



# **IMPROVING CIRCUIT RIDER SERVICE TO VOLUNTARY AND COMMUNITY ORGANISATIONS**

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## **TOOLS TO BUILD CIRCUIT RIDER COMPETENCIES**

**VERSION 1.0**

**AUGUST 2008**



## **Credits**

This guide has been produced by Lasa as part of the ICT Hub's Circuit Rider development programme funded by CapacityBuilders between April 2007 and March 2008. Lasa thanks all those who have been involved, directly and indirectly, too numerous to mention individually but including members of the UKRiders mailing list and attendees at various events including the 2007 and 2008 Circuit Rider Conferences in Birmingham. In particular we thank Marc Osten of Summit Collaborative ([WWW.SUMMITCOLLABORATIVE.COM](http://WWW.SUMMITCOLLABORATIVE.COM)) who authored the study that laid the groundwork for this guide. Marc also wrote this guide with the support of Ryan Jacobs, a Summit Collaborative Associate, Ian Runeckles and Paul Allen at Lasa and the Advisory Group that provided essential feedback as the guide was under development. Members of the Advisory Group were:

- Catherine Palmer, CVC Circuit Riders, PAVS
- Simon Davey, Preponderate Network
- Kate White, Superhighways
- Dave Florence, Anthem ICT Services
- Pauline Baker, Greater Manchester CVO

## **Why Version 1.0?**

Our research confirmed that this is the first comprehensive Circuit Rider competency and improvement guide published. We view it as a work in progress which, we believe, will need to be revised as it is applied. Lasa, starting in 2008 will apply both the content and processes described in the guide via a structured training project for London-based Circuit Riders. The guide is published under a Creative Commons Attribution – NonCommercial - ShareAlike 2.5 License. We hope that you find it helpful and provide us with feedback by emailing [circuitriders@lasa.org.uk](mailto:circuitriders@lasa.org.uk)

## **About Lasa**

Lasa (London Advice Services Alliance) delivers innovative services in the fields of welfare rights, ICT and advice policy. Lasa is an acknowledged leading organisation in the UK Circuit Rider movement and community and since 2002 has run two projects working directly with small VCS organisations, the UKRiders mailing list, four major conferences and a host of seminars and training events. Lasa has produced publications, reports, newsletters and evaluations on and about Circuit Riding and the [ukriders.info](http://ukriders.info) website. See [www.lasa.org.uk/circuitriders](http://www.lasa.org.uk/circuitriders) for more information.



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## INTRODUCTION

This guide functions as a scaffold to improve the competency of those who assist Voluntary and Community Organisations (VCOs) to take full advantage of information and communications technology (ICT). When we use the term Circuit Rider in the guide it refers to a mobile worker who provides ICT support and development to a caseload of small voluntary organisations and who works in collaboration with other circuit riders.

It is very important to note however that the competencies and tools presented in this guide are also applicable to accidental techies, ICT staff in VCOs, ICT professionals working with VCOs, ICT volunteers, for-profit consultants that primarily work with VCOs and others who may not call themselves or be seen by others as Circuit Riders per se.

The content and processes in the guide stem from research findings about effective practices and gaps within the field of Circuit Rider training. The research found that:

- There are existing, generally accepted VCO ICT standards that substantially inform what competencies a Circuit Rider needs
- There is a generally agreed upon list of basic skills that Circuit Riders need to be successful when serving VCOs
- Soft skills such as general consulting, ICT assessment and the ability to connect clients to specialist services are considered the most important skills that a Circuit Rider needs to be successful
- There is nothing currently published that explicitly details the competencies a Circuit Rider needs to help a VCO
- Circuit Rider improvement is primarily personally driven most usually in an informal manner
- Primary methods that Circuit Riders use to improve their skills are through informal peer-to-peer contact and direct experience serving clients
- There is an abundance of excellent learning resources available to Circuit Riders but these resources are not well organized and therefore accessible

These findings provide a rationale and context for the competencies and processes described in the guide. A set of Circuit Rider Principles and VCO ICT Standards provide the foundation upon which the competencies are built. The competencies themselves are organised to reflect the core competencies that we believe every Circuit Rider should have and specialised competencies that different Circuit Riders need depending on the type of work they do and the organisations they work with. The guide also presents suggested processes and tools to identify and improve competencies.

