

The Community Resource Kit

Guidance for people setting up and running community organisations



Section 12

Information technology

THE COMMUNITY RESOURCE KIT

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Introduction

Computers and other information technology (IT) can be a powerful tool for community and voluntary organisations if it's understood and used correctly. However, using IT can be daunting for those who are not familiar with it.

The guidance and links presented below will help your organisation use computers and other technology productively and safely. There are commonly accepted things you can do to ensure your organisation prevents foreseeable problems and is ready if a disaster should happen.

With so many opportunities to create, find and share information through the worldwide web, it can be hard to know where to start. Some suggestions are included here. However, as things change so rapidly, we encourage everyone to put their learning hat on and give things a go.

We know that not everyone is an aspiring computer technician, so we have tried our best to use plain language. Some jargon is unavoidable, so we suggest you look in one of the glossaries listed in section eight if you get stuck.

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Safe and healthy computing

Before you switch on your computer or office IT system you need to be sure you are doing enough to stay safe and healthy. By putting in place basic protections you can confidently rely on your computers/ IT system.

There are very good reasons to set up your computer or system so that you're protected. If something goes wrong you could:

- lose vital data (including spreadsheets, financial records, photos, maps, address details) that cannot be easily replaced
- waste a lot of time getting things back to normal
- spend money on repairs or replacement costs that you allocated for something else.

When you use computers there are many threats and hazards. While these are an unavoidable part of computing life there are straightforward and dependable things that you and your organisation can do.

Every organisation should have these things in place:

1. know where your files and other data live, how it is backed up and how it can be restored
2. measures to protect your data.

Tip - prevention is better than a cure

You could think about computer health in the same way as you do about keeping a car roadworthy. Normally you don't wait for your vehicle to have an unexpected breakdown then make urgent repairs. Rather, to pre-empt bigger problems it is common to take a vehicle for a maintenance check. The same preventative approach applies to computing.

Back-up and restoring

Restoring an organisation's valuable computer files after a disaster can be done speedily if you are prepared. When planning how your organisation backs up its computers, you need to be prepared for a variety of situations, including:

- hard-drive failure or a dead computer (NB all computers eventually die, no matter how well maintained).
- hardware theft or loss
- fire
- corruption by viruses or other attacks.

When setting up a back-up routine, the first thing you'll need to know is where the data is stored. If you're using a single computer this is straightforward, but if you have a small office system, data could be scattered across several PCs. Some consolidation may be necessary so it is easy to run back-ups.

In the event of a disaster, as well as restoring files, you'll likely need details of any licensed software, email accounts, and other user names/passwords. Make a list, then store a copy securely offsite in case you're unable to access your computers after a fire or natural disaster.

Steps to take:

- develop a back-up plan. You might need to get an experienced IT person to check this
- choose the way or ways you'll back up. Options include: online back-up, portable hard disk, DVD, USB drives
- schedule back-up and, if automatic, make sure that you've pressed go
- test that you can actually access any data you've backed up
- ensure websites or other online services you use are backed up.

Protecting your files and data

Putting precautions in place so you can recover if something goes wrong is part of safe and healthy computing. You also need to avoid the root causes of computer failure that may disrupt your organisation's day-to-day activity.

Blocking intruders

Intruders come in a few main forms:

1. network intrusions where someone attempts to gain access to your computers or IT system, whether motivated by a desire to gain control of your resources, to plant malicious codes or simply snoop around
2. viruses are programmes that run on your computer without your permission and can self-propagate to infect others
3. spyware is installed on your computer without your knowledge and tracks online activities. It can breach your privacy by secretly sending details to a wrongdoer's computer
4. phishing is attempts to steal your personal information by tricking you into entering credit card details or other sensitive data.

Steps to take:

- install anti-virus and anti-spyware software, keep this up to date
- turn on a pre-installed firewall or purchase firewall software
- use spam or junk email filtering.

Physical security

It is not unknown for computers, particularly laptops, to go missing through accidental loss or theft. Less commonly, someone may try to break in to a desktop computer to steal information. Some precautions can be taken to prevent unauthorised access to information stored on your computer or other device.

Steps to take:

- store portable devices in a locked cabinet when not in use
- set up your computer to require a password when you start up and wake from sleep or hibernation
- ensure data stored on portable drives has some form of security login.

Well maintained PCs

Manufacturers are always releasing updates to their software. These updates often bring in minor improvements, remove security flaws or fix bugs. It is important to install authorised updates in a timely way.

Computers can slow down over time as files clutter up the system. There are several things you can do to maintain your computer, including deleting temporary files, clearing caches and defragmenting the disk. Some of these tasks can be automated or you can use software that makes it easier to carry out routine maintenance tasks. In Windows 7 the Windows Experience Index, which comes pre-installed, analyses your computer and then helps you sort out what actions to take to speed it up.

Steps to take:

- apply software updates and patches as soon as possible after they are released
- only install genuine software from an authorised source
- on Windows operating systems, run disk defragmenter, delete temp files and undertake other maintenance tasks

- if your computer is not behaving as it should, investigate further or get help from an IT professional.

Good computing habits

Learning about good habits and best practices will reduce the need and the likelihood that you or another person in your organisation will put a step wrong. This is particularly important when it comes to using the Internet.

Good habits include things like:

- blocking pop-up windows when browsing the Internet
- double-checking a website's security when making online payments
- knowing how to identify scam emails.

Steps to take:

- keep up to date by reading tips from Netsafe, *Netguide*, security websites and similar authoritative sources.

