IT Infrastructure in the Voluntary and Community Sector

A report on survey findings

between October and December 2005

by

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Key Findings

- Respondents were from a variety of organisations, with 60% being second tier organisations (including Councils for Voluntary Services and Volunteer Centres) and a quarter being service charities (i.e. a charity providing services directly to individuals, families or communities). Respondents tended to have turnovers in excess of £100,000, but the majority of respondents only have one office or branch.

- Over a third of organisations interviewed do not have a budget allocation for IT. Of those with budgets, size varied a great deal by organisation. There is however, a correlation between the annual turnover of an organisation and their annual IT budget/spending.

- The average increase in IT budget/spending over the next 2-3 years for those organisations who are proposing an increase is 38%. More than a third of organisations expect no increase in budget.

- Almost three quarters of organisations have a major IT investment planned – this is most commonly an investment in hardware, often servers and networks. Software is also mentioned as a major investment.

- IT support is most commonly available to organisations on an ad hoc basis, and is most often received from a paid external source. Organisations do not expect this to change significantly in the next 2-3 years.

- Less than one in five organisations have access to a full-time internal IT support specialist.

- Satisfaction with support is generally high, but availability and reliability are the main reported issues. Organisations would also benefit from having training available for staff and volunteers.

- Microsoft Windows dominates the desktop operating system platforms in use, with 98% using it for the majority of their everyday work. This is not expected to change significantly in the next 2-3 years although Mac OS and Linux are both mentioned as possible alternatives by some organisations.

- Microsoft again dominates the Office software in use – MS Office is used by all organisations and this is not expected to change significantly in 2-3 years, although OpenOffice is mentioned by a small number of organisations.

- Penetration of broadband is high, with almost nine in ten organisations having broadband access in at least one branch. This is not expected to increase significantly over the next 2-3 years.

- Web-based email and internet banking are the most commonly used internet applications. Reliability is cited as the main problem experienced.

- LANs (local area networks, both server-based and peer-to-peer) are the most common networks currently in use, and this is likely to remain so over the next 2-3 years – but there will be a small shift towards WANs (Wide Area Networks).

- Microsoft yet again is the most common provider of server operating systems – Windows is the system most commonly in use and this is not expected to change in the near future – although Linux is expected to gain slightly in popularity.

- The number of organisations with no remote networking capabilities is expected to decrease significantly in 2-3 years from a half to under a quarter.

- The amount of work done in an out-of-office or outreach capacity is expected to increase in the next 2-3 years, when almost a quarter of organisations will do half or more of their work out of the office. Use of mobile computers (e.g. laptops) is expected to increase also.

- Windows XP Firewall is the most common firewall software in use, but hardware or router is the most common type of firewall in use.

- Norton is the most commonly used desktop anti-virus software. Symantec is a popular firewall and anti-virus product.

- Microsoft Access is currently used by more than three quarters of organisations, although this number is expected to decrease in the next 2-3 years. SQL Server and MySQL are expected to grow in popularity.

Executive Summary

The survey was completed by a variety of organisations, with a third being Volunteer Centres, a quarter being service charities (i.e. a charity providing services directly to individuals, families or communities), and 17% being a CVS (Council for Voluntary Services). The majority of responding organisations were in the mid- to high-annual turnover range of small/medium organisations, with 60% having a turnover of more than £100,000 a year, and 16% having a turnover of more than £1 million. Only 22% of organisations have more than 2 offices or branches, with the majority (63%) only having one office or branch.

50% of responding organisations have a budget allocation for IT. For these organisations, the annual budget for IT varies a great deal – more than a quarter (28%) of organisations report a budget of less than £1,000, but a similar number have an IT budget of more than £10,000 a year. While 47% of organisations say their budget is definitely or quite likely to increase over the next 2-3 years, only a slightly lower number (36%) of organisations do not expect an increase. For those organisations expecting an increase (and that give figures for their current and future budget), the average expected increase over the next 2-3 years is 38%.

Almost a third of organisations have no major IT investments currently planned, but for a quarter of these it is due to recent investment rather than a lack of funding. For those organisations that do have major IT investments planned, this was most commonly an investment in hardware (one in five organisations plan to invest in hardware). Server, software and network investments were also common plans.

Perhaps not surprisingly given the often ad hoc funding-dependant nature of the sector, most support received is ad hoc rather than on a full time or part time basis. However, external paid support is more commonly used than pro-bono – perhaps a reflection of the difficulties in finding a volunteer with the appropriate skills or a support provider willing to carry out pro-bono work. Two-thirds of organisations use external paid support. Internal paid support is the only kind of support more likely to be had on a full- or part-time basis rather than ad hoc – 17% of organisations have full-time paid internal support, and 19% have part-time internal paid support. Organisations expect very little change in the provision of their IT support in the next 2-3 years – there is a small shift towards full-or part-time positions from ad hoc in the external and internal paid categories, perhaps as a result of increased or more reliable/stable funding. Although satisfaction with the available support is generally high, there are issues that could be improved – most commonly availability and reliability of support, and training of staff to make external support less necessary. Of course, more funding for support, and greater awareness of its value and importance by funders would help too.