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## TERMS USED IN THE GUIDE

**Business Systems** – Procedures, with or without the use of ICT tools, for administration of financial, event registration, publication, budgeting, invoicing and other management needs of an organisation.

**Capacity** – Numbers of staff and volunteers, the time people spend to accomplish things, expertise and/or funds to invest in ICT initiatives.

**Human Systems** – Teams, departments, committees, boards and other structures within organisations.

**ICT** - Information and Communications Technology - or Technologies includes items such as computers, networking hardware, digital media tools, phone systems, Internet based tools, etc.

**ICT Initiative** – An ICT related project or use of an ICT strategy such as reviewing and upgrading ICT infrastructure, technology training for staff or use of ICT to improve service delivery.

**ICT Standard** – A statement of generally agreed upon ICT related practices that voluntary community organisations (VCOs) aspire to.

**ICT Strategies** – The application of ICT tools in a manner that is thoughtful and deliberate to maximize benefit of the particular tool(s) to be used.

**Personal Learning Plan (PLP)** – A set of learning topics with clearly identified methods/resources to facilitate education (e.g. mentoring, taking workshops, field experience) and a timeline to gauge progress toward learning goals.

**Personal Learning Environment (PLE)**–The resources (e.g. Workshops, literature, peer-to-peer forums, mentors, online resources and field experience) that a Circuit Rider combines to facilitate learning.

**Programme** – Structured education, campaigning, direct service, advocacy and other types of efforts by VCOs to attain mission.

**Qualification and Credit Framework** – A way of recognising skills and qualifications by awarding credit for qualifications and units (small steps of learning) and enables people to gain qualifications at their own pace along flexible routes.

**Stakeholders** – Staff, trustees, volunteers, clients, activists, partners, customers, members, funders and supporters, government officials and/or anyone else with a stake in the VCO's success.

**Total Benefits of ICT Ownership** – The grouping of all benefits related to an ICT initiative. ICT benefits include items such as efficiency improvements, enhanced service delivery, better communications, marketing and fundraising and/or more staff collaboration.

**Total Cost of ICT Ownership** - The grouping of all costs related to an ICT initiative. ICT costs include hardware, software and connectivity costs, staff time and consulting fees for ICT planning, training and technical support fees and/or managing changes that impact staff.

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# CIRCUIT RIDER COMPETENCIES

## **BUILDING ON A STRONG FOUNDATION**

### Building Block 1: Circuit Rider Principles

These principles emerge from already recognised effective practices that service providers, particularly Circuit Riders, use to inform their approach when serving organisations. They are one of the two building blocks upon which the Circuit Rider Competencies are founded.

#### ***Vision and values***

- 1. Recognise and respect the characteristics (vision, values, culture, funding, mission, beneficiaries and services) of the particular Voluntary and Community Sector (VCS) organisation I/we work with and adapt my/our approach appropriately.*

#### ***Working practices***

- 2. Work honestly and transparently, declaring any conflicts of interest (including reselling activities) and be prepared to say when a non-Information and Communication Technology (ICT) solution is the best course of action.*
- 3. Use non-technical language and examples to help organisations understand ICT and their choices.*
- 4. Understand the limitations of my/our ICT skills and knowledge and help to connect VCS organisations I/we work with to other ICT providers and development workers if unable to meet the organisation's needs.*
- 5. Ensure legal and best practice requirements are made explicit to the organisations I/we work with (e.g. health and safety, data protection, environmental, accessibility, inclusion, confidentiality and licensing).*

#### ***Learning, professional development and support***

- 6. Engage in continuous learning to maintain the necessary skills and level of knowledge to understand ICT, the VCS in general and any sub-sectors (e.g. health, environment, etc.) I/we work with.*
- 7. Participate in and share my/our knowledge with the VCS ICT community and the organisations I/we work with.*

## **Supporting organisational development and sustainability**

8. *Help organisations understand the impact ICT can have on staff, volunteers and beneficiaries, taking responsibility to highlight and assist with change management.*
9. *Equip organisations with tools, knowledge and processes to enable them to make informed decisions and take full advantage of ICT and how to make ongoing strategic decisions with or without external support.*
10. *Enable organisations to understand the total cost of ownership (TCO) needed to maintain and improve their ICT commitments, offering choice and refraining from prescribing dependency-based ICT solutions.*

