



CITA Volunteer Guide

Contents

1. Introduction	3
2. Tech Surgery.....	4
2.1 What is a Tech Surgery?.....	4
2.2 Selecting a new IT Consultancy engagement.....	4
2.3 Arranging the Tech Surgery appointment	4
2.4 Delivering the Tech Surgery	5
2.5 Drafting the introductory email	6
2.6 Writing up a Tech Surgery report	6
2.7 Hints and tips	8
3. IT Consultancy.....	10
3.1 What is an IT Consultancy?	10
3.2 Selecting a new IT Consultancy engagement.....	11
3.3 Arranging a kick off meeting and agreeing scope of engagement	11
3.4 Delivering the IT Consultancy	12
3.5 Concluding the engagement	12
4. IT Project Delivery	13
4.1 What is IT Project Delivery?	13
4.2 Selecting a new IT Project Delivery engagement.....	13
4.3 Arranging a kick off meeting and agreeing scope of engagement	14
4.4 Delivering the IT Project Delivery	14
4.5 Concluding the engagement	14
5. Referral to additional support for charities	15
6. Volunteer responsibilities	15
7. Using the members' portal	16
8. FAQs	17
Version control:.....	18

1. Introduction

Thank you for volunteering to help charities obtain as much benefit as possible from their IT investments.

This guide has been developed to provide you with advice and support when volunteering with the Charity IT Association (CITA).

CITA has been set up to provide a way for charities to engage with pro-bono volunteers who will help them use IT more effectively.

We will deliver 3 key services to help charities:

Service	What is it?
Tech Surgery <i>“Independent advice on effective IT”</i>	A service matching volunteers with strategic business and IT experience with charities who probably have little or no ‘in house’ IT skills available to them. The intent of this service is to review the Charity’s current use of IT and to identify project areas where better use of IT would provide more business benefit to the charity.
IT Consultancy <i>“Helping you through your IT project”</i>	A service matching volunteers with the skills and experience in scoping, defining, designing, planning and managing IT projects for charities who have identified an IT project but do not have the in-house resources to deliver it. The volunteer will assist in such areas as: <ul style="list-style-type: none">• System scoping, definition and design• Project management• Supplier selection and management• Business process change management
IT Project Delivery <i>“The right skills for your IT project”</i>	A service matching volunteers with experience in building IT systems for charities who have defined and designed their IT solution but do not have the technical skills required to deliver it. Likely project areas would include: <ul style="list-style-type: none">• Website development• Hardware and Network development• CRM systems• Accounting Systems

These services are designed to provide a holistic approach to supporting charities with their IT requirements from an initial strategic review through to designing, implementing and delivering IT related projects. In most cases the Tech Surgery will be the starting point for Charities but Charities can choose to proceed directly to IT Consultancy and/or IT Project Delivery where appropriate.

In delivering these services the following policy on expenses must be adhered to:

- Volunteer expenses should always be in line with the Charity's policy on expenses (if they have one)
- Volunteer expenses should explicitly be agreed by the Charity in advance of them being incurred

2. Tech Surgery

2.1 What is a Tech Surgery?

A Tech Surgery is a 2 hour discussion (usually over the phone) with a charity to review their use of IT and determine if there is any potential for more effective use of IT. The discussion should not attempt to solve any perceived problems. Instead, it should highlight areas where further action to improve the charity's use of IT might be required. Following this, the services required to improve a charity's use of IT can be sought from one of the other two CITA services or from a third party depending on which is most appropriate.

The diagram below provides a simple representation of the Tech Surgery process:

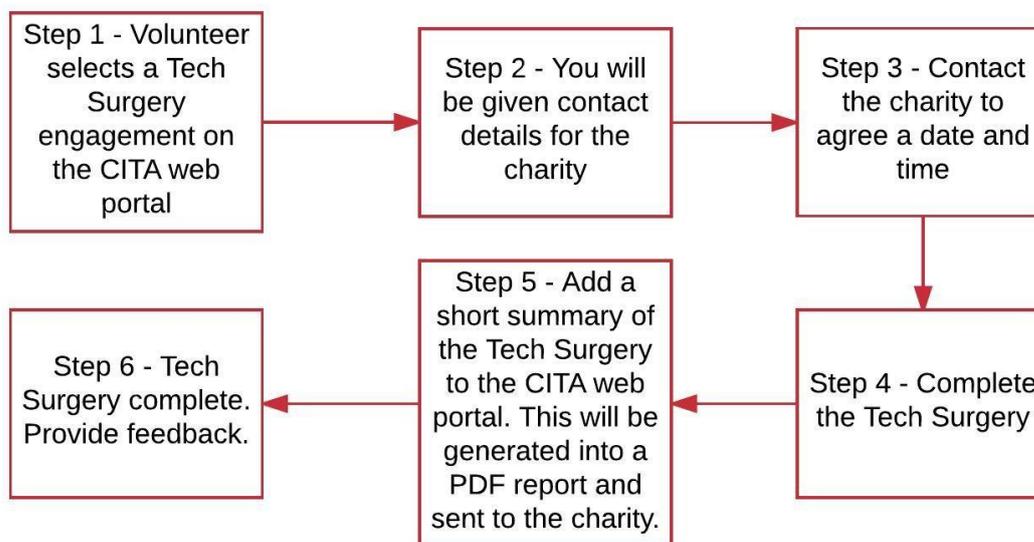


Figure 1 - How the Tech Surgery works

2.2 Selecting a new IT Consultancy engagement

You can select a new Tech Surgery engagement via the members' portal. You will then receive an email confirming the charity's contact details.

2.3 Arranging the Tech Surgery appointment

The Tech Surgery is intended to take place over the phone (or by Skype/Google Hangout or other virtual means) as this is more time and cost effective. If you are conveniently close to the charity you may want to meet up, however this is not a requirement.

CITA does not offer expenses for travel, so if a charity asks that you attend in person and you need to have your travel expenses covered you must discuss and agree this with the charity in question before committing to the volunteer role.

2.4 Delivering the Tech Surgery

We have tried not be too prescriptive with regards the delivery of the Tech Surgery as we believe as skilled professionals you will have your own tried-and-tested approach. It is up to you how you wish to deliver the Tech Surgery.

We have created a checklist below which is based on the experience of our volunteers who have already carried out a Tech Surgery which you might find useful.

Checklist for Tech Surgery			
No.	When	Point to cover	Completed (Yes/No)
1	Before the appointment	<p>Contact the charity to introduce yourself and confirm who is representing the charity during the Tech Surgery.</p> <p>Explain the purpose of the Tech Surgery</p> <p>Agree a suitable time and date for the Tech Surgery discussion</p> <p>An example of an introductory email is shown below.</p>	
2	During the appointment	<p>Ask the charity to confirm that they understand the purpose of the Tech Surgery and the following points:</p> <ul style="list-style-type: none"> • The Tech Surgery will last a maximum of 2 hours • The Charity will receive a brief summary of the conversation after the meeting with any recommendations discussed. This report is intended to start the charity's thought processes, not necessarily solve any issues. • Additional work will likely be required by the charity to explore the issues further and deliver any specific projects. • Explain that volunteers, or companies from which volunteers receive direct benefit, or in which volunteers have a personal interest, will NOT be introduced for commercial purposes to the Charity clients of CITA. • Ensure the Charity is aware that if you mention any particular technology or pricing, this is NOT a recommendation but merely market intelligence that you are sharing. Inform the charity that they need to conduct their own due diligence in any supplier selection process. 	
3		Discuss the charity's current IT infrastructure	
4		Discuss any specific IT projects/issues/opportunities/threats	
5		Discuss recommendations and potential next steps	
6	After the appointment	Write up a short summary of the Tech Surgery on the CITA website	

2.5 Drafting the introductory email

Example of a draft introductory email:

Dear [Insert name],

I am contacting you in relation to your application for a Tech Surgery with the Charity IT Association. I have volunteered to complete your Tech Surgery which is usually conducted over the phone. I am contacting you to agree a suitable time and date. Please can you confirm your availability?