Almost all organisations interviewed use Microsoft Windows as their desktop platform, with more than nine in ten organisations using it as their only platform and another 5% using it alongside other systems such as Mac OS. When asked what system they expect to be using in two to three years time, a large majority expected to remain with Microsoft Windows – however there does appear to be a small shift towards Mac OS or Linux.

A similar pattern is evident in the usage of Office software. Again Microsoft dominates – not surprisingly given Microsoft's domination of the market generally in the home and small business sector. MS Office is in use as the only office software by almost nine in ten organisations – and it is used along with other office software by all other organisations (excluding the one organisation who did not know which they use). Again, there may be a small shift away from the Microsoft product in the next two to three years, with a small number (4%) of respondents saying they will be using Open Office in the future.

As this survey was completed on the internet, it is not unexpected that all of the respondents have internet access although this is not necessarily true of all organisations in this sector. The results show that the majority of organisations use broadband – for three quarters of organisations this is their only type of internet connection. Several organisations use various types of internet connection at their various branches or offices. Comments later in the survey show that at least one organisation has a 'branch' at someone's home, so this variety in types of connection is perhaps not unexpected given the nature of the sector. In the future, there will be a continued shift away from dial-up, and fewer offices expect to have no connection at all. Web-based applications commonly in use are web-based email and internet banking, although almost a quarter of organisations do not use web-based internet applications at all. Reliability is the biggest issue when using web applications, with 65% saying they have problems with this.

The most commonly used network (57% of organisations) is the server based local area network (LAN). A further 20% use a peer-to-peer LAN. This is not expected to change significantly over the next 2-3 years, but there is a move away from LAN's to Wide Area Networks (WAN). Microsoft again dominates the server operating systems in use (59% of organisations using this) and results suggest this will not change in the next 2-3 years. Peer-to-peer networks are currently used by 14% of organisations, with this number expecting to decrease slightly over the next 2-3 years, and Linux gaining marginally in popularity.

Currently, 10% of organisations have no networked desktop computers, and slightly over one half (52%) have between 1 and 10 networked desktop computers. Two thirds of organisations expect their number of networked computers to increase in the next 2-3 years. Remote networking is less common – a half of organisations currently have no remote networking capabilities, although this is expected to decrease significantly in 2-3 years, with only one in five expecting to have no remote networking capabilities after this time. Virtual Private Networks and Wi-Fi will be the methods taken up most by organisations within the next 2-3 years.

Less than a third of organisations currently share data with other organisations over a network – but this number is expected to increase to over half within the next 2-3 years. A quarter of organisations share data with 1-5 offices, and this will increase to almost 40% within the next 2-3 years. Almost two-thirds of respondents to this question expect the offices or organisations they will be sharing data with to definitely or quite likely be using the same desktop platform.

Again, when asked about application server software, a large number (38%) were unable to answer the question, and a further 43% said they didn't use an application server. Of the small remaining number of organisations, Microsoft Terminal Services is the most commonly used application server software. An even larger number of organisations – almost a half – were unable to answer whether they would be using application server software to run some of or all applications centrally on a server in 2-3 years time. This again reflects either a lack of technical knowledge or the difficulty in predicting this. The responses given tend to be towards this being quite likely or definite, with only 3% saying this will definitely not happen. However it is possible that some respondents may also have misunderstood this question and referred to the use of web applications running on a web server, rather than an application server like Citrix.

Currently, 65% of organisations do less than a quarter or none of their work in an outreach capacity. The amount of work done in an outreach capacity is expected to increase over the next 2-3 years, with only 4% doing no 'out-of-office' work in 2-3 years, and almost a quarter (22%) doing a half or more of their work in an outreach capacity. Mobile computer usage is also expected to increase in the next 2-3 years; currently 26% use a mobile computer (e.g. laptop) for more than a quarter of their work and in 2-3 years, this number increases to 44%.

Organisations are divided on whether staff will have remote wireless network access in 2-3 years time – a quarter say their staff are very likely to have access, but a third say it is not likely. Less than one in ten are definite either way – 9% say they definitely will, 7% that they definitely won't. Again, more than a quarter were unable to answer the question.

The most common Firewall in use is hardware or a router, with more than a third using this method. Windows XP Firewall is the most commonly used firewall software, in use by more than a quarter of organisations, and Symantec is also popular, in use by more than one in five organisations. Symantec is also a popular provider of desktop anti-virus software, used by a quarter of organisations – although Norton is the most popular desktop anti-virus software, being used by 30% of organisations.

When asked about remote storage of sensitive information, more than a half of organisations either already store information remotely or would consider doing so. However, 18% say they would never consider it – some organisations are concerned with confidentiality, and some do not store any personal details on a computer in any case.

Microsoft Access is the database most commonly used by organisations, currently in use by three quarters of those who responded.

Respondents were invited to comment at the end of the survey, and the comments made reflect the difficulty some respondents had in answering some fairly technical questions; there is often no specific technically-trained member of staff within an organisation. Technical equipment and software are difficult things to get funding for, and as such the type and age of equipment used by organisations is almost wholly dependent on what funding is available. This affects long term plans and decision-making, and means that often the most up-to-date or appropriate hardware or software is not available. Organisations are required to balance their needs and IT is not always a priority. Comments are also made about levels of staff knowledge, reflecting a degree of frustration among these organisations; they are often unable to afford the training necessary to get to grips with the required equipment. Again, it comes down to cost – training costs money.

