

# Key software solutions for the VCS

What's available, and how it can be used to improve operational performance



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## 1. Introduction

This report was commissioned by the ICT Hub and CITA have developed these resources in partnership with the VCS. It is aimed at informing the small to medium sized Voluntary and Community Organisation (VCO) about which software is available. It will address issues such as the availability, likely cost, usability and ease of set up. This report addresses the following five areas of software;

- 1) Fundraising Products
- 2) Financial Management Products
- 3) Contact Management Systems & Customer Relationship Management systems
- 4) Content Managed Websites & Online Transactions
- 5) Products You Need But Don't Have

For the purposes of this report we consider small VCOs to have a turnover of £100,000 or less and/or to have less than 6 members of staff (or full time equivalent). Medium sized VCOs have a turnover of up to £1 million and up to 25 staff. Our findings are aimed very much at the lower end of the scale. We assume that 1% of turnover for an IT budget but know from our own experience that it is often far less.

There is a significant level of cross over between the areas of software that were investigated. Many of the higher end CRM systems offer modules that include fundraising and finance e.g. Sage and Prophet.

The findings are not exhaustive and are not intended as endorsements. The lists are intended to be starting points for an organisation to look at what potential software is available, they could fall out of date within days of the publication of these findings.

We have rated each of the software items for; cost, ease of use and set up.

Each section of the report contains two case studies relating to software within the study.

## 2. Overview

The “Fundraising Products” section of the report looks at fundraising software and covers the following categories; Donor management and tracking, Identifying funding and writing better applications. Commonly used websites such as Grantfinder and Funderfinder already assist the VCS in the fundraising process. This section looks at other systems, sites and portals that are available to help you identify potential funders, other sources of funding, manage donations and frame funding bids.

The section on “Financial Management Products” speaks for itself.

Many VCOs make use of Sage or Quickbooks. Small VCOs could simply use a spreadsheet from a template or a more sophisticated menu form driven spreadsheet.

The “Contact Management and Customer Relationship Management” section looks at which systems might suit the small to medium VCO.

Customer Relationship Management (CRM) software provide advanced databases systems that help to organise, track, record and report on interactions with clients and customers.

There is a scale for “databases” from simple lists, through Contact Management (CM), to full CRM and from there to full Management Information Systems (MIS). These are beyond the reach of the average VCO and hence are not included in the findings.

CM systems are half way houses between an address book (e.g. Outlook) and CRM systems and share some of the features

CRM systems also come in different “flavours”, leaning towards donor relationship management (DRM – e.g. Donorflex), case recording, finance or sales.

The “Content Managed Websites and Online Transaction” section looks at what is available at low cost to help the VCS develop and maintain a web presence.

Many VCOs have a website, typically it is relatively small but not easy to update information. This element of the research looks at what is available at low cost to the sector.

Content Management systems (CMS) are potential ways to avoid using complex packages such as Dreamweaver or Front Page to manage and update a website and reduce the reliance on a few technically minded individuals to support your web presence.

There are many CM systems available, some are “off the peg”, others are modified or tailored from existing products some are fully bespoke. Your web designer will have an individual preference but all should allow easy and on screen modification of website content.

Getting donations direct from your website is becoming popular within the VCS. Using services such as PayPal or Worldpay, secure online transactions can be set up to accept payments. Some systems can be complex if you want direct control, otherwise third party payment systems, such as these, offer convenience and security.

The “Software You Need But Don’t Have” section could be a vast report by itself, we have concentrated on useful tools and software that can help your organisation run. Within the report we have identified utilities to help back up e-mails, provide automatic and secure off site data backup, remote access, et al....

### **3. Background**

Commercially available software can either partially meet or go far beyond the basic needs – the key to identifying the requirements of any software is the balance between the aspiration of what you need or want it to do and the budget that you have. This is the hardest part of the process.

There are solutions to meet all requirements – remembering that including more features and functions scale will normally mean moving up the budgetary scale.

Bespoke systems should do exactly what you want but come at a premium and carry the risk of extended development time.

Any “off the peg” solution will inevitably lead to compromises.

A half way house is utilising “tailored” solutions that are modified from existing products or solutions. For example website systems such as Xoops, Drupal and Joomla can be a more cost effective way of getting a manageable web site. Tailored solutions can be within reach, however set up, development, training and on costs all need to be met. Care must be taken to source a reliable and sector friendly developer that is not going to be a long term financial burden.

DIY or home made solutions will do what you want them to do, but tend to be very dependant on one member of staff or volunteer and are often a bit “clunky”. In most cases VCOs lack the internal expertise to make an Access database or Excel system fool proof, user-friendly, reliable and most importantly scalable. Internally developed systems typically lack the “polish” of a professional product but do the job and require regular “tweaks” to keep going.

A high level of planning needs to be undertaken when designing and developing any new IT system. Many new systems and procedures will need to be developed in tandem with software developments.

Open Source offers the carrot of “free” but still requires development

and support, these are normally not free services.

Little known solutions can also be attractive but questions need to be asked regarding longer term compatibility (will it work with new Microsoft Operating Systems?) and technical support. Databases can be prone to changes in Microsoft operating systems and can be required to work in the longer term (3-5 years).

There are many providers offering services and solutions from under £100 to many thousands. By and large we have found that you “pay for what you get” in terms of IT, hence do not expect a lot of functions and features for a little outlay.

Decide on the critical requirements of the system and be prepared to compromise over the extras. Be prepared to halt the development of a new system that doesn’t do all that you want – it may be better to wait until either funding can be found or the technology changes to make the job easier and cheaper.

It should also be noted that any on costs (training, support, hosting, maintenance, rentals, etc) need to be considered and budgeted for as a part of any IT development. Remember to ask if training is included in the package price – it is common that it is not and can drive up the package cost considerably. be useless.

Training must planned as an integral part of any development process from the very start – be it “in house”, part of the package or training via an external agency.

## **4. Fundraising Products**

### **4.1 Introduction**

This section of the research looks at fundraising software products and online information available to the VCS.

This report looks at fundraising software in the following categories:-

- Donor (donations) management and tracking
- Online fundraising
- Identifying funding streams
- Writing better applications

and provides two case studies.

### **4.2 Donor management and tracking**

For some Voluntary Sector Organisations, a simple, in-house database containing information on donors, donations and possibly Gift Aid recovery would be perfectly adequate. This database could be created using software such as Microsoft Excel.

For other Voluntary Sector Organisations, whose income is based heavily on donations, a fundraising software package and/or donor relationship management (DRM) system may be the best option.

As with the other categories of fundraising software, such packages range in price and complexity.

DRM systems are designed to record and track fundraising in the form of donations management, funding applications, communications with

donors both existing and prospective, gift aid and regular giving and include report writing facilities which is, in many cases within the sector, a very useful tool.

Fundraising software packages may be compatible with existing accounting software packages which could potentially improve the Financial Management function within the organisation. For example, packages such as “Raiser’s Edge” from Blackbaud which is designed to manage large quantities of donors can be linked to Sage as well as other financial software, which would improve financial reporting.

As with all software packages the training aspect of implementation should be considered for budgeting and staff allocation purposes. The more complex the package, the higher the training overhead.

As well as buying software packages to be used on site, outsourcing companies are also available offering database hosting, security and back-ups which may appeal to those Voluntary Sector Organisations where space and manpower are issues.

### **4.3 Online fundraising**

The easiest way for most donors to give money online is to use a credit card. This process needs to be secure, quick and user friendly.

Some Voluntary Sector Organisations may have the capability to handle credit card transactions, thus receiving donations in this manner through their own websites.

Packages are available to enable an organisation to carry out credit card transactions by being transferred to a third party website for the secure element (World Pay or Protex). In house systems keep the transaction within the website and make use of supporting software for the secure banking transactions element, these are commercial packages and come at a premium. Transaction provision packages are usually based on a weekly/ monthly or annual subscription fee.

The Charities Technology Trust ([www.ctt.org/fundraising](http://www.ctt.org/fundraising) – CTX) has an online transaction system available to the sector, “CP Terminal”.

The trick with getting donations via your own website is to be able to attract traffic to your site and from there to persuade people to donate on a one off or longer term basis.

Another option is to subscribe to a website which provides an online fundraising tool whereby the organisation’s information is entered onto a “Fundraising Page”. Websites such as “Just giving”, “Efundraising” (Charities Aid Foundation - CAF), “edirectdebit” offer this facility. Donations are processed and transferred on either a weekly or monthly basis. Such companies often offer gift aid recovery as part of the subscription which gives the advantage of reducing valuable administration time.

There are also a number of philanthropy sites and services which can direct donors to your organisation or help plan campaigns (“Philanthropy UK”)

Also available are websites providing donations through online shopping. For example, “easy fundraising” or the free “BuyAt”, whereby a percentage of purchases from retailers are given to registered organisations.

Other systems offer banners or search boxes on a “penny a click” basis (“homepages-friends”). Another option is to promote the use of “Give or Take” to your donors, this is a cash-back shopping website where people can choose to keep or donate their cash-back. To get nominated e-mail them at [charities@givortake.com](mailto:charities@givortake.com). There is little effort involved in the above and returns reflect this.