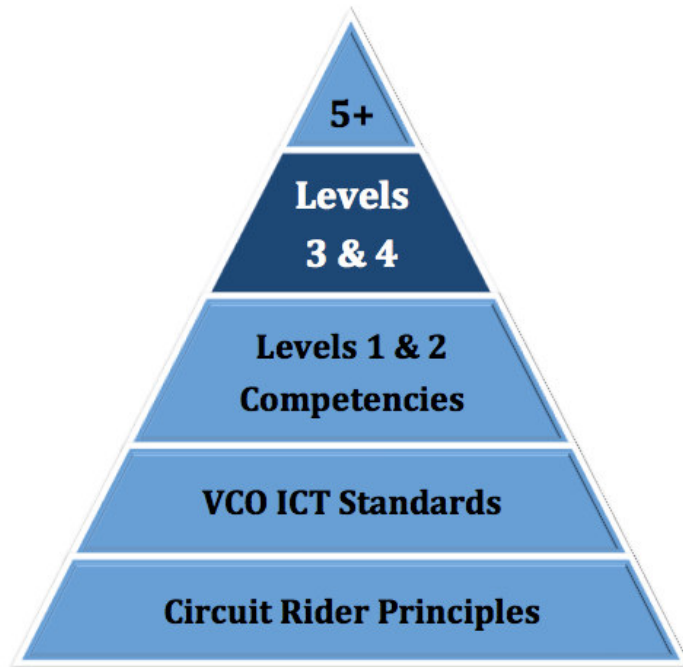
To see how the competencies are built off the principles take the following examples:

<b>Principle</b>	<b>Associated Competencies</b>
Understand the limitations of my/our ICT skills and knowledge and help to connect VCS organisations I/we work with to other ICT providers and development workers if unable to meet the organisation's needs.	Ability to identify what Level 3 and 4 competencies you do and do not possess to develop and monitor their ongoing improvement.
	Ability to find VCO friendly ICT resources (e.g. Websites, mailing lists, discussion forums, blogs, other Circuit Riders, etc.)
	Ability to connect a VCO with these resources.
<b>Principle</b>	<b>Associated Competencies</b>
Help organisations understand the impact ICT can have on staff, volunteers and beneficiaries, taking responsibility to highlight and assist with change management.	Basic knowledge about the ways VCOs use ICT to improve business systems, enhance programme delivery, increase stakeholder engagement, build capacity, boost fundraising, strengthen staff qualifications, etc.
	Ability to detach from technical mindset and be sympathetic to a variety of organisations' interests and needs.
	Ability to conduct an assessment of organisational use and issues related to ICT.

## Building Block 2: VCO ICT Standards

Another critical building block used to ground the Circuit Rider Competencies comes from the client side of the equation – the VCOs being served.

Along with the Principles, this guide presents five ICT standards, which frame the competencies that Circuit Riders need to provide organisations with exemplary service. These two building blocks, principles and standards, form the foundation from which the Circuit Rider competencies are built. This guide focuses solely on level 3 and 4 competencies (see page 10 for explanation of the levels).



The standards are not meant to be a comprehensive statement of what every VCO must strive for. **It is not a benchmarking tool for VCO ICT performance as there are many factors that affect the way the standards are applied in real life.**

The challenge is to determine what tools, procedures and/or strategies are appropriate for an organisation to use to meet that standard. This is especially complicated because every organisation is different. We can group them by budget size, number of employees, mission focus, stakeholder demographics, geography and so on. This grouping of organisations can sometimes clarify what approaches (tools, procedures and strategies) make most sense to use to meet a particular standard. Another characteristic, for example, the number of sites the organisation has, could change the approach. Maybe it will be a mission focus that is the determining factor. Sometimes it is the organisation's strategic priorities (diversify funding base, launch new or expand existing programmes, enhance communications, open two new offices, etc) or maybe its programmes (advocacy, education, community action, direct services, research, etc.) that will be the deciding factor.