Methodology

This was an online self-completion survey conducted between 11th October 2005 and 31st December 2005 aimed at organisations in the UK Voluntary and Community Sector (VCS). Respondents were sourced through email and a number of popular VCS mailing lists, and were invited to access the survey via a URL link. The survey consisted of 36 questions regarding their use of IT now and their expected use of IT in 2-3 years time.

About your Organisation

What is the best description of the organisation you are representing?
150 respondents

- A third of the respondents to this survey were Volunteer Centres, and a further quarter (24%) of responses came from an organisation which identified as an 'Other service charity'.

Organisation	% orgs
Volunteer Centre	33%
Other service charity (i.e. charity providing services directly to individuals, families or communities of interest)	24%
Council for Voluntary Service (CVS)	17%
Other infrastructure charity (i.e. second-tier charity that supports other charities)	9%
Youth agency (i.e. organisation offering information, services and support to young people)	2%
County Sports Partnership	2%
Educational institute (e.g. school or university)	1%
NHS Trust	1%
Other	11%

- 16 respondents (11%) selected "Other" and entered a free text description of their organisation. One of these was an infrastructure charity while the others were as described below:
  - Organisations providing support to the charity/voluntary sector (3 respondents)
  - International organisations (2 respondents)
  - Citizens Advice Bureau (1 respondent)
  - Research & publishing charity (1 respondent)
  - Youth organisation (1 respondent)
  - Human rights organisation (1 respondent)
  - Volunteer led arts festival (1 respondent)
  - Hospital appeals charity (1 respondent)
  - Recreational sport body (1 respondent)
  - Social enterprise (1 respondent)
  - Umbrella body for amateur theatre (1 respondent)
  - Trade union owned organisation (1 respondent)

Approximately what is your organisation's current annual turnover? - optional -
129 respondents

- The majority of organisations (60%) responding to the survey have a mid-to-high level annual turnover (for small to medium organisations) of at least £100,000 – and 16% have an annual turnover of over £1,000,000.

Annual turnover	% orgs
Under £10k	4%
£10k - £25k	5%
£25k - £100k	23%
£100k - £500k	33%
£500k - £1m	11%
Over £1m	16%
Don't know	8%

How many distinct offices / branches does the organisation have in total?
150 respondents

- Two-thirds of respondents represent an organisation with only a single office (63%).
- Only 13% of organisations responding to the survey have more than 5 offices or branches.

No. of distinct Offices/Branches	% orgs
1	63%
2	16%
3 - 5	9%
6 - 10	3%
11 - 20	3%
21 – 100	4%
More than 100	3%

IT Budgets and Spending

Does your organisation have a budget allocated for IT?
150 respondents

- One half (51%) of organisations have a budget allocation for IT.
- 38% of organisations do not have a budget allocation for IT, with the remaining 12% of respondents not knowing whether they do or not.

Approximately what is your organisation's current annual budget/spending for IT (including hardware, software, planning/analysis, consultation and technical support)?
68 respondents

- The annual budget for IT varies a great deal by organisation – at one end of the scale, 28% have a budget of less than £1,000 – at the other, more than a quarter (27%) have an IT budget of more than £10,000.
- The majority (63%) of organisations have a budget of less than £5000.

Current annual IT budget	% orgs
£0	10%
£1 - £999	18%
£1,000 - £4,999	35%
£5,000 - £9,999	10%
£10,000 - £100,000	21%
More than £100,000	6%

- There is a correlation between the annual turnover of an organisation and their annual IT budget, with those organisations that gave both these figures tending to spend 1%-10% of their annual budget on IT.

How likely is your organisation's annual IT budget/spending to increase during the next 2-3 years and why?
150 respondents

- More than one third (36%) of organisations say they are unlikely or definitely not going to have an increased IT budget during the next 2-3 years.
- However, almost one half (47%) are quite likely or definitely going to increase spending.
- Almost one in five respondents do not know whether their budget will increase or not.

Likelihood for budget to increase	% orgs
Definite	19%
Quite likely	28%
Not likely	33%
Definitely not	3%
Don't know	17%

- Whether the budget is likely to increase or not does not seem to depend on whether the organisation currently has an IT budget – 51% of those who currently have a budget expect their budget to increase, compared to 46% of those who do not currently have a budget.
- For those organisations that say their budget will definitely or is quite likely to increase, this is most commonly due to the organisation growing in size or needing to replace equipment.
- For those who are not likely to or definitely not going to have a budget increase, this is most commonly due to a lack of available funding. Some organisations have recently replaced their IT equipment, and are not expecting to need to replace it again soon.

Approximately what would you expect your organisation's annual IT budget/spending to be in 2-3 years time?
51 respondents

- This table and the bar chart below support previous results that suggest IT budgets are going to increase, with a shift towards higher levels of spending on IT.

Annual IT budget in 2-3 years time	% orgs
0	6%
£1 - £999	10%
£1,000 - £4,999	33%
£5,000 - £9,999	20%
£10,000 - £100,000	24%
More than £100,000	8%

- 45 organisations give a figure both for their current budget and expected budget in 2-3 years – of these, only one expects to have a decrease in budget in this time. 10 organisations expect their budget to stay the same. Of the 34 organisations that expect an increase, the average budget increase is 38%.

