eRider **Starter Kit**

Version 1.0

Created by Teresa Crawford &
the Tactical Technology Collective
with support from the
global eRider community

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Teresa has spent the last 6 years supporting non governmental organizations to make better use of information and information technology. In addition to supporting and mentoring various circuit rider projects she currently manages the global eRider community website – http://www.eriders.net and the global eRider community discussion list.

From 1998 - 2004 Teresa was the technical director of The Advocacy Project, a US based organization, that supports community campaigners for peace and human rights to use ICTs in their advocacy work. With AP she has worked in over 20 countries on over 30 projects. In 1999 Teresa co-founded the first post war Internet Service Provider in Kosovo. In 2004 she helped to found the first Roma led independent consulting organization providing services to Roma organizations in Central, Eastern and Southeastern Europe.

Teresa has often been accused by other eRiders of being online all the time. It is most likely because she works from home in Brooklyn, NY, USA and to the chagrin of her husband is usually found in her pajamas in front of the computer.

Tactical Technology Collective – Amsterdam, Holland

The Tactical Technology Collective's aim is to advance the use of new technologies as a tactical tool for civil-society in developing and transition countries. We are a not-for-profit stichting (foundation) based in Amsterdam.

The Tactical Technology Collective (Tactical Tech) aims to strengthen social technology movements and networks in developing and transition countries, as well as promote civil society's effective, conscious and creative use of new technologies.

Tactical Tech stands at the crossroads of the civil society and technology sectors. Through building links between them, we aim to help establish an accessible baseline of Information Communication Technologies (ICTs) needed by all civil society organizations and their integration beyond rudimentary usage into an integrated strategic tool for planning, advocacy & campaigning.

I. Introduction

This starter kit is designed to help organizations understand, design, implement, maintain and sustain an eRider project or program. This document is not the only way to go about developing a project but outlines a tested process that has been implemented by a variety of different initiatives throughout the world.

What is eRiding?

eRiding is a model for providing mission-driven technology support for the civil society sector. Services are provided by roving consultants with a wide range of skills including planning, training and technology troubleshooting. The eRider model is designed to deliver personal, flexible and mission-driven expertise at a relatively low cost to the nongovernmental organization (NGO).

Why Do eRiders Ride?

From eRider veteran Dirk Slater…
I eRide because I couldn't figure out any other job where I could use my interest in technology to really have an impact and contribute to real change in policies that impact negatively in low-income communities. I believe that the only way real change will happen is if the folks who are affected have a say in what those policies should be. So through supporting the organizing work in low-income communities and helping community-led organizations there, I feel that I am doing the best work towards change that I can. I also have a severe problem-solving addiction (anyone want to form a support group for that?).

Dirk is an eRider with the LINC Project of the Welfare Law Center based in New York, USA – http://www.lincproject.org

eRiding is a holistic approach to technology support which includes an in-depth understanding of the way the organization works, how it integrates ICTs (information and communication technologies) into its programs and the steps needed to use technology as a tool in its work.

Tom, eRider from Poland helps an NGO recycle new computers from old computer parts.

eRiding is based on the 'circuit riding' model pioneered in the United States. Circuit riding began more than seven years ago as an effort by several foundations to provide technology assistance to their grantees. Within these few years, the community has grown to include more than 600 circuit riders and several national and community foundations provide eRiding services to their grantees throughout the United States. eRiding, the global brand of circuit riding, began to spread outside the United States in 1997.

eRiding is in contrast to isolated or fragmented programs that would provide equipment to a group but no training or train a group but develop no plan for how to use the technology in their work or would develop a plan but would not help the group to implement the plan. In developing the eRider model in the US and abroad, donors and NGO supporters, recognized that groups would benefit from an approach that focused on training, planning, project development and implementation.

II. The eRider Concept

eRiders are roving consultants who work on a one-to-one basis with a group of NGOs, helping each organization to develop and implement an information and communications technology (ICT) strategy tailored to its unique aims, needs and context.

The eRider's primary aims are to help organizations

- Understand the potential value of information and communication technologies (ICTs)
- Integrate ICTs into their programmatic work
- Enhance the ICT component of their management.

Because eRiders primarily local consultants (from the country, region or city in which they are working) who have both significant NGO experience and substantial technical expertise, they are able to think about technology from the NGO's perspective. As local individuals, they are aware of the NGO's cultural context and are sincerely dedicated to improving the society in which they work.

The job of eRiders is to help their clients navigate the complex world of computers.

eRiders often work in small teams coordinated by a local leader. Other eRiders work as part of a larger team or network, coordinated by an outside manager or capacity building organization. These teams deliver one-to-one consulting services and hands-on technical support. Although much eRider work is technology related, eRiders also are adept at diagnosing management, fundraising, accounting and personnel problems.

The exact nature of the services they provide depends on whether their interventions are technology specific (Free and Open Source Software) or sector specific (minority rights groups).
The ultimate aim of eRiders is to raise the NGO's level of knowledge and expertise to a point that renders eRider services unnecessary. The eRider may then move on to work with other organizations.

A. NGO-Centered Technology

In general, NGOs in developing and transitional countries have just begun to explore the ways in which new technologies can maximize the impact of their programs. Some organizations are struggling to acquire computer equipment, while others already actively use e-mail and the World Wide Web. But very few have fully integrated ICTs into their programs and projects. eRiders help these organizations to understand the value of integrating information and communication technologies into their work by focusing on projects and missions, and not solely upon computer systems. eRiders work with NGOs to help design and execute an ICT strategy specifically tailored to their specific aims, needs and context. In fact, the first step in the eRiding process is for the NGO staff and the eRider to assess and develop a strategic overview of the NGO's aims. They ask and answer questions such as:

- What does the organization want to achieve or change?
- What resources are available?
- What additional resources are necessary?
- What tools would be most useful?

The eRider approach is not about transforming civil-society NGOs into technology-driven organizations, but rather about supplying the NGOs with the hardware, software and expertise that is most relevant to their unique aims. In summary, the eRider model is designed to deliver personal, flexible and mission-driven expertise at a relatively low cost to the NGO.

B. The eRider's Role as Consultant

As a consultant, an eRider's success depends upon the level of trust and mutual respect exhibited in the professional relationship with the client organization. This relationship is of particular importance to eRiders for two reasons. First, eRiding is a client-centered approach in which the client is expected to play an active role. Second, most eRider clients are not accustomed to such a relationship.

Often, client organizations expect the eRider to act as an expert or doctor who simply arrives, diagnosis a problem, fixes it and then leaves. Or, the eRider is viewed as an extra employee and is expected to help with the work that is already being implemented.

In reality, the tasks of an eRider may be summarized in six steps:

- Discuss client needs and potential working relationship
- Agree on work products, possible work activities and working relationship
- Gather and present data regarding needs or problems

Practice Makes Perfect:
An eRider's First Day

After weeks of eRider training on technology and consulting issues, an optimistic eRider went to her first NGO, expecting her skills and the Technology Assessment Form (TAF) to get her through the initial interview. She was confident and ready to build the capacity of any NGO. Upon entering the office, however, she realized there was not even a desk at which to sit. The emptiness of the room closed in on her expectations. She had been taught not to present herself as an expert, but her quickly diminishing self-confidence made everyone a bit confused. Instead of working through the TAF on her lap, she sat in the office and read a book on tips for consultants. Practice makes perfect.

An eRider story from the Georgian eRider project – http://www.osgf.ge

- Review possible solutions and actions
- Implement agreed-upon activities to address problems or needs
- Review and evaluate the working relationship

Riders consistently look forways to apply new technologies in their work. This out door lab was set up at a training on community wireless.

eRiders are not magicians or doctors. As a facilitator, the eRider may help the client define a problem and generate a solution, but the client must be involved in implementing the solution. As a trainer, the eRider may offer skills, best practices and/or theoretical frameworks. Often, the eRider and the client have a long-term relationship, and both are involved intimately in the implementation process. eRiding always aims to build the internal capacity of the client organization so that it can take on its own technology needs competently and strategically in the future.

C. The eRiding Process: An Overview

NGO Needs Assessment

Working in tandem, the NGO staff and eRider develop and complete a customized needs assessment of the NGO's goals, resources and activities. Conclusions drawn from the assessment become the foundation for the development of the organization's technology strategy. The eRider needs assessment is a thorough and collaborative effort, distinguishing it from the standardized questionnaires that other consultants may use.

Strategy Development

The eRider works with the NGO staff to design a technology strategy specific to the NGO's needs. The strategy will consider the NGO's primary aims, the results of the needs assessment and the larger context of the organization's working environment, among other factors. A strategy may include the use of wireless technology, SMS, fax and video in addition to more traditional ICTs such as e-mail and the Internet. A complete implementation plan and timeline are included in the strategy.

Training

Staff and volunteer training often happens in parallel with strategy development and provides a tangible benefit to the organization while it goes through the planning process (which has benefits less visible to the NGO). This initial training often encompasses current technologies, and is not limited to new technologies that might be part of the planning process.

Implementation

During implementation the NGO management, staff and the eRider work together. The first phase of their work may be to acquire the necessary tools and/or resources. If so, this work may include proposal writing for technology equipment and upgrades, purchasing and installing hardware and installing software. Quite often this period involves an intensive round of training to get staff skills up to a competent level.

The eRider's activities and level of involvement will vary depending upon the needs of the organization, as will the frequency of visits and the duration of the relationship between the eRider and the organization. In some cases, the eRider may provide highly technical assistance for an organization every six months for several years, while in other cases the eRider may guide an organization, step-by-step, through an entire project.

Positive Side Effects:

ICTs have been an attractive force for NGOs hoping to attract volunteers. One of Astana's NGOs was having a particularly difficult time recruiting volunteers. The eRider organized a meeting and made a presentation to prospective volunteers. He stressed the opportunity for the volunteers to develop ICT skills while working with the NGO. One individual expressed interest in developing database skills and currently works on a project with the eRider. Since the meeting, two more volunteers have joined the organization and have initiated projects under the eRider's supervision.

An eRider story from the
Kazakh eRider project - http://www.soros.kz

Evaluation

During the strategy development phase, the NGO staff and eRider decide upon criteria for evaluating both the eRider program and the NGO's progress. The evaluation measures outputs, outcomes and impacts and may employ both qualitative and quantitative methods.

D. The Value of Exchange

The flexible nature of the eRider model creates many secondary benefits for the NGOs involved. The thematic focus of each project is often its driving force. Many eRider projects focus on a particular theme, such as social service in Poland or Free and Open Source Software in Bulgaria. Other eRider projects entail working with a certain sector of groups such as public HIV/AIDS clinics in Southern Africa. This focus allows the eRiders to have a cross-pollinating, or "bumblebee," effect: they pick up good ideas and best practices from one organization and introduce them to others. Such thematic focus also helps the eRiders to gain expertise in the field, enhancing their capacity to act as knowledgeable consultants. Not all eRiding projects have a thematic focus nor does a thematic focus prevent them from working with other groups.

NGO Networks

Since eRiders often work with a group of related organizations, they are ideally positioned to help these NGOs build effective networks. For example, an eRider working with several civil society organizations in Poland can help clients to identify others working on similar campaigns. These organizations may then work together, sharing valuable experiences and resources, and creating the kind of organizational "community" that generates both confidence and political influence. In addition, training materials and resources may be used at multiple organization thereby spreading development costs among multiple organizations.

eRiders themselves are part of a growing community dedicated to the free sharing of ideas, resources and tools. Therefore, working with an eRider is equivalent to working with a global network of technology consultants.

The exchange of knowledge within the budding international eRider network sets it apart from its corporate counterparts. Stories are shared (how an NGO network developed an information campaign), tips exchanged (how to work with a power generator), tools reviewed (pros and cons of online content management systems) and questions answered (such as which computer/fax system or Free and Open Source operating system distribution to recommend).

To enhance this exchange, the eRider network incorporates various ways for eRiders to share knowledge, enthusiasm and experience including a community website, regular newsletter and public discussion list and when possible "round-ups" or skill-share events where eRiders can meet, network and collaborate with one another. The eRider model is unlike corporate consultancy models where knowledge is proprietary. The commitment to sharing resources and materials supports ongoing 'low-touch' (low-intensity and therefore low-cost) support for NGOs.

Customize Your eRider Project

Advocacy eRider: Works with groups to better use ICT tools to advance their public lobbying, campaigning and advocacy efforts on behalf of disadvantaged individuals and communities.

Free and Open Source Software eRider: Works with groups to implement FOSS solutions ranging from the desktop to servers to content management systems.

iRider: Focuses their work on helping groups better access online information and tools for their work.

Health eRider: Works with service delivery organizations to integrate technology into their work providing essential health services to their community.

Telecentre eRider: Works to improve the functions of telecentres by upgrading software, hardware, staff skills. Aids in streamlining existing services, expanding services and better managing operations.

Education eRider: Works with schools with computer labs or institutions incorporating ICTs into their teaching and training.

Security eRider: Focuses on improving the security and integrity of NGO data and communications. Especially for those groups working on dangerous or risky issues.

Gender eRider: Focuses efforts on supporting women's groups especially those organized in coalitions or working on joint campaigns.

Media eRider: Works with media organizations to integrate technology into their work, streamline their operations and better manage their technology. Can include newspapers, radio and television with both an offline and an online component.