Please note:

- *the Tech Surgery can take up to 2 hours. I will write up a brief summary of our conversation afterwards and you will receive a copy of this report by email;*
- *during the Tech Surgery discussion, we will discuss your current IT infrastructure, any specific IT projects/issues/opportunities/threats as well as any recommendations. It is likely that additional work will be required by you to explore the issues further and deliver any specific projects. Where possible, I will try to sign post you to other support services;*
- *any sign-posting to potential suppliers during the visit or in the Tech Surgery report is not a recommendation of these services either by the volunteer or by CITA and you will need to ensure that you go through a due-diligence process for your final selection of any supplier*

In regards to my background and experience, [provide a link to your LinkedIn profile or attach your CV to the email]

Kind regards

CITA Volunteer

In approaching this engagement please take note that CITA only introduces charities to potential volunteers: it is the responsibility of the charity to make its own decision on entering into the relationship with the individual. Consequently, a description of your background and experience in the introductory email is important.

CITA does not provide any warranty to the charity about the skills of candidates. For clarity, CITA is not a commercial organisation: our activities are wholly charitable, and money does not change hands for these introductions.

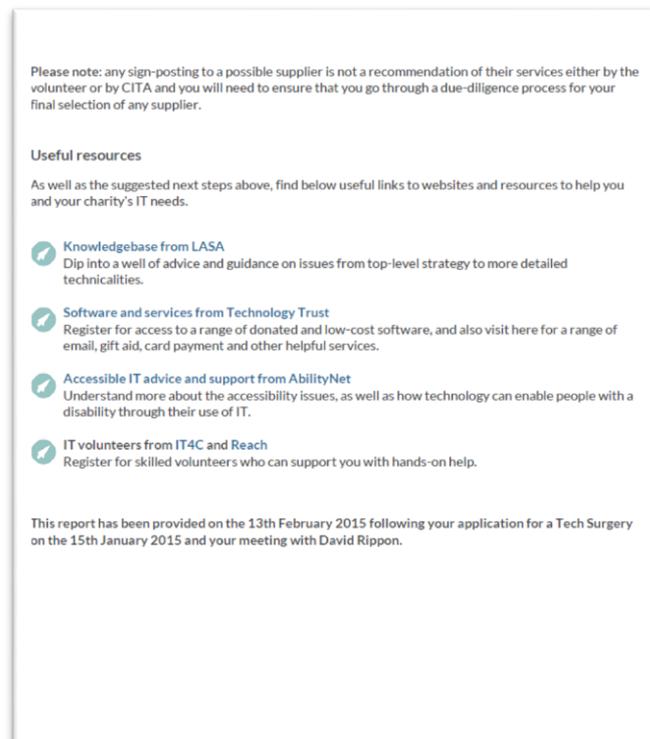
2.6 Writing up a Tech Surgery report

After you have completed the Tech Surgery, please log into the CITA web portal and submit a summary of the meeting and any recommendations. You will be asked to respond to the following points:

- **Provide a summary of the conversation between you and the charity** – In this section you should just summarise the charity's current IT infrastructure and any issues that you discussed.

- **Details of suggested actions and next steps** – In this section you should summarise any actions or next steps for the charity to take forward. You are welcome to use bullet points to summarise the information.

This produces the following report which will be sent to the charity.



Please note:

- The report will be sent to the charity directly and as such you should only write something that you want the charity to see
- Please proof read the report to make sure that there are no mistakes

2.7 Concluding the engagement

Once the agreed work has been delivered, please update the members' portal providing feedback on the outcomes. This is important as it allows us to measure the impact that our volunteers have.

Please be aware that a copy of your report is sent to the charity.

You will also be asked for your feedback which CITA will use to improve and refine the service.

Hints and tips

1. You aren't there to fix anything. You are there to listen, form an impression, propose some directional improvements, and signpost some resources which can help them to make positive progress. The output of the Tech Surgery is the report, and the interaction is then formally over.
2. The "presenting symptom" is often not the real problem. For example, "we need a new database" is often a coded signal for a lack of understanding about the modern world of Data Protection, list management, CRM and communications. The post-email world of social communications threatens to pass many charities by. Adequate IT expertise in the leadership of the charity is often a problem, as they plan to expand or to provide new services for their customers.
3. Try to really make the consultation a 2-hour slot. Avoid the temptation to draw it out over several sessions.
4. So you really like the charity, and you think you would personally like to help them. Fine – great outcome for both parties. However, please complete the report after the consultation. Make your subsequent help a distinct separate part of a different programme, e.g. with Reach, LASA or WCIT. We need to be able to evaluate the Tech Surgery concept on its own merits.
5. Please attend to the paperwork. If your member body has Liability Waiver paperwork, please ensure that you take care of that with the charity. CITA cannot accept any liability. The terms and conditions that the Charity accepts when it registers with CITA are easily found on the CITA web site and should be brought to the attention of the Charity if necessary.
6. Please strongly encourage the charity to provide feedback on the Report and on the whole experience. This is promoted through the mechanics of the site, but we really need that feedback in order to tune the product. The charities also undertake to give this feedback by accepting T&C's when they apply for a Tech Surgery.
7. The Charity must book an appointment within 10 days of you first contacting them. If they do not then please inform the CITA (contact@charityithelp.org.uk) who can chase up on your behalf. Charities using the CITA service sign up to an obligation for professional communication and appointment management.