Does your organisation have any major IT investments planned, and if so what are they? (for example new or upgraded software, hardware or network)
123 respondents

- Almost a third of those responding to this question (29%) have no major IT investments planned – but for a quarter of these this is due to having had a recent investment and therefore not needing any for the time being.
- The most common intended investment was hardware, with 21% of organisations saying they are intending to upgrade this in the near future.
- Investments in servers were also common, with 15% of organisations mentioning this.
- The table below shows investments mentioned by more than 4 organisations.

Planned major IT investments	% orgs
Hardware	21%
Server	15%
Software	14%
Network	14%
Website development	8%
Internet connection	7%
Database	7%

- Investments mentioned by 4 organisations or fewer include telephone system upgrades, printers, ICT infrastructure, CRM systems, cabling and storage.
- Three organisations mentioned that their intended investments had been funded or assisted by the Change Up initiative.

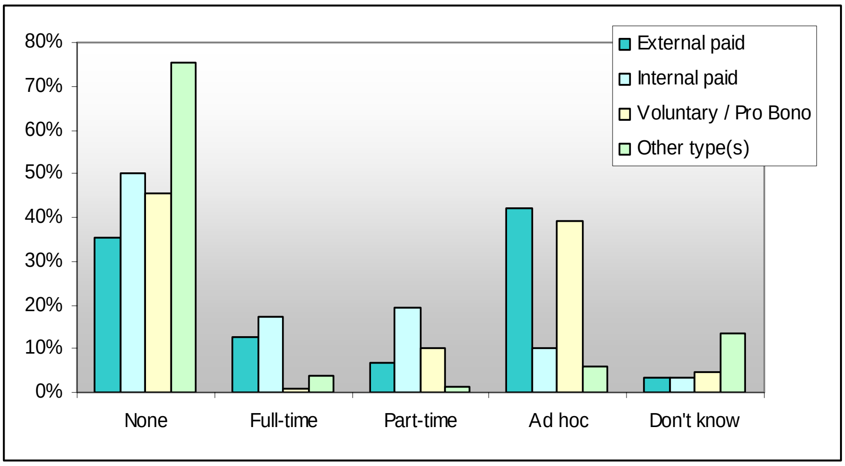
IT and Systems Support

What type(s) of general IT/systems support does your organisation currently have and are these available full-time or part-time?
150 respondents

- The type of support most commonly used is external paid support – however this is most commonly used on an ad hoc basis, with 42% of organisations using ad hoc external support (and 62% using external support in total).
- One half of organisations use voluntary or pro bono support – again, this is most commonly on an ad hoc basis.
- Almost a half (46%) of organisations has access to internal paid support – for over a third of organisations (36%), this is full or part time.
- Only 2 organisations have no support at all.
- Other types of support mentioned include support contracts, and support received from local councils.

Type of support	Full-time	Part-time	Ad hoc	**Total**
External paid	13%	7%	42%	**62%**
Voluntary / Pro Bono	1%	10%	39%	**50%**
Internal paid	17%	19%	10%	**46%**
Other type(s)	4%	1%	6%	**11%**

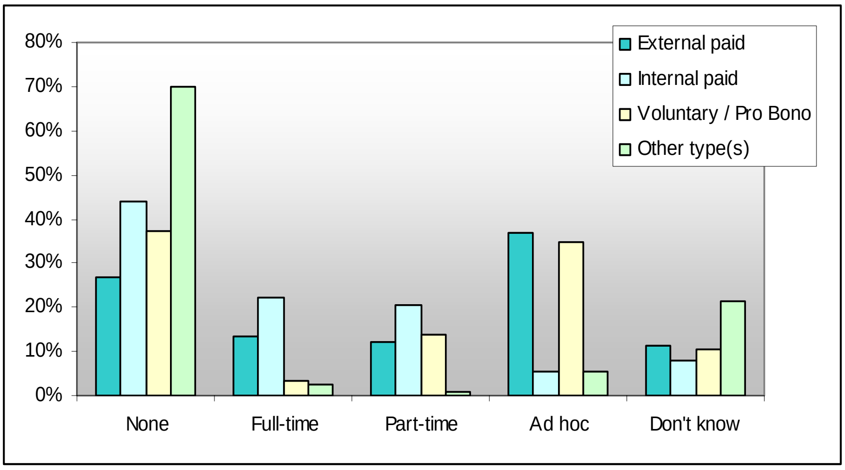
- The chart below clearly shows that support is most commonly received on an ad hoc basis.



What type(s) of general IT/systems support would you expect your organisation to have in 2-3 years' time and are these likely to be available full-time or part-time?
150 respondents

- Organisations expect very little change in the provision of their IT support in the next 2-3 years – there is a small shift towards full- or part-time positions from ad hoc in the external and internal paid categories.