Payroll Giving offers a means of donating via an employer. The process is similar to Gift Aid and access to these schemes is available via the Inland Revenue website. The employer’s scheme and benefiting charity need to be registered with the Inland Revenue.

#### **4.4 Identifying funding streams**

This section is mainly web-based. Voluntary Sector Organisations can subscribe to online funding databases or portals which provide access to a variety of available funders and grants. They provide the facility to search potential funding opportunities according to project and criteria. These websites include, “grant finder,” which provides access to comprehensive information on UK and European financial support provision and “grants online,” which gives information on funding opportunities in the form of latest

funding news via weekly e-newsletter and e-mail alerts.

Many regional portals are being launched allowing for local funding opportunities to be identified.

As with the previous section of research, prices for subscriptions vary.

There are some very good sites such as “UK Fundraising” offering free subscription which give information on grants available, although access to specific databases is often limited. J4Bgrants is available via some Local Authorities, but access may be variable depending on the level of subscription taken up by the authority. J4B send e-mail alerts and have a searchable database.

For those sites where a subscription is payable, newsletters, e-mail alerts, testimonials and other resources are made available. There are also sites which provide handbooks to guide through search criteria. Some sites make use of new (Web 2.0) technologies such as RSS.

Many funders also offer e-mail alerts direct from their websites (Big Lottery, Government agencies). One very good service is available via UK on line, Funding Matters.

#### ***4.5 Writing better applications***

Many of the fundraising software packages detailed in the first section of the research have funding and grant application features but there are also service providers available to assist with this process and

improve the likelihood of securing such vital bids.

As with the second section of this research, access to this information and service is often subscription based. There are many companies whose services are available to the Voluntary Sector to assist in improving strategy. Organisations such as “The Charities Aid Foundation” aim to assist charities in making the most of what they get. This service is not only designed to improve applications to ensure funding but promoting awareness through improving websites and assist in online fundraising.

Other subscription websites provide access to fundraising consultants for example “Expertsonline” or “Free Funding Update”

Funders themselves aim to help you to bid successfully for their funds and often offer tips and advice on how to apply (Awards for All, Lloyds TSB).

The fundraising software market is rapidly changing. New software is continually available while existing software is being evolved or discontinued.

Before a decision is made on purchasing or subscribing to such software, an organisation must decide which package is compatible with both needs and budget.

## 4.6 Case Study – COCO

COCO (Comrades of Children Overseas) is a Children's Charity based in the North East of England supporting children whose lives are affected by poverty, famine, war, illness and disease.

The initial need for this particular software was to segregate the data with regard to specific donors and donations. Coco had over 3000 donors and required reports which segregated data on the grounds of date, amount, particular events etc.

The organisation had previously been using spreadsheets to collate data so a contact management system seemed to be natural progression from this method.

The organisation hoped that by purchasing the Raiser's Edge software, efficiency would be improved in terms of reducing the man hours required for the analysis of data.

The Raisers Edge software is a Contact Management System containing specific features for charities. These features include Contact Management with prospects and donors, Operational Management in the form of letters etc, Relationship cultivation and diverse fundraising methods. One of the features which particularly attracted Coco was the facility to link the software with the organisations existing financial package which they have successfully achieved.

The organisation is very happy with the results of investing in the Raiser's Edge package which has

considerably improved performance in terms of improved communications and financial reporting.

The main problems with the software have been financial implications. The initial purchase of the package was a significant cost and was spread on a monthly basis over a period of three years. The organisation found the maintenance cost was too much of a financial burden which, on occasion, has caused problems and resulted in one off payments for trouble shooting telephone calls.

The training sessions offered by Blackbaud are both expensive and time consuming and the organisation did not feel they could spare the resources for this. As a result, the package is only being used at around 50% of its potential capacity.

In conclusion, the purchase of the Raiser's Edge package has considerably improved data processing and donations management as well as communications but cost limitations have resulted in the system not being used to its full potential.

[www.coco.org.uk](http://www.coco.org.uk)

## 4.7 Case Study – Percy Hedley Foundation

The Percy Hedley Foundation is a charity providing specialist services for disabled people in the North East of England.

The Foundation was established in 1953 as a small charitable school for children with cerebral palsy. The Foundation now meets the needs of disabled people with cerebral palsy, communication impairments and complex learning, social care and therapeutic needs.

During the Financial Year 1 April 2006 to 31 March 2007 the Foundation spent £11m providing specialist quality services.

The Foundation raises in the region of 10% of funds from events and received a lot of requests for sponsorship forms from supporters. For example, supporters of the organisation may decide to donate proceeds from sponsorship of a sports or social event. The handling of such events had previously been carried out by the Fundraising department which required a considerable amount of administration time in terms of sponsorship form collection, analysis, counting and banking monies.

The “Just Giving” website provides an easy to use online fundraising tool which enables online events sponsorship. A “Fundraising Page” is

created to collect donations in support of any event or appeal (like an online sponsorship form). Donations are processed and transferred to Charities at the end of every week and gift aid is automatically reclaimed. A 5 % transaction fee is charged on donations.

The Foundations Director of Resources considers the introduction of the “Just Giving” package to the organisation’s website as being very successful and good value. The website has a direct link to “Just Giving” which enables supporters to choose the “Donate” option and create a “Fundraising Page” for their chosen event.

The Foundation’s event fundraising is becoming more successful, particularly since the use of the Internet is becoming more widespread. The “Just Giving” package is particularly successful as recommendations can be made for friends and colleagues to donate achieving widespread awareness.

In conclusion, the Foundation would recommend the introduction of the “Just Giving” package to other organisations with events fundraising needs. For a relatively small administration fee, the site provides a user friendly service which requires little or no input from the organisation itself.

[www.percyhedley.org.uk](http://www.percyhedley.org.uk)

	Comparison Table	Cost	Ease of Use	Set up
The Raiser's Edge	Donor Management System Features for Charities:- Contact Management(prospect/donors)/ operational management/ relationship cultivation/ diverse fundraising	££££	*	*
Donorflex (Care Data Systems)	Fundraising Administration Package. Records and Tracks the application of funds. Monitors fundraising, can record expenditure associated with application of funds.	££££	*	*
World Pay	Enables organisations to accept payments/ donations online by phone, fax or e-mail. <a href="http://www.worldpay.com">www.worldpay.com</a>	£££	****	**
Just giving	Easy to use online fundraising tool to help raise money. A "fundraising" page is created to collect donations in support of any event or appeal. <a href="http://www.justgiving.com">www.justgiving.com</a>	££	****	****
Easy fundraising	Free fundraising service where funds can be raised for any charity when you shop online. Over 500 of the UK's best known retailers are registered. <a href="http://www.easyfundraising.org.uk">www.easyfundraising.org.uk</a>	£	****	****
Grant finder	Subscription provides access to powerful tool for searching all aspects of your funding priorities. <a href="http://www.grantfinder.co.uk">www.grantfinder.co.uk</a>	££	****	****
UK Fundraising	Free registration information site: News/ jobs/ suppliers/ books/ forum/ training/ resources etc. <a href="http://www.fundraising.co.uk">www.fundraising.co.uk</a>	£	****	****
Charities Aid Foundation	Aim to assist charities in making the most of what they get:- "Efundraising" facility/ fundraising support etc <a href="http://www.cafonline.org">www.cafonline.org</a>	££	****	****
<u>Cost</u> £ Free ££ Under £100 £££ up to £500 ££££ £thousand plus	<u>Ease of use</u> * Extensive training needed ** Some training required *** Requires use of a manual **** Easy – no training required	<u>Set up</u> * Specialist setup required ** Expert user setup only *** Setup for experienced users and/or practitioners **** Very easy		

## **5. Financial Management Products**

### **5.1 Introduction**

Financial Management software is used primarily for book – keeping on a day to day basis, allowing an organisation to record and track income and expense. As more information is entered the financial picture is built up. Over time reports can be produced to show the financial situation over a month or a year.

The Voluntary and Community Sector need to monitor and be aware of their financial situation to help with planning and budgeting. Computerisation of financial management can bring benefits to the organisation overall.

### **5.2 What's Available?**

A number of specific Financial Management programs are available, ranging from basic cash book programs to software aimed at small to medium sized organisations, (such as Quickbooks or Sage 50 Accounts), right up to bespoke modular programs (like PS Financials and Access Horizons).

As well as tracking finances, most of these packages have additional functions such as invoicing or contact management. These can bring about improvements in day to day performance other than simply having a tighter control of finances, although that is the main reason for purchasing this type of software.

Spreadsheets such as Microsoft Excel are widely used by the voluntary sector to manage finances, and with the right setup and user

expertise, these can be a useful financial management tool.

### **5.3 How will we benefit?**

There are a number of ways in which performance will be improved by any computerised financial management solution:

Saving time is an obvious benefit. Once users are familiar with a new system, they will find many of the daily financial tasks take less time than a manual system.