Putting it all together: a security plan

Put all these measures you're taking to protect your computers into a simple plan. A plan can help you see if you are doing enough, or if there are gaps. See a sample security listed in the links.

Note on the security plan areas where you need to take action to improve security. Make sure you come back to these at least every six months to check if you still have problems. As well as reviewing your security for any gaps, it is a good idea to schedule a preventative computer health check of your computer or IT system. It is suggested you do this every 18 months.

Part of a security plan may involve noting when and how outdated equipment will be replaced. Generally computer equipment more than seven years old has reached the end of its usable life. It's best to replace it before it dies.

The plan is something coordinators or managers can show board or committee members. This will give reassurance that the computers or IT system used in your organisation is sound and you're able to recover should a disaster happen.

Some other things to think about

Ergonomics and usage

Computers, if used incorrectly, can be harmful to a person's health. As you know, people are your most precious resource in your organisation, so you need to look after them.

Occupational health and safety laws require organisations to minimise risks relating to any hazardous activity. This includes computer usage. Most problems related to computer use are completely preventable and many are temporary. Adopting simple corrective action can quickly resolve problems.

The main risks associated with using computers include musculoskeletal problems and eye problems. These can range from general aches and pains to more serious problems and include repetitive strain injury (RSI), tenosynovitis, back and neck pain and discomfort, tension, stress headaches and related ailments, and carpal tunnel syndrome – which is by far the most important as it can quickly lead to permanent incapacity. Symptoms related to vision include visual fatigue, blurred or double vision, burning and watering eyes, headaches and frequent changes in prescription glasses.

Getting help

If any of the suggestions above make you nervous or overwhelmed, then you'll need to get help. This might include getting help with some or all of the following:

- installing and tweaking virus protection, firewalls, security patches, back-up and system upgrades
- installing new software programmes
- routine maintenance, including network administration, installing broadband connections and wireless hubs
- working out what computers you need and helping to evaluate options (or, for larger organisations, proposals)
- working out information needs and developing a custom database.

Help could come from an advisor, technician, jack of all trades, strategist, network administrator or consultant. It's relatively rare for one person to be able to do all the things you need. Making a decision about the best service or person requires some careful attention. Even if you've got an offer of volunteer or pro bono help, you need to be assured that whoever is working with your organisation can actually deliver on what they promise and won't upset your system.

There are a small number of specialist organisations providing IT services to community and voluntary organisations.

Tips on choosing a volunteer

- Ask for references, particularly from other organisations that they've worked with.
- Take a look at their CV. You may not understand all the technical terms but you'll get an idea of their areas of expertise.
- If someone will be working alongside vulnerable clients or dealing with confidential data you may need to run a standard police check and ask the volunteer to agree to your privacy policy.
- If your project is to design a website, ask to see other sites they have designed
- As with people from any specialist profession, IT has its own jargon. Choose someone who takes the time to ensure you understand what they're talking about.

Links

Getting help that is helpful, article, TechSoup (USA) (<http://www.techsoup.org/learningcenter/volunteers/page5428.cfm>)

Working with technical volunteers guide, TechSoup (USA) (<http://www.techsoup.org/learningcenter/volunteers/page11651.cfm>)

Tips

Do you actually know if your back-up is working as it should? Run a trial by restoring some important files from your back-up every month or so.

Keep a log of bugs and gremlins you experience with computers in your organisation. Review the list to see if a particular computer is playing up.

Computer safety resources, Netsafe (NZ) (http://www.netsafe.org.nz/keeping_safe.php?sectionID=computers&pageID=253&menuID=253)

Healthy and secure computing workbook, TechSoup (USA) (<http://www.techsoup.org/hsc/page6151.cfm>)

Ten tips to protect yourself – ICT Advice and Support, NCVO (UK) (<http://www.ncvo-vol.org.uk/advice-support/ict/managing-ict/ten-tips-to-protect-yourself>)

Sample security plan, Microsoft (<http://www.microsoft.com/canada/smallbiz/issues/sgcv2/security-guidance-centre/whats-a-security-plan.msp>)

Choosing computer hardware

There are many choices of computers and related devices. It can be difficult to know what is the best match for your organisation's needs. As you are unlikely to replace your computers very often, it is important to take enough time to make a good decision.

Of course we're talking about much more than just PCs, as you'll likely need a printer, scanner, portable hard drive, and, if you're in an office with lots of computers, possibly a dedicated file server.

With computer technology changing so rapidly it is not possible to advise on minimum specifications.

Before you purchase

The first thing to think about is how a computer will be used. There are many different scenarios within an organisation:

- basic office work by an administrator who writes letters, checks emails and updates the website
- database administrator who handles large quantities of data going back many years
- a communications person designing the newsletter
- a volunteer who updates records once a week
- a field worker who spends most of their time visiting clients.

For each of these roles you can choose a computer with a set-up that best suits needs and budget. You don't always need expensive and fast computers loaded with software.

It's helpful to know what the various parts of a computer are so your salesperson doesn't baffle you. The core computer parts are: processing power (or CPU), graphics card, memory (or RAM) and hard drive (storage). If you're going to link computers in an office, you'll need a network (or ethernet) port.

Getting a basic understanding of specifications will help you write down a list of what you need. Take this with you when you visit a computer store.

Thinking through the full cost of owning any equipment before you buy can save you money later. For instance, it may be tempting to buy a computer running a different operating system to one you've used before. Without access to support you'll probably be slower doing things, need extra time to learn and you may have to pay for courses. You could face compatibility issues with existing computer equipment that is time-consuming to sort out.