Type of support	Full-time	Part-time	Ad hoc	**Total**
External paid	13%	12%	37%	**62%**
Voluntary / Pro Bono	3%	14%	35%	**52%**
Internal paid	22%	21%	5%	**48%**
Other type(s)	3%	1%	5%	**9%**



How satisfied is your organisation with its current general IT support?
150 respondents

- Satisfaction is generally high, with 71% of organisations describing their support as being of good quality, and only 4% saying it is not at all sufficient.
- Availability is an issue for 37% of organisations, who say their support is not always available when needed.

Satisfaction with current support	% orgs
Good quality and usually available when needed	41%
Good quality but not always available when needed	30%
Not always of sufficient quality, but usually available when needed	11%
Not always of sufficient quality and not always available when needed	7%
Not at all sufficient	4%
Don't know	6%

Is there anything your organisation would like to improve regarding its IT support?
95 respondents

- Several issues surrounding IT support are mentioned:

Better availability/reliability of support (16%)
- *"I would love to have someone on hand to troubleshoot and also on a less ad hoc nature."*
- *"We need consistent resource on tap when we need it"*

More training for staff (15%)
- *"More training for in-house support staff"*
- *"Would like to have regular up to date training available for all staff and volunteers."*

More funding for support (13%)
- *"Money to spend on it would be nice"*
- *"Core funding for the purpose."*

- Other issues mentioned include needing someone to contact for IT support, having more staff for the purpose, and needing more reliable long-term support.

Desktop Platforms

Which desktop platform does your organisation use for the majority of its everyday work and which is your organisation most likely to be using for the majority of its work in 2-3 years' time?
150 respondents

- Almost all organisations (98%) use Microsoft Windows for the majority of their everyday work – 93% using only Windows and the remaining 5% using Windows combined with another system.
- One respondent mentioned using Novell.

	Currently used	In 2-3 years
Desktop platform	% orgs	% orgs
Microsoft Windows	93%	90%
Microsoft Windows and Mac OS	2%	3%
Microsoft Windows, Mac OS and Linux	1%	1%
Microsoft Windows and Linux	1%	1%
Microsoft Windows and Other(s)	1%	1%
Mac OS	1%	1%
Mac OS and Linux	0	1%
Linux	0	1%
Other(s)	1%	2%

- The table above also shows the desktop platform organisations expect to be using in 2-3 years time. There does appear to be a small shift away from Microsoft Windows towards Mac OS and/or Linux, although a large majority (96%) still expect to be using Microsoft Windows as one of their main desktop platforms in 2-3 years time.

Office Software

Which Office software does your organisation use for the majority of its everyday work and which is your organisation most likely to be using for the majority of its work in 2-3 years' time?
150 respondents

- Microsoft Office is the preferred software currently in use. Discounting the organisation that does not know which software is in use; all organisations currently use Microsoft Office software.
- While the majority use MS Office alone, 12% use it alongside another type of software, the most popular being OpenOffice and MS Works. One respondent also mentioned Ability Office.

	Currently used	In 2-3 years
Office software	% orgs	% orgs
MS Office	88%	84%
MS Office and OpenOffice	4%	5%
MS Office and MS Works	4%	3%
MS Office, MS Works and Other(s)	1%	1%
MS Office and Lotus SmartSuite	1%	1%
MS Office, Lotus SmartSuite and MS Works	1%	0
MS Office and Other(s)	1%	1%
OpenOffice	0	4%
Don’t know	1%	2%

- Again, results for the software expected to be in use in 2-3 years time show a shift (although a small one) away from the Microsoft product. However 95% still expect to be using MS Office, albeit sometimes in combination with other software.
- The small shift away from MS Office is towards an open-source product called OpenOffice. One respondent also mentioned Ability Office.

Internet Access and Applications

What type of Internet access does your organisation use in its office(s) and what type is likely to be in use in 2-3 years' time?
150 respondents

- This table shows the types of internet connection currently in use at the organisations interviewed.
- As can be seen below, a variety of combinations are used. Generally though, we can see that broadband is the most common connection type, with almost three-quarters using broadband as their only connection type, and a further 15% using it as a connection type (amongst others), meaning 88% have access to a broadband connection in one or more of their offices.
- 7% use only a 56k dial-up connection. Including those who use dial-up as one of their connections, 18% use dial-up in one or more of their offices.

	Current	In 2-3 years
Internet Connection Type	% orgs	% orgs
Broadband (ADSL, Cable, Wireless etc.)	73%	72%
56k Dial-up	7%	1%
ISDN	2%	1%
Leased line	1%	2%
Broadband, Dial-up and Other(s)	1%	1%
Broadband, Dial-up, Leased line and ISDN	1%	0
Broadband and Dial-up	5%	3%
Broadband and ISDN	2%	4%
Broadband, Dial-up and Leased line	1%	1%
Broadband and Other(s)	1%	2%
Broadband and Leased line	1%	3%
No internet access and Broadband	1%	1%
No internet access, Broadband, Dial-up, Leased line and ISDN	1%	0
No internet access, Broadband, Dial-up, ISDN and Other(s)	1%	0
No internet access, Broadband and Dial-up	1%	1%
Other(s) (please specify below)	1%	1%
Don’t know	1%	8%

- Although the majority of organisations use broadband, the type of connection used is by no means uniform across the sector – and in many cases, not uniform across the different offices of one organisation. 4% of organisations have no internet connection at all in one or more of their offices, although all organisations have at least some form of internet access. Considering this was an online survey, that result is perhaps not fully representative of the sector.
- When asked about internet access in 2-3 years time, the main shift that can be seen is away from dial-up connections. Only 1% expects to be using only dial-up as a main connection in 2-3 years time, compared with 7% currently.
- A similar number expect to be using broadband in one or more of their offices, and slightly more expect to be using a leased line.
- Only 2% do not expect to have internet access in one or more of their offices.