Regardless of the rationale used to modify a given standard, they are, along with the Principles, useful determinants of the Level 3 and Level 4 competencies for a Circuit Rider. The five standards are:



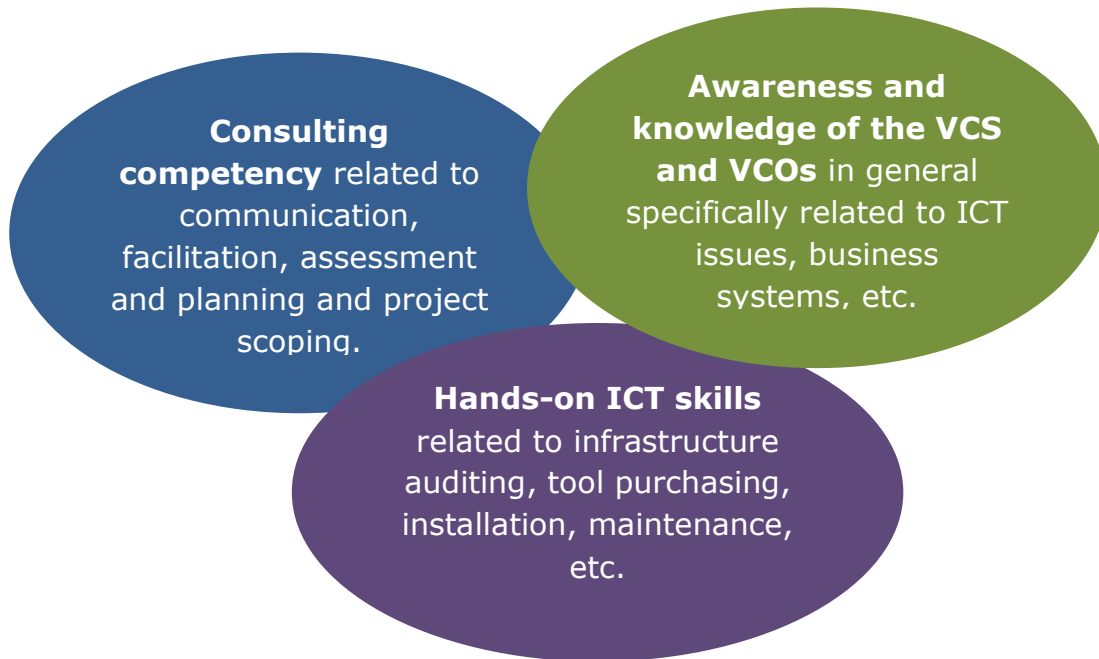
Standard	Description
<b><i>ICT Planning</i></b>	ICT needs and priorities (e.g. Infrastructure, staff skills, strategic, etc.) for the next one to two years are identified based on an assessment of current practices, activities and future aspirations. These are justified with clear objectives and outcomes specified and timelines and milestones are detailed. Human and financial investments are clearly communicated to all those with a stake in the organisations use of ICT.
<b><i>ICT Infrastructure</i></b>	Servers, desktop computers, operating systems and other software, network infrastructure, Internet access, peripherals, cabling and all other ICT-related materials deemed necessary are kept up to date and in good working order and are integrated (interoperable) as deemed necessary.
<b><i>ICT Implementation &amp; Maintenance</i></b>	Implementation and ongoing management of ICT related infrastructure and/or strategic ICT initiatives is handled in a manner that emphasises integration with existing human and technical systems, leaves room for ongoing adjustments and takes into consideration accessibility, change management, environmental, legislative and health and safety needs. Appropriate attention is paid to the involvement and/or needs of staff and the clients, activists, members and/or others they serve to assure appropriate and sustainable use of ICT. There is internal and/or external knowledge and support available at reasonable cost when required to ensure ongoing operation of mission-critical ICT hardware and software.
<b><i>Staff and other Internal Stakeholder Communications</i></b>	There is a strategy in place for efficient and effective information sharing between staff, volunteers, trustee board members and others who work within the organisation.
<b><i>External Constituent Communications</i></b>	Information and knowledge can be efficiently shared for marketing, engagement and/or other purposes with members, funders and supporters, media, volunteers, VCOs and others deemed important to the organisation.

To see how the Circuit Rider competencies are based on the VCO ICT Standards take the following as an example.

Standard	Associated Competencies
<b>ICT Staff and other Internal Stakeholder Information Sharing</b>	Deep knowledge of organisational business systems and knowledge management tools and techniques related specifically to information collection, organisation, management sharing, analysis and storage.
	Ability to map the flow of information and communication, identify bottlenecks and other technical and/or human system challenges and then identify opportunities for improvements.