E. Specifics

The eRider model is flexible and may be adapted to suit a variety of contexts. For example, eRiders may:

- Work with advocacy or service NGOs;
- Provide short-term interventions or long-term support;
- Work with existing networks or foster new ones;
- Generate new projects or strengthen those already underway.

eRider programs often focus narrowly on a given sector, which enhances the eRiders' ability to act as experts and network builders. eRider projects may be focused by:

- Geographical area (a particular city or region);
- Issue;
- Type of organization;
- Supporting members of a network or clients of an existing intermediary organization.

eRiders are chosen carefully for their capacity to bridge the NGO-technology gap. Preferably eRiders:

- Are from the country, region or town in which they will work;
- Have civil society experience;
- Have technical skills and ICT knowledge;
- Have strong consultancy skills;
- Work with a group of NGOs;
- Have strong interpersonal skills and the ability to communicate in plain language;
- Work well in a team, are self-directed and able to work well independently.

Bulgarian eRiders help NGO staff use Free and Open Source software in their work.

It is not always possible for every eRider in a team to have all of the above skills. But teams of eRiders allow you to create a group that has all of the above skills within it. Some eRider projects have chosen to focus on hiring new graduates and then training them in many of the above skills. But the essential aspects of openness, motivation, creativity and curiosity distinguish a successful eRiders from others.

The team should have a:

- Strong network
- Prioritized information and knowledge exchange
- Determined, motivated and enthusiastic members
- Well documented processes and procedures
- Take a holistic/strategic approach;
- Focus on knowledge and skill transfer;

If just one or two eRiders work on a project, the goals and expectations should be clear and realistic. The work to be done should be manageable given the skills of the eRiders.

eRiders often provide a variety of services and may act as:

- Trainers
- Planners
- Trouble shooters
- Problem solvers
- One-to-one consultants
- Group facilitators
- Contact points
- Information brokers
- Content aggregators
- Negotiators
- Networkers
- Cross-pollinators (bring best practices, examples and tools from other clients)

But, the eRider will focus upon the services specifically outlined in the individual strategy developed for their clients. For example, one organization may need the eRider to work primarily as a trainer, while another may need more extensive project-management assistance. The range of services provided also will hinge on whether the project is sector specific or technology specific. An example would be an eRider project working with environmental organizations or a project spreading Free and Open Source Software use.

In a diverse group of projects, which have already been implemented, eRiders have been trained to aid organizations with the following tools and activities prioritized depending on the specific aims of the project:

- Management
- Project design
- Proposal writing
- Internet and website use/security
- Allocating staff resources
- Strategic planning
- Staff training
- Technology troubleshooting

eRiders also have provided regular technical assistance to help maintain the organization's computer systems, to include:

- Network services
- System configuration management
- Backup and recovery assistance
- Antivirusing
- General system maintenance
- Equipment troubleshooting and basic system repairs
- Hardware and software selection and installation

III. The eRider Process

There is no universally proven process for delivering eRider services. Rather, the eRider approach is inherently flexible, allowing managers to tailor the model to a variety of contextual factors. Likewise, there is no universal timeline for an eRider program, although this section offers approximations for each phase. In general, these durations assume that the clients share common features, but that they are new to the eRider model. The timeline may be condensed for more experienced parties. Conversely, more time may be necessary to organize a program for organizations with very little in common.

This section presents a general framework for the eRider process. It begins with a discussion of key factors that should be considered when conceiving an eRider project. It then presents each phase, offering alternative methods and recommendations for each.

B. Key Factors

Business/Financial Models

eRider services may be delivered via a variety of models, each of which permits a different financial, managerial and operational dynamic. A few sample models are presented below but are in no way representative of all the ways eRiding can be supported. To date, only the funded model has been used with projects outside the United States. This should be made clear to funders who should prepare for a long term investment in the eRiding model or only commit to a one off, short term intervention. Several global eRider projects are currently experimenting with earned income strategies.

Funded

In this model, a donor or group of donors subsidizes an eRider program for one or more NGOs. The donor may cover the entire cost of the eRider program or partially subsidize the cost. Often, services are provided for a limited period in order to render immediate aid to the NGO without burdening the donor with a long-term commitment. A donor may choose to manage the program in-house or to implement the program via an intermediary organization. Membership

In this structure, a group of NGOs receives services from a capacity building or other service-providing entity in

Gender eRider Tackles a Women's Network in Kosovo

The Kosova Women's Network was formed in 1998, with its primary focus being to provide humanitarian assistance to refugees and displaced people uprooted by the conflict in Kosovo. By 1999, with the end of the war and the international intervention, there were more than 30 members struggling to coordinate their activities and strengthen their network. They also were struggling to build the capacity of their newer, younger member organizations.

In 2001, in partnership with The Advocacy Project, an international organization, they implemented an eRider project to provide training and support for their members, help develop a website and launch an e-mail newsletter. The eRider traveled the province providing training, troubleshooting and general technology support to the members. The support was well received and this was one of the first projects to build the capacity of the network as a whole.

There were major challenges with the project. The Network hired just one eRider who had difficulty traveling on poor roads especially in winter; the phone company was undergoing major upgrades and changes; the funding environment was contracting and donor funds drying up; the Network did not have any paid staff or an office and struggled to coordinate its work and provide support to the eRider.

Producing regular content for the newsletter and website proved beyond its ability during the project's duration.In 2004 the network has established an office, is making use of the website, is issuing a regular expanded newsletter and points to the eRider project as the key for improving the input and communications with their members.

The Advocacy Project
http://www.advocacynet.org

Kosova Women's Network http://www.womensnetwork.org

return for fixed membership fees. The membership fees are then pooled and managed by the intermediary organization (local or nonlocal) in order to finance the eRider program. The intermediary organization may exist before the eRider program is set up or it may be created specifically to facilitate the eRider program. This model lets a group of NGOs obtain services that no single organization could afford. Membership in the service network may include benefits and/or costs in addition to eRider services.

Shared Cost

This model is similar to the membership structure described above. However, a group or network of NGOs assumes the role of the intermediary NGO. This network of NGOs must organize and manage the eRider program, collecting funds from the participating NGOs and allocating these funds accordingly.

Fee-for-services

In this model, a single NGO participates in an eRider program in exchange for a set fee. It is important to note that this is not a single fee-for-service model, but a fee-for-*services* model. The eRider takes the NGO through the entire strategy and technology development process in exchange for a predetermined fee. Quite often the fees are determined on a sliding scale with an organization with a larger budget paying more for services then one with a smaller budget but still below market prices for a similar service from a for-profit technology support company.

Mixed

Any combination of the above models may accommodate the real and current needs of the NGOs involved. Consider, for example, a network of human rights NGOs running an eRider program under the membership model. This network may have an interest in forming a partnership with a group of environmental NGOs in another region. Therefore, the human rights organizations may help the environmental organizations to obtain funding from a donor in order to participate in the eRider program, sharing eRiders and other resources. This may be described as a mixed Membership/Funded model, where the costs of the eRider program are shared unequally among the participating organizations.

Management Team and Expertise

Although other parties may be involved, most eRider projects include several of the following: donor, eRider leader, eRiders, lead NGO, client NGOs, partners, trainers and technology services providers. The process will be affected by the nature of the organizations and individuals involved at the start of the eRiding program and by their collective knowledge and expertise. These factors are quite relevant during the preparation phase of the eRider process, discussed later in this section.

The Client Group and Environment

The process also will be affected by the extent to which the client organizations share aims and beneficiaries and whether or not they work within the same network or sector. In general, the process runs more smoothly when the clients already are connected by some key factor. Further, the richness of the surrounding civil society and ICT sector will influence the process. A thriving ICT, business and development environment tends to enhance the eRider services.

It is vital to note that the above factors are interdependent. Throughout the description below, reference is made to these factors and how they may effect a particular phase of the eRider process.

C. Phase One: Planning an eRiding Project

1. Assess Sector Needs

The eRider model is essentially a needs-based approach. Therefore, it is essential for the managing parties to understand the basic needs of the NGO sector and client organizations before progressing. Often, a donor, a capacity-building organization, a network hub or a board of local experts is able to identify these needs. If the managing parties do not already possess substantial knowledge of the sector, then a preliminary needs assessment is essential. Questionnaires, interviews, site visits, research consultants and/or other methods may be employed. If the team has already identified its eRider leader, this individual will be essential in the assessment process.

2. Assess the Local Environment

eRider services thrive in some environments and struggle in others. Therefore, it is important to have a strong sense of the greater NGO and ICT community so that the eRider team is prepared for likely challenges. Once again, this expertise already may exist within the management team, or an independent environmental scan may be necessary.

The following elements often enhance eRider services:

- Access to a pool of developers
- Small business owners providing technical services such as web design, database development or network maintenance
- Multiple Internet service providers (ISP) operating in a competitive environment
- Favorable government regulations related to telecommunications, NGO governance and registration and liberal information, copyright and trademark laws
- Pool of volunteers and/or educated young people
- Mature and accountable organizations
- Multiple sources of funding
- Availability of strong and motivated potential eRiders
- Critical mass of NGOs
- Other capacity building/training NGOs
- A degree of personal security
- Effective public transportation

3. Recommendations and key issues

The managing team should contact the larger eRider community during this stage in order to begin discussing their general strategy and to learn more about the strategies of other eRiding projects.

D. General Strategy Development (one-two months)

1. Develop the Concept

The management team must determine the realistic and measurable aims of the project and how resources will be allocated to achieve these goals. In addition, it must make several determinations with regard to the programs basic structure. For example, will the project:

- Require a single eRider or a team
- Require the eRider to have special skills
- Be regional or local
- Be issue or sector based or focus on a particular technology solution
- Be managed by an existing organization, network, donor, informal group

A managing organization may be a(n):

- Local capacity building or intermediary organization
- eRiding or technical assistance organization
- International NGO or other outside organization
- Network hub
- Local organization
- Donor

Anna and Taya, women eRiders from Georgia, are empowered to use technology to improve the work of NGOs in their country.

Deciding which organization will manage the project requires an open and frank discussion of power dynamics, a thorough understanding of the NGO environment and insight into the project's objectives. Will choosing one organization make it difficult to work with some clients? Will choosing another organization require compromises on autonomy and management?

At this stage, the method and structure for how the project will be evaluated should be determined and integrated into the planning.

Recommendations and key issuesTo avoid conflict during implementation, there should be discussion and agreement regarding the roles and responsibilities of the players involved.

If a key secondary aim of the project is to create eRiding capacity that continues after the project ends, then it may be advantageous for a local capacity-building organization to manage the project.

If a key secondary aim is to strengthen or create an organizational network, then it may be advantageous for a network hub to manage the project.

If a key aim is to improve collaboration among NGOs working on a specific issue, then it may be advantageous to place management responsibilities with a local NGO/international NGO that has expertise in this field.
If the region has very little experience with eRider services and there is no neutral and qualified organization that can manage the project, then it may be advantageous for the donor to manage the program. Although a donor may manage the overall project, it is often advantageous for the actual provision of services to be managed by a lead eRider or eRider manager.

Outlines of an Open Source eRider Project

Project Aims

- To promote the advantages of open-source software within the NGO sector in Bulgaria
- To assist selected NGOs in switching to open- source software
- To raise public awareness of open-source software usage

By helping NGOs to switch to open-source software, the project will help NGOs save money on commercial software. These funds then may be used for other activities.

Target Groups

- Bulgarian NGOs active in all fields, including policy institutes, health support organizations, cultural NGOs and grass root organizations.
- The Bulgarian public

Project Framework

The project has several phases:

- Creating a team of five eRiders, who will train and offer continuous support to NGOs switching to open-source software;
- Organizing a public presentation of the project accompanied by lectures and public debates to raise the awareness of open-source software;
- Organizing a competition for NGOs to switch to open-source software;
- Assisting NGOs to convert to open source software through in-house trainings, general group trainings and continuous support;
- Creating a website with information materials about the project and downloads of open source software as well as tips for solving open source software problems.

From Interspace, Bulgaria – http://www.i-space.org

Georgia: eRider Project Phases

The project was divided into several stages: eRiders' preparation for the project (training, preparing materials such as application forms for NGOs, training materials, software packages, etc.), NGO selection, NGO evaluation (technical and organizational), working with NGOs and the final stage--coming up with the recommendations on the required upgrade of technology for the future advancement of the NGO activities.

The hardest and the most important part of the project was NGO selection. The criteria were: permanent office, at least one computer, at least one running project. From more than 100 NGOs that filled up the application form to participate in the project 41 were chosen. NGOs were divided into five groups depending on their field of activities (culture and education; health and the disables; human rights; law and anti corruption; women). Each eRider worked with one group of NGOs, although often eRiders worked in teams, since each was an expert in a specific field and had to apply his/her experience and knowledge at the NGOs outside of the original working group.

The Georgian eRider project
http://www.osf.ge

3. Select Clients

It is important to identify the participating client organizations as early as possible. Sometimes, within a funded model, these organizations are preselected based upon their status as grantees. Or, the clients may have preselected themselves as participants in a membership model.

Generally, eRiders work well with existing networks, whether connected by a common mission or issue, or by common geography and beneficiaries. For example, eRiders may work with a network of environmental organizations or with a group of NGOs in a particular city. They may service groups working with the homeless or groups focused on advancing human rights.

If, however, the specific clients have not yet been identified, then there are several ways to identify interested organizations, to assess them and to select clients from among this pool. Several methods and modes are listed below.

Identify potential clients

- Solicit the recommendations of foundations, local leaders and others.
- Make an open call via radio, print and/or television to submit an application or to attend a public meeting.
- Promote and present the project at an informal meeting of network members or conference.
- Contact NGOs directly, by telephone, e-mail or post.