If you are updating a computer, this is a good time to think about other equipment you might need. Keyboards and mice wear out so they may need to be replaced. A portable hard-drive that plugs into your computer can store an entire copy of all your files. This is a very convenient way of backing up data (see section 1.1 Backing up and restoring).

Buying new

There are many types of computer suppliers. As well as visiting the local big chain store, you may like to consider shopping with a specialist business computer store. Consumer reports show smaller businesses are top-rated for their customer service. Business suppliers sell PCs designed for prolonged usage every day and with fewer bells and whistles (i.e. a workhorse not an entertainment centre). You can also shop online.

Before handing over a cheque:

- ask about the warranty that comes with the computer
- check exactly what you will get in the box (a keyboard, mouse as well as the computer itself?)
- check if there is a support number you can call, and how many days' support you get to help with setting up the computer.

Buying used

There are always cheap computers for sale on auction and classified ad websites. Be wary of these as you cannot verify a unit's history. If possible, view the computer before you pay for it and ideally have it checked by an experienced IT technician. It is best to avoid all used laptops as these are difficult to repair and subject to much rougher lives than desktop computers.

A better option than buying used is purchasing refurbished computers. These are typically from corporate or government offices and are inspected and updated by a professional.

Options for buying refurbished computers:

- TechSoup New Zealand offers a range of computers with a 90-day warranty from a professional refurbisher
- Check the Computer Access New Zealand-affiliated refurbishers
- Ask at your family-owned computer store, they often have a stock of good used computers.

Free computers

Offers of free computers are pretty frequent. These need to be looked into just as closely as when you are buying equipment. Accepting a gifted computer could be more trouble than it's worth.

As it will most likely be older technology, check that it has the processing power and memory needed to run the software you regularly use. Getting an old and slow machine will frustrate you, and be something you wished you'd never accepted.

If you do accept a free computer, make sure it is 'cleaned' of all old data, and has current virus protection software installed. Also get copies of appropriate licences as you do not want to be caught out breaching software terms of use.

Tips

Consumer publishes reviews about computers, printers and other devices. This includes information about running costs and reliability.

After you've decided on the equipment you want, check the PriceSpy database to find the lowest prices.

Links

Buying hardware – ICT Advice and Support, NCVO (UK) (<http://www.ncvo-vol.org.uk/advice-support/ict/managing-ict/buying-hardware>)

Computer Access New Zealand (<http://www.canz.org.nz/>)

Consumer NZ (<http://www.consumer.org.nz>)

PriceSpy (<http://www.pricespy.co.nz>)

TechSoup NZ (<http://www.techsoup.net.nz/>)

Choosing and using software

If hardware and wiring is the computer system's skeleton, then software is the organs. Without software you would not be able to use a computer.

While there are many common software needs shared by organisations, your needs are different to every other group. You may need to gather and analyse statistics, scan documents, keep track of clients, raise funds, publish reports, or do other activities no other organisation does. Only you can assess what your needs are.

It is important to know about what types of software are available, how to choose software, and where to get it from.

What do you need?

There is some software that virtually everyone in your organisation will use. A standard range of programmes you'd expect to find on a computer reflects the common tasks we undertake:

- word processing – producing letters and reports, simple posters, flyers and other printed materials
- spreadsheets – managing finances and project budgets; storing, analysing and monitoring information, and statistics

- email – sending and receiving emails
- contacts – storing and retrieving addresses, phone numbers, email addresses and so on; managing mailing lists and producing labels
- web browser – searching the Internet and viewing web pages
- diary – calendars, reminders and planning
- instant communications – instant messages, chat or Internet phone calls (e.g. Skype).

Some people carry out specialist roles so need the tools to do the job. For example:

- desktop publishing – producing more advanced flyers, posters, newsletters
- graphics programs – working with images
- managing your accounts
- designing and updating your website
- preparing presentations
- managing information using a database, such as client record systems, maintaining relationships with supporters, bookings, information for monitoring and reporting activity for funders, etc
- preparing schedules and task lists when managing projects or teams of people.

What are the options?

The Microsoft Windows operating system dominates the market, as does the Microsoft Office suite of tools. The familiarity and relatively low price presents a compelling case for its integrated bundles.

There are other choices, including free, open-source software. This type of software is created by people working together around the world and can be modified by its users. There is no charge for using it. Programmes run on Windows, Mac OS X and Linux systems. For almost every package you use from Windows or other commercial suppliers, you can find open-source alternatives. The most widely used examples include the Firefox web browser, OpenOffice productivity suite, and VLC player.

Some software can be used over the Internet without the need to download or install software on to your computer. These online tools include Google Docs, Zoho productivity applications, and Microsoft Live Office. Most online services support document editing by more than one person, and export in a variety of formats. These sorts of tools are particularly useful for working with others. You rely on being connected to the Internet to use them.

A wide range of specialist software is available for sale. This is often used for tasks such as keeping accounts, designing newsletters, running events, or web design. For community groups there are many affordable and reliable packages to help you keep track of supporters, volunteers, membership fees and other fundraising activities.

In some situations, you might not be able to find existing software that does exactly what you want it to. This particularly applies to databases. So you might need to design and create your own database, ideally with professional help. There is considerable effort involved in defining needs, communicating with IT professionals, testing and introducing customised software. This is not for the faint-hearted.

How to choose?

Price is just one of the things you need to take into account when choosing software. It is recommended when choosing to ask to see or download a demo, and ask around others who are using it.