Systems can also help overall accuracy as information need only be entered once and not manually copied.

Calculations are also done in a fraction of the time, financial information such as total income can be pulled up on screen or on a report in seconds.

The ability to produce more complex reports leads to an important benefit, more in–depth analysis can be carried out far more quickly. If the software is set up efficiently, reports can pinpoint key financial information (facilitating decisions about how to concentrate time, effort and finances on income generation in future).

Most packages allow budgets to be set manually, or by using the figures from a previous year as a starting point. Having easier access to figures from previous years, and better facilities to manipulate these, will allow for more in depth, and therefore potentially more accurate, budgeting.

Keeping a computerised debtors ledger will allow you to keep tabs on outstanding and overdue debts easily, and where appropriate produce statements and chase letters at the touch of a button.

Other useful features can include a database of all customers that gives you a very basic contact management system (some programs take this further, such as MYOB which offers a full contact log.). This could be used to monitor customer contact much more carefully and allow for more targeted marketing, and better overall customer service and retention.

## **5.4 What Features?**

Consider, very carefully, what is the most appropriate software for your organisation.

Start by looking at your needs and what features the package offers; what information do you need to record, and what information you need to produce?

If a package doesn't do what you need it to do, then don't use it. If the software does do exactly what you require, the more expensive solution may be justified.

Some packages can be purchased on a bespoke basis, allowing you to buy and combine modules specifically required, and although these tend to be the most expensive packages, they can also be tailored to your needs much more specifically. PS Financials and Access Horizons are both examples of this type of software which can be set up specifically to deal with functionality needed by not for profit

or charitable organisations, such as SOFA and SORP reports, and fund tracking.

When looking at off the shelf packages, Quickbooks can be set up to account for a not for profit organisation, but does not include a specific fund tracking feature, or SORP / SOFA reports as standard (add-on products can be purchased which link to Quickbooks and provide additional functionality in this area.) Sage 50 Accounts has a charity accounting feature, which allows you to set up and track funds, and also includes SORP / SOFA reports.

Microsoft Excel can be set up to produce reports, although it does not include many time – saving features which will make improvements to performance:

- Invoicing which pulls through customer details and update onto your accounts ledgers.
- Reports on multiple business areas at the touch of a button.
- Detailed aged debtor and creditor information.

If these features will make a difference in streamlining your operation (saving time and improving analysis) a compromise is to look at a system that will integrate with Excel. All of the programs detailed allow information to be exported, with most integrating with Excel, giving you the advantages of a designated financial management package, but with the flexibility of exporting and tailoring reports.

Our advice is to carefully consider what you need from a package and spend a little time ensuring that

anything that you are considering will fulfil your needs.

Remember that some features which are essential to the day to day running of your organisation may be quite specific to your organisation and the sector. Asking a salesperson whether the software which they are selling can be used for X, Y or Z will invariably result in a “yes”, as most packages can be adapted. Many sales people will not have the technical knowledge to explain exactly HOW a feature works, or whether there is a work around.

Getting demonstrations or trial copies of a package which you are considering is a good idea. It can also be very useful to contact a company’s technical support team to verify that a package will deal with your specific setup.

### **5.5 What else to consider?**

There are a number of other factors which you should consider to avoid other potential pitfalls - incorrect or incomplete information being recorded due to a lack of training or experience, or spiralling on costs.

Implement the wrong package, or going off “half baked” could potentially create more problems than it solves.

Installation and setup: some programs can be installed and set up easily from a CD or an internet download, with a manual or on-screen instructions to guide you. Quickbooks particularly prides itself on being easy to set up; GNU cash is not quite so easy to follow, but does include an on – screen guide which

gives a lot of helpful information for the novice user to assist in setup. Sage Accounts falls somewhere in between the two. Version 14 of Sage Instant Accounts has improved usability and help for the less experienced user, with updated help files.

The financial setup and installation of a program can be complex and so an extra budget, to pay for expert help would be worth considering.

Training: in most cases some training should be considered to make sure that users are confident and able to get the most out of your new system.

Training is available in many guises. Packages such as Sage Accounts and Quickbooks, have registered ‘experts’ who offer on-site training specific to your needs at an hourly or daily rate.

Although more expensive on the face of it, in terms of pounds per hour, this will be more specific and tailored than any pre-defined training course which you would pay to attend. In some cases, bespoke programs such as Access or PS Financials, setup and training are considered essential and should be included with the initial costing.

Updates: most software is routinely upgraded to offer new features. You should be aware of how often this happens and what the likely cost would be.

Ongoing Support: Is there a support helpline? If so does it meet your requirements (for example: Will help be offered on financial processing, or only technical issues? What hours is

the support line available? Do you pay for an annual contract, or is there a premium rate number for calls?)

Hardware: do you have the necessary hardware to support your chosen software? (check system requirements). If your PCs are not up to the required specification it could mean that your software will run slowly, or not at all.

Users: who will be using the software? What is their current experience? What happens if they are off sick or on holiday? Contingency planning should be a part of the process.

## 5.6 What Costs?

Budget does play a major part in the decision of which system to buy. The range of prices runs from Free / Open Source packages such as GNU cash, to bespoke packages running into the thousands (PS financials or Access Horizons).

When considering the total costs involved in implementing a package make sure that you refer not only to the software cost, but also to all of the other considerations mentioned earlier; installation, setup, training, ongoing support, and hardware costs.

A number of companies offer discounts to charities, although often this is for the software only, and not for support or training.

Funding can be available - Business Link offer up to 50% funding for training of employees in a charitable organisation.

## 5.7 Case Study: Real Care

Real Care is attached to Villa Real School for children with severe special needs in Consett, County Durham. Real Care operates after school and holiday clubs and activity outings for the children who attend the school, as well as children with similar needs from the surrounding area.

Real Care were struggling to keep track of income, and more importantly to identify and contact debtors, as their financial management consisted of a number of systems, some manual and some computerised.

Cash was paid on a daily or weekly basis by some regular attendees and, although tracked overall, individual under or advance payments were often missed. This made chasing debt difficult, firstly because those still owing money had to be identified, and secondly because there was no system of invoicing or sending statements to debtors, so ineffective verbal reminders were often all that was used.

Real Care's records showed which Social Service area paid for which children attending sessions, but there was no easy way to calculate totals expected from each area, and allocate payments appropriately.

Real Care realised that a more formal system was needed to keep track of 'customers', monies owed, and payments received. Their initial approach was to purchase Sage Accounts, in early 2007.

Lack of knowledge and experience of using a financial management package meant that the program did not solve the problems, so later in 2007 key staff met with Sage experts employed by their accountants to discuss how to get the best from their software.

A training program was devised, and now all of the relevant systems have been updated because staff now understand what information is required to keep the Sage data accurate.

Any outstanding debts being clear at a glance, statements can be sent to remind debtors in a more formal way and letters generated automatically.

'Customers' are categorised according to which Social Services is funding their session, allowing reports to be run showing what is due, so that payments are allocated correctly and any missing funding can be chased.

The main pitfall which Real Care encountered initially was rushing into purchasing a program without fully considering the need for training and help in setting this up.

What has worked well now that debts are accurately recorded and can be chased, social services funding can be tracked easily and accurately, and cash is properly accounted for. Several employees are conversant with the software, allowing them to share tasks when others are unavailable, and pass on their knowledge to any new employees as appropriate.

## 5.8 Case Study : Streetwise North

Streetwise North is a Young People's Project based in Newcastle upon Tyne, offering information and advice to under 25s on any issue, including contraception, sexual health, mental health and drug or alcohol misuse. The centre runs on a drop in basis, and offers a free counselling service. The project employs about 20 staff and makes use of sessional workers.

Streetwise have used Excel to manage their finances for a number of years, but have run into problems: all the necessary information was held on Excel, but it had been set up in a non-standard way, the manager (who set it up) has left on maternity leave and it was difficult for her replacement to manage system.

The information required by potential funders has also become more specific, meaning that finances have to be tracked in more detail.

In order to overcome these problems it was decided to implement a package designed for Financial Management. The rationale was that all information could be held in one place, in as much detail as was needed, and that a well – known software package would be easier for new or alternative users to understand and process than a spreadsheet customised by an individual.

Sage Accounts was purchased, and set up using the Charity Accounting feature, with assistance and training from an external Sage specialist. Unfortunately a number of factors meant that the transfer of systems

did not happen as easily as it might have done:

Maternity leave meant that the main intended user of Sage was on long term absence from part way through the setup and training, leaving somebody who had not been involved with the training program to carry on with completing the setup and implementation. The timing of the setup also meant that in order to have a full year's financial information on Sage a lot of back dated entries would have to be made.

Amongst these difficulties sickness absence amongst staff who had completed the Sage training meant that there was a lack of resource to enter this additional information, alongside a lack of confidence from staff who had not been trained.

These combined issues resulted in Sage Accounts not being fully set up, and information continuing to be entered on Excel, with further amendments to the formatting and information captured being made where necessary.