Assess Clients

- Create a formal application, paper-based or online.
- Organize interviews
- Visit each organization.

Gabi Hrabanova, eRider from Czech Republic, introduces Roma activists to computers for the first time

Organizations that benefit most from eRider services often have many of the following components and characteristics.

- A capable, committed and interested staff
- An engaged and committed leadership
- A basic technology infrastructure
- An open attitude toward the use of ICTs in their activities
- A sustainable funding stream and a track record of implementing projects, even if on a small scale
- Participation in other capacity-building projects
- Management committee/trustee/board interest and support

With smaller, younger and less experienced organizations, an eRider also can provide valuable support but the eRider and the staff must be realistic about what types of projects and initiatives they can undertake. Quite often the focus with these groups is on staff training and the development of simple processes and systems rather then larger-scale projects.

Recommendations and key issues

Solicit broadly to ensure that all potential clients can participate. If a donor is managing the eRiding program, then the donor should introduce the eRider services to his/her grantees.

The selection process should be transparent and somewhat standardized, particularly if the person who will eventually evaluate the success of the project is part of the managing team. It is important to balance empowerment of the eRiding team with transparency.

The organizations involved should be made fully aware of the nature of their commitment and involvement. It may be worth developing “contracts” which set out what is expected on both sides.

Thorough and intelligent promotion is important. It will increase both the number of applications received and the speed of the selection process.

4. Budget

Most eRider program budgets may be divided into two parts: initial costs and ongoing costs. Often the initial costs are quite high because of training and equipment costs but ongoing costs and the costs to provide assistance per NGO are quite low compared to similar initiatives.

Sample budget items are listed below.

Initial costs

1. Needs assessment
2. Project design
3. eRider training and project development workshop
4. Equipment for eRiders, which may include one or more of the following:
    a. Laptop
    b. Mobile phone
    c. Personal Digital Assitant (Palm Pilot or Pocket PC)
    d. Appropriate software (preferably Free and Open Source Software which reduces ongoing costs and ensures the project is complying with relevant software licensing)
5. Management tools, including website, domain, server space, chat, blog, etc.
6. Promotion, including brochures, business cards, advertising, etc.
7. Evaluation
8. Warranty and insurance

Ongoing Costs

1. Administration
2. eRider salaries
3. Internet access
4. Subsidized cell phone
5. Transportation
6. Equipment maintenance
7. Public relations
8. Additional training
9. Trips, events, etc
10. Publishing
11. Mini grants to client NGOs
12. Specialist support (e.g., technical work not handled by the circuit rider)

If launching a new organization or setting up an independent office, the following additional costs must be considered: rent, communications (phone) and banking costs.

Recommendations and key issues

Expect the initial equipment allocation to be significant. eRiders almost always need a laptop. If the eRiding is a time-limited project the laptop may be donated to a client at the end of the project or kept by the managing organization.

The eRiders' travel budget should be flexible and, if possible, should not entail spending an inordinate amount of time collecting and organizing receipts for expenses such as five-dollar train rides or four-dollar meals. Some organizations managing eRiders will require receipts but a system should be in place to simply and effectively manage this so the eRider is not overburdened with reporting.

To avoid purchasing mobile phones, many eRiders use their own mobile phones, along with a budget allocation reimbursing them a fixed amount of their monthly bill.

A skilled eRider team can save costs by using Free and Open Source Software tools or by creating their own tools. For example, some teams have designed their own interactive websites with free software.

The managing organization should not earn a great deal of money from the project. Large earnings may motivate or legitimatize a degree of influence that disrupts the client/eRider relationship.

If equipment costs are a limiting factor, then it may be cost effective to work with a small team of full-time eRiders rather than a large team of part-time eRiders.

eRiders work hard to improve their skills and share knowledge.

In Their Own Words

What eRider Tom Rusiecki thinks it takes to be a good eRider

An effective eRider in Poland must be more than just a good techie. While technical knowledge is important, it is only one aspect of an eRider's work. An eRider also needs an understanding of the organization's fundraising, program development, and relationship management. Someone who is only a techie would have a hard time helping an organization with its financial systems or with project management, for example.

Tomasz Rusiecki of Da Vinci Association, Wroclaw, Poland

E. eRider Recruitment, Selection and Training

The needs of the client organizations and the general framework of the particular eRider project should direct the eRider team's formation. After training, the eRider team should possess most of the knowledge and skills required to serve clients effectively. Various factors may influence the number of eRiders required to deliver services. On average, an eRider can work with ten to fifteen organizations during a given period. If the clients already are part of a network that cooperates, communicates frequently and shares resources, then the eRider may be able to work with a greater number of clients. Of course, geographically dispersed clients will require a larger eRider team.

1. Describe the Position

When creating the eRider job description, it is vital to consider which skills the eRiders should have at the time of hiring, which skills they can teach one another and which skills they will acquire as they train. Clearly, team size determines the necessary qualifications of the applicants. For example, if there is only one eRider or small team, then the program may require individuals who have:

- Relevant NGO experience
- Basic technology experience as a user and planner
- Management experience
- English/other foreign-language communication skills
- Ability to manage his/her own work
- Capacity building or development work experience

Of course, a larger team creates the opportunity to recruit an experienced team leader and several "experts" who can deliver services that complement one another.

Recommendations and key issues

It is extremely important to consider where the team resides on the technical/nontechnical spectrum. That is, think carefully about the clients' needs and the greater NGO and ICT context before deciding what kind of team to recruit.

Organizers should be conscious of several issues or questions when soliciting: Would you like to create a professional eRider who does this work for life or to harness the energy of a skilled expert for a short period of time? Do you aim to lure someone away from his/her current job? What if the applicant plans to study and work as an eRider at the same time?

eRiding, or providing consulting services to the NGO sector, is a potential career. This may be stressed in order to attract potential eRiders and to motivate novice eRiders to develop their skills. Managers should not expect all eRiders to make a career of eRiding. But, eRiders should be expected to stay committed long enough to make investment in training worthwhile. It is often relevant to consider age, gender and ethnicity/religion when selecting a team of eRiders.

So That is What I Have Been Doing All This Time

During the process of interviewing with potential eRiders we discovered a very interesting tendency of the people involved in the IT background of NGO development in Azerbaijan. Most of them already were eRiders, but they didn't know about that yet.

We hope the trusted relations established between selected eRiders and most of the local and regional NGOs will be the positive basis for the future of eRider project implementation, effectiveness and fundraising.

From the Azeri eRider project - http://www.osi-az.org

Many NGO directors are middle-aged men, who may be resistant to advice offered by younger men, females or members of a different ethnicity or religion. This does not imply that young people or women should not be hired. But it may mean that these individuals may require additional support in order to deal with such resistance. If the project is set up as an independent organization or plans to become independent, then the team should also have financial management, fundraising and marketing skills. Also important are training skills, especially training-program design and implementation.

2. Recruit and Select eRiders

There are many of ways to identify and select the eRiders. Often, a member of the organizing team, a prospective client or other local party can recommend individuals who already provide "eRider"-like services within one or more organizations or who have exhibited the capacity to do so. Additional prospective eRiders may then be identified through a formal, competition-based application process.

Recommendations and key issues

Solicit broadly to ensure that all interested and capable individuals have the opportunity to apply. Use both a paper application form and interviews. Ensure that the process is transparent. Recent graduates from technology programs may constitute a good pool of applicants. Often, these individuals have some NGO experience, either with volunteer or student organizations. An experienced eRider leader may offset their relative lack of NGO experience.

3. eRider Training

The training and teambuilding process begins after the team has been selected.. The initial eRider training should include both technical and non-technical skills. Although professional instructors will teach some skills in a formal workshop environment, it is essential for the eRiders to train one another so that personal expertise is dispersed throughout the team.

Formal training usually occurs in a workshop environment that brings together a select group of local experts and experienced eRider trainers. Often, the eRiders contribute to the organization of the workshop, helping to decide which skill building should be addressed by an outside trainer and which skills they can teach one another.

Training to Improve eRider Impact:

Gabi Hrabanova joined Roma Information Project (RIP) in November 2002, bringing with her diverse experiences in politics and computer technology. Gabi firmly believes that technology training for Roma women is one way to empower members of the Roma community to effect national reforms. Gabi herself feels empowered by her technology training with RIP, which she transmits to Roma NGOs in the Czech Republic: "I came back from our RIP training in the US full of ideas and energy," she remembers. "Also, I learned how to be an effective trainer, which helps people get the most out of my classes." Roma NGOs, in turn, bring this knowledge back to their communities. Gabi says "Making Roma NGOs more effective gives Roma a better chance in all regards. This is why I do this work."

From Roma Information Project - http://www.riptech.org

Miro, eRider from Slovakia, helps his organizations make decisions about which technologies best meet their needs.

Training topics may include:

eRiding Framework

- introduction to eRiding (what it is, where it comes from, different models)
- eRiding logistics (necessary conditions, potential coverage)
- eRider support channels (international eRiding, eRider specific resources)
- business models (funded, membership, shared cost, fee, sponsored, mixed)
- cooperative eRiding (communication, resource sharing, gatherings)
- eRider management (finances, remote administration, work reporting, motivation, evaluation)
- promotion (advertising products and channels)
- overview of eRiding (client relationship management, assessment, technology planning, implementation, training, evaluation)

Consulting Skills

- consulting stages (tie in to eRiding processes)
- self-analysis (personal sources of motivation)
- effective facilitation (consultant roles, guidelines, managing resistance, group facilitation)

eRiding Processes

- introduction (assessing change readiness, preliminary communication, contracting)
- assessment (benchmarks, data gathering techniques, technical & skills assessment, data presentation)
- technology planning (technology planning process outline, incorporating assessment outputs, role of strategic plan and benchmarks)
- implementation (considerations and potential obstacles, ending)
- client relationship management (communication, clear expectations)
- effective training (methods, pitfalls and resources)
- evaluation (measuring impact)
- website planning (planning process, hosting options, roles and responsibilities)

Environment

- nonprofit environment (characteristics, how to deal with, levels of intervention)
- relevant policies (differ for different regions; telecommunications, freedom of expression)

eRiding Issues

- Free and Open Source Software vs. proprietary software
- refurbished computers
- advocacy campaign development
- issue network support
- intellectual property

Hands-on

- communication tools (uses and limitations of: fax, telephone, SMS, IRC, email, web log (blog), instant message, intranet)
- eRider tools (TechSurveyor, Belarc, Martus...)
- connectivity options (dialup, ISDN, DSL, wireless, Internet cafes, creative solutions)
- practical intro to Free and Open Source (Linux, OpenOffice.org, Email clients, Gimp)
- online information resources (eriders.net, techsoup, kabissa, trainingpoint, itrainonline, npower, APC, bridges.org, onenw)
- advanced email (discussion lists, newsletters, contact management, webmail, POP/IMAP, hosting options, spam, viruses)
- network wiring (wired/wireless, routers, hubs, switches, firewalls)
- networking configuration (documentation, different OS, universal networking concepts and procedures)
- NGO-relevant software (office apps, browsers, financial & specialty software)
- end-user fundamentals (email, file management, security, backups - how to get the message across)
- databases (database planning)
- security & virus protection (security policies, backup practices, antivirus software)
- content management systems (introduction to, potential and limitations, resources)
- researching the Internet (search engines, methodologies)
- Online collaboration tools (web log (blog), wiki, distribution and discussion lists)

Dirk Slater and Ryan Jacobs - eRider from South Africa - share experiences and network to improve their work.

Recommendations and key issues

In the past, eRider training sessions have been most effective when they:

- Last five-ten days
- Include five-ten eRiders
- Include only one eRider team or a mix of eRiders working on similar or related projects to aid in cohesiveness and team building efforts
- Are conducted in a comfortable room with few distractions (i.e., no computers)
- Include access to a computer lab
- Include instruction from local experts and experienced eRiding trainers
- Offer follow-up opportunities for additional learning on specific subjects

By the end of the workshop, the eRiders should be able to articulate clearly what an eRider does and how groups can benefit from eRider services.

This is a good time for the eRiders to begin working on materials that will actually be used in the project, such as calls for client applications, assessment forms, reporting procedures, timelines, a web-

site and brochures. This allows the eRiders to teach one another and use their new skills in a problem-solving manner.
This is also a good time to introduce the eRiders to the global eRiding community and its resources, models and concepts so that they feel comfortable using this support network.

The workshop should include social activities, such as outings and group dinners. As they will be relying on one another heavily during the implementation of the project, it is important to offer the eRiders opportunities to get to know one another and to develop a sense of community.

F. Phase Two: Working with Clients

1. Introductions

Often, the NGO's director will gather the staff and put aside a few hours for a formal introduction meeting with the eRider. This visit may involve an informal needs assessment and a brief overview and/or demonstration of technology tools that the NGO may find useful such as instant messaging, groupware or more advanced features of programs they use on an every day basis such as word processors or spreadsheets. This meeting also offers the eRider the opportunity to establish his/her credentials with the staff. It is important that the eRider learn as much as possible about the NGO's programs and aims, and that he/she identifies which staff members will serve as internal experts for various topics. It is helpful for the eRider to work closely with a designated contact person within each organization. Ideally, this would be the staff member possessing the most ICT knowledge.

After this meeting, the eRider often opens a research file for the organization in order to begin developing an organized assessment. This may be accomplished using TechAtlas and/or TechSurveyor. An offline version this tool is now available.