8. If a Charity cancels or fails to attend an appointment more than twice then please inform CITA (contact@charityithelp.org.uk) who will contact the charity and cancel their requested service.

3. IT Consultancy

3.1 What is an IT Consultancy?

This role is designed to provide the expert advice required to help the charity define and manage an IT based change project. IT Consultancy volunteers are typically experienced professionals, with experience of strategy and delivery. They will be current or recent practitioners who can steer a charity in the right direction with objective and impartial advice.

Amongst other things, a good IT Consultancy volunteer will help to:

- Generate a clear audit of the charity’s starting point in terms of software and hardware
- Identify the change project(s) needed to help the Charity realise the best possible return from its investment in IT
- Generate a clear vision of the strategic objectives of the change project and the IT changes needed to achieve it
- Scope and define the change project.
- Design and maintain a plan to achieve the objectives
- Advise on the execution of the plans, including key supplier selection/procurement
- Project manage any delivery required (whether provided through CITA or not).

An IT Consultancy volunteer does not become an executive of the charity. They won’t, for example, be expected to:

- Act as a helpdesk or fix day-to-day technical issues
- Directly supervise suppliers, volunteers or staff
- Write detailed policy/procedure documents

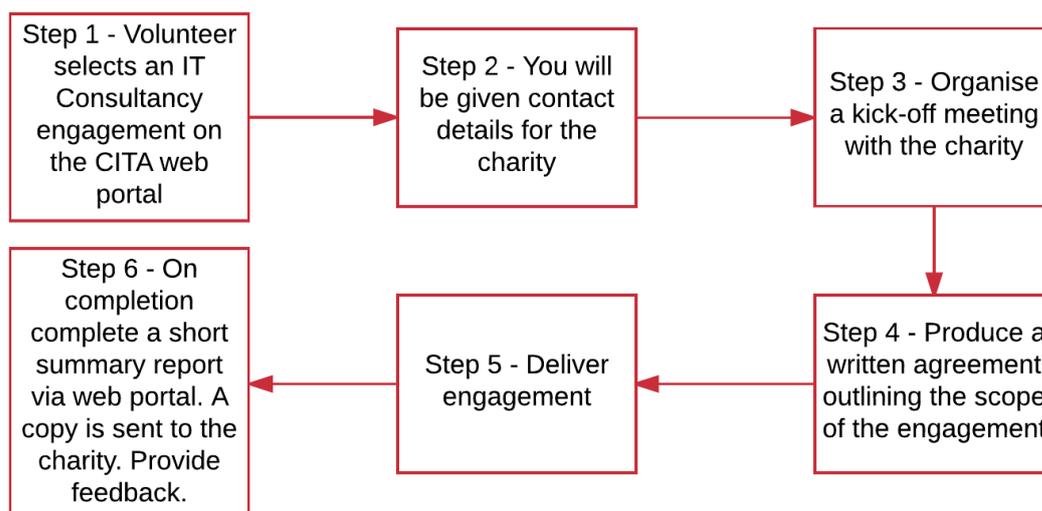


Figure 2 - How IT Consultancy works

3.2 Selecting a new IT Consultancy engagement

You can select an IT Consultancy engagement via the members' portal. Once you select an engagement the charity will be invited to confirm whether they are happy to proceed. If both parties are happy then you will be sent an email with contact information so that you can discuss the next steps.

A placement works well if it's a good fit for everyone and you can only find this out by discussion. An application for a role does not imply commitment, and it's always OK for either party to decide not to proceed.

Please note that the charity will be given access to the CV or LinkedIn profile that you submitted when you registered with CITA. Therefore please keep this information up-to-date.