Although the introduction of a specific financial management package had been planned, Streetwise now find themselves in the grip of a number of pitfalls with the implementation of their new system:

Timing: as Financial Results are measured annually it is much easier to have a full year's information recorded on one system – whilst changing part way through the year

is possible, it is easier to do so at the beginning of a new financial year, but enough time should be allowed for setup and training.

Setup: most packages can be set up in a number of ways, and ensuring that all of those who will be involved in processing are also part of the setup discussions and decision making will make training easier and improve user confidence. Making sure that the way a system is set up is logical and can be followed easily by a number of people also means that, as and when it becomes necessary for others to be involved, through expansion or staffing changes, they can pick up what is being entered more easily.

Training: Although training was organised by Streetwise those involved were, for a number of reasons, not available at the essential points when book keeping should have started on the new system. This stresses the importance of ensuring that a number of people are trained on a new system as backup if the intended user(s) become unavailable.

Despite these setbacks Streetwise are still keen to move their accounts onto Sage, and are confident that they will reap the benefits of this, but the pitfalls which they have come across highlight a number of the considerations mentioned in this research.

[www.streetwisenorth.co.uk](http://www.streetwisenorth.co.uk)

		Comparison Table	Cost	Ease of Use	Set up
Sage - Instant Accounts	Free email support Annual telephone support contract Good in program help – greatly improved in version 14, Microsoft integration <a href="http://shop.sage.co.uk/accountslanding.aspx">http://shop.sage.co.uk/accountslanding.aspx</a>	££	***	****	
Sage - Sage 50 Accounts	Annual support contract Specific charity accounting functions - funds, donors, SORP / SOFA reports. Microsoft integration	£££	**	**	
Quickbooks - Regular	Step by Step setup wizard with clear explanations Free online help, Annual telephone support contract , Add – on solutions for charity specific functions <a href="http://quickbooks.intuit.com">http://quickbooks.intuit.com</a>	££	***	****	
Excel	Likely to be in use already. Can be as simple / complex as desired Highly Flexible (within M/S Office)	££	***	***	
Access Accounting - Horizons	Bespoke Software Project managed implementation, Microsoft Integration, Specific Charities functionality. <a href="http://user.access-accounts.com">http://user.access-accounts.com</a>	££££	**	*	
GNU Cash	Free/ Open Source Available for various O/S Easy to download & install Manual can be downloaded with program.	£	***	**	
PS Financials	Bespoke Software Project managed implementation Community edition specifically tailored to charity sector needs – SORP / SOFA and Fund reporting, automated Partial VAT recovery, Annual support contract includes upgrades, Microsoft Integration <a href="http://www.psfincials.com/index.html">http://www.psfincials.com/index.html</a>	££££	*	*	
MYOB	Available for Windows or MAC Integrated Payroll Support via telephone or email Microsoft Integration, Job / fund tracking <a href="http://myob.com">http://myob.com</a>	£	***	***	
<b>Cost</b> £ Free ££ Under £100 £££ up to £500 ££££ £thousand plus	<b>Ease of use</b> * Extensive training needed ** Some training required *** Requires use of a manual **** Easy – no training required	<b>Set up</b> * Specialist setup required ** Expert user setup only *** Setup for experienced users and/or practitioners **** Very easy			

## 6 Contact Management Systems & Customer Relationship Management

### 6.1 Introduction

What is a database, why do I need one and how can it help improve performance? To gather information for a report from paper records can take a long time. Client information, telephone numbers, addresses and records of interactions with clients can all be stored electronically and hence can be recalled in an instant. The trick is to store the data in such a way that it is easily recovered in a form that makes sense – an old IT saying is Garbage In, Garbage Out (GIGO).

Databases can be very simple – a list of customer names and telephone numbers on a spreadsheet (Contact list) – easy to use and easy to update.

To develop a database you need to know your *exact* requirements before you start – you need to know exactly what you want to get out of it. This is the hardest part of the process, once requirements are identified key features are easily identified.

Any organised information forms a database, the software that runs the database system on a computer is called a development tool or a platform e.g. Microsoft Access is a database development tool. To produce detailed reports a more advanced kind of a database is required, one you can ask questions (query). Access is a part of the Microsoft Office suite and is one such database platform. To make an

Access database user friendly, reliable and accessible across an office is tricky and probably beyond the skill level of the “average” computer user. Typically the office “expert” or a volunteer will be behind the development and maintenance of such systems. Microsoft Excel could also be developed into a more advanced database by such technically minded people. Both systems, however, have their limitations and do rely heavily on internal expertise to keep functioning.

The advantage of a home made database is that it will do exactly what you want it to, the disadvantage is a lack of flexibility and scalability. There are other more complex databases and so more complex development tools are used to form the database systems, e.g. Oracle, SAP, Microsoft CRM. Internal expertise in such systems is rare and external expertise comes at a premium. Commercial database designers can create bespoke or tailored systems using any number of database platforms (Oracle, MySQL, PHP, Quark), these are major undertakings, can take a considerable amount of time and can be expensive.

Open Source offers free licensing (e.g. Sugar, Civi) but in many cases the expertise to support and develop the systems is not free and the end package can cost as much as a commercial product.

There is a scale of databases, depending on the functions and features that are required, from a simple list to contacts lists, document management and on to a full blown Customer Relationship Management system (CRM) with many advanced features.

## **6.2 Contact Management**

Contact Management (CM) systems allow groups to keep track of contacts, customers and/or clients and can, typically, be used by more than one person at a time.

Many people use address books within their mail client software (e.g. Outlook). These can be very useful but are tricky to share, normally cannot cope with individuals that are associated with more than one group, and/or documents associated with interactions.

CM systems can be useful tools to plan and undertake mail shots. Many systems exist that extend the features or interact with Outlook to provide the extra functions and features required. Web based (hosted) CM systems are available which have the added advantage of being accessible away from the office and hence make home working easier. CM systems can have other additional features such as shared diaries, mail merging and tracking.

## **6.3 Customer Relationship Management (CRM)**

CRM systems allow advanced manipulation and reporting of data. They can be little more than a CM

system or have all the features required to run and operate a complex and large scale operation (e.g. Progress, ThankQ). Many are modular and can build up to complex systems.

CRM systems allow for flexible recording of customer interactions. This can improve “customer service” considerably and be invaluable in providing statistics to funders and report against targets. CRM come in many “flavours”, they can lean towards fundraising, membership or contacts. Some of the commercially based systems can be sales orientated, many interact with financial packages to assist in financial management. They can be network based or available via the internet (hosted) or a combination of both.

Security of the information is a vital consideration, consider this and insist on robust backing up procedures when making choices.

Prices vary from free to many thousands. The free systems rely on groups having the expertise, time and/or training budget to configure and bend the system to suit their needs. Bespoke systems remain the best choice but are far out of reach for the average VCO, tailored systems offer an interesting potential.

The commercial concept of “cheap” seems to fall somewhere between £3000 and £5000, with significant on costs (20% - 30%). Some suppliers offer discounts or limited free licences to the VCS but typically recoup costs by other means. Be

careful to ask if training is included in the price or comes at an additional cost. There are relatively few genuinely low cost solutions.

CRM systems tend to be environments that a user works within on their PC. E-mail and calendar functions can be a bit of a change from the Microsoft Outlook environment often used.

It is possible to adapt an existing database or use Outlook as an elementary CRM, however they are limited and probably would not do what you want them to in the longer term, hence at some point a “better” system will need to be looked at.

At the far end of the database scale lies the Management Information System (MIS), these products are industrial strength tools that are far beyond the reach of the intended target group for this report.

## **6.4 Case Study – The Peace Factory**

The Peace Factory are based in a large four bed roomed house just outside Dungannon, Northern Ireland. They offer a holistic approach to health and well being including a wide range of complementary therapies. They have moved towards “rural outreach” and more recently establishing a Confidential counseling service. They promote individual tailored training by supporting people to look at their talents and aptitudes in a new/creative way. If people are at a stage to access their own desired training they support them to overcome the obstacles, which might

be; lack of funding, confidence, encouragement, health issues or simply moral, peer support.

They had a requirement to provide monthly, quarterly, and annual reporting on all their participants, programmes/services, activities, training and outputs to substantiate their grants. In addition they were required to report on the make up of their users, geography, types of services accessed and demanded. These reports whether qualitative and quantitative, had been difficult to collate, monitor and score. This had always been done manually and was laborious and arduous to complete. Funders do not have one agreed approach to this task and there is often too many disparities existing between the various bodies. It is also the case that these funding bodies’ non-financial requirements change from year to year.

While there are several financial software packages in the market to help groups monitor their budgets, there were ‘none’ we identified to allow them to monitor & evaluate the ‘non-financial’ aspects of their work. With the pressure to deliver programmes, seek further funding, fill in timesheets, co-ordinate staff diaries, evaluate their work - then it amounted to a lot of time behind the desk and too much paperwork!