2. Assess the Needs of Each Client

After the introductory meeting, the eRiders create and conduct a customized needs assessment with each of the clients. There are several standardized forms that may be modified to meet a particular reality. This process typically involves an initial paper assessment, an onsite visit and an interview with one or more of the NGO staff.

Recommendations and key issues

Often, the client is interested in elevating the staff's skills as quickly as possible, even though other needs may seem more important to the eRider. As a result, eRiders must balance the client's perceived needs with their plan for the client's overall progress.

It is helpful for the eRiders to do the initial meetings and interviews in small groups. Each eRider can see how the others work and the team leader can observe the eRiders "in action."

Changing Expectations for the Better:

"The most important thing I've learned during my work with the Roma Information Project (RIP)," says Slovak eRider Miroslav Olah (Miro), "is when not to laugh." One of the first times he conducted a computer training session, a member of the NGO's staff held the mouse up to the computer screen and fingered the buttons as if it were the remote control to a television.

"It was a bit of surprise at first," remembers Miro, who joined the RIP team in late 2002 as a recent college graduate with a degree in engineering. "I had no idea that the organizations would be at this level with technology, and I had to quickly change tactics." He spent the whole morning teaching mouse-ing skills to the group. As do many of his eRider colleagues, Miro describes these incidents with a sense of bemusement. Yet it is also clear that he has discovered one of the most essential parts of his job--to make his "students" at Roma NGOs, most of whom are much older than he, more comfortable with technology. This includes learning when not to laugh and offering encouragement to those just beginning to work with computers.

From Roma Information Project - http://www.riptech.org

eRiding helps Roma bridge the gap among their distant communities in Slovakia, Bulgaria, Hungary, Czech Republic and Macedonia.

eRiders should not collect more data then necessary, as this only will overwhelm the organization and the eRider. Thus, if the eRider is not going to work with the organization's phone system, then no phone data should be collected.

When working with small organizations having very little technology experience, it may be best to begin with basic skills and knowledge training. Once the staff becomes more adept at using technology and more aware of its possibilities, then it will be better able to participate in long- term technology planning.

A set of technology benchmarks or best practices document is useful at this stage. Benchmarks allow the eRider to compare where an organization is now (the assessment) to where it would like to be (the benchmark). They are helpful for getting an NGO to understand the complete picture, and benchmarks can give it some options to think about when actually going through the strategic planning process. Benchmarks are particularly useful when working in a specific sector, where generalizations are likely to be more universal.

In this phase some eRiders have found it useful to give each staff member a skills survey and then interview each person individually to find out what he/she really does. This was useful to get an idea of the general skill levels within the organization as well as to get to know the people within the organization. The initial period working with the organization is generally the most challenging as relationships are being established; this process helps break the ice.

3. Develop a Client-Specific Strategy

The eRider and the staff develop a strategy tailored to the client's particular mission and needs. This strategy may include planning sessions, staff trainings, installations and other services, all situated within a detailed timeline.

This is an important step and can take longer than anticipated. It is very useful if the organization has undergone a strategic-planning process, as the technology then can be discussed as a complement to the NGO's work and the existing organizational strategy. If discussions are purely technology focused, you can end up with technology solutions that may not be particularly in line with the organization's mission and projects. eRiders need to be aware of this and keep discussions focused on what the organization 'does' and not what technologies can be implemented.

4. Implementing the Strategy

The strategy includes a clear implementation plan that sets goals and deadlines and that identifies who is responsible for each task. Often, this implementation plan is developed by the eRider using a project management tool such as a detailed spreadsheet, Microsoft Project or the advanced functions of Tech Atlas/Tech Surveyor. These programs can generate charts that are useful for both the eRider and the NGO. If necessary, the eRider will act as a liaison between other technology consultants and developers whose skills may be required to implement the strategy.

Staff Training Recommendations

Small groups (fewer than eight) are best for basic skills training.

One-on-one instruction that focuses on specific tasks is often best for advanced training in skills such as photo editing, design and layout and website development.

One of the greatest difficulties to group training is the wide range of technology skills usually found within any group. It is often advantageous to organize a pre-training session that will prepare those trainees with very little technology experience for the pace of the actual training session.

If the clients have network meetings with computer access, then the eRider should consider attending these meetings, helping with planning or other issues and offering individual technical training after the meeting.

It can beneficial to hold the training sessions outside the NGO office, so that the staff is not distracted by its day-to-day work. This is especially true for small group trainings.

If training occurs within the organization, it is important to lay down the training agreements at the outset. Plan the training far enough in advance that the staff has no excuse for work it has to do. Cell phones should stay switched off and participants should not be called out for phone calls.

Helping Groups to Make Use of Their Existing Technology:

As part of their work with a client Lasa eRiders provided them training in Outlook. After the training the group assessed what the training helped them to accomplish - Although our initial incentive to have the Outlook training was to become more co-ordinated with staff timetables, meetings and appointments other aspects of the training have been extremely helpful. Staff knows now how to keep their inbox tidy, creating folders to keep important information and adding addresses to their contact lists. A list of objectives for the day can be input into the task application and reminder notes can be placed on the desk top. Sending and receiving e-mails has become more sophisticated, automatic 'out of the office' messages are now being sent and staff have a much better understanding of the tool bar in general. Overall the training has proved both useful and effective and was definitely worth taking the time to ensure staff members attended, although no training can be considered a complete success unless the trainees take the opportunity to put it into everyday practice.

From the Lasa Circuit Rider project - http://www.lasa.org.uk

Visit Recommendations

The number of times an eRider visits a group depends on several factors: what type of work the organization and eRider are implementing; the capacity of the group to handle multiple visits/trainings; whether or not the eRider project is bringing them together for other events and training. The number of visits can range from quarterly to two-three times per month.

Planning Recommendations

Minutes should be taken at each meeting and a follow up e-mail sent that recaps the conversation, commitments and next steps. The conclusion of each meeting should include setting the date and agenda for the next meeting.

Too Good to Be True?

From Roma Information Project eRider Miro Olah…

Here is little story about how technical knowledge can help an eRider understand a resistant executive director:

I agreed to an appointment with the director of an organization. I began by explaining our mission, and she stopped me and said, "We have everything; we are equipped with computers, a fax machine, and printers, and we are connected to the Internet. In addition, I'm working on a web site for us. Our systems of work are effective. How can you help us?"

I was a little bit concerned about whether the organization really was as technologically competent as she said. Once she made this short speech, I tried to use more technical language, and I asked detailed questions about their systems. On every question she answered "yes." I decided to use a trick, and I asked, "Do you have a network card in your computer?" She answered "yes." I asked her, "Do you have a switch card" (there is no such thing), and she also answered "yes." She was simply answering yes to everything, whether or not the technology even existed. From our exchange I understood that she was not very technically oriented and she understood that I actually did
know what I was talking about.

Technical skills can help eRiders understand their work, but convincing an executive director to cooperate in a project requires another set of skills. A deep understanding of an organization's programmatic, staffing, and budgeting needs is essential.

From Roma Information Project - http://www.riptech.org

5. Potential Challenges with Client Interactions

Incorporating new equipment and new operations into one's daily work is difficult; resistance is natural. Therefore, it is important for the eRider and clients to express their mutual expectations. Managing these expectations often diminishes resistance.

A few common misconceptions are:

- The eRider's job is to do office work for the staff.
- The eRider is just a technology troubleshooter and is not competent to advise on planning or strategy issues.
- Female eRiders do not have sufficient technology expertise to instruct males.
- The eRider will implement the action plan on behalf of the organization (i.e., do all the work!)

Recommendations and key issues

If the client is extremely resistant, then it is best to discontinue services. Often, after witnessing the benefits of eRider services for other organizations, this client will request to resume participation.

Avoid asking the donor to talk with a resistant organization. This creates a situation in which the eRider becomes a "spy" with the power to affect essential funding.

eRiders must be patient. Clients need time to understand the importance of the eRider services.

G. Phase Three: Maintenance

There are two levels of maintenance necessary for effective eRider projects. Sustaining your work over time with a client and sustaining your eRiding project after the project finishes.

The work of eRiding does not end with a successful intervention with a client. eRider projects continue to evolve. Some eRider projects grow into independent technology assistance organizations. Others partner with other organizations to continue to provide services. Partners can include: funders, international NGOs, NGO networks. Partnering may mean providing services for their grantees, their partner's partners, and members of a network. It might also include working with an Internet service provider to provide discounted rates to clients or with a web design firm to provide small, low cost web design and hosting.

As projects evolve and grow, it becomes crucial that they be marketed and publicized effectively. Most projects develop their own promotional materials such as websites, brochures and business cards. Several projects have launched 'tech talk' discussion series open to the public and touch on a variety of technology topics. Other projects have hosted conferences on the information society, free and open-source software and technology for development. Still other groups hold 'antivirus days' where they aim to inoculate the computers of any organization in their area that asks for help.

H. Phase Four: Evaluation

1. Evaluation

A program of integrated evaluation is key to the continued development of eRider projects. An evaluation plan should be built into both the eRider program as a whole and the plan for each client. Although a clear set of criteria should be developed early, managers should resist evaluating too frequently or letting the donor drive evaluations.

Instead, evaluations should be conducted when it makes sense to measure progress. Evaluation of the entire eRider program should include input from each of the stakeholders. Therefore, it is important to establish consensus regarding what "success" will look like and how it will be measured.

Riders rely on each other for support and expertise. eRiders from Kazakstan, Hungary and Macedonia work together.

The eRider and the client may evaluate the eRider's work at that particular organization. The basic aim of this evaluation is to (1) measure the difference between the organization's capacities before and after the eRider intervention and (2) measure the impact of the eRider's services upon the organizations capacities. It is key that thorough pre- and post- assessments are done at the beginning and end of the intervention even if there are few notes taken in between.

Both parts of the evaluation should distinguish between three distinct categories of data. Each of these data sets may be measured in both qualitative and quantitative terms. The timelines given below generally are accepted among evaluators.

Evaluations may incorporate a variety of data-collection methods, including pre and post staff-training tests, phone, print and/or e-mail client surveys and/or interviews with clients and eRiders.

Recommendations and key issues

Tech Surveyor is a useful tool for gathering data, producing an assessment and tracking improvements over time. This tool allows the eRider to gather data from the very first visit and to measure the NGOs progress over time. The offline version of TechSurveyor is convenient to use and makes evaluation simpler and more efficient.

For more on evaluation in the sector see Bridges.org – Real Access/Real Impact key determining factors for the success of ICT enabled projects.

IV. Management and Support

A. Managing eRiders

There are several challenges to managing a team of eRiders. Because eRiders spend a great deal of time in the field, it is essential that the managers develop a flexible reporting system that the eRiders are willing and able to use. The development challenge will differ if the eRider team is dispersed across a wide region with little face-to-face time or if the team works from a shared office and is face to face on a regular basis.

eRider managers should seek a balance between formal and informal feedback. With both types of teams, a combination of chat, instant messaging, e-mail and keeping an online web log can aid managers and often enhances both individual performance and team building. Capturing both experiences and work processes also guards against work stoppages and major losses if an eRider leaves or gets sick for an extended period of time.

The series of recommendations below primarily is aim managing a dispersed team of eRiders who do not meet regularly with each other and their management. Although geared this way, these tool recommendations are useful in other types of eRiding projects as they promote accountability, transparency and allow for simplified tracking of interventions and impact. In urban areas or where eRiders are working in a small geographic area it is preferable that they meet face to face on a regular basis.

Recommendations and key issues

- Organize mandatory, weekly team chats concerning a specific issue.
- Encourage IM among eRiders and between eRiders and the manager. Set guaranteed times when the manager is available to chat. Everyone should use the same IM client and be able to IM when traveling.
- Establish a discussion list and a policy that e-mail must be answered within 48 hours. Manager/eRiders should copy one another on e-mails to groups/donors/possible collaborators.
- Each eRider should have a POP e-mail account with a large capacity that can be checked via the Internet or be able to access their e-mail remotely.
- Each eRider should establish a web log (blog) and blog regularly about their work. The team should come up with an outline of a sufficient blog entry to provide structure and continuity. The manager should blog on major issues.
- eRiders should submit a general work plan for the coming month, to include vacation and travel plans.

B. Supporting eRiders

Although the eRider may have access to a fully equipped office, their working and traveling schedule may not permit frequent visits to this office. They must be prepared to provide technical services in remote areas, to access the Internet from the field for research purposes, to communicate with clients and to troubleshoot while away from the central office. Therefore, an eRider needs certain tools, which may include a laptop, roaming Internet access, a cell phone, a travel fund and a small equipment fund. They also benefit from a flexible and adaptable manager and from the use of e-mail, instant messaging, chat and web logs to document and manage a portfolio of work.

Current eRider projects make use of the eRiders.net website, the Global eRiders discussion list, Globe-trotter – the global eRider newsletter and the US based Riders discussion list.

V. Glossary

Information and Communications Technologies (ICTs) –

ICT (information and communications technology - or technologies) is an umbrella term that includes any communication device or application, encompassing: radio, television, cellular phones, computer and network hardware and software, satellite systems and so on, as well as the various services and applications associated with them, such as videoconferencing and distance learning. ICTs are often spoken of in a particular context, such as ICTs in education, health care, or libraries. According to the European Commission, the importance of ICTs lies less in the technology itself than in its ability to create greater access to information and communication in underserved populations.