You might also check online to see what others in the same situation are using. The Social Source Commons is a place people working in groups share lists of software tools they're using. On the Idealware website and blog you will find independent product reviews of software that not-for-profits use, along with advice on choosing software.

Things to think about:

- is the software compatible with the version of the operating system you've got
- does your computer have enough memory and oomph (or meet minimum specifications)
- how much support is offered when you're learning a product? Does this include phone support or just online?
- is the software familiar to people in your organisation, or will everyone need to learn it from scratch?
- do you get free upgrades when a new version comes out or do you have to pay for them?
- is a discount offered to charities?
- is the company or organisation behind it legitimate?

When choosing large and costly software, a rigorous selection process is recommended. This can take a significant amount of time, and achieves best results when people from across the whole organisation are involved in making decisions.

Where to get software?

You don't need to buy software in a box from a physical store any more. Availability of fast Internet connections means it is possible to download and install software from your desk.

When looking for software, don't trust every source you find on the Internet. Sometimes people use software downloads to install viruses or other malicious things on your computer without your knowledge. It's important to download new software from a reputable source, such as downloads.cnet.com or sourceforge.net

Donated Microsoft software, along with software offered by other commercial providers, is distributed by TechSoup New Zealand. After organisations register and are assessed for eligibility, they pay a small administration fee to receive the software. The catalogue is available online.

Cloud computing

This new concept is attracting a lot of attention as it promises to reduce the need for continual computer upgrades and provides access from virtually anywhere.

Using cloud computing means the programmes and data you use are not stored on your computer, but on the IT system or servers of a provider.

As maintenance, software upgrades, system maintenance, etc, are the responsibility of the service provider, all your organisation needs to do is keep a basic computer going.

You may already be using the cloud without knowing it's called this. Accessing email from Google or Yahoo is an example. You log in via a webpage to read and send messages, rather than using a programme on your computer like Outlook or Thunderbird.

Common things you may do in the cloud include: writing or storing documents, backing up files, accessing email, or tracking the work of a committee or project.

Practical examples include:

- the New Zealand Drug Foundation keeps track of finances through the Xero accounting package. This New Zealand-based software as service (SaaS) offers multiple logins so you can access your bank transactions, invoices, reports, GST, etc. All your data is stored on Xero's computers.
- the NZ Coalition to End Homelessness is using wiki to store minutes and documents, and make them available to all members of the organising committee.

Links

Cloud computing resources, TechSoup (<http://home.techsoup.org/pages/cloudcomputing.aspx>)

Tips

- Keep track of licences – as a software licence holder you are responsible for keeping track of serial numbers to prevent misuse. These details may also be needed when you're restoring a faulty computer.
- If commercial software you'd like to have is outside your budget, visit 'Alternative to' or 'Open-source alternatives' to find other options.

Links

Alternative to (<http://www.alternativeto.net/>)

Choosing software – ICT Advice and Support, NCVO (UK) (<http://www.ncvo-vol.org.uk/advice-support/ict/managing-ict/choosing-software>)

downloads.com (<http://downloads.cnet.com/>)

Idealware (<http://www.idealware.org/>)

Open Source Alternatives (<http://www.osalt.com>)

Open Source Manuals (<http://en.flossmanuals.net/>)

Social Source Commons (<http://socialsourcecommons.org/>)

Sourceforge, for free, open source software (<http://sourceforge.net/>)

TechSoup NZ (<http://www.techsoup.net.nz/>)

'The Perfect Fit: A Guide to Evaluating and Purchasing Major Software Systems', article, Idealware (http://www.idealware.org/articles/purchasing_major_systems.php)

Office set-up

Nowadays it is very rare for organisations to use computers without an Internet connection. Getting Internet access is one of the first things that organisations do when they're setting up an office. How to get connected to the Internet is outlined below.

If your organisation is very small, using just one computer, you will not gain much from installing a computer network. However, if you're in a situation with several computers and want to share files, access a single Internet connection and printer, access common calendars, and back up to a portable drive, then setting up a network is worth investigating.

Getting an Internet connection

Getting connected to the Internet means you can receive email, browse websites, do other things like make Skype phone calls, send instant messages, keep your accounts on Xero, and use other online services.

To be connected you need:

- a service that delivers Internet to your building from an Internet Service Provider (ISP). Options available are dial-up, broadband (either ADSL or cable), wifi and satellite. Internet access is provided by large phone companies and many specialist ISPs. You normally pay monthly for a package with a set amount of downloads. Sizes and costs vary; see the *Consumer NZ* broadband calculator.
- a modem to receive the Internet via a cable or wirelessly, and cables to link the modem to your computer (or router in networked offices).

You may need some technical assistance to make sure all the wires are plugged into the right places. This is normally part of the deal when you set up a new account. Sharing an Internet connection with a neighbouring office is something you could look into.

All ISPs will have their own complaints procedures. If you are not satisfied a problem has been addressed by your ISP then you can approach the Telecommunication Dispute Resolution service. This is a free and independent service with many major telecommunication companies involved.

Out of the office

For people whose work regularly takes them from their desk and who use a laptop, it is easy and affordable to connect to the Internet while on the move.

Most recent laptops have a wireless or wifi networking card pre-installed. This allows users to access wifi that is readily available through:

- public libraries that are part of the Aotearoa People's Network
- hotspots provided by Telecom at hundreds of cafes, hotels, and airports
- free wifi provided by local businesses or cafes, eg Lawrence in Otago, Wellington waterfront, Ponsonby retailers, Starbucks
- commercial services in main centres such as CafeNet, Fivo, and at Internet cafes.