They learnt through one of their funders that Cúnamh ICT had developed a very unique database called eMonitoring which would ‘take the hassle out of monitoring & evaluation’. It has been piloting the system with 10 other CVS groups

whose activities and reporting requirements were similar.

With funds secured they had eMonitoring installed and under a support contract received one-to-one training for a year. eMonitoring takes a technology-based approach to cataloguing and monitoring the work, thus freeing up more time for actual delivery of programmes and services. It gives other office functions such as mail wizards, contact\correspondence logs but most of all provided **ALL** the funding bodies with the confidence that their grant aid packages were being put to their proper use. It now allows them to record thousands of hard and soft indicators on users and activities and produces customised reports in minutes – not 3-4wks trawling through folders, filing cabinets and lever arch file! They found it to be easy to use and requires little maintenance – all updates are downloaded through their website.

They, like a lot of community groups, are constantly reminded by funding bodies and the statutory and governmental departments of the need for effective monitoring and evaluation. They found that eMonitoring gives the flexibility of setting up and measuring their own organisational aims & objectives, to import and evaluate activity outcomes, and to setup participant feedback questionnaires. There is even a section to setup and record equal opportunities data.

A recent development is 'Soft Monitoring'. Something they understand to be a key part of funders' new 'non-financial'

requirements. They can now measure the stages of a participant's progress with them and can use this information to improve activities making a case for better investment into what they do.

They have a tool that provides a paperless environment, allows them to put all their contacts in one place and generally make all the monitoring & evaluation aspects of their work much, much faster, easier and more enjoyable. One thing is they now think twice on the impact their work has in the community.

The only slight issue is that they didn't earmark sufficient time at their end to the training, to get the full benefit. The main plus has been an increase in confidence in staff feeling "on top" of the work. More organised, more time for clients and belief in what they do based on experience and underpinned by the efficient collation of facts.

In their opinion "for the price now you pay for eMonitoring you more than make it up on wasted time spent doing monitoring reports, whilst improving your own programmes & services. What seemed impossible because of the workload became second nature and will be our biggest selling point. Tools like eMonitoring should be made available to all CVS groups as part of their funding. We were lucky to acquire the grant aid for its purchase/support, but not everyone may be in that position".

## 6.5 Case Study – Chesterfield Law Centre

Chesterfield Law Centre offers free, confidential legal help, advice and representation to individuals and groups in Chesterfield and North East Derbyshire. They also provide signposting to other agencies, self help information fact sheets and helpline information.

Volunteers run the reception, for phone and drop-in enquiries. This provides work experience, which helps volunteers move into paid work or further learning opportunities. Information had been held individually by case workers, and given out to clients on an individual basis. There was no central pool of information and so no standardised approach to information provision.

It was decided that a centralised database could provide information, so that the volunteers could offer clients a first level of response, freeing case workers to work directly with clients. Anne Frazer, the administrator, was given the role to research what was needed. With the help of High Peak CVS, contactLINK was identified. She downloaded a demo version to trial.

“I realised I didn’t know exactly what we wanted until I really started to experiment with it.”

The supplier imported names and basic contact details from Word documents, and training was provided to key staff – including discussions on how best to set up and use the features for their

organisation and processes, as well as a plan for rolling it out over the whole organisation.

The volunteers were trained in the use of the system by the staff over the following weeks.

The benefits are that; volunteers now provide initial level support and signposting to clients. Case workers spend more time providing advice in their specialist areas, staff generally have more time, more clients can be seen and served, faster and more efficiently, all paid staff now share their contact information.

They are very happy with services provided by ITsorted, and note that the installation was easy and the system works well. Having data transferred for them was a great help.

It did, however, take the Law Centre much longer than expected to enter the remaining data from paper sources. Their advice is to, “Allow twice the amount of time you think it’s going to take, have a strategy to get people on board and engaged with the system and to stay engaged with it. Work out ways of encouraging staff to use the database and store information they collect on it”. In the words of one of the managers, “if you don’t use it, you’ll lose it!”.

Training is essential – both initially and regular refreshers, to keep skills up-to-date as well as simply encouraging the effective use of the database.

[www.chesterfieldlawcentre.org.uk](http://www.chesterfieldlawcentre.org.uk)

	Comparison Table	Cost	Ease of use	Set up
ACT	Half way house to full CRM, diaries, document management, tracking and configurable reporting <a href="http://www.act.com">www.act.com</a>	£££	**	***
CharityLog	Hosted volunteer based CRM <a href="http://www.charitylog.co.uk/index.php">www.charitylog.co.uk/index.php</a>	££££	**	*
Contact Link	Low cost Access based network CM system <a href="http://www.itsorted.org.uk">www.itsorted.org.uk</a>	££	**	*
eMonitoring	Access based, peer to peer, fully functional networked CRM - <a href="http://www.emonitoring.org">www.emonitoring.org</a>	£££	**	**
eVol	Fully featured hosted CRM/MIS developed for WVCO. <a href="http://www.e-vol.co.uk">www.e-vol.co.uk</a> – a good bench mark.	££££	**	*
Kiss	Network based CM plus membership & donations <a href="http://www.kissofwareolutions.com">www.kissofwareolutions.com</a>	££	***	***
Lamplight	Hosted CM service, can be customised. Can log details of interactions and report <a href="http://www.lamplightdb.co.uk">www.lamplightdb.co.uk</a>	£££	***	***
Myoffice.net	Low cost hosted system, a range of services to full CRM <a href="http://www.myoffice.net/">http://www.myoffice.net/</a>	££	***	****
OfficeZilla	Free web based CM system, can be used to share diaries - <a href="http://www.officezilla.com">www.officezilla.com</a>	£	****	****
Zoho	Free web based systems, many features <a href="http://www.zoho.com">www.zoho.com</a>	£	****	****
Salesforce	10 free licences for charities – sales orientated needs extensive setup <a href="http://www.salesforce.com">www.salesforce.com</a>	££££	**	*
Sugar CRM	Open source (free licence) – sales orientated but needs extensive setup <a href="http://www.sugarcrm.com/crm">www.sugarcrm.com/crm</a>	£	**	*
volbase	Access based, network CRM <a href="http://www.volbase.co.uk">www.volbase.co.uk</a>	££££	**	*

<b>Cost</b> £ Free ££ Under £100 £££ up to £500 ££££ £thousand plus	<b>Ease of use</b> * Extensive training needed ** Some training required *** Requires use of a manual **** Easy – no training required	<b>Set up</b> * Specialist setup required ** Expert user setup only *** Setup for experienced users and/or practitioners **** Very easy
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## **7. Content Managed Websites & Online Transactions**

### **7.1 Introduction**

A website is normally high on the list of wants for any organisation, most people want a web presence but do not know why, how one works and if it is doing its job. Many websites once launched become stale, out of date and can become more of a liability.

A website will not attract new clients or customers by itself, a potential client must either know about you or the site or use, be referred or chance upon it using a search engine (Google, Yahoo, etc).

Every organisation must know what it expects to gain from its website, who it is intended to serve and what message is intended to pass on. Does the group need a separate website if all it needs to do is publish contact details? Why not save the money and get the details added to a web directory, these are normally free to the VCS.

A common use of a website is to advertise an organisation's services (and/or goods). Such websites are termed "brochure ware" and need to be kept fresh and up to date.

The website is the first port of call for a potential funder or recruit, an out of date or amateurish look can be a liability. A good website can give an organisation an edge.

### **7.2 Website Costs**

The domain name ([www.mygroup.org](http://www.mygroup.org)) needs to be rented, normally for a period of up to 2 years, this can cost up to £25 but is often part of a wider package.

You also need to rent some space on a server to save your website code – hosting. This can cost from a few pounds to a few hundred, depending on the level of services required. Most hosting packages include e-mails addresses and can include other features such as domain names, file transfer systems, templates, etc.

A cost that is rarely considered is the long term maintenance and management of the site. Professional web designers often engage clients in relationships with respect to on-going website development, updating and management. Groups need to consider the budgetary implications of paying a website designer £20 each time additional information is added to the site, either that or someone needs to be trained how to do it internally. Training someone to manage a "flat" (HTML based) website using Dreamweaver or Front Page can be time consuming and cost a few hundred pounds.

On-going site development (new sections, make-overs, additional features, etc) needs also to be considered. Time needs to be allocated to manage the site, the

more complex the site the more time it will need.

Initial design costs can be as low as £50, with professional fees running into many thousands of pounds for large scale and complex websites.

### **7.3 Homemade, Tailored or Bespoke?**

One way to keep the costs down is to create a website in-house – the type of the website is dependent on the level of skill available within the organisation. Such websites cost no more than the hosting charges and domain name but are very reliant on the original creator for updating and management.

A volunteer can knock up a website very quickly for little or no money but the longer term management of the site needs to be considered.

The process of website design can be very frustrating, make sure that you check how “professional” your designer is prior to signing up.

A professional designer may tailor a website for an organisation using one of many systems (and/or modules) available. Some of these modules require a licence, hence cost, but many are based on Open Source products and are as such “free”. Tailored systems allow for flexible functions and features but can be complex to manage and require expert maintenance.