3.3 Arranging a kick off meeting and agreeing scope of engagement

The next step will be to contact the charity and arrange a kick off meeting. We recommend a face-to-face meeting however this is not mandatory and it is up to you and the charity to agree how you want to handle this.

Prior to any work commencing you should discuss and agree the scope of the engagement. Either at the meeting or afterwards, you should put this into writing ensuring that there is a written record. To help, CITA has created an optional template for your use as follows:

CITA ITC Consultancy Engagement Scope Template

This document should define the project in sufficient detail so that the total cost of the project can be estimated before the project commences. The document will be an important tool in managing any 'scope creep' that may occur. If the Charity agrees we would encourage you to share the document with CITA for possible inclusion in a case study once the project is completed. CITA recommends that the document structure and content should be based on the following guidelines.

AIM

Why does the Charity want this project, e.g. cost saving, improved marketing, technology refresh, etc?

OBJECTIVES

What are the specific strategic and/or tactical objectives of the project?

SCOPE

Which functional areas of the organisation will the project impact?

Which business processes will the project impact?

PROJECT DEFINITION

The most detailed definition possible should be documented. This definition should consider:

- All changes to existing processes
- Any new processes that will be required
- Data load/conversion requirements
- IT infrastructure impacts

PROJECT PLAN

A high-level plan should be produced. When producing this plan the following should be considered and where relevant the specific actions identified:

- CITA Volunteer effort required for project management including estimated time of volunteer's commitment.
- Effort required from the Charity's existing staff
- Application/web development

- Infrastructure development
- Supplier selection/management
- Estimated time of volunteer's commitment.

You can adapt this as required, but a written agreement is a condition of the scheme and you will be asked to confirm (via the members' portal) that an agreement is in place. Please note that you are not required to share this with CITA.

CITA introduces charities to potential volunteers: it is the responsibility of the charity to make its own decision on entering into the relationship with the individual. CITA does not provide any warranty to the charity about the skills of candidates. For clarity, CITA is not a commercial organisation: our activities are wholly charitable, and money does not change hands for these introductions.

3.4 Delivering the IT Consultancy

This is ultimately down to the charity and IT Consultancy volunteer. However, there should be structure to the relationship. We would suggest:

- Quarterly project meetings – preparation + attendance in person by the IT Consultancy volunteer
- Monthly calls with the senior manager / CEO
- By prior agreement, participation in key supplier selections or project meetings
- You should agree an "initial term", so that a minimum period of engagement is defined, and it is clear to both sides what commitment has been entered into. Typically this term would be defined by the expected duration of the project.

A senior representative of the charity (trustee or CEO) must take responsibility for the volunteer relationship. Delegating this relationship to someone in the charity who is not properly empowered is unlikely to lead to a successful engagement.

3.5 Concluding the engagement

Once the agreed work has been delivered, please update the members' portal providing feedback on the outcomes. This is important as it allows us to measure the impact that our volunteers have.

Please be aware that a copy of your report is sent to the charity. You will also be asked for your feedback which CITA will use to improve and refine the service.

4. IT Project Delivery

4.1 What is IT Project Delivery?

This role is designed to match skilled volunteers with charities who need help to build and deliver specific IT projects. IT Project Delivery volunteers are typically experienced professionals, with a wide range of experience in the IT sector. They will be current or recent practitioners who bring specific skills to a project.

IT Project Delivery volunteers will help to deliver a wide range of IT projects such as:

- Help to develop a new website
- Migration to a new software package
- Setting up a new database