### COMPETENCY FOCUS AND LEVELS

Review of existing Circuit Rider job descriptions and training materials and interviews with Circuit Riders and others confirm that there are three inter-related topics that competencies focus on:



#### Competency Levels

The competencies in this guide have been grouped into levels, which reflect those used by the UK Qualification and Credit Framework (QCF). This has been done as it has always been the intention of Lasa to develop a curriculum from

the standards which can lead to a recognised accredited training programme for Circuit Riders. This could also fit with existing National Occupational Standards.

- **Level 1:** We believe that this QCF level is below that necessary for Circuit Riders to operate currently. This is therefore outside the scope of this document.
- **Level 2:** These are currently outside the scope of this guide as it has been developed primarily to cater for working Circuit Riders. However, it is likely that we will develop this level in tandem with training packages for new and emerging Riders.
- **Level 3:** These are competencies that all Circuit Riders must have. It focuses on basic preparation of Circuit Riders to effectively serve VCOs. The learning objectives of Level 3 are:
  - The Circuit Rider understands the basic characteristics of the VCS as a whole as well as the current trends and issues facing it.
  - The Circuit Rider understands what the basic characteristics are of individual VCOs, both ICT and non-ICT related.
  - The Circuit Rider has more specific knowledge about those basic organisational and ICT specific issues
  - The Circuit Rider has basic consulting skills
  - The Circuit Rider has basic information and communication assessment and problem-solving technology skills
- **Level 4:** These are the competencies that relate directly to the specialised services advanced Circuit Riders provide to VCOs. They are matched to the five VCO ICT Standards described on page 9. Specifically the learning objectives of Level 3 are:
  - The Circuit Rider understands what the specific issues are that VCOs face in relation to the related VCO ICT standard.
  - The Circuit Rider has detailed knowledge of the approaches and skills needed to help a VCO reach the related VCO ICT standard.

The Level 3 and 4 checklists (pages 17 onwards) present four different choices to rank proficiency. These are:

<b>I am proficient</b>	<b>I need to improve</b>	<b>I am not proficient</b>	<b>I am not sure</b>
The Circuit Rider checks this box if they believe they have achieved a full level of proficiency for the competency listed.	The Circuit Rider checks this box if they believe they have some proficiency but believe they can make considerable improvements.	The Circuit Rider checks this box if they believe they have not achieved an adequate level of proficiency for the competency listed.	The Circuit Rider checks this box if they need assistance understanding the competency or in assessing their abilities.

- **Level 5:** These are qualifications that are achieved through deep, highly focused training programs offered by Universities, associations, trade groups and product certification institutions. These are also currently outside the scope of this document but we have included suggested “links” to level 5 competencies where we think it appropriate or useful for Riders to consider.

**Important Note:** Whilst it is advisable that all Circuit Riders need to achieve all Level 3 competencies, few, if any, Riders will aspire to or need to attain all level 4 competencies in all specialised areas. It is likely that a Rider putting together a Personal Learning Plan will initially concentrate on the one or two standards that they help VCOs meet depending on their current skill set, interests, experience, strengths, job description and so on.