What are the main online (web-based) Internet applications used by your organisation as part of its everyday work?
145 respondents

- Web-based email is the most common Internet application used by organisations, with over a half (52%) using it.
- Internet banking is used by one in five (19%) organisations.
- Almost a quarter (23%) of organisations do not use web applications at all.

Internet Applications	% orgs
Web-based email	52%
Don't use web applications	23%
Internet banking	19%
Other	18%
Mailing list management	13%
Content Management System (CMS)	12%
Web-based survey software	7%
Customer Relationship Management (CRM)	6%
Don't know	6%
HR system	2%

- Other Internet applications mentioned included:

    - Online database (7 respondents)
    - Online booking system (events, rooms etc.) (3 respondents)
    - Inland Revenue (2 respondents)
    - Online bookshop (2 respondents)
    - Bulletin Board / Mailing list (2 respondent)
    - Online grantmaking applications (2 respondents)
    - Finance system (2 respondents)
    - Helpdesk (1 respondent)
    - Shared Calendars (2 respondenta)
    - Fundraising system (1 respondent)
    - Wiki (1 respondent)
    - Blogging (1 respondent)

When using online internet applications for its everyday work, does your organisation have problems with any of the following?
150 respondents

These results exclude those who do not use web applications.

- Reliability is the biggest issue when using web applications, with 61% of respondents saying they sometimes have problems with this, and an additional 4% saying they often or always have problems.
- Speed is an issue for 52% of organisations.
- Protection and privacy is least likely to be a problem, although one quarter of organisations have had problems with it at some stage.

Problems with internet applications	Never have problems	Sometimes have problems	Often have problems	Always have problems	Don't know
Reliability	28%	61%	3%	1%	8%
Speed	41%	45%	7%	0%	8%
Usability	44%	36%	8%	1%	12%
Protection and privacy of sensitive / personal data	58%	21%	2%	2%	17%

Network Infrastructure

What type(s) of network does your organisation use and what type(s) of network are likely to be in use in 2-3 years' time?
150 respondents

- The most commonly used network currently is the server-based LAN (local area network), with 57% of organisations using this. A further 20% use a peer-to-peer LAN.
- Although organisations using each type of network are expected to remain similar over the next 2-3 years, there is a move away from LANs to Wide area networks.

Type of network	In use now	2-3 years
Server-based local area network (LAN)	57%	52%
Peer-to-peer local area network (LAN)	20%	11%
No network	10%	4%
Wide area network (WAN)	8%	16%
Don't know	5%	15%
Other(s)	1%	2%

What server operating system is used to manage your organisation's network and its user accounts? What server operating system is likely to be used in 2-3 years' time?
150 respondents

- Microsoft Windows is the most common server operating system in use today and will remain that way in the next 2-3 years, with around 60% of organisations using it. Linux will gain marginally in popularity.
- A peer-to-peer network is currently in use by 14% of organisations, with this number decreasing slightly to 10% over the next 2-3 years.
- The number of organisations without a network is expected to reduce from its current 10% to only 3%.

Server operating system	In use now	2-3 years
Microsoft Windows	59%	60%
Peer-to-peer network	14%	10%
No network	10%	3%
Linux	5%	8%
Novell Netware	3%	3%
Unix based OS	2%	3%
Mac OS	1%	2%
Other(s)	7%	10%

- It is interesting to note that in this question, 14% of organisations said they currently have a peer-to-peer network compared to 20% in the previous question. This may indicate that some organisations misunderstood one of these questions.

Approximately how many desktop computers does your organisation currently have networked in total and approximately how many do you expect to have networked in 2-3 years' time?
150 respondents

- Slightly over one half (52%) of organisations have between 1 and 10 networked desktop computers.

Desktop computers	Now	2-3 years
0	10%	6%
1-5	29%	25%
6-10	23%	22%
11-20	16%	21%
21-50	14%	16%
51-100	3%	4%
101-1000	3%	5%
More than 1000	1%	1%

- Overall, just under one third of organisations expect to have the same amount of networked computers in 2-3 years time.
- Two-thirds expect to have more networked computers, and only 2% expect to have less.

- It is interesting to note that in this question, 6% of organisations expect to have no networked computers in 2-3 years time, compared to 3% in the previous question. This small disparity is likely to reflect organisations unable to predict this with certainty, or who misunderstood one of these questions.

Do staff ever connect to your network remotely by any of the following methods and which of these methods do you envisage staff being able to use in 2-3 years' time?
150 respondents

- Currently, a half of organisations have no remote networking capabilities – this is expected to decrease significantly in 2-3 years, with only 21% expecting to have no remote networking after this time.
- Virtual Private Networks (increasing from 20% to 30%) and Wi-Fi (increasing from 16% to 25%), will be the methods taken up most by organisations within the next 2-3 years.
- However a significant amount (29%) does not know which if any of these methods they will be using in 2-3 years time.