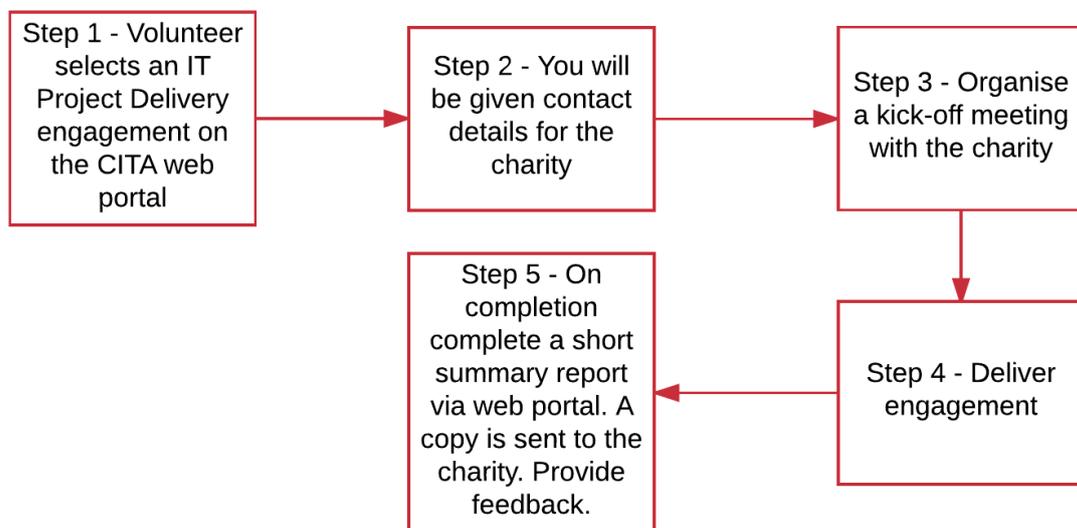


Figure 3 - How IT Project Delivery works

4.2 Selecting a new IT Project Delivery engagement

You can select an IT Project Delivery engagement via the members' portal. You should read the project description carefully to ensure that you are a suitable fit and can commit the time and effort required.

Once you select an engagement the charity will be invited to confirm whether they are happy to proceed. If both parties are happy then you will be sent an email with contact information so that you can discuss the next steps.

A placement works well if it's a good fit for everyone and you can only find this out by discussion. An application for a role does not imply commitment, and it's always OK for either party to decide not to proceed.

Please note that the charity will be given access to the CV or LinkedIn profile that you submitted when you registered with CITA. Therefore please keep this information up-to-date.

4.3 Arranging a kick off meeting and agreeing scope of engagement

The next step will be to contact the charity and arrange a kick off meeting. We recommend a face-to-face meeting however this is not mandatory and it is up to you and the charity to agree how you want to handle this. This is also an opportunity to discuss the project description and clarify any points which are not clear.

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4.4 Delivering the IT Project Delivery

This is ultimately down to the charity and IT Consultancy volunteer. However, there should be structure to the relationship. We would suggest:

- Quarterly project meetings – preparation + attendance in person by the volunteer
- Monthly calls with the senior manager / CEO
- By prior agreement, participation in project meetings
- You should agree an “initial term”, so that a minimum period of engagement is defined, and it is clear to both sides what commitment has been entered into. Typically this term would be defined by the expected duration of the project.

A senior representative of the charity (trustee or CEO) must take responsibility for the volunteer relationship. Delegating this relationship to someone in the Charity who is not properly empowered is unlikely to lead to a successful engagement.

4.5 Concluding the engagement

Once the agreed work has been delivered, please update the members’ portal providing feedback on the outcomes. This is important as it allows us to measure the impact that our volunteers have.

Please be aware that a copy of your report is sent to the charity. You will also be asked for your feedback which CITA will use to improve and refine the service.

5. Referral to additional support for charities

CITA volunteers provide three free services for charities. Please refer charities to these services as appropriate. They can submit an application via their account on the member's portal. We recommend that charities begin with a Tech Surgery. However they can apply for IT Consultancy or IT Project Delivery without having a Tech Surgery if they have already identified projects. In order to apply for IT Project Delivery then the charity must have a well-defined project description and will be required to detail this in their application. If they do not have this then we will advise that they request support to develop a project plan via the IT Consultancy service.

For external support, please see below or refer to the resources section of the CITA website for the most up-to-date list of resources.

[KnowHowNonProfit](#)

Knowledge and e-learning for charities, social enterprises and community groups on a wide range of topics including technology, social media and communications.

[Connecting Care](#)

From Lasa, resources on using, managing and getting the most out of technology for health and social care providers.

[Digital Unite](#)

Straight-forward guides to technology from the Digital Unite community provide smaller organisations with all they need to get started with digital technology and the web.

[Community How To](#)

Provides a library of information about useful tools and websites that help a community group work smarter on line.

[Software and services from Technology Trust](#)

Provides access to a range of donated and low-cost software, and also a range of email, gift aid, card payment and other helpful services.

[Accessible IT advice and support from AbilityNet](#)

Provides expert services and resources to help disabled people use digital technology at work, at home or in education.