You can depend on finding wifi virtually everywhere you travel.

The option of purchasing a plug-in mobile broadband USB-dongle/ thingy means you can access email and the Internet anyway within range of the cell phone network. Telecom, Vodafone and 2degrees all offer different packages. Not all providers offer nationwide coverage.

The best match for your needs depends where and how often you move around. As well as considering cost (and whether you will really need mobile access) you need to take security precautions. Using public wifi networks does open your computer to some threats.

Networking basics

When you outgrow sharing files by handing over a floppy disk or USB drive or emailing documents, then it might be time to look into setting up a computer network. The core idea stays the same regardless of size or complexity: it's about two or more computers being connected together to share information. All networking, no matter how complex, builds off this simple system

Other advantages of networks include:

- ease of automated back-up between multiple computers
- allows for remote access
- increased speed and efficiency of software updates.

Networks come in two main forms:

- peer-to-peer, which does not have any dedicated computers or hierarchy among the computers. All of the computers on the network handle security and administration for themselves
- server-based, which involves storing all files and managing the network from a powerful computer dedicated to the task.

Networks can be run using cables or via a wireless unit. The software used to run a network can be either proprietary (such as products offered by Microsoft) or free, open source.

Choosing a particular approach depends on your needs and the size of your office. Just as there are things you need to do to ensure individual PCs are secure and protected, so are there steps you have to take to do this with networks.

Planning and setting up a computer network is something where experienced help can save time and be more reliable. Factoring in ongoing network maintenance and troubleshooting support is essential to a healthy and functioning network.

Emerging technologies

Do you need a fridge in your office that you can remotely control? Or a powerful smart phone that you can record video on and send out to the world?

Sometimes there are easy answers, other times not so easy. It can be hard to decide what is essential and what is just desirable.

People often talk excitedly about the promise of the latest gadgets. In 2010 interactive tablet devices like the iPad, are being touted as tools for health workers, fieldworkers and therapists. You need to ask, will the benefits of using a new technology outweigh the potential pitfalls? Or are you adopting technology for the sake of it? How much use will the powerful and expensive tools really get?

Links

Broadband Internet, *Consumer NZ* (<http://www.consumer.org.nz/reports/broadband-internet/>)

'Getting online', article, Lasa ICT Knowledgebase (UK) (<http://www.ictknowledgebase.org.uk/gettingonline>)

'Getting a network', article, Lasa ICT Knowledgebase (UK) (<http://www.ictknowledgebase.org.uk/getanetwork>)

Networking resources, TechSoup (USA) (<http://www.techsoup.org/learningcenter/networks/index.cfm>)

Telecommunication Dispute Resolution Service (<http://www.tdr.org.nz/>)

Technology planning

The main reason to do some technology planning is to ensure your organisation thinks ahead and makes wise use of limited funding. Effective planning is all about working through what your organisation is trying to achieve and whether you've got the right tools to do this. It is not about writing big documents or focusing solely on computers and other IT equipment.

Planning helps you focus on your administration, information, communication and management needs, rather than on the technology for its own sake.

Many people think they need detailed technical knowledge before making decisions about technology, or are confused about what it can do because they're not familiar with it. Use the planning process to record where you and others want to learn more.

Whatever form your plan takes, it's useful to consider whether the following fit in:

- Running a skills audit of staff and volunteers
- Checking health of computers, including checking virus protection and performance
- Documenting what computer equipment you've got, including noting down the age, operating system and serial numbers. Use this information to decide when things need to be replaced.
- Recording passwords and permissions, any software licences, domain names, ISP account details and other similar details.
- Considering what you can afford to spend on replacements, maintenance and trying new things out
- Summarising the technology help and support available to you.
- Noting any weak links in the way you use technology.

Writing some of this information down is important for insurance purposes, should anything go missing or be destroyed. It's a good idea to keep a copy of essential information offsite.

As well as keeping details up-to-date, if you purchase new equipment, set a date to review your plan every six months or so. This gives you a chance to check what progress has been made against key targets or if any of the problems you listed are resolved.

Policies

For organisations working with whānau, children and young people, it is very important to think through the risks of misuse of computers available to the public and staff. NetSafe recommends every organisation put in place a robust cybersafety framework. Sometimes this is called an acceptable use policy.

While inappropriate computer use (e.g. time-wasting, accessing offensive material) is generally covered by the terms of volunteer or employment agreements, having a specific IT policy is a good idea. Not only does it make clear what standards everyone in an organisation must live up to, it provides a way of positively promoting safe computing.

An agreement offered by Netsafe defines staff obligations, responsibilities, and the nature of possible consequences associated with cybersafety breaches and behaviour which might undermine the safety of the workplace environment. Guidance is also available on handling an incident of misuse.

Other policies you'll need depend on what your organisation does. If you are storing personal information then a privacy and/or confidentiality policy might be needed. Your board might ask to see what measures you're taking to protect the organisation's computers, which a security policy would cover.

Links

Cybersafety framework, Netsafe (http://www.netsafe.org.nz/keeping_safe.php?sectionID=business&titleID=Community%20Organisations&pageID=177&menuID=177_)

'From nightmare to nirvana: an ICT survival guide for trustees', NCVO (UK) (<http://www.scribd.com/doc/4020650/ICT-Hub-Good-Governance-Guide>)

'Why should I write an ICT plan?' – ICT Advice and Support, NCVO (UK) (<http://www.ncvo-vol.org.uk/advice-support/ict/managing-ict/why-should-i-write-an-ict-plan>)

Using the Internet to reach out

You can get a lot done through using the Internet. As well as research and learning, you can go online to:

- connect and engage with supporters and members
- promote what you do and your views
- tell your story
- organise a meeting or manage a project
- collect opinions or facts
- network and collaborate with other professionals and people working in your field.