Remote connection method	Now	2-3 years
None	50%	21%
Virtual Private Network (VPN)	20%	30%
Remote Access Service (RAS)	20%	23%
Wi-Fi	16%	25%
Don't Know	7%	29%
Other method(s)	5%	7%

How many offices / organisations do you share data with over a network and how many are you likely to share data with in 2-3 years' time? (e.g. over a WAN or VPN)
150 respondents

- More than two-thirds of organisations do not share data over a network with any offices or organisations. This is expected to decrease to under a half (46%) in the next 2-3 years.
- A quarter of organisations share data with 1-5 offices – this will increase to almost 40% within the next 2-3 years.

Offices/orgs share data with	Now	2-3 years
0	69%	46%
1-5	25%	39%
6-10	2%	8%
11-100	2%	4%
More than 100	2%	3%

- Almost two-thirds expect to be sharing data with the same amount of offices in 2-3 years time.
- Only 1% expects to be sharing with fewer offices – a third expect to be sharing their data with more offices or organisations in 2-3 years time.

How likely is it that these offices / organisations will all be using the same desktop platform(s) (i.e. types of computer and operating system) in 2-3 years time?
119 respondents

- This question is asked in relation to the previous question - how many other organisations do you expect to share data with in 2-3 years' time. Almost a half (46%) of organisations answered zero to that question and we have therefore not included their responses when compiling the below statistics for this question.

Likelihood same in 2-3 years	% orgs
Definite	11%
Quite likely	54%
Not likely	11%
Definitely not	1%
Don't know	15%

- Almost two-thirds of respondents to this question (65%) expect other offices or organisations will definitely or quite likely be using the same desk top platforms in 2-3 years time

If you use application server software to run some of, or all, applications centrally on a server, what software do you use to do this?
150 respondents

- 43% do not use an application server and 38% don't know if they use application server software, so these answers are not representative of application server software in use.
- However, of those mentioned, Microsoft Terminal Services is the most commonly used, with 13% of organisations using this software.

Application server software	% orgs
Don't use an application server	43%
Microsoft Terminal Services	13%
Citrix	5%
Oracle Application server	2%
Other	3%
Don't know	38%

How likely are you to use application server software to run some of, or all, applications centrally on a server in 2-3 years time?
150 respondents

- An even larger number of organisations – this time close to half – answered 'don't know' to this question.
- This could be due to some organisations not having a member of staff technically knowledgeable enough to answer. This assumption is reflected in some later comments made by respondents.
- Of those that did answer, responses tend to be towards a central application server being quite likely to definite. However it is possible that some respondents may have misunderstood this question and may be referring to the use of web applications running on a web server, rather than an application server like Citrix.

Likelihood to use app server software	% orgs
Definite	12%
Quite likely	21%
Not likely	16%
Definitely not	3%
Don't know	48%

Outreach Work

Approximately how much of your organisation's total work is done in an outreach / out-of-office capacity and approximately how much do you expect to be done in 2-3 years' time?
150 respondents

- Currently, 65% of organisations do less than a quarter or none of their work in an outreach capacity.
- The amount of work done in an outreach capacity is expected to increase over the next 2-3 years, with only 4% doing no out-of-office work in 2-3 years, and almost a quarter (22%) doing a half or more of their work in an outreach capacity.

Work done in outreach capacity	Now	2-3 years
All	2%	1%
Half or more	11%	21%
A quarter to a half	19%	29%
Less than a quarter	50%	29%
None	15%	4%
Don't know	4%	16%

Approximately how much of the above outreach / out-of-office work is currently done, and is likely to be done in 2-3 years' time, on a mobile computer (e.g. laptop)?
150 respondents

- The use of mobile computers, such as laptops, is expected to increase in the next 2-3 years – currently 26% use a mobile computer for more than a quarter of their work, and in 2-3 years, this number increases to 44%.

Outreach work done on laptop	Now	2-3 years
All	8%	8%
Half or more	9%	12%
A quarter to a half	9%	24%
Less than a quarter	46%	31%
None	15%	2%
Don't know	5%	19%

How likely do you think is it that your organisation's staff will be able to access your Network and/or the Internet via a wireless connection 100% of the time when working remotely in 2-3 years time?
150 respondents

- Again, more than a quarter of respondents do not know the answer to this question.
- Of those that do, a quarter think it is very likely staff will have remote access, but a third think staff are not likely to. Less than one in ten are definite either way – 9% say they definitely will, 7% that they definitely won't.
- The answer to this question may have been difficult to predict as it depends on an organisation's local wireless infrastructure which is not usually under their control.

Likelihood to access	% orgs
Definite	9%
Very likely	23%
Not likely	32%
Definitely not	7%
Don't know	29%

Security

What type(s) of Firewall does your organisation use?
150 respondents

- Hardware or a router are most commonly used – 37% of organisations using this.
- Windows XP Firewall is used by more than a quarter (27%) of organisations, and Symantec is used by a further 22%.