Bespoke systems should always do exactly what you want them to do but come at a premium.

### **7.4 What Website?**

The choice of websites is as wide as the potential budget. Many websites can be built for “free” or rather, using templates that come as a part of a package (e.g. Communigate), many websites hosting packages offer template systems that can build a functional website. These can look very effective but lack flexibility and control in the look and feel of the site.

A “flat” website is rather old fashioned by today’s standards – these are typically written in a programming language called HTML, often using development tools such as Dreamweaver or Front Page. They can be excellent systems but, unless specifically written, require the same tools to manage and maintain them. The website designer will often look to sell these additional services as a part of the website package.

Currently best practice suggests that most web designers make use of CSS (Cascading Style Sheets – a design system) in website design, these are more flexible and adaptable than flat sites but require more development work and hence cost more. CSS is one of the mechanisms that allows for accessibility options to be included within the site.

One intermediate step is a website that is written with a specific management tool in mind, e.g Adobe Contribute. These sites will be more expensive to set up but cheaper to manage in the longer term. This type of site is less rigid, compared to a template driven site, in the respect

that the content (text, images, etc) can be changed easily, even the colours, but layouts and menus are often fixed.

A Content Managed System (CMS) website allows, in theory, the site to be updated easily by non-experts. They are more expensive to set up (typically) and the lower cost ones can be a bit “clunky” to manage. Higher end systems have more user friendly management interfaces built in. Low cost systems in the main utilise Open Source systems such as Wordpress, Joomla, etc – there are hundreds of “off the peg” solutions that can be adapted. The basic idea of a CMS website is that changes can be made on a “click and go” basis.

Care needs to be taken with accessibility issues when using these systems – the look and feel needs to be modified to address the requirements for different text sizes and high contrast. Such systems make use of CSS for the look and feel (Skin). The content (text, images, documents, etc) are independent of the code and so the entire look and feel can be changed without having to re-write any of the information in the site – this makes a complete make-over far easier. Working with a local supplier so that face to face meetings can occur regularly should also be a preference. Training costs from a national provider might drive the project costs up significantly.

### **7.5 What Features?**

A website can simply provide contact details or be a fully interactive system. Such sites have a high

management overhead. Raising funds via the web is one potential avenue to explore. Sites that have these feature need not be complex. Third party systems such as PayPal are easy to set up and require a simple link to be added to the site. Sites that require internal transactions need to make use of commercial systems, come at a premium and have additional requirements in terms of banking set up and security associated with them. Other forms of fundraising such as sponsored linking can also be useful, systems such as BuyIT allow customers discount on goods from 3<sup>rd</sup> party suppliers by following links from your site.

Website directories such as Charitysave can also be used to attract donations. Registered groups are advertised to potential donors.

On Line trading is easiest to set up using E-Bay or similar systems but can give a less than professional look. Many of the Open Source systems allow for shopping carts to be included. Setting up such systems is complicated by the requirement to set up secure payment options, these again can be done via third parties (PayPal etc) or additional commercial modules (e.g. Protex). An online trading system is both a significant investment and management overhead.

The developers mentioned in the table (over) can be found in the ICT Hub directory of suppliers; ([directory.ict hub.org.uk](http://directory.ict hub.org.uk)). These are not intended as recommendations and are purely for illustrative purposes. Many other local suppliers

will also use these and other systems, Business Link and other directories are often a good starting point, but make sure that references are thoroughly vetted.

## **7.6 Case Study : Konnekt NE**

The group is a member of the North East Further Education Interfaith Forum and is a specific project aimed at auditing and improving current provision for values, beliefs, faiths and community cohesion in NE Further Education Colleges.

Konnekt NE promotes equality and diversity in FE colleges from a faith perspective, and aims to remove barriers that prevent young people from attending college and obtaining the skills and knowledge that will enable them to contribute to their own and their community prosperity. Konnekt needed a mechanism that enabled them to communicate easily, economically and effectively with their stakeholders. These were based at many locations throughout Durham, Teesside, Northumberland and Tyne and Wear. A real logistical 'headache'! The need was two-fold with 'Konnekt' needing to disseminate information to a large number of stakeholders over a large area and the stakeholders needing a mechanism that was easily accessible and useable to them.

They approached the problem by convening a meeting with the members and stakeholders, talking through the communication issues. Areas covered included: Methods of communication, Use of ICT, Affordability, Managing the process,

Sustainability, Accessibility and Need for rapid implementation

Lack of knowledge and awareness of what was available to a small VCS in relation to communication and ICT support proved a barrier to progress. After contacting VONNE and seeking advice from other VCOs a Content Managed website was identified as a solution.

The completed website has enabled Konnekt to achieve their original aims. The staff now have one main method of communication with stakeholders, are trained so Konnekt now has the resilience in internal ICT management structure, and most importantly can disseminate relevant information rapidly and easily. Stakeholders can now access their services and information database 24 hours a day.

Konnekt can promote the work they are doing not only to stakeholders in the North East, but to a national and international audience.

What worked well was having a ready source of expertise and knowledge available to consult with about their problems, the ease of the application process and the jargon free and practical training and support provided.

[www.konnektne.org](http://www.konnektne.org)

## 7.7 Case Study : Electroville

Electroville are a Social Enterprise based in Dewsbury, West Yorkshire. The organisation grew from another, training based, group and became an independent entity, delivering IT goods and services to the local voluntary sector, in 2007.

Part of Electroville's mission is to support employment opportunities for the disabled.

Electroville provide the full range of IT support services, data cabling, web and database design, IT strategy through Net:Gain, management training packages and host the regional ICT champion for Yorkshire and Humberside.

The problem that they had encountered with the old (flat) website belonging to their parent organisation was that a full time technician was required to manage and maintain the site. Wanting to maintain a low operational overhead they turned to CMS websites for a solution.

Colin Harrison adds an anecdote to illustrate the rationale for looking at CMS websites; "in the early days when I wanted a letter written it went down to the typing pool, it bounced back and forth until everyone was happy, this was the same with any changes to the old website"

After examining many options including Open Source solutions

such as Joomla and Drupal Electroville settled on a local supplier's (Artimedia) system – ArtiCMS.

Electroville have now formed a relationship with Artimedia to market ArtiCMS and deliver the product as a part of a training package in combination with Wordpress. Colin sees Wordpress as the first port of call for a CMS, allowing users a simpler way to start, manage and maintain a web presence. Within the training package, "Website in a day", two types of clients are served. Wordpress suits those making a start whilst ArtiCMS is useful for those who want something more sophisticated that looks good and is easily maintained.

All CMS can be "fiddly" in parts, depending on the complexity of the site. Colin's only regret is that he didn't ask for the back end statistics to be built into his system, whereas Wordpress has built in statistics.

The "website in a day" course that Electroville run shows great potential and is providing a useful service to groups in the Yorkshire area.

In terms of saving staff resources and allowing Electroville to manage their website for themselves ArtiCMS does its job well.

[www.electroville.co.uk](http://www.electroville.co.uk)

		Comparison Table	Cost	Ease of use	Set up
Lycos Tripod		Web Builder – domain name not individualised <a href="http://www.tripod.lycos.co.uk">www.tripod.lycos.co.uk</a>	£	***	***
Communigate		Simple site building tools, template driven, annual rental, <a href="http://www.communigate.co.uk">www.communigate.co.uk</a>	££	***	**
Site Builder		Template driven simple site building tool, available from many hosts (e.g. Blackfoot <a href="http://www.blackfoot.co.uk">www.blackfoot.co.uk</a> ) also known as Bravenet, Bazaar Builder	££	***	**
Open Source Drupal		Mid range to large scale CMS website tool, see SCIP, <a href="http://www.scip.org.uk">www.scip.org.uk</a> , (S East) Illuminate ICT, <a href="http://www.illuminateweb.org.uk">www.illuminateweb.org.uk</a> , (W Midlands)	£ - ££££	***	*
Open Source Joomla		Mid range CMS website - requires additional set up and support – see CITA <a href="http://www.communityitacademy.org">www.communityitacademy.org</a> (N East)	£ - ££££	***	*
Open Source Wordpress		Good starting point - can also be developed on a DIY basis, see FreeCharity (all regions) <a href="http://www.freecharity.org.uk">www.freecharity.org.uk</a>	£ - ££££	****	**
Open source Plone		Larger scale website development tool. Midlands based M6 IT <a href="http://www.m6-it.org">www.m6-it.org</a> Cornwall based Altcom <a href="http://www.altcom.co.uk">www.altcom.co.uk</a>	££££	***	*
Rocket CMS		COSMIC - SW based bespoke and open source CMS <a href="http://www.cosmic.org.uk">www.cosmic.org.uk</a>	££££	***	*
ArtiCMS		Open source based CMS <a href="http://www.artimedia.co.uk">www.artimedia.co.uk</a>	£££	**	*
BuyAt		Sponsored link/referral type <a href="http://www.buy.at">www.buy.at</a>	£	****	****
CP Terminal and others including SMS text donations		Discounted services available from Charities Technology Trust <a href="http://www.ctt.org/fundraising/default.asp">www.ctt.org/fundraising/default.asp</a>	££ - £££ (on usage)	**	*
Donation4Charity		Directory where registered groups can receive and seek donations included are RSS (live news) feeds <a href="http://www.donation4charity.org">www.donation4charity.org</a>	£	****	****
<b>Cost</b> £ Free ££ Under £100 £££ up to £500 ££££ £thousand plus		<b>Ease of use</b> * Extensive training needed ** Some training required *** Requires use of a manual **** Easy – no training required	<b>Set up</b> * Specialist setup required ** Expert user setup only *** Setup for experienced users and/or practitioners **** Very easy		

The table above gives some examples of online fundraising systems, for a more detailed list please refer to the Fundraising products section of this report.