Some of the many things that your organisation may do online are rock solid. They have been around since the birth of the Internet and are well proven. Other things were invented just last week by someone in their garage and they may vanish within a month or have 500 million users after five years (as Facebook did).

Taking your organisation online means to some extent being prepared to experiment and be creative. Seldom does everything you try actually achieve what you thought it would. Learning itself is a positive outcome.

If something is not working out then it's easy to stop doing it. It's not the physical world where you will be left with boxes of brochures that are out of date if things don't go as planned.

With so many opportunities to try things online, when you start you need to have some idea of what success looks like. Note down your goals, then measure progress regularly. Goals are things like increasing members, receiving more donations, or having more people using your services. Having large numbers of website visitors may not necessarily help your organisation achieve its vision.

Websites

Whether you want to advertise your opening hours, reap support for a campaign or tell your story, an organisational website has a place to play. Think of your website as a showcase to the world.

The structure and design of websites varies a lot. While bigger organisations may have sophisticated websites with lots of features, even the smallest ones can have a simple website that is like a brochure telling people what you do and where to find you.

The possibilities of what you can share using a website is almost limitless. As well as the written word you can easily incorporate multimedia. Things you might consider are: video; slideshows; presentations; audio; mindmaps; word pictures.

Websites can also be a place for people to interact with each other or people within your organisation. A blog is one way for leaders to share their opinions and workers their experiences. Free-flowing discussion and debate can be fostered in online forums. Or you can run short polls, or offer ways for people to take action (e.g. send a quick submission).

Common ways to create a website are:

- DIY – an enthusiastic volunteer may create a website from scratch using a programme like Adobe Dreamweaver, NVU, Expression Engine. This involves manipulating HTML code.
- Use a content management system (eg Wordpress, Drupal, Joomla) – with some help with installing software and modifying the look and feel, you can allow many people to make updates themselves
- Free site builders – based on templates you can piece a website together using different elements e.g. Google sites, Weebly, Wordpress.com

As well as actually building a website and uploading material, things you need to ask questions about are:

- Security and privacy – are things set up so no-one can hack your website, or steal users' personal information?
- Maintenance – who is going to do this and how often?
- Integration with all the other ways you communicate – are you saying the same things everywhere?

Email newsletters and lists

Putting together a collection of stories, updates and appeals, then sending them out by email is a very convenient and cheap way of telling people what your organisation is doing.

Messages arriving in your supporters' or members' email inboxes are hard for people to ignore. Email is something people check very regularly, unlike web pages, which rely on people to remember to visit.

There are two parts to setting up email newsletters:

- Formatting: you are not restricted to plain text as you can have more control of style and format of your newsletter using HTML. You can include logos and pictures, though this does require a higher level of skill. Choice of format really depends on the preferences of your subscribers, so offering a choice is good.
- Administering email list membership: rather than using an email group in Outlook or Thunderbird, it is recommended you use an email list service. This automates some of the administration and makes it easier for people to subscribe/unsubscribe. Services often allow you to track what links people click on.

Every email newsletter or alert you send must include details of how to unsubscribe. The rules governing spam also require that you include a way for people to make contact. While strictly speaking the anti-spam legislation only applies to businesses, it makes sense for community organisations to follow best practice.

Even with the growth of other networking opportunities, email lists which allow any member to send messages to everyone (known as many-to-many or discussion lists) are still important. Organisations can run these types of lists so people can ask questions, seek support or share news and updates. Common platforms include: Google Groups, Yahoo Groups, Mailman and Phplist.

Tip: Collect email addresses at every opportunity, including via a sign-up box on your website. You can even pass a paper list at seminars or workshops.

Facebook and other social media

People of all ages are using Facebook and other social networks. In 2010, it was reported that 72 per cent of New Zealanders use Facebook, the most popular social networking website. There are myriad other ways people connect online at photo-sharing, blog, bookmarking and video-sharing websites.

With everyone from corporations, government agencies, universities, to celebrities and good causes setting up a presence on social networks, it has rapidly become a mainstream communications activity.

However, it is also subject to change and fluctuations. The social networking world has yet to grow up, having only become popular in the last few years.

Popular networks have grown then died, or radically changed direction. Some networks that are popular elsewhere (such as Google's Orkut) get very few users in New Zealand. Other networks have been criticised for potentially breaching users' privacy, and could be subject to regulation or litigation.

As a presence on networks such as Facebook and Twitter is technically easy and free, there are few barriers to setting up a page or account. However, there are nuances of language and behaviour that are different from those used on your website or through official emails. The medium requires personality, not bland messages.

When you set a page or something up on a network you are to some degree giving over control. People who join do not just want to hear from you, they want to have a say. This is not always complimentary, so be ready for brickbats as well as bouquets.

People using social networks expect responsiveness. Comments or replies may be posted at nights or on the weekends. If you're only keeping office hours, some users will lose interest if there is not a quick reply.

Before jumping into the social media sea, your organisation will need to think through who can say what, when and how. And don't just follow the crowd. When choosing where to have a presence, make sure it's your goals and audiences that drive your decision not personal preferences.