Free and Open Source Software (FOSS) –

Free software is a matter of the users' freedom to run, copy, distribute, study, change and improve the software. More precisely, it refers to four kinds of freedom, for the users of the software:

- The freedom to run the program, for any purpose (freedom 0).
- The freedom to study how the program works, and adapt it to your needs (freedom 1). Access to the source code is a precondition for this.
- The freedom to redistribute copies so you can help your neighbor (freedom 2).
- The freedom to improve the program, and release your improvements to the public, so that the whole community benefits (freedom 3). Access to the source code is a precondition for this.

From -http://www.gnu.org/philosophy/free-sw.html

Nongovernmental Organization (NGO) –

There is no generally accepted definition of an NGO and the term carries different connotations in different circumstances. Nevertheless, there are some fundamental features. Clearly an NGO must be independent from the direct control of any government. In addition, there are three other generally accepted characteristics that exclude particular types of bodies from consideration. An NGO will not be constituted as a political party; it will be non-profit-making and it will be not be a criminal group, in particular it will be non-violent.

Short Message Service (SMS) –

Available on digital GSM networks allowing text messages of up to 160 characters to be sent and received via the network operator's message center to your mobile phone, or from the Internet, using a so-called "SMS gateway" website. If the phone is powered off or out of range, messages are stored in the network and are delivered at the next opportunity.

Wireless –

Using the radio-frequency spectrum for transmitting and receiving voice, data and video signals for communications.
Web Log (blog) –

A blog is basically a journal that is available on the web. The activity of updating a blog is "blogging" and someone who keeps a blog is a "blogger." Blogs are typically updated daily using software that allows people with little or no technical background to update and maintain the blog. Postings on a blog are almost always arranged in cronological order with the most recent additions featured most prominantly.

Personal Digital Assistant (PDA) –

A small hand-held computer that in the most basic form, allows you to store names and addresses, prepare to-do lists, schedule appointments, keep track of projects, track expenditures, take notes, and do calculations. Depending on the model, you also may be able to send or receive e-mail; do word processing; play MP3 music files; get news, entertainment and stock quotes from the Internet; play video games; and have an integrated digital camera or GPS receiver.

Internet Relay Chat (IRC) –

A chat system that enables people connected anywhere on the Internet to join in live discussions. To join an IRC discussion, you need an IRC client and Internet access.

Instant Message (IM) –

Technology similar to that of chat rooms, which involves software that notifies a user when a friend is online, allowing them to "converse" by exchanging real time text messages.

Integrated Services Digital Network (ISDN) –

High-speed telephone line designed for transmitting digital signals and voice at the same time. Some businesses use ISDN lines for high-speed computer access.

Digital Subscriber Line (DSL) –

This is technology that uses ordinary copper telephone lines to provide Internet speeds ranging from 1.5 to 9 Mbps--speeds that are 30 to 50 times faster than a regular 56-kbps dial-up modem. DSL also allows users to receive voice and data simultaneously, since the signal is carried on a higher frequency than normal telephone communications.

Wiki –

Wiki is a piece of server software that allows users to freely create and edit Web page content using any Web browser. Wiki supports hyperlinks and has a simple text syntax for creating new pages and crosslinks between internal pages on the fly.

VI Templates and Samples

Appendix A - **Sample Budget**

From Lasa – United Kingdom
"Report on Circuit Riders for Off the Streets and into Work"

Note: This budget was developed for a Circuit Rider project with clients already known to Lasa. The project focused on building basic skills and improving basic infrastructure. As it was done in house with existing Lasa staff it does not include fees for management and overhead.

Circuit Riders are paid for by a funding orgainsation to work exclusively with a selected group of agencies. In the case of ITSUVO, an estimated total of £100,000 was needed to fund a Circuit Rider for 1 year. Lasa have estimated similar costs for their Circuit Rider project. Costs include the salary for a Circuit Rider who has a multifaceted role supporting many organisations, and software development needed for the role. Costs are met by funding for the post and associated costs, plus charges made to participating agencies for general work (see Appendix C for an example of ITSUVO's pricing of general work). The funding should ideally run for at least two years in the first instance to allow the Circuit Rider to demonstrate intervention and create an impact.

The funding required for a multifaceted role, including a substantial chunk for software development (depending on the required role of the Circuit Rider) could break down as follows:

Salary:	25-30K
Employment Costs:	£4K (plus 10% pension)
Travel and Accommodation:	£5K

Additional funding costs would be required for hardware and software resources, testing and evaluation of those resources, training, seminars, events and any additional technical start up costs incurred. These costs may look something like this:

Central Costs: £6K
Management, admin, photocopier, stationary, stamps, heating, telephone, office space, office equipment

Training and Development: £20K
Room hire, event planning, training and personal development, organised training events, publicity, data projector

Software Development and Evaluation Testing: £12K
Lab network and maintance

Cabling and Telephone Exchange: £12K

Software Licenses: £10K

It would also be necessary to carry out a proper evaluation of the Circuit Rider Service after a period of around 18 months of operation. This would involve additional costs of between £5-10K.

Appendix B **- Sample Budget**

Open Society Foundation – Georgia

Note: This project included 5 eRiders with one eRider helping to manage the work of the team. As this project was implemented by the foundation overhead and management costs are not included. All design, layout and development was done in house by the eRider team.

№	Description	Cost	Qty	OSGF/OSI	Other	Total
1.	**Trainings**					
1.1	Sending one person to Pristina	1200	1	1200	-	1200,00
1.2	Trainers	3000	-	6000	-	6000,00
	Trainings Total			7200	-	7200,00
2.	Salaries					
2.1	Leader's salary	350	1x11	3850,00	-	3850,00
2.2	Other eRider's salary	300	4x11	13200,00	-	13200,00
2.3	Taxes on salary		z	9180,77	-	9180,77
	Salaries Total			26230,77	-	26230,77
3.	**Other Costs**					
3.1	Communication Costs	30	5x11	1650	-	1650,00
3.2	Transport Costs	30	5x11	1650	-	1650,00
3.3	Stationery	499,23	1	499,23	-	499.23
3.4	Admin Expenses	600	1	600	-	600,00
	Other Costs Total			4399,23	-	4399,23
4.	Small Equipment Fund	3000	1	3000	-	3000,00
	Grand Total			40830	-	40830,00

Appendix C - **Sample Circuit Rider Job Description**

From Lasa – United Kingdom

Job Description for:	**CIRCUIT RIDER** (Information & Development Consultant)
Salary:	**PO1 Points 33-36**
Hours:	**35 hours per week**
Reporting to:	**Circuit Rider Project Manager**

Aims of the Post

- To deliver the Circuit Rider service to the participating agencies. This will involve developing support materials; publicising the project; recruiting, training and supporting the organisations; helping organisations formulate and implement IT strategy and action plans.
- To contribute to the work of the Information Systems Team to further develop and run an IT advice and information service consisting of: telephone help-line, e-mail advice, an online knowledge base, publications and seminars aimed at advice and voluntary sector agencies.
- To research, write and update information items for the knowledge base and for publication in Computanews.

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1. Contribute to the development of IT Strategies and action plans through one-to-one and group working both in the agencies and at events to facilitate the effective use of IT within the organisations.
2. To deliver training seminars and produce the relevant training materials.
3. Maintain good records of work and progress for monitoring and evaluation purposes.
4. To contribute to the development of a circuit rider web site.
5. To keep abreast of developments in information technology and share information with the Team and others as appropriate.
6. To provide telephone and email advice to callers on a wide range of issues around the use of IT in advice and voluntary sector agencies.

7. To assist in the moderation the IT discussion forums on the web site.

Other Duties

1. Promote the work of the Circuit Rider movement, Information Systems Team and Lasa.
2. To meet agreed income targets associated with the post.
3. Participate in team meetings and contribute to Lasa-wide activities as appropriate.
4. Provide reports as necessary to the Circuit Rider Project Manager.
5. Work within the provisions of Lasa policies, including abiding by and implementing Lasa's Equal Opportunities policy.
6. Work within agreed work plans, manage own workload and be self-servicing.
7. Be prepared to travel as necessary.
8. Carry out any other duties appropriate to the post as agreed by the Circuit Rider Project Manager.
9. This job description will be subject to periodic review, in consultation with the post holder.

Appendix D - **Sample eRider Job Description**

Roma Information Project - Bulgaria

PROJECT SUMMARY

For this project the eRiders primary goals will be to a) assess the information needs of a small number of Roma groups, and b) to help them implement a small number of ICT projects developed by the organizations themselves. These projects range from producing paper based information material (flyers, press releases) to websites.

The eRiders will also create a common website, develop its content and set up a Roma Information Project discussion list. We anticipate that the eRiders will create a "learning network" that would enable Roma advocates to share their experiences and lessons learned. This website is intended to enhance the organizations' advocacy, campaigning, outreach and service delivery.

RESPONSIBILITIES

1) Training Roma NGO staff to effectively use computer technology and the Internet

2) Minor installation, upgrade and modification of computer hardware and software to improve the ease and effectiveness of computer use by the staff (Primarily Windows systems).

3) Application software support, including installation and use (Primarily MS Office 2000 Pro including Internet Explorer and Outlook Express).

4) Trouble shooting, frequently from a remote location.

5) Training project participants in technology support. Training will be one-on-one and in small and large group settings.

GOALS of the training and support are:

a) Work onsite with partner groups to asses their level of technology use, help them to develop individual technology plans, and then to provide advice, assistance and education in implementing the plans;
b) Help organization staff to find creative solutions to problems using information technology.
c) Increase the technological self-sufficiency of the organizations.
d) Help staff experience the ways in which technology can increase their effectiveness.
e) Insure that basic network and computer maintenance will be done on an ongoing basis (e.g. data back-up, virus checking).
f) Strengthen and broaden the network of technology-interested Roma NGO staff by advising on the development and maintenance of a variety

of mechanisms, including listservs and collaborative websites;

g) Work with our team of eRiders and technical experts to develop innovative resources and tools to extend the erider's reach in the participating community;

h) Work with other eRiders, troubleshooting, sharing knowledge and technology strategies, and avoiding duplication of efforts in the advocate community.

QUALIFICATIONS

ESSENTIAL SKILLS

* We are looking for an innovative and self-motivated person:

* Fluent in English and another language from the region with the ability to both speak and write in English.

* Combines solid technical knowledge with the demonstrated ability to work with nonprofit organizations, ideally with background in the Roma or human rights communities;

* Communicates in plain language about computer and internet-based technologies. Ideally, the person will have experience in training;

* Enjoys working collaboratively, both with a wide variety of partner groups and with other Technology Project staff;

* Practical use of a wide range of communications technologies, particularly electronic mail and the World Wide Web, understanding of the relevance of the Internet for non-profits; and

* Ability and willingness to travel up to 40% of the time.

ADDITIONAL SKILLS

* Specialized technology skills in one or more of the following areas are a plus: LAN, web design and programming, database development, software solutions for nonprofits, hardware and/or software troubleshooting.

A person with strong organizational and management skills and/or background may be promoted to manage the Roma eRider Program.

Appendix E - **Sample eRider Contract**

Roma Information Project - Bulgaria

The following is a consulting contract for work entered into by X(hereafter referred to as eRider) and The Advocacy Project (hereafter referred to as AP)

This contract runs from X to X.

X is being engaged by the AP as an eRider or non profit technology consultant. Their main task will be to work with Roma civil society organizations in X. Their job will entail providing training, consulting, project planning and management and technical support to a group of civil society organizations in X.

The eRider is expected to produce:

- a country strategy for their work within the first two months,
- monthly reports work that outline the support they provide to be delivered by the end of each month,
- work plans and evaluations within two (2) months of the first visit for each of the groups they support.

These products must be approved by the manager of the project.

The Advocacy Project will provide:

- training,
- management support,
- a laptop,
- travel stipend
- monthly Internet access fee.

AP staff will make regular visits to work with the eRider.

Upon receipt of monthly status reports the eRider will be paid a salary for the following month. The monthly salary is based on a daily rate of X. The eRider is expected to work between 12 -15 days per month. They will also be paid 250.00 per month for travel and 40.00 per month for Internet access. The eRiders monthly salary will be paid on the 5th day of each month. The eRider is expected to keep receipts for travel. Receipts are not expected unless travel costs exceed 250.00 USD.

Each eRider will be provided with a laptop for their work. This laptop is the property of The Advocacy Project. If employment is terminated or the eRider quits, then the laptop must be returned to The Advocacy Project. If it is not returned, then AP will withhold the last months salary.

Laptop serial number:_____

In the event that the laptop is stolen, it will be replaced if the following conditions are met:

A police report is a) drawn up and submitted within 24 hours, b) The Advocacy Project is notified within 24 hours, c) the laptop was not left unattended in an unlocked vehicle, where they can be seen. They can be in a locked boot.

If the following conditions are not met, then the eRider must replace the laptop with their own funds.

The eRider is a consultant and not an employee of The Advocacy Project. The eRider is responsible for all taxes and other fees that their government may impose. The eRider is bound by a confidentiality agreement. They agree to keep private all matters that are disclosed to them by the groups they support.

The eRider is barred from sub-contracting any of their work to a third party unless prior approval from the project manager is secured. The eRider agrees not to undertake additional outside work that might impede their ability to provide services to the groups they support.

Any materials developed by the eRider during the course of their work including web sites, databases, brochures or other materials belong to the groups they are supporting or to The Advocacy Project. AP reserves the right to promote and publicize all elements of the project where appropriate.

This contract may be canceled with cause at any time by the management of The Advocacy Project. The eRider must give at least two weeks notice (14) days notice to terminate this contract.

