a number of benefits. They now have a WIFI connection in the office which they didn't previously have. It also paved the way for a move to a private cloud with a locally hosted server. There have been some challenges – for example the SIM required for the 4G service is in a dongle in a router device, but the provider assumes all SIMs are in phones and communicate by text! However GrantScape can check usage online and phone up for top-ups if needed. More importantly, by moving to a 4G connection the charity is saving an estimated £3,000 p.a., helping to free up vital funds.

Twinkle House

Twinkle House applied for a Tech Surgery in April 2016 looking for advice around developing compatibility across the organisation, communicating with vulnerable clients and keeping IT costs down, both with regard to licencing and hardware. The CITA volunteer advised the Charity to look into a free Office 365 licence which could reduce the need for onsite hardware and allow staff to work from home if required. He also suggested using Skype as a means of communicating with some of the clients who had issues with face to face contact, and signposted forums where the Charity could put call outs to schools and other local organisations who may be clearing out their hardware – a great way to get good spec machines for free!

“CITA IT help for Charities is an invaluable support service for small organisations like ours who struggle with few resources and often not having the expertise in-house to cope with the ever changing world of IT. Twinkle House received excellent, clear and useful information regarding improving our IT that will aid our Charity in making better decisions and getting help in the future. I wholeheartedly recommend CITA IT help for charities to other organisations.”

Elmbridge Rentstart

Elmbridge Rentstart requested a Tech Surgery from CITA looking for a review of its historical use of IT, recent logistical and system changes and potential sharing of approaches with another similar charity (Spelthorne Rentstart) to determine whether there were any improvements that could be proposed to meet its long-term goals.

The CITA volunteer provided support around identifying clear communication paths and agreements with all providers of IT, working in partnership with Spelthorne Rentstart to ensure that the database met the charity's short term operational needs and identifying high-level long-term system goals that would guide the use of current IT, including a reworked client database. The CITA volunteer additionally provided advice around producing a repeatable, layered and regularly exercised business continuity plan and a comprehensive audit of the whole IT infrastructure in order to facilitate future decisions.

“We are extremely grateful for the CITA volunteer's expertise following the sudden loss of our computer system. He was able to securely extract all our data, maintaining its integrity and create for us a new system using Microsoft Access that replicated our previous system. He helped us to rapidly be up and running on a new efficient and effective computer system ensuring minimal disruption to the running of our charity. This was of huge assistance to us and solved what would have been a very costly problem. The CITA volunteer's work with us has enabled us to focus on identifying our future business needs and to clarify the direction that we should take with our procedures and computer systems. This service gave us, a small but growing organisation, the opportunity to take a step back and really identify our growing needs.”

Humber & Wolds Rural Community Council

Initially the charity used the information from the Tech Surgery, and a pre-written letter provided by CITA's volunteer, to contact their local network provider to ask about their current system and how

they could upgrade to a faster service. The surgery also explained what they would need to do before moving to a Cloud based system. Following that advice, Humber & Wolds completed an audit of their current system and what they would need to do to get up and running on the cloud. This information was then provided to a number of local companies to quote for the work.

“I think that the support from the Tech Surgery has helped us to understand more clearly what we have to do and also what is possible for the organisation. The cost savings at the moment will be small, but the chance to be able to work more effectively remotely will be a great boon to us. Rurality means that internet connections will be somewhat hit and miss, but when working from a decent connection, either at home or out in the patch, we will be able to do and see so much more with our beneficiaries.

Your help has been invaluable. We would not have got to where we are today without the support and encouragement from CITA.”

South Northants Volunteer Bureau

“Our Tech surgery with the CITA consultant happened at a very opportune time. Our consultation reinforced some of our thinking and helped to give us confidence to go ahead (eventually with a commercial IT consultant) to plan and execute a completely new IT infrastructure. This was completed very smoothly with minimum disruption.

The CITA volunteer suggested that the SNVB upgraded their server hardware and move to a hosted exchange solution, offering suggestions of how to implement these changes whilst minimising expenditure. SNVB successfully implemented both of these recommendations in the summer of 2015: they installed a new server, UPS along with the associated hardware whilst their email is now hosted free of charge thanks to a charity scheme.”

Abortion Support Network

Since ASN’s Tech Surgery a new shared drive and telephony system has been implemented and an investment made into a new CRM which will be up and running by September.

“The CRM, once it’s up and running, will enable us to be smarter and more targeted in our fundraising efforts. The ability to talk directly to an expert and receive relevant advice rather than having to muddle through on our own was invaluable. We heartily recommend CITA to absolutely any charity that requires technical assistance.”

Church of England Soldiers’, Sailors’ and Airmen’s Clubs (CESSAC)

“The Tech Surgery volunteer quickly assimilated our situation and provided clear, easy to understand advice and options. We are most grateful.”

After the Tech Surgery, CESSAC received a summary report which provided an overview of the charity’s IT set-up and some recommendations. The Tech Surgery was a very useful process which has helped to support the case for moving from using a server to cloud based services. This move could reduce running costs, avoid the capital expense of buying a new server, improve business

continuity and help to automate software and hardware upgrades. As a result of the Tech Surgery, the charity intends to move to cloud based services when the time is right.

Further information

Please visit our website:

www.charityithelp.org.uk/

Or get in touch with our programme manager:

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