## **DEVELOPING A PERSONAL LEARNING PLAN (PLP)**

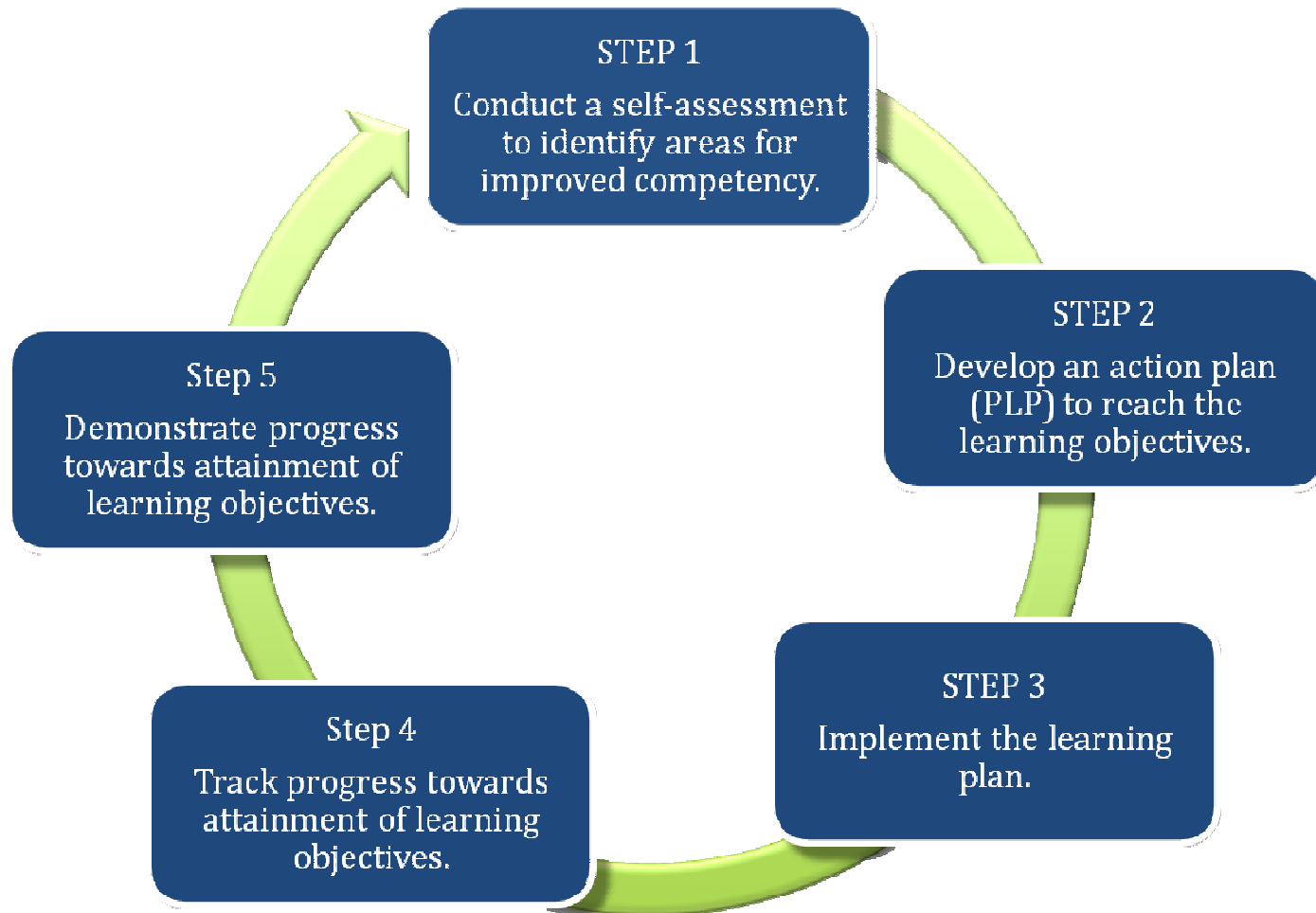
Personal learning can only thrive if there is an environment that supports that learner. Circuit Riders fortunately have at their disposal a wide variety of high quality resources available to them to enhance their learning. Many Circuit Riders use these resources on an ‘as needed’ basis to improve their competencies.

A more structured approach to learning may however be desired in some situations. What might motivate a Circuit Rider to be more methodical in designing a learning plan? It may be to simply understand and/or attain the core and specialized competencies needed to serve VCOs. Possibly there is an interest in adding a new set of specialised skills to a resume. Perhaps there is a particular sub-sector (e.g. children’s health, environmental protection, etc.) in the VCS that needs additional Circuit Rider support. Regardless of the motivating factor, we suggest an approach that is organized and intentional. Steps to consider following are:

- Step 1: Identify learning Objectives via Self-Assessment
  - Review the Level 3 and Level 4 competency checklists. Please note that some competencies in Level 4 appear in more than one standard – this is intentional.
  - Determine an approach for development and ongoing assessment of progress against the PLP you ultimately develop. It could be working in an accreditation-type programme such as Lasa is currently developing, working with a mentor or coach, a colleague, or even independently.
  - Complete the Level 3 Core Competencies self-assessment checklist

- Complete the Level 4 Specialised Competencies self-assessment checklist
- Step 2: Develop the PLP using the completed checklists
  - Transfer the competencies from the checklists to the PLP
  - Identify what resources will be part of the PLE that is used to attain the competencies
  - Develop the timeline for implementation
- Step 3: Implement the PLP by utilising resources such as workshops, peers, web-based case studies, etc.
- Step 4: Track progress against learning goals by using a consulting log, collecting testimonials from clients, etc.
- Step 5: Demonstrate progress through testimonials from clients, development of a portfolio, additional self-assessment, etc.