Engaging innovatively

Of course the Internet provides chances to tell people what you're doing but it also offers many ways to collect, collate, share and debate both opinions and facts.

Here are some examples of how organisations are using online tools to collect and publish feedback:

- Workbridge and CCS Disability Action are using a wikispaces website to discuss the barriers that disabled people face in education and employment. Any visitor can add pages or leave comments.
- To get input about a governance review, Plunket asked its 2000-plus supporters on its Facebook page to share their views.
- More than 20 people have contributed to a cycle accident blackspot map set-up using a Google service by Cycle Aware Wellington. Anyone visiting can add to the map.

Links

Making it Work (<http://makingitwork.wikispaces.com/>)

Cycle Aware Wellington accident blackspots map (<http://maps.google.com/maps/ms?hl=en&ie=UTF8&source=embed&msa=0&msid=106796145084961333415.00045051b574a80432b8e&ll=-41.291222,174.79763&spn=0.102024,0.133209&z=13>)

Tips

Don't spread yourself too thin. Choose a small number of things and do them well.

Check the bona fides of any websites or services you use. Simple tests include references in IT media and use by large corporations.

Be prepared for change. Companies offering web services have been known to close down or be taken over. Make sure you can export or back up data stored online.

Keep it fresh! Your visitors are very discerning and quickly move on to somewhere else if you have stale information.

Make sure everyone can visit your website by ensuring accessible design is factored in. This is particularly important for seniors and people with disabilities.

Links

Broadcast emails resources, Idealware (USA) (<http://www.idealware.org/emails>)

Email discussion list resources, Idealware (USA) (<http://www.idealware.org/discussion>)

'How to Use New Media Guide' and 'New Media Case Studies', NCVO (UK) (<http://www.ictHub.org.uk/publications/#general>)

Websites section – ICT Advice and Support, NCVO (UK) (<http://www.ncvo-vol.org.uk/advice-support/ict/managing-ict/websites>)

The Nonprofit Social Media Decision Guide, July 2010, Idealware (USA) (<http://idealware.org/reports/nonprofit-social-media-decision-guide>)

Online toolkit for not-for-profits, yMeida (NZ) (<http://challenge.ymedia.co.nz/resources/>)

Social Networking how-to guide, CommunityNet Aotearoa (<http://www.community.net.nz/how-toguides/Social+Networking/>)

Your online presence resources, Lasa ICT Knowledgebase (UK) (<http://www.ictclubknowledgebase.org.uk/youronlinepresence>)

Training and learning

Gaining and improving IT skills has many benefits. It makes it easier for people to do their work, increases productivity, and helps your organisation make a greater impact.

There are downsides as time spent gaining new and improved skills does not always directly improve how your organisation operates, and not everyone wants to spend the time on computer training.

When you have limited time and budget you need to choose training and trainers carefully. To start with it's helpful to do some form of training needs analysis. This involves finding out what software people in your organisation are using and how skilful they are at using it. A simple needs analysis process can be run in any-sized organisation.

There are two steps:

1. creating a checklist for each bit of software you use
2. running a questionnaire to find out people's skill levels.

Analysing the results will help you decide on both individual and group training for your organisation. Remember, the aim is to improve everyone's knowledge in order that they can do their jobs quicker and easier, not to put people on the spot.

There are many free or affordable ways to access training. Listed below are a variety of training options available.

The basics

Do not take it for granted that everyone knows basic things about how to use a computer. For people who didn't receive schooling in New Zealand or have come from a country where computers weren't common, basic computing support will be required.

Two online essential resources:

- BBC Webwise – offers web-based courses on such things as how to use a mouse and keyboard, printing, what are windows and icons, what the Internet is and how it can be used.
- Kiwiskills International Computer Driver's Licence – covers key concepts of computing, as well as the practical office PC applications at work and home. Seven modules cover: security for IT users; fundamentals; word processing, spreadsheet, database and presentation software; and using email and the Internet. After completing the modules you can sit a test and receive a qualification. There is a charge for this course.

Formal and structured training

Training comes in all shapes and sizes, to reflect the variety of styles preferred by learners. Providers include big institutions like universities, schools providing community education, companies and not-for-profit organisations.

Common subjects for short courses include:

- common software packages for word processing
- design and web publishing
- using image and multimedia
- setting up and running a database.

Longer courses offered include business computing, programming, network administration, IT management and website design. Some papers from a degree course might be useful for a staff member in a management role, or someone planning a major database project.

Informal learning

You're doing this already if you are reading this guide. Most people learn using an organic, self-directed process. Much as classroom learning is important, typically we also learn when we've got a problem or opportunity that needs new knowledge to respond to.

One of the most important sources of help is the people around you. Share tips over a coffee or ask the IT enthusiast down the hall. One of the best things about casual learning like this is that people translate the often obscure computer terms into words and concepts you can actually understand.

Online courses

Support and mini courses about software and problem solving are abundant online. Other computer users just like you are contributing to websites like Wonder How To and eHow. More structured online courses are offered by specialist training companies, such as vtc.com and lynda.com, with a monthly subscription fee. Courses can run for as long as nine hours.

Not-for-profit

Courses and events are run by community organisations around the country. Volunteer centres, yMedia, local community ICT trusts, TechSoup NZ and others run everything from one-hour seminars to conferences. Keep an eye on community notice boards or event lists for details.

Access to the worldwide web means anyone can access support from like-minded people using IT in community organisations around the world.