## 8. Products You Need But Don't Have

### 8.1 Introduction

The list of potential products in this section of the report could be huge. To keep things to a manageable size this work focuses on low cost and free tools and software that assists in office management. The benefits of such software are clear - having an efficient way of producing work or having well maintained, and hence reliable, PC systems is essential to the smooth running of any organisation.

The first section looks at office productivity software, the second into Microsoft products and the third section examines what Open Source products can be of use.

### 8.2 The Charities Technology Trust (CTX)

CTX offers very low cost Microsoft (MS) via the Microsoft giving programme. It also includes software from other suppliers including Symantec (Norton). This is available to registered charities and not for profit groups. Some religious groups are ineligible for the scheme and there are limits, make sure to check the criteria and read the terms carefully.

Typically registration takes two weeks and ordering around 10 days.

### 8.3 Anti Virus or Anti Spyware Products

We all know about viruses that can potentially destroy data and even damage the PC, but spyware slows internet access considerably and

now by linking in with viruses (Malware) can be equally as damaging. We recommend the use of both anti virus and anti spyware systems, some come in a combined form.

One problem with modern anti virus software is that it can slow PCs down. A fully functioning real time anti virus and anti spyware package will make a reasonably fast PC (for example one that was top of the range two years ago) run very slowly.

AVG is probably the best known "free" program, but it is **NOT FREE** to the VCS, is only free for *personal* use. The same is true with AVG anti spyware.

Packages like Norton anti virus are excellent and can be purchased very cheaply from CTX. Free anti virus solutions include PCtools, Clamwin and threatfire. Some are cut down commercial packages and require manual updating.

Windows Defender is free and is a real time protection against all types of Malware. It is available for Windows XP and is built in to Windows Vista. This is good but far from perfect protection, it can be downloaded from:

<http://www.microsoft.com/athome/security/spyware/software/default.aspx>

Housecall is a free online virus and spyware scanner produced by Trend Micro and is quite effective. It can take several hours to scan a full hard drive so overnight scanning is advised. To use Housecall go to: [//housecall.trendmicro.com](http://housecall.trendmicro.com)

## **8.4 E-Mail products**

Spam is becoming the scourge of the Internet. It creates a large waste of time, necessitating a trawl through a large list of e-mails daily. Outlook does have spam controls but still requires each new message to be tagged as spam. There are other products that deal with spam in a more proactive way (Mailwasher, Spam B, Cloudmark, Spam Bayes).

Whilst some people back up key files, many do not, or don't know how to. Backing up e-mails should be the basis of any backing up regime, MS Outlook Personal Folders Backup offers this facility. It can be obtained from the Microsoft downloads centre. Once copied the files can then be backed up with any other data as a part of your normal backup routine.

Outlook 2003 is possibly the least reliable of the MS Office products, and mailbox files can often become corrupt. Windows has a utility that attempts to fix corrupt mailbox files – ScanPST.exe is available from within your Windows installation. The best way to find it is by using the search facility in Windows. There are many commercial equivalents that can perform the same task and even attempt fixes that this tool cannot. Outlook Express has equivalent software free from Microsoft.

There are other PC based e-mail clients such as Thunderbird. Web mail does provide an alternative but is far from immune to spam.

## **8.5 Backing up**

The dangers of ineffective or incomplete backing up can be

catastrophic. To be effective backup should be automatic, there should be multiple copies and one must be taken off site (a fire proof safe is an alternative).

MS Backup is available in all MS operating systems but is not installed as a default in XP Home, it is usually found in the system tools part of accessories. MS Backup is often much maligned because using backup software with tape drives is complex and this makes it difficult for a non-expert to put into practice. It has become more useful with the advent of flash drives and small external hard drives. A word of warning about flash drives - they can be fragile. It is important that vital backups are not stored on only one flash drive, rotate at least three or even better use inexpensive external 2.5 inch hard drives.

MozyHome remote backup is a free remote web based backup that can hold up to 2GB. It is easy to install, automatic and easy to restore either everything or just an odd file.

## **8.6 Web Based Services**

The recent increase in free web based services primarily sprang from Hotmail being bought and developed by Microsoft. Recent years have seen the growth of Google to a stage where it rivals Microsoft as an influence on IT. Many services offered by both companies are free, they also offer a raft of other features such as e-mail, document sharing, web storage, diaries, etc.

Hotmail – now re-branded “Windows Live Hotmail” has developed a great deal and now offers many additional

services in many ways similar to Outlook. The use of Windows Live (as it now likes to be called) is becoming a social networking service capable of offering file storage (Sky Drive, still in beta format), blog and other features. Microsoft are even offering a PC and personal protection service called One Care, which incorporates backup, anti virus, anti-spyware identity protection and most things with the possible exception of life assurance. This can offer a valuable service to small organisations, particularly if people work in disparate locations.

Other virtual office services can offer a raft of services up to and including a full CRM service (MyOffice.net, Officezilla, Zoho). They can work on a local PC and synchronise to the web.

### **8.7 Remote Access**

Being able to access your office work whilst at home or at another PC makes managing documents or getting e-mails much easier. Web based remote access systems such as LogMeIn and GoToMyPC allow this facility. Some systems allow files to be copied and pasted and even printed via the remote link. Remote access software can be complex to set up and may require a file server (Windows remote desktop, VNC), whilst others work via a web interface. Some are free, whilst others come at a cost, depending on the features required. Some systems can be complex to set up but all require Internet access and the PC at base to be kept on just in case.

### **8.8 Social Networking**

Social networking is a relatively new phenomenon and has yet to be fully adopted by the VCS. Generally referred to as “Viral Media”, it has a huge potential for connecting isolated groups and even for fundraising. Several social networking sites exist, the most popular being Facebook, Bebo and MySpace. Facebook has recently teamed up with PayPal and offers a potential way to fundraise.

Video and pictures can be displayed on the web using Youtube and Flickr, this can save bandwidth and hosting costs on your own website.

### **8.9 Conversion Tools**

The ability to convert files between different formats (e.g. PDF from Word) is becoming increasingly important as the need to put documents on websites grows. Commercial products like PDF factory offer this facility. Open Office can also convert document format and is free. Web based conversion tools also offer free conversion (pdf online, primo pdf).

### **8.10 Communications**

Communicating via webcam and elementary teleconferencing can be achieved at low cost or even for free (e.g. Skype, MSN). Some systems can be complex to set up and lead to less than satisfactory results. There are also potential security risks in allowing users access to other features within the software.

As bandwidth increases and new technologies emerge these systems can only get better and offer an

interesting potential for development within the sector.

By the way of a “verbal chat room”, real voice to voice conversations can be achieved using Voice Over IP (VOIP) through Ventrilo.

### **8.11 Shared Calendars**

Sharing and being able to change a calendar can stop double bookings and help to make your organisation run more effectively. Many systems exist to allow diaries to be shared. Web based office systems include Officezilla and Zoho. MS Exchange can be accessed via a web interface. A full MS Exchange installation needs an investment of both time and money. Although licences can be obtained cheaply from CTX, a full blown MS Exchange system needs a server and the associated expertise to manage and maintain it. Other simpler (web based) systems allow for calendars to be shared e.g. Google and Yahoo groups.

Shared calendars can be added to websites but also require expert installation. Users access their diary via a secure log in (e.g. PBX). Many are based on Open Source. Free online diaries such as Google are easier to set up.

MS Outlook 2007 also offers features for sharing a diary on the web via Hotmail Live but the calendar can only be viewed and not edited by others. Commercial tools such as OfficeCalendar offer full sharing capabilities for Outlook.

### **8.12 Microsoft Products**

Although not for small groups, MS server products may be useful to

medium sized groups, as they are available at very low cost from CTX. There are many advantages of using a file server (file sharing, centralised backing up, resource sharing, remote access) but these require extensive planning, setup and implementation. A considerable level of skill in maintenance and support is also required.

Open Source (Linux systems) offers direct competition to MS server solutions.

One implementation of Microsoft's Server 2003 family (Small Business Server 2003 R2) offers a range of IT services for organisations of up to 75 users. Using other low cost options from CTX, it can be developed into an extensive and sophisticated office system, managing e-mails, Internet, Intranet, websites, etc.