Signed: _____

Date: _____

Signed: _____

Date: _____

Appendix F - **General Terms and Conditions**

Lasa – United Kingdom
"Report on Circuit Riders for Off the Streets and into Work"

Note: These general terms and conditions are applicable to: ICT Audits & Development Reports, General Work, Web Site Development, Service Units, Support Contract and Training. This language might form the basis for a memorandum of understanding between an eRider and client organization.

i) English Law will cover the contracts.

ii) In offers and contracts "Client" is your organisation, the "Service Provider" is TSUVO Ltd.

iii) Acceptance of Terms: :A Client returning a signed quotation or contract by mail or fax is deemed also to be acceptance of the Service Provider's general terms and conditions.

iv) Delivery: Delivery of products by the Service Provider will normally be within 14 working days of receipt of an order unless agreed differently with the Client. The Service Provider will make every effort to ensure that delivery schedules are met but cannot guarantee this, as it is dependent upon external suppliers meeting their obligations.

v) Insurance: Once equipment or software has been delivered to a Client's site responsibility for its care rests with the Client i.e.: prevention of loss, theft, damage by any means and costs of making good such events rests with the Client. It is recommended that the Client takes reasonable steps to prevent loss, theft, damage including making sure that adequate insurance is in place and where equipment may be used out of office e.g.: laptops, that consideration is given to making sure adequate protection and insurance measures are in place.

vi) Dispute: In the event of any dispute both Client and Service Provider agree to use third party arbitration to resolve disputes and accept arbitrators' judgement, with arbitration costs being shared.

vii) Delivery charges from the Service Provider to the Client will be charged at cost and are additional to quoted purchase prices.

viii) Payment Terms: All orders for hardware and software payment must be made in advance of delivery. All other charges are due as and when supplies and or work have been completed to quotation and specification. Specific payment terms are as specified in the Client quotation. The Service Provider reserves the right to claim costs from the Client for extra administration and interest when payment is late.

ix) Site Access: Quotations for the supply and delivery of goods, the installation of equipment and cabling do not allow for any time required for the movement of office furnishings.
x) Software: If an installation, or reinstallation, requires the Service Provider to access pre-existing software then the Client must ensure that working copies are available.

xi) Packaging: The Client is responsible for the disposal of redundant packaging.

xii) Power and Telephone Points: The Client is responsible for the provision for adequate power points, telephone points and space for the installation of equipment.

xiii) Network cable installation: The Service Provider does not undertake network cable installations, as this is invariably more economical if completed by a local contractor. However, the Service Provider will accept instructions to liase with contractors on behalf of the Client.

xiv) Extra Hours: If we need to attend the Client site because any of the above conditions have not been met, or because of any other conditions beyond our control, then we retain the right to charge pro-rata. Any work not itemised in the Service Provider's quotation, but requested by the Client, will be charged for.

xv) Dates of installations: If the Client has to re-arrange a scheduled installation, then the Client must provide warning of at least five working days. The same applies to the Service Provider.

Appendix G - **Terms and Conditions for Support Contracts**

Lasa – United Kingdom
"Report on Circuit Riders for Off the Streets and into Work"

1 Designated Point of Contact (DPC)
The Client must assign one staff member plus one deputy as their Designated Point of Contact. All technical support from the Service Provider, whether by means of telephone, e-mail, fax, hard copy or person to person, will be supplied only via the Client's DPC or Deputy DPC. Ideally, the DPC should be the staff member possessing the most ICT knowledge and experience.

2 Notification of a system failure
If the Service Provider is unable to resolve the failure with the Client's DPC over the telephone, it will then use dial-up access to the Client's system to attempt to resolve the problem remotely. If this fails, the Service Provider undertakes to recall the Client within two hours to provide either a fix to the problem or arrange a visit by a technician.

3 Response time
The Service Provider undertakes to have a technician attend the Client site within three full working days of completion of the foregoing sequence. This does not mean that the problem will be solved within three days. Restoration time may well be longer than the response time.

4 Visits
On site attendance will normally be between 10am and 5pm Monday to Friday. A technician will require unfettered access to any failed system. It is essential that the person who first identified the problem is available when the technician attends, or alternatively, that the DPC has comprehensive details of the issues from that person. In the case of network problems the server may have to be shut down. In such an event, at least ten minutes notice will be given to the DPC. Before leaving the site, the technician will explain to the DPC what work was done. The Service Provider will keep appropriate records, but to minimise costs no other paperwork will be issued.

5 Loan Equipment
If any equipment needs removing and replacing then when necessary the Service Provider will loan the Client adequate substitute equipment.

6 Accelerated Response
On occasion, a Client may request a faster response than that specified in the contract. Wherever possible, the Service Provider will attempt to meet such a request but only up to a maximum of twice per year.
7 Service Complaints
In the first instance these must be made on the Service Provider's telephone support line. If that fails to resolve the issue, then the Client must call the Emergency number provided to them in the Support Contract.

8 Audit
The Service Provider will undertake an introductory and thereafter an annual audit of hardware, software and configuration the systems at the Client site to be included under the Service Contract. The Support Contract shall apply only to the infrastructure so audited and this will be specified in a Support Contract Register. Any changes to hardware or software made by the Client with-

out the PRIOR consent of the Service Provider may invalidate the agreement. The Client may need to make software and hardware enhancements during the period of the service contract. But as such changes sometimes cause system damage, then whenever efficient the Service Provider should do such work. If the Client or a third party plans to change hardware and/or install any software, the prior agreement of the Service Provider is mandatory.

9 The support contract register

The support contract will include a register of items covered.

· Stand alone PCs & PC network equipment.
· Software eligible for telephone support.
· Response undertakings.
· Contract start and end dates.
· Client and Provider contacts.

Any equipment added in the period of the support contract will be charged pro-rata for that year and then appended to the support contract register upon renewal.

10 Tasks covered by the Contract

i) Repair or replace PC parts, excluding items physically damaged by misuse.
ii) Network configuration maintenance, excluding failure due to Client interference.
iii) Voice telephone support as required on software and hardware.
iv) Dial-up telephone support intervention by PC Anywhere.
v) Disaster recovery - reloading software from Client's disks plus any data backed-up by the Client.
vi) Annual audit and report.

11 Tasks not covered by the Contract

i) Changes requiring site visits, eg: new user add on, hardware and software changes, new printer set-up, additional Internet access.
ii) System upgrades, network development, training.
iii) Specialist software not listed in the support schedule e.g.: QuickBooks, File Maker, DreamWeaver, etc. The Service Provider is not responsible for the re-installation or reconfiguration of any software not listed in the support contract register. Should a third party software supplier claim that a system is causing operational problems vis a vis its product, then we will attempt to assist resolve the issue. However any demands from a supplier for special configurations are the responsibility of the supplier, not the Service Provider.
iv) Consequences of intervention and tinkering by the Client.
v) Any equipment over 4 years old at the start of the Contract
vi) Damage due to careless handling/accidents.

12 For the Support Contract to enter into and remain in force

i) Both parties take contract payment as binding acceptance of the contract and its terms.
ii) Contract payments are made in full within 30 days of date of invoice.
iii) Identified pre existing system faults are resolved in advance or itemised as being excluded from the contract. The initial audit will identify defects that require correcting at the Client's expense.
iv) There is a nominated DPC as specified above and as shown in the Support Contract Register.
v) Servers are shut down by the Client every 2 months and cleansed.
vi) Servers are protected by anti-virus software and the Client updates it at least every fourteen days.

vii) Where designated, workstations are protected by anti-virus software and the Client updates it at least every fourteen days.
vii) Backups as agreed in the Contract Register are carried out and checked for operability at least once every fourteen days.
viii) The Client has the right to terminate the Support Contract and obtain a full refund of value pro-rata the unused period of contract if response times from the Service Supplier are not adhered to. i.e. should the Service Supplier on three occasions breach the contract terms, within the life of the contract, excluding factors not within the Service Provider's control.
ix) Support contracts will be renewed automatically and continue to be in force until cancelled in writing with thirty days notice by either Client or the Service Provider.
x) The Client agrees not to offer any ICT related work to the Service Provider's employees without the express prior written permission of the Service Provider.
xi) The maximum liability of the Service Provider, its employees or its agents shall be the value of the remaining contract for any losses or consequent loss of the Client, caused directly by any action or inaction on the part of the Service Provider, its employees or agents.

Appendix E - **Entry Meeting Report**

Ungana-Afrika - South Africa

Section Heading 1

0.1.Dates:

0.2.Venue:

0.3.Organisation visited:

1.Meeting Objectives and Expectations

Specify the expectation of the meeting, and the goals set between you and the NGO

2.Introduction of UA and our services

Specify how did the NGO receive UA and our services and the eRiding concept

3.Organisational Background

Brief background of the NGO, make reference or attach any document with detailed information on the NGO

4.Needs Identified

Specify the needs of the NGO and how familiar are they with the technology

5.High Level Assessment

Specify general technology they have and technology aware staff they may have, attach the tech assessment if allowed to do one.

5.1.Number of Computers available:

5.2.Number of computers fully functional:

5.3.Internet Access (Y/N)

5.4.Provider

5.5.Number of staff members

5.6.Number of computer literate staff

5.7.Number of staff with internet access

6.Collaboration Possibilities

Specify all the possibilities of collaborating with UA

7.Project readiness

Project the technology readiness of the organisation

8.Next step

What are the outstanding issue or information needed by the organisation, are sending a contract?

9.General Remarks

Your impressions on the organisation, the meeting proceedings and any other general staff

Appendix H **- Sample Client Needs Assessment**

Lasa – United Kingdom

Note: There are many iterations of needs assessment for eRider projects. Each project requires its own customized needs assessment. A balance must be struck between gathering enough information to create a comprehensive picture of the organization and gathering too much information that you will never use.

Lasa Circuit Rider Project – Healthcheck

The organisation

Organisation name	
Organisation representative	
Email address	
Healthcheck date	
Lasa Circuit Rider	

1 - General

1.1 Organisation's mission
1.2 Number of staff & volunteers (given separately)
1.3 When was the organization established?
1.4 What strategic/business plans do you have for the future of the organisations? Can you make this available to Lasa?
1.5 Who are your principal funders? Do you expect any major changes to your funding?
1.6 Who is responsible for fundraising in your organizations?
1.7 Do you have any other offices? Or remote workers?

1.8 Any future plans in place which are likely to affect your IT? *(e.g. new projects, moving plans, new staff etc.)*
1.9 Any previous Lasa contact?

2 - Support & development needs

2.1 Identified ICT Support & development needs *(from application)*

3 - Computer use

3.1 What work do you currently use your computers for?
3.2 What recent changes to IT have you made?
3.3 Have there been any problems with these developments?
3.4 Is there any work that you can't do currently ?
3.5 What technology **is** working well in the organization?
3.6 What technology **is not** working well in the organization?

4 - The computers in the organisation

4.1 Do you have an inventory or list of all your IT equipment and software? *(can we have a copy?)*	
4.2 How many computers do you have in the organisation?	
4.3 Do you have a peer-to-peer network?	
4.4 Do you have server-based network?	
4.5 How many printers do you have?	
4.6 Any peripherals (e.g. scanner, digital camera, CD rewriters etc)	

(Go to hardware audit sheet)

5 - Software audit

	Application	Version	License?	Notes
5.1 Office suite				
5.2 Word Processing				
5.3 Spreadsheets				
5.4 Databases				
5.5 DTP				
5.6 Presentation				
5.7 Email				
5.8 Web browser				
5.9 Accounts				
5.10 Anti-virus				
5.11 Case recording e.g. AIMS				
5.12 Web pages				
5.13 Advice software				
5.14 Other				
5.15 Notes				

6 - The Internet

	Yes	No
6.1 Does your organisation currently have access to the Internet?		
6.2 Do staff have Internet access on the computer they normally use?		
6.3 Do staff have their own e-mail addresses?		
6.4 Your ISP		
6.5 Registered domain name		
6.6 Website address		
6.7 How do you access the Internet? Modem/phone-line ISDN Leased line ADSL		
6.8 How much do you pay your ISP/month?		
6.9 Other monthly spend on Internet access (Include any line rental, phone call or connection charges) **£**.....		
6.10 Notes		

7 - Managing IT in Your Organisation

7.1 Computer use, policies & practice

7.1.1 How many staff need access to computers?
7.1.2 Do any staff use computers anywhere outside your organization? *(e.g. at another site or at home)*
7.1.3 Do you offer your service users access to computers?
7.1.4 Are any formal IT policies in place?
7.1.5 Are you registered under the Data Protection Act?
7.1.6What is your back-up policy? If so, what is it and what media is used?
7.1.7 Is any "housekeeping" carried out on your computers? *(e.g. archiving user files, deleting temporary files, scandisk, defragmenting etc)*
7.1.8 What security is in place? *(e.g. anti-virus, firewalls, passwords etc)*
7.1.9 Is there an event/fault-logging system in operation?
7.1.10 Do you have a formal, written IT strategy? If so, can we see a copy of it?

7.2 Training & induction

7.2.1 How do you assess staff training needs?
7.2.2 Has a training needs analysis been carried out recently?
7.2.3 What IT training have staff received recently? Please list
7.2.4 Who do you go to for IT training? Or do they come to you?
7.2.5 Do staff receive any IT induction? What does it consist of?

7.3 Finance

7.3.1 How much did you spend on IT (equipment purchase / maintenance / support / training / Internet) in the last year?
7.3.2 Is there a separate IT budget? If so, what does it cover?
7.3.3 Do you have any IT insurance? If so what does it cover?
7.3.4 What and who influences your decisions on what hardware and software to buy?
7.3.5 Where do you buy hardware and software?
7.3.6 Have you had any equipment donated?