Short online training webinars (seminar on the web) with specialist speakers and a chance to ask questions are available. Joining in live means can mean an early start as currently most of the webinars available are run from the USA. However, often you can access an archive of the recording, presentation and materials after the event. Topics cover everything from databases, web design to using shiny, new social media tools.

Check out:

- Network for Good's free training series on non-profit marketing and online fundraising
- TechSoup Talks.

Getting a chance to ask questions or scan what is on top for others is a feature at forums offered by UK ICT Knowledgebase and TechSoup. These forums are friendly places where you can make contact with enthusiastic people addressing practical issues. Don't be whakamā, or shy, about joining in.

Many IT practitioners, visionaries and advisors working with not-for-profit organisations are writing about how organisations are using computers powerfully. Individual blogs wax and wane, so any thing suggested here is not guaranteed to still be around. Look for blogs by the organisations listed in the general resources section, or search for blogging plus nfp tech, non-profit technology, or community ICT.

New Zealand know-how

There are lots of ways to find a New Zealand take on technology. In your library, bookstore or online you'll find publications with news, reviews and opinion about technology products, services and everything else. These include *Consumer* and *Netguide*. Commentators regularly appearing on the TV and radio talk a lot about trends and the social side of the Internet, not just the gadgets. People to look out for include Hamish McEwan, Jules Older, Helen Baxter, and Ben Gracewood. Blogging and tweeting with a non-profit focus can be found at Netsafe and yMedia.

Supporting accidental techies

Do you have someone in your organisation you turn to for help with computer problems? Is someone always saying this is not in my job description, but I can help to fix the printer?

It's important to acknowledge the contribution of this type of support. If you're looking for a name for your troubleshooter, the idea of accidental techie has sprung up.

People in this role, along with dedicated IT staff (who are few and far between), will benefit from access to more advanced training opportunities. Learning about what is on the horizon and applying this to the work of your organisation can play dividends.

Look after your geek.

Links

'Training: get the ICT skills you need' – ICT Advice and Support, NCVO (UK) (<http://www.ncvo-vol.org.uk/advice-support/ict/managing-ict/training%3A-get-the-ict-skills-you-need>)

Basics

BBC Webwise (<http://www.bbc.co.uk/webwise/>)

Kiwiskills International Computer Driver's Licence (<http://www.kiwiskills.co.nz/>)

Forums

UK ICT Knowledgebase (<http://www.ictknowledgebase.org.uk/forums/index.php>)

TechSoup (<http://www.techsoup.org/community>)

New Zealand know-how

Consumer NZ (<http://www.consumer.org.nz/>)

Netguide, from your newsagent or dairy

Netsafe blog (<http://blog.netsafe.org.nz/>)

TechSoup NZ (<http://www.techsoup.org.nz>)

yMedia (<http://challenge.ymedia.co.nz>)

Online training

eHow – free how-to videos (<http://www.ehow.com/>)

lynda.com – paid-for online software training (<http://lynda.com>)

vtc.com – paid-for online software training (<http://vtc.com>)

Wonder How To – free how-to videos (<http://www.wonderhowto.com/>)

Webinars

Network for Good's training series, (www.fundraising123.org/training)

TechSoup Talks (<http://www.techsoup.org/learningcenter/webinars/index.cfm>)

General resources and glossaries

There are many sources of advice and support for community and voluntary organisations about using computers and other technology. The general resources listed here are comprehensive, regularly add new material, invite contributions from a wide network of people, and are targeted specifically at the needs of community organisations.

CommunityNet Aotearoa how-to guides

Practical information and resources that help New Zealand community organisations to be effective and sustainable, including use of IT and Internet (<http://www.community.net.nz/how-toguides/it/>) and Social networking (<http://www.community.net.nz/how-toguides/Social+Networking/>).

Idealware (<http://www.idealware.org/>)

A source of independent product reviews of software that not-for-profits use, along with advice on choosing software. Publishers of 'The Fieldguide to Software for Nonprofits'

Managing ICT guide, NCVO

This 106-page guide covers the basics of good practice management of ICT within the community and voluntary sector. Hardcopy for sale by NCVO (<http://www.ncvo-vol.org.uk/products-services/publications/guide-to-managing-ict>)

PDF version on Scribd (<http://www.scribd.com/doc/4029043/Managing-ICT-in-the-Voluntary-Sector>) (http://www.ichub.org.uk/managing_ict/)

Lasa ICT Knowledgebase (<http://www.ichubknowledgebase.org.uk/>)

A comprehensive source of independent ICT information and advice. Includes articles, checklists, templates, links and discussion for everyone from beginners to advanced practitioners.

TechSoup (<http://techsoup.org>)

A one-stop resource providing free information, resources, and support to not-for-profit organisations.

Other places to look:

Beth Kanter (USA) – blogs about how networked non-profits are using social media to power change

Connecting Up Australia (<http://www.bethkanter.org/>)

Non-profit Technology Network (USA) – a membership organisation of non-profit professionals who put technology to use for their causes (<http://www.nten.org/>)

Glossaries

If you want to know what RAM is or need a short description of how email lists work, you should be able to find a definition that you understand in one these glossaries. Each of the glossaries listed here takes a different approach from covering basics to the highly technical.

BBC WebWise glossary (<http://www.bbc.co.uk/webwise/a-z/a>)

Managing ICT glossary, NCVO (UK) (http://www.ict hub.org.uk/managing_ICT/glossary.html)

Tech Encyclopedia (www.techweb.com/encyclopedia)

Whatis.com (<http://whatis.techtarget.com>)