Microsoft Office 2007 looks very different from earlier versions, much of the functionality is there but in a slightly different form. Additional packages are now also included within the suite (Groove, One Note, Project, etc). Care must be taken when installing this on older PC systems as they might slow down. Check the amount of RAM and the processor speed of the PC carefully against the recommended specification.

Add ins can be freely downloaded from the Microsoft download website ([www.microsoft.com/downloads](http://www.microsoft.com/downloads)). There is one that creates pdf formatted documents from Office 2007. Photostory is a useful tool that can be used to create video presentations of digital photographs.

## 8.13 Open Source

Open Source has the benefit of being “free”. Free as in having no cost to purchase, but often costs are incurred for support and maintenance of the systems. There are many direct equivalents to Microsoft products, (e.g. Windows & Ubuntu) some that are even better (e.g. Linux Terminal Services - LTSP), but still most people use Microsoft.

Open Office offers a free alternative to MS Office and can do exactly the same job, but care must be taken when setting up to make opening and saving the documents MS compatible. The database element and MS Access are not fully interchangeable in terms of templates but data can be freely exchanged in the vast majority of cases. Calc (the spreadsheet) and MS Excel are 99% compatible. Open Office Writer also allows conversion of files to pdf format.

GIMP is a photo editing suite and provides a decent alternative to Adobe Photoshop, performing many of the same tasks.

Using Firefox and Opera as your web browser instead of Internet Explorer, reduces the threat of Spyware considerably.

More advanced CRM packages such as Civi and Sugar CRM offer low cost alternatives to potentially highly expensive corporate cousins. However setup and support are significant aspects of the additional cost.

## 8.14 Case Study – SCIP

SCIP are an IT development and support social enterprise based in Brighton. They serve both the Voluntary and Community sector (VCS) and support businesses operating in the small to medium enterprise (SME) market. They offer a range of IT services including technical support, consultancy, web and database design and training.

Spam is getting to be a huge problem, many users do not know how to deal with the volume of the messages received and there remains an education issue as to which message types are true Spam. Some of SCIP's clients were receiving over 300 SPAM messages per day, thus taking a large amount of time separating the “wheat from the chaff”. SCIP came across Spam Bayes through word of mouth and now recommend it to all clients. It is Open Source and so comes at no cost.

Spam Bayes works using a logical algorithm that needs to “learn” which messages are Spam and which are not, it places messages it cannot decide on in a “suspects” folder. This leads to a very slight training requirement for the system (5 - 10 minutes). One disappointment is the lack of help within the system, you simply need to follow your nose, although documentation is available from the website. However once the idea of the “suspects” folder is grasped the system is very easy to use.

Spam Bayes also works with mail clients other than Microsoft Outlook, It has reduced SCIP's Spam problem to virtually zero, but as can happen with Open Source products, can break down occasionally. Internal tools allow for easy recovery.

[www.scip.org.uk](http://www.scip.org.uk)

## 8.15 Case Study - COSMIC

COSMIC are An IT social enterprise company based in Devon and operate across the South West and UK. Their services include website design, IT training, technical support and consultancy.

COSMIC currently host the SW Regional ICT Champion and Accessibility Champion. Cosmic had been looking for a solution to overcome the fact the organisation had no central database, which could not only be used to hold customer contacts and service history, but also be used as a tool to help COSMIC market its services and track its campaigns from beginning to end. COSMIC had had tried and tested many systems including the development of bespoke systems using its own internal skills and resources. With staff already working to full capacity and with a budget which had not been set to include the purchasing of a new system, an Open Source solution, Sugar CRM, was recommended.

The initial installation was time consuming and not straight forward.

Sugar is a huge contact management system which does far beyond what COSMIC needs to use it for. It takes time to strip out the components which are not required. A fairly large amount of time needs to be dedicated to getting familiar with Sugar.

COSMIC's Kim adds; "The percentage of the program we use is so small and it can feel a little like swimming around in a huge ocean if you're not careful". Other organisations would benefit from spending time putting things on trial.

There were initial technical teething problems, but once successfully installed Sugar can be used by all members of staff (once a user name has been created for them). Staff can also be given various levels of access rights and editorial control. Contacts and clients can then be accessible and managed by all staff. Now three months on from the adoption decision the system is working across the company and its activities, providing a central source of information, reporting and updating. It has extensively enhanced their client management and provides regular reminders and suggestions for new ways of engaging existing and new clients in new products and services. COSMIC's Pete Goff stated; "Sugar has made my life easier because it allows me to monitor client flow and cash flow from the same place. I am able to predict monthly incomes and therefore plan workload far easier." "For clients it means they feel a more personal approach from us in that we can take notes and anyone can pick up the account and within a few

minutes see the whole background and history.”

[www.cosmic.org.uk](http://www.cosmic.org.uk)

	Comparison Table	Cost	Ease of use	Set up
Low cost and free Microsoft software	Charities Technology Trust <a href="http://www.ctxchange.org">www.ctxchange.org</a>	££		
	MSDownloads <a href="http://www.microsoft.com/downloads">www.microsoft.com/downloads</a>	£		
Anti-Virus	Housecall <a href="http://www.trendmicro.com">www.trendmicro.com</a>	£	***	***
	ClamWin <a href="http://www.clamwin.com">www.clamwin.com</a>	£	***	***
E-Mail	ScanPST.exe (Within Windows)	£	**	**
	Outlook Personal Folders Backup <a href="http://www.microsoft.com/downloads">www.microsoft.com/downloads</a>	£	***	***
Backing Up	Microsoft backup – (within Windows)	£	**	**
	Mozy Backup <a href="https://mozy.com/home">https://mozy.com/home</a>	£	***	****
Web Based Services	Hotmail <a href="http://www.hotmail.co.uk">www.hotmail.co.uk</a>	£	****	****
	Google <a href="http://www.google.co.uk">www.google.co.uk</a> (wide range of office services/features)	£	****	****
Remote Access	MS remote desktop (within Windows)	£	**	**
	LogMeIn <a href="http://www.logmein.com">www.logmein.com</a>	£	****	***
Social Networking	Facebook <a href="http://www.facebook.com">www.facebook.com</a>	£	***	***
	MySpace <a href="http://www.myspace.com">www.myspace.com</a>	£	***	***
Conversion Tools	PDF Factory - converts .doc – .pdf format <a href="http://www.fineprint.com/products/pdfactory/">www.fineprint.com/products/pdfactory/</a>	££	****	****
	Online conversion via <a href="http://www.pdfonline.com">www.pdfonline.com</a>	£	****	****
Communications	Skype <a href="http://www.skype.com">www.skype.com</a>	£	***	***
	Ventrilo <a href="http://www.ventrilo.com">www.ventrilo.com</a>	£	***	**
Shared Diaries	Inbox Journal <a href="http://www.inboxjournal.com">www.inboxjournal.com</a>	£	***	***
	Office Calendar <a href="http://www.officecalendar.com">www.officecalendar.com</a>	££	**	**
Microsoft Products	Microsoft Server 2003 and Office 2007 from <a href="http://www.ctxchange.org">www.ctxchange.org</a>	££	*	*
		££	***	**

<u>Cost</u>	<u>Ease of use</u>	<u>Set up</u>
£ Free	* Extensive training needed	* Specialist setup required
££ Under £100	** Some training required	** Expert user setup only
£££ up to £500	*** Requires use of a manual	*** Setup for experienced users and/or practitioners
££££ £thousand plus	**** Easy – no training required	**** Very easy

		Comparison Table	Cost	Ease of use	Set up
Open Source Products	File server software - Linux (e.g Fedora) <a href="http://www.fedora-linux.org/">http://www.fedora-linux.org/</a>	£	*	*	
Office Suites	Officezilla – <a href="http://www.officezilla.com">www.officezilla.com</a>	£	***	****	
	Open Office – <a href="http://www.openoffice.org">www.openoffice.org</a>	£	****	***	
Photo editing	GIMP – <a href="http://gimp.org">http://gimp.org</a>	£	***	****	
Web browser	Firefox – <a href="http://www.mozilla.com">www.mozilla.com</a>	£	****	***	
E-mail client	Thunderbird – <a href="http://www.mozilla.org/projects/thunderbird">www.mozilla.org/projects/thunderbird</a>	£	***	*	
Ant-Spam	Spam Bayes – <a href="http://spambayes.sourceforge.net">http://spambayes.sourceforge.net</a>	£	****	***	
CRM	Sugar – <a href="http://www.sugarcrm.com">www.sugarcrm.com</a>	£	*	*	
	Civi - <a href="http://civicrm.org/">http://civicrm.org/</a>	£	*	*	
<u>Cost</u>		<u>Ease of use</u>		<u>Set up</u>	
£	Free	*	Extensive training needed	* Specialist setup required	
££	Under £100	**	Some training required	** Expert user setup only	
£££	up to £500	***	Requires use of a manual	*** Setup for experienced users and/or practitioners	
££££	£thousand plus	****	Easy – no training required	**** Very easy	