Type of Firewall	% orgs
Hardware / Router	37%
Windows XP Firewall	27%
Symantec	22%
Norton	15%
Don't know	15%
McAffee	8%
ZoneAlarm	6%
Other(s)	6%
None	4%

Which desktop Anti-Virus software product(s) does your organisation use?
150 respondents

- Norton is most commonly used – 30% of organisations use this software.
- Symantec is again popular, being used by a quarter of organisations.

Type of Anti-Virus software	% orgs
Norton	30%
Symantec	26%
McAfee	21%
AVG	15%
Sophos	9%
Panda	1%
Other(s)	9%
Don't know	7%
None	2%

- Other anti-virus software in use includes Trend Micro and F-Secure.

Data Storage and Databases

Does your organisation have either a policy or a documented process for data backup?
150 respondents

- 69% of organisations have either a policy or a documented process for data backup.
- 24% of organisations do not have one, and the remaining 7% do not know.

Would your organisation store sensitive/personal data remotely on a secure server outside of the organisation? If not, please explain your reasons in the text box below.
150 respondents

- Again, a quarter of organisations do not know the answer to this question.
- More than a half (56%) of all organisations either already store information remotely or would consider doing so.

Storing data externally	All orgs
We already do	17%
We would consider it	39%
We would never consider it	18%
Don't know	26%

- However, 18% say they would never consider it:
    - Concerns are stated about confidentiality:
        - *"Our clients need to be assured that enquiries made to this office are confidential."*
        - *"Confidentiality of the information."*
    - Some organisations do not store any personal details on computer.
        - *"We do not keep any sensitive personal data on computer other than names, addresses or other contact details. This applies to staff and clients."*
        - *"We do not store sensitive/personal data electronically."*

What type(s) of database does your organisation currently use and what type(s) is your organisation likely to use in 2-3 years' time?
150 respondents

- Microsoft Access is currently in use by more than three quarters of respondents. Although it does appear this will decrease over the next 2-3 years, in fact a quarter of respondents do not know what database they will be using, so the actual reduction may not be that significant.

Type of database	Now	2-3 years
Microsoft Access	78%	56%
Other(s)	19%	19%
SQL Server	10%	15%
MySQL	10%	15%
Don't know	6%	24%
None	5%	1%
Oracle	3%	5%

- V-Base was mentioned by 11% of respondents, however this product currently uses an Access database. Raisers Edge was mentioned by 1%, and this uses an MS SQL Server database.

Other Comments

- Comments were made by 55 respondents about a variety of issues.

Funding for IT (mentioned by 17 respondents)

- *"Funding is the key to making improvements for us."*
- *"It is very difficult to access IT update support funding. There would a benefit I think in having an identified stream of funding which one could use to help update software and hardware."*
- *"It's very difficult to plan any changes as so much depends on what funding is available. IT can 'always wait' until next year if things are tight."*
- *"Very difficult to predict what will happen in 2-3 years. Difficult to know what funding will be like or even whether we will still be a stand-alone centre or merged."*
- *"We make do on a tight budget but trying to keep up to date with PC's is difficult because of cost we use recycled PC's too. Cost of IT training is expensive, salaries are low."*

These comments indicate that IT within many of the organisations interviewed is closely if not wholly dependent on what funding is available. This affects long term plans and decision-making, and means that often the most up-to-date or appropriate hardware or software is not available. Organisations are required to balance their needs and IT is not always a priority.

Staff experience/knowledge (mentioned by 14 respondents)

- *"As a small organisation that cannot afford to employ an IT specialist, we want a simple reliable computer network that requires the minimum of attention. IT developments seem to continually add complexity, cost, and the need for further staff training."*
- *"The very nature of voluntary sector promotes 'accidental techies' - those who manage the ICT within a group who learn as they go along. This survey has shown that my knowledge needs to be more developed to be able to understand [our] ICT needs."*
- *"We can co-ordinate our efforts to make all the hardware and software compatible, we can ensure that we have the fastest bestest everything, but we can't make the staff any better at using it."*
- *"Even if we had sufficient resources to develop the IT infrastructure I still think that there will continue to be a problem with finding sufficient and ongoing resources to develop the capacity of staff to use the software well."*

The comments made about staff knowledge reflect a degree of frustration among these organisations; they are often unable to afford the training necessary to get to grips with the required equipment. Again, like the comments about funding above, it comes down to cost – training costs money.

Current systems need upgrading (mentioned by 5 respondents)

- *"Current system small and basic. Future developments (i.e. wireless networking etc.) will require more support. Parent organisation currently working on this. "*
- *"Our infrastructure is drastically in need of upgrading"*
- *"We are hampered by old computers, broadband in one office, but not in the other and by having to ask staff to come to one office to input [data] etc as we do not have a server."*

Perhaps unsurprisingly given the nature of the sector, several organisations mention that their current systems need upgrading. This is obviously also connected to lack of funding mentioned above.

Investment in IT (mentioned by 5 respondents)

- *"IT infrastructure has been identified and there is likely to be significant investment in the next few years"*
- *"We are currently investing in a new Windows Server 2003 setup to increase our networking capability and security"*
- *"We have just got an IT plan which needs to be fleshed out to relate to all the issues raised in this survey."*

Although as we have seen, IT at some organisations suffers from lack of funding, several organisations do mention that IT issues are the target for further investment and plans are being made to that effect.