7.4 Support

7.4.1 Who supports your IT at present? *(e.g. staff, volunteers, external service contract)*
7.4.2 What is supported?
7.4.3 What kind of support do they provide?

8 - Hardware audit

8.1 PCs & server

Manf.	No. of	Model	Age	OS	CPU	RAM	Hard drive	NIC?	Notes

8.2 Printers

Manf.	Model	No. of	Type	Age	NIC?

8.3 Other peripherals

9 - Notes

Appendix I - **Notes for Training Coordinators**

Lasa – United Kingdom

Developing IT Skills and Competences
Training Needs Analysis

Introductory notes for the ICT training co-ordinator

While training is generally seen to be a 'good thing', it is all too easy to send someone on an expensive IT training course without being sure that the course is worthwhile, or even that it is the right course for the person. So how to decide what training needs you have? The answer is to do a training needs analysis (TNA).

The starting point is the needs of your organisation (aims, objectives, and work plan) and the needs of the individual worker. The aim is to identify gaps between what staff need to know in order to do their job, and what they actually know. Go carefully here, you don't want to put people on the defensive and make them feel bad about their lack of IT skills: rather approach the issue as an opportunity to improve staff's knowledge in order that they can do their job quicker and easier.

So how to find out what staff need to know? You can start with the checklist for each bit of software in use, and perhaps use a questionnaire to find out where the gaps are. You may have to do a bit of brainstorming to make sure you've covered the main points, don't aim for perfection: the questionnaire itself will uncover things you haven't thought of.

This checklist is intended as a template which can be customised. The main aim is to engage staff in discussion about their needs and areas for development.

Having circulated the checklist you can correlate the answers and begin to assess the priorities for training and think how to meet these needs. The guide at the end of these notes gives some suggestions as to the next steps for training. You may send staff on external training courses, you may want to do some more informal in-house training, or bring in a trainer for a tailored course (for example if you have a number of users with similar levels of experience and need). Whatever option you choose, the results of the TNA will set your goals for the training sessions. It will help select the right course, and set the standard by which you can evaluate its usefulness.

As ever, the option that works best for you will depend on your needs and available resources. However it is worth thinking about more than just responding to immediate training need. How will your approach help you respond to staff needs long after the training course has become a distant memory? It is worth linking your training strategy to the development of the role of 'super-user' in any important areas of work. One way of doing this is to concentrate on developing the skills of a group of workers who can then train others in the organisation – or in smaller organisations, individuals known as "super-users". This is likely to give you more options when, as is always likely, staff need some help on a day to day basis.

Results analysis and next steps

Add up the number of ticks in each column and multiply them by the skill rating e.g. ticks in the first column multiply by 0 (!) the next by 1 etc. As the number of questions and therefore total points changes from section to section, the following are somewhat approximate total.

A recommended guide to next steps in your training plan could be:

Users that score up to 15 points in a section (eg for General Windows Skills):
An introductory training course would probably benefit this person o some one-to-one training in-house from a "super-user"

Users that score from 16 to 35 points:
An intermediate course might be appropriate.

Users that score over 35 points
This user is very skilled and might only benefit from an advanced course in the application if this is very relevant to their job e.g. if they are responsible for administrating and developing the organisation's database. They should also be used as a "super-user" to pass on their skills to others in small or one-to-one sessions. They could benefit from a train-the-trainer session.

Appendix J – **Training Needs Analysis**

Lasa – United Kingdom

Name: _____

Please rate your level of skills from 0 to 3 (0= No skills at all, 3= Very skilled.) and tick the appropriate boxes.

General Windows skills		**0**	**1**	**2**	**3**
1	I can find, save and print my own documents				
2	I can recover deleted documents				
3	I know how to save files in my own directory and in general directories				
4	I know how to use Windows explorer to manage files				
5	I can create new directories/folders				
6	I know how to move and copy files				
7	I can create a shortcut on the desktop				
8	I know how to rename files				
9	I know how to search for a file				
10	I know how to deal with a "frozen" application				
11	I can use to disk cleanup tool				
12	I know how to run scandisk				
13	I know how to defragment my C: drive				
14	I can switch between applications				
15	I can minimise, maximise and resize windows				
16	I can cut/copy and paste between applications				
17	I can use Windows Help				
18	I can set up a screensaver				
19	I can back up my work to floppy disk				
20	I can update my anti-virus				
21	I know how to shut my PC down properly				
	TOTAL				
General Windows skills comments:					

Printers and other peripherals		**0**	**1**	**2**	**3**
Printers					
1	I can deal with a printer paper jam				
2	I can print on labels				
3	I can print on non-standard paper				
4	I can deal with print queues				
Scanners					
5	I can scan an image				
6	I can manipulate a scanned image with appropriate software such as Paint Shop Pro etc				
7	I can scan a text page and use the OCR software				
8	I can scan a page to the printer				
	I can scan a page to fax				
CD Writer					
9	I can "burn" files to a CDR (recordable CD)				
10	I can erase and reuse a CDRW (rewritable CD)				
Digital camera					
11	I can transfer a file from the camera to the PC				
12	I am able to email an image file				
13	I know how to manage image files on the PC				
Web Cam					
14	I can set up and use a web cam				
	TOTAL				

Printers and other peripherals comments:

Word Processing		0	1	2	3
1	I can format text e.g. size, bold, font				
2	I can spell check a document				
3	I can cut and paste				
4	I know how to use Undo				
5	I can customise my toolbar				
6	I can set margins and page breaks				
7	I can set indents and tab section breaks and partial formats				
8	I can create numbers and bullets				
9	I know about multi level numbering				
10	I can set headers and footers				
11	I can use tables to present info				
12	I can add borders & shading to tables and paragraphs				
13	I can use templates for standard docs				
14	I can use heading styles				
15	I know how to create a table of contents				
16	I can mail merge				
17	I can create labels				
18	I can import images into my document				
	TOTAL				

Word Processing comments:

Spreadsheet		0	1	2	3
1	I can enter text and numeric data in cells				
2	I can enter a simple formula (e.g. to add up a column of figures)				
3	I am able to save a spreadsheet document				
4	I can change the orientation of the print-out from portrait to landscape				
5	I can enable gridlines to be shown on prints				
6	I can insert and delete rows and columns				
7	I can change the width of a column and height of a row				
8	I can switch between worksheets				
9	I know the difference between a relative and an absolute cell reference				
10	I can print part of a spreadsheet				
11	I can format text (size, colour, bold etc)				
12	I know how to format a number to decimal places				
13	I can copy and paste a cell				
14	I can link cells between worksheets				
15	I can sort data in a column				
16	I can use the Autofill tool				
17	I know how to add headers and footers				
18	I can produce a chart from my data				
19	I can edit a chart				
20	I can import information into a spreadsheet from another application (e.g. from a Word document)				
	TOTAL				

Spreadsheets comments:

	Outlook/Email	**0**	**1**	**2**	**3**
1	I can create and send an email to other staff				
2	I can create and send an email to colleagues outside of the organisation				
3	I can reply to, delete or forward an email				
4	I can add a contact to my Contacts list				
5	I can attach a Word document to an email				
6	I know how to sort my emails				
7	I can create a meeting & invite people to a meeting				
8	I can allocate time in my Calendar				
9	I can book a meeting room or a resource				
10	I can save my email to an Outlook folder				
11	I can create a new Outlook folder				
12	I know how to clear my deleted mail box				
13	I know how to set auto archive				
14	I can use the journal to monitor project work				
15	I know how to create and edit a Task List				
16	I know how to fax from my PC				
17	I can subscribe to and unsubscribe from an email mailing list				
	TOTAL				

Outook/Email comments:

Internet and on-line activities		0	1	2	3
1	I can connect to the Internet				
2	I think I am a competent user of the Internet				
3	I use the Internet proactively				
4	I can open my web browser software				
5	I know where to put a URL in the browser to find the page I'm looking for				
6	I know how to find the information that I require				
7	I can add pages to my favourites/bookmarks				
8	I know how to download a document				
9	I know how to download software				
10	I can unzip programmes that I download				
11	I know how to save pictures to my hard-drive				
12	I know how to change the appearance of my browser window				
13	I know how to set my default Home page				
14	I can send the page I am viewing to another person by email				
15	| know how to use a search engine				
16	I know how to navigate a website				
17	I know how to view & download Adobe Acrobat (pdf) documents				
18	I can use an online discussion forum				
19	I can change the security settings of my browser				
	TOTAL				

Internet and on-line activities comments:

Databases (MS Access)		**0**	**1**	**2**	**3**
Using an existing database					
1	I know how to open the database				
2	I am able to enter data				
3	I can search for data				
4	I can create new records				
5	I know how to run a report				
6	I can write new queries				
7	I can use the database as a data source for a mail merge				
8	I am able to update records				
9	I know how to do a “wildcard” search				
	TOTAL				

Databases (MS Access)		**0**	**1**	**2**	**3**
Creating a new single table database					
1	I can create a new database				
2	I can design a table and add new fields				
3	I know what a primary key is				
4	I know what an index is				
5	I can enter data in a table				
6	I can print a table				
7	I can add and delete records				
8	I can sort data				
9	I can sort using a filter				
10	I can find data using the Find command				
11	I can find data using a query				
12	I can select records using more than one criterion				
13	I can create a report using the report wizard				
14	I can adjust a report's layout				
15	I can create a form using Autoform				
16	I can create a form using the form wizard				
17	I can enter and edit data in a form				
18	I can modify a form				
	TOTAL				

Databases comments:

Presentations		0	1	2	3
1	I can create a new presentation				
2	I can make a bulleted list				
3	I can add an image or graphic				
4	I can move parts of the slide around				
5	I can add text and images to a blank layout				
6	I know how to add colour				
7	I can create and use a master slide				
8	I can add shapes and lines				
9	I can duplicate slides				
10	I can delete slides				
11	I can add notes to a slide				
12	I can create an organisational chart				
13	I can create a bar chart				
14	I can import objects from other files				
15	I can create transitional effects				
16	I can start a slide show				
	TOTAL				

Presentations comments:

TOTALS SUMMARY	0	1	2	3	Total
General Windows skills					
Printers and other peripherals					
Word processing					
Spreadsheets					
Outlook/Email					
Internet and online activities					
Databases (using existing)					
Databases (creating a single table database)					
Presentations					

Appendix K – **Sample Evaluation Outline**

Lasa – United Kingdom

Note: Each eRider project demands an individualized internal evaluation plan. The scope of the evaluation will depend on the project aims. Evaluation should be built into all the eRiding processes. In addition to internal evaluation measures many eRider projects benefit from outside evaluation. Evaluation should not be undertaken too early nor too often.

CIRCUIT RIDERS EVALUATION PROPOSAL

- General approach & methodology
- Collaborative with programme operators, equality issues re those evaluated
- Proposed Research & Evaluation Methods
- Specific approaches based on subject/s under investigation, time and resources available
- Summary of Timetable
- Pending discussion with programme operators
- Including milestones

Elements to the research and evaluate:

Selection Process:

- How were the agencies selected and are they appropriate?
- Who are the key stakeholders, are they the correct are any missing?
- Did agencies understand their role?
- Was communication effective?
- What did the CR staff think of the process, strengths and weaknesses?
- What did the agencies/various stakeholders think of the process, strengths and weaknesses?
- Were any target groups missed out who should have been included?

Consultancy & Deliverables:

- What have you asked for and why?
- Was the need assessment process effective, how did it work, how was identified need arrived at? (N.b. is need assessment part of selection process?)
- What happened at the CR Consultancy?
- Was this process effective?
- How much input did your gency have from CR, (i.e. frequency, duration etc)?
- Over period of consultancy what worked what didn't?
- How would you do things differently?
- How do you rate specific bits of support:- training / resource materials / helpline / web?
- How might your client group benefit from planned inputs?
- What outputs did you achieve, e.g. equipment, funding strategy etc?
- Q's for the Circuit Rider re their experience of above where appropriate?

Impact & Outcomes:

- Did you achieve what you set out to achieve. What factors led to success, what led to failure?
- How has the agency benefited?
- How have clients benefited from changes?
- What would you do differently?
- Did you think the input was the correct one or would something else have been better?
- Was it sustainable?
- What support is required after the input is finished?
- What was the CBA / VFM?
- What if any other resources have been levered in as a result of the input?
- Question's for the Circuit Rider re their experience of above where appropriate.

Things to do:

Look at groups selected; confirm why chosen; identify data re;- size, structure, finances, any other criteria and consider the impact this might have on outcomes.

Look at groups selected and determine how many sub-sets required for study, e.g. large / small / BME / etc.

Identify how a value for money or cost benefit analysis might be determined. Do agencies have cost centres, can we get financial data? Can we price up CR consultancy time against agency time saved as a result? Are some Inputs measurable in terms of money saved.

Look at paper procedures to determine what is being measured, what data is being captured and if anything is missing.

Use initial visit/data collection to establish a baseline for each agency. Consider how this baseline can be used to measure change in agency capacity as well as benchmarking against A N Other agency not involved in CR project.

Identify what will count as a success indicator/s for a range of inputs. Check/confirm these are measurable and shared by CR and groups.

Get feedback from groups on the process as they experienced the start up phase (i.e. pre-consultancy). Gather views of their expectations to measure against actual deliverables later.

Collect all hard data currently available, e.g. health check info. Work with CR to identify all possible sources.