[IT volunteers from Reach](#)

Free service for recruiting volunteers with professional expertise in areas including SEO, analytics, web design and development, and more strategic leadership including trusteeship.

6. Volunteer responsibilities

CITA volunteers have the following responsibilities:

- You, or companies from which you receive direct benefit, or in which you have a personal interest, will not be introduced for commercial purposes to the Charity clients of CITA.
- If you mention any particular technology or pricing you must ensure that the Charity is aware that this is not a recommendation but merely market intelligence that you are sharing. You must ensure that they are aware of the need to conduct their own due diligence in any supplier selection process.
- You will only use this site for voluntary activity and not as a way of finding paid work.
- You will engage with the Charity in a spirit of exploration. A placement works well if it's a good fit for everyone and you can only find this out by discussion. An application for a role does not imply commitment, and it's always OK for either party to decide not to proceed.
- You will reply quickly and politely to all communications from the Charity you are volunteering for and will never leave them unclear about your intentions.
- You will always be realistic about what you can offer, especially time and skills.
- You will maintain your information with CITA to ensure it is always current especially with regard to availability and skills.
- You will ensure that the information requested from CITA about an engagement is always kept up-to-date.
- You will ensure that confidentiality is maintained by not sharing with anyone any information that the Charity may disclose during your project.

In addition there are a few things which will avoid misunderstandings and provide CITA with helpful information to ensure the overall process is as efficient as possible:

- If you will need travel expenses please agree these with the Charity before committing to the volunteer role.
- The Charity must book an appointment within 10 days of you first contacting them. If they do not then please inform the CITA Admin (contact@charityithelp.org.uk) who can chase up on your behalf. Charities using the CITA service sign up to an obligation for professional communication and appointment management.
- If a Charity cancels or fails to attend an appointment more than twice then please inform CITA Admin (contact@charityithelp.org.uk) who will contact the charity and cancel their requested service.

7. Using the members' portal

The members' portal has been set up to make it easier to manage your engagements. You can use the portal to select a new engagement and provide updates on any existing engagements.

You will receive helpful email reminders as well as weekly alerts on the applications that are waiting for a volunteer.

It is important that you keep the website updated with progress as the engagement moves forward. In order to keep CITA's resource costs low, the web portal is the main way that we track progress. If you do not update the portal then we will assume that the engagement is not progressing and contact you directly for an update, so it really helps us if you can keep your dashboard on the portal up-to-date.

If you encounter difficulties reaching the charity or having them make a firm commitment to an appointment please let us know. Sometimes charities request help but then do not engage with our volunteers – we want to identify these cases as early as possible so that we can ensure our resources are focused on charities who are ready and available.

8. FAQs

1. How long does the Tech Surgery take?

It should take no longer than 2 hours. If you factor in 1 hour to arrange the visit and an hour for writing the report, each Tech Surgery will require around 4 hours of your time.

2. Do I have to attend the charity's office?

We would suggest that you do the Tech Surgery over the phone or via Skype unless there is a particularly reason why a face-to-face visit is required.

For IT Consultancy and IT Project Delivery we recommend that you agree the scope of the engagement prior to embarking on any work (including the frequency and format of any meetings). It is good to establish a rapport with the charity therefore an initial face-to-face meeting followed by catch ups over the phone/skype can work well.

3. Are expenses available if I visit the charity's office?

CITA does not pay any travel expenses. If you will need travel expenses please agree these with the Charity before committing to the volunteer role.

4. I am working with a charity who needs help to identify a supplier. Where can I direct them?

NCVO provides a searchable list of suppliers of goods and services, including technology services, to voluntary and community sector organisations. The NCVO Supplier List is managed by NCVO: <https://www.ncvo.org.uk/practical-support/trusted-suppliers/supplier-list>

Please remember that volunteers, or companies from which volunteers receive direct benefit, or in which volunteers have a personal interest, should not be introduced for commercial purposes to charities that you are working with.

VERSION CONTROL:

Version	Description of change	Date
1.0	First issue	11/05/2016
2.0	Substantial update incorporating IT Consultancy and IT Project Delivery services.	04/07/2016
2.1	Update to section 5 Referral to additional support	25/7/2016
2.2	Added detail p3 re volunteer expenses	16/01/2017
2.3	Numerous changes after full review plus addition of ITC template	15/03/2019