During consultancy and deliverables:

- Keep records of hours consultancy per agency.
- Visit agency to observe CR.
- Visit agency to gather current views of progress for comparison with later evaluation experience.
- Visit two agencies that have gone for the same input to seek compare and contrast examples.
- Consider uses to be made of evaluation to determine which methodologies are best suited.

Research Methods Available:

- Data capture during Design Phase
- Desk Research
- Site Visits
- Case Study approach
- Telephone Interviews
- Face to Face Interviews
- Focus Group / Participatory Method
- Questionnaire
- Hard Data

Phase 1 Design and Initial Monitoring.

Purpose: Identify baseline data set for participating groups; collect and evaluate information relating to selection process; identify and analyse issues relating to groups that might impact on future developments.

Method: Consultation with CR project staff to identify evaluation objectives and priorities. Confirmation of data collection requirements throughout the project.

Undertake Desk Research;

- process data collected during selection process
- construct additional short questionnaire
- develop baseline dataset for future comparison

Undertake interview with CR staff.

Design and test questionnaires to be used in latter phases.

Timetable: 7 days

Phase 2 Consultancy & Deliverables.

Purpose: Evaluate the effectiveness of the assessment process; identify hoped for benefits and other agency expectations; identify actual use and effectiveness of support services delivered.

Method: This stage of the evaluation will be undertaken by questionnaire with selected groups receiving a follow up interview. To accommodate the staggered starting times of each group questionnaires would be sent out throughout the period, once it had been identified that the group had completed that phase.

Undertake interview with CR staff.

Hard data on usage of various support services should wherever possible enable user identification.

Consider use of a Focus Group / Participatory Method to gain overview of groups experience of the consultancy phase.

Timetable: 5 Days

Phase 3 Impact Assessment and Outcome Monitoring.

Purpose: Follow up on the consultancy and deliverables research to identify realized outcomes and evaluate impact on service delivery; identify strengths and weaknesses of process as seen in retrospect, evaluate sustainability; identify any differential benefits associated with agency type and input.

Method: Questionnaire to all participants. Delay in dispatching questionnaire may offer opportunity to test longevity of benefits.

Interview targeted agencies for case study approach.

Compare phase 1 and 2 data with phase 3 results.

Timetable: 5 Days

Analysis, draft write up, CR consultation, final version write: 8 days

Appendix L - **Sample Benchmarks**

Summary from: The Advocacy Project – Kosova Women's Network eRider Project

Full report can be found at: http://www.npowerseattle.org/tools/benchmarks%206.02.pdf

Note from report: "Benchmarking is a powerful process nonprofits can use to assess and evaluate their organizations' practices, operations, and functions against a set of "best-in-class" criteria. This document contains 43 "best-in-class" benchmarks divided among six different sections. Each benchmark represents the current standard for appropriate, efficient and sustainable technology use in a nonprofit organization. Collectively, they provide an example of how a technologically literate nonprofit integrates technology into its daily work."

BENCHMARKS

This document presents a summary of benchmarks from the Technology Literacy Benchmarks report. Please see the full report for a complete description of benchmarks and how they may be used for planning and evaluation.

CONNECTIVITY

Each organization should have:

1) A reliable connection to the Internet;

2) At least one computer connected to the Internet;

3) A single, agency-wide connection to the Internet;

4) An Internet connection with adequate speed and "bandwidth"; and

5) E-mail accounts for each staff person.

PLANNING

1) Each group should have a 2 - 3 year, written technology plan that is integrated into the greater development plan.

The plan should include:

A technology vision statement for the organization;
A statement describing the organization's mission and programs;
A statement describing the organization's current use of technology and how it supports program operations;
An inventory of the organization's current hardware and software;
An inventory of the staff's computer skills;
A training plan to improve the staff's technology skills;
A statement of long and short-term technology goals;
A strategy and timeline for meeting these goals;
A budget detailing the costs of implementation;
And evaluation criteria to determine whether the goals have been met.

2) The organization should have adequate funding to develop their plan or means to acquire the necessary funds.

3) The organization should identify those parties who will be responsible for implementing the technology.

TRAINING / REGULAR TASKS

1) All staff members should have access to the computer software and hardware necessary to do their assigned work.

2) The organization should have adequate data backup systems.

3) Virus protection software should be installed on all machines.

4) All staff members should have desktop access to the Internet resources necessary to do their assigned work.

5) All staff members should have access to the technology training necessary for minimum levels of technology competency. Minimum skills include those necessary for handling e-mail, word processing, spreadsheets, and Internet based research.

6) Technology literacy should be a criterion for hiring new personnel and should be integrated into the ongoing staff review process.

BUSINESS SYSTEMS

1) Staff members should use a database to keep records of all parties associated with the organization, including clients, members, volunteers, contacts, and donors.

2) An organization with more than five computers should have a peer-to-peer network, while organizations with more than ten computers should have a network server.

3) Basic accounting should be accomplished with accounting software or spreadsheets.

4) Systems should be well documented so that important information can be easily found. Important reference data may relate to passwords, user names, ISPs, network configurations, and database management.

WEBSITE / NEWSLETTER

1) The organization/network should have a website that is integrated into its overall communications strategy. Small organizations with limited resources and/or limited communication needs have a simple website that acts as an online brochure.

3) The organization's website should be updated regularly.

4) The organization should utilize one or more media on a consistent basis in order to carry out advocacy, campaigning, and other communication work. They may use newsletters, action alerts, stakeholders' updates or other formats.

Appendix M – **PC Assessment Process**

Ungana-Afrika – South Africa

Note: The following is a good example of the development of processes to standardize eRiders interventions. This aids in the collection of common and comparable data and makes it simpler to hire and train new eRiders.

PC Assessment Process

The following process is intended to be one of the first things you do for an NGO after the introduction period. It gives you an opportunity to personally assess each PC (hardware, software), as well as each user(s)' abilities, usage characteristics, etc. The goal is to get a detailed assessment of the technical and human resources of the organization, while introducing who you are and what you are doing to *each* employee.

This is also a chance for you to personally assess the "bigger picture" of the organization's infrastructure and start to piece together a plan for backup, data protection and training needs.

Depending on the size of the organization, this process may take several visits, and may be conducted in parallel with other tasks.

Preparation

1) Organize a date(s) with the organization in which you can spend some time working with each PC and each user. Insist that the primary PC user(s) be present for this procedure
2) Copy the Belarc Advisor installation executable to a floppy and have it ready.
3) Have a blank (hard or soft) copy of the computer skills assessment form ready for each employee.

Procedure (Perform the following for each employee/PC)

a) Introduce yourself and the Ungana-Afrika concept. This can be a much abbreviated version of the introduction you gave to the director/head. Just let them know why they are going to be seeing your face quite a bit from now on. You may wish to give them a brochure or business card if they seem especially interested.
b) Find out who they are and what they do for the organization. Try to do this in conversational style as much as possible (avoid the temptation to read questions off a list). Also, avoid an "interview" type conversation, as you are not there to assess their value to the organization.
a) Record their job title and function. In a non-profit environment, their "title" may be a very flexible and broad thing, so try to find out as much about their different functions as possible.
b) Try to hone in on their specific computer usage characteristics.
a) What software do they use on a regular basis?
b) What software do they need to get their job done?
c) How do they share information with others (stiffy, network), where do they print, etc?
d) Where do they store their files (is everything in My Documents, on floppies, on a network)?
c) Piece together their answers to the computer skills assessment form. Again, this is just a conversation, if it's clear that they only have basic word processing skills, there is no need to get into the specific questions about their website management experience, etc.

d) Fill in the computer skills assessment form. You may wish to do this after talking to them so you aren't just filling in a list while they talk.
c) Gather the specifications for the PC using the Belarc Advisor and save them to a floppy. You should show the user(s) exactly what you are doing so they don't think you are copying personal information from their PC (don't worry about explaining what all the specifications mean though).
d) Check the system over (quick diagnostics). Don't worry too much about fixing any problems you may find, just make a note of them.
a) Run a quick scandisk on all drives
b) Open device manager and look for devices that are not functioning properly. If you find problems here, you may need to seek out drivers and do some "heavy" technical work . . . save this for another time.

Follow Up

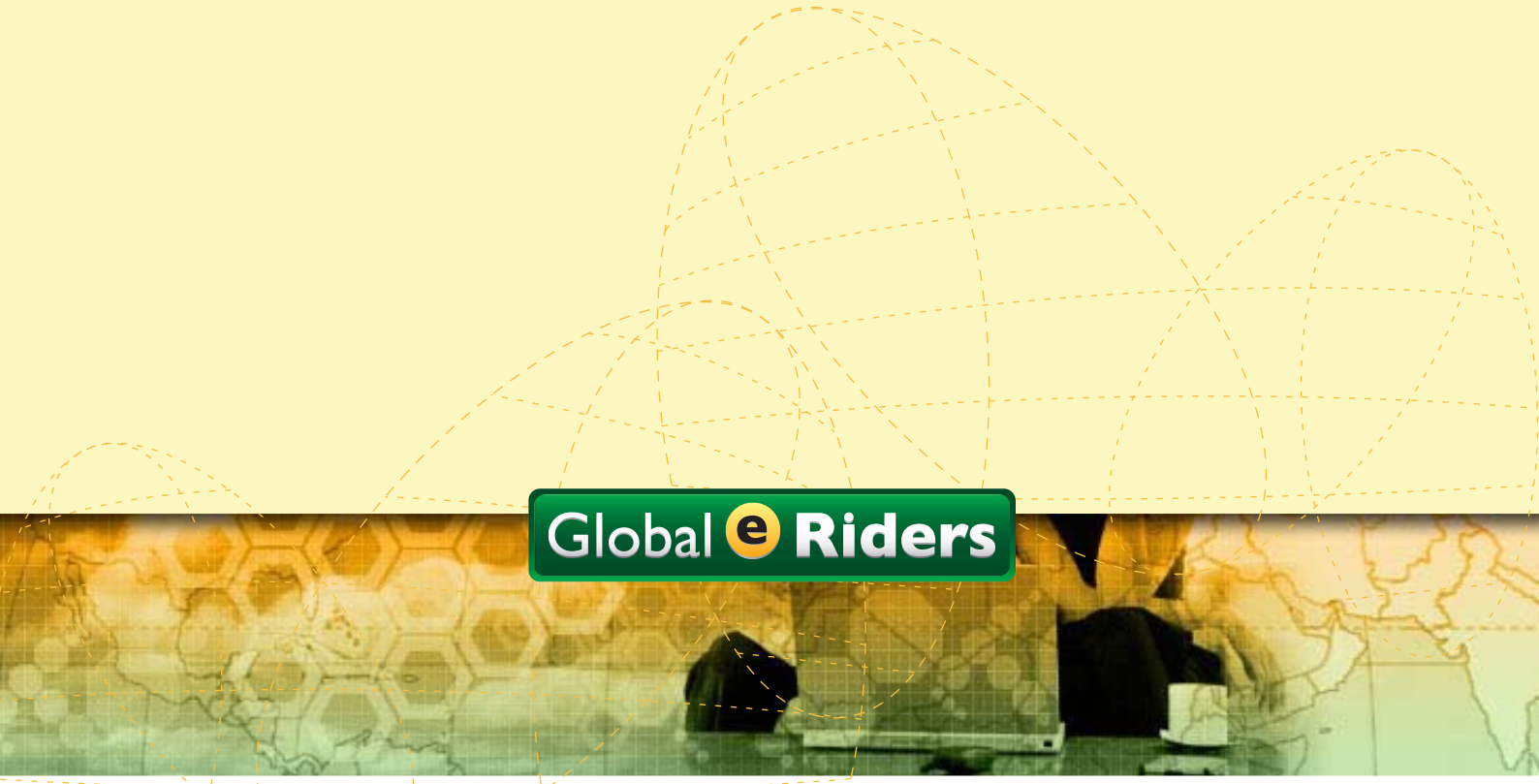
At a later time, summarize your findings into the "specifications" template for each PC and organize the computer skills assessment answers you collected.

Optional Procedures

You may wish to do the following if you have extra time and the user already seems fairly knowledgeable about computer usage (i.e. they don't need the "computer fundamentals" class). If the user does not fall into this category, or you plan to do group training that includes the following, you should save these steps for a later time.

1) Show them basic housekeeping processes.
   a) Explain how unused applications can still take up resources, etc.
   b) Start with taskbar, talk about what background apps may be turned off.
   c) Check add/remove programs list (explain its purpose, and assess any programs that could be removed.
   d) Explain the disk cleanup wizard
   e) If you aren't sure about disabling/removing something, *just leave it*.
2) Install/upgrade free software viewers and media players.
   a) Some users are unable to access information that they find on the internet or receive in e-mail (.pdf documents, movie files, etc.) because they don't have the correct software. Explain how easy it is to install the basics (Acrobat Reader, Winzip, etc . .), and explain the purpose of each.
   b) Take them through the installation process for any of the free programs that they may need. You can use the Ungana-Afrika software resource CD to accomplish this (and to serve as a nice example of the decisions they would have to make if they were doing this process themselves via a website).
   c) Explain the importance of being selective when installing new software via the web. Remember, computer storage and resources may be quite limited.

3) Take them through the online software update procedure.
   a) Explain that Windows (and other major software vendors) are always finding security holes and bugs in their programs. As a result, they continually release recommended updates and patches which can be installed for free.
   b) If they have an internet connection available, you can show them where to go for updates (windows update pages) and even take them through the process. If applicable, show them how to update their virus protections definitions. Explain the importance of doing this.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