# Circuit Rider Competency Improvement Cycle



## **CUSTOMISING A PERSONAL LEARNING ENVIRONMENT (PLE)**

There is a wealth of diverse resources that a Circuit Rider can use to build and improve their competencies. For example:

- Online resources with databases of materials to share (e.g. ICT Knowledgebase, Techsoup, eRiders.net, TechRepublic, Consultant Commons, etc.)
- Specific training materials for reference by learners or trainers (e.g. iRider consulting programme materials, CompassPoint Institute for Nonprofit Consulting, etc.)
- Online discussions/sharing (e.g. Circuit Rider discussion lists, Non Profit Tech blogs)
- Technical support from software companies (e.g. help documentation, online materials, hired training, etc.)
- Themed Conferences (e.g. Circuit Rider Conference, NetSquared, NTEN's NonProfit Technology Conference (NTC), etc.)
- Formal focused programmes offered by external accredited groups (e.g. ECDL (Europe Computer Driving License); CompTIA A+, Network+, Security+; ASP product trainings/certification; Microsoft Certifications; ITIL; Linux Professional Institute etc.)
- Workshops, academies and offerings by external accredited groups (e.g. Cisco Networking academy, IT Essentials 1 and 2, NonProfit Tech boot camps, SharePoint Academy, Exec Techtalk Sessions, Groundspring workshops, etc.)
- Programmatic or regional based eRider training programs offered by eRiding hubs and organisations (e.g. Ungana-Afrika, CompassPoint)
- Formal (and informal) mentoring programs (e.g. Cisco mentoring project)
- Virtual colleague exchanges (e.g. Techsoup organised discussion forums, NTEN Webinars)
- Physical colleague exchanges (e.g. Tactical Technology exchange programmes)
- Direct Field Experience (e.g. working to support an organisation in development of an ICT plan)

This amalgamation of resources, when focused appropriately comprises a PLE.

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## RESOURCES

Various organisations and resources are mentioned in this guide. We have listed their web addresses below:

- Lasa - [www.lasa.org.uk/circuitriders](http://www.lasa.org.uk/circuitriders)
- UK Circuit Rider site - [www.ukriders.info](http://www.ukriders.info)
- UKRiders mailing list - <http://lists.lasa.org.uk/lists/info/ukriders>
- Summit Collaborative - [www.summitcollaborative.com](http://www.summitcollaborative.com)
- ICT Knowledgebase - [www.ictknowledgebase.org.uk](http://www.ictknowledgebase.org.uk)
- e-Riders - [www.eriders.net](http://www.eriders.net)
- TechRepublic - [www.techrepublic.com](http://www.techrepublic.com)
- Consultant Commons - [www.consultantcommons.org](http://www.consultantcommons.org)
- CompassPoint - [www.compasspoint.com](http://www.compasspoint.com)
- Compumentor (NetSquared) - [www.compumentor.org](http://www.compumentor.org)
- NTEN (NTC) - [www.nten.org](http://www.nten.org)
- ECDL - [www.ecdl.org](http://www.ecdl.org)
- Microsoft (certification) - [www.microsoft.com/learning/mcp/default.mspx](http://www.microsoft.com/learning/mcp/default.mspx)
- IT Infrastructure Library (ITIL) - [www.itil-officialsite.com](http://www.itil-officialsite.com)
- Linux Professional Institute - [www.lpi.org](http://www.lpi.org)
- CompTIA - [www.comptia.org](http://www.comptia.org)
- Cisco Networking Academy - [www.cisco.com/web/learning/netacad](http://www.cisco.com/web/learning/netacad)
- Microsoft SharePoint Academy - [www.microsoftsharepointacademy.com](http://www.microsoftsharepointacademy.com)
- Groundspring - [www.groundspring.org](http://www.groundspring.org)
- UnganaAfrika - [www.ungana-afrika.org](http://www.ungana-afrika.org)
- TechSoup - [www.techsoup.org](http://www.techsoup.org)
- Tactical Technology Collective - [www.tacticaltech.org](http://www.tacticaltech.org)



## Level 3: Self-Assessment Worksheet

Learning objectives in this level focus on basic preparation of Circuit Riders to effectively work with VCOs. They represent the foundation on which more specialised Level 4 competencies are built. That is where Level 4 comes in

Use this worksheet to determine which competencies you need to address in your Personal Learning Plan (PLP).

- Objective 1 – The Circuit Rider understands what the basic characteristics are of the voluntary and community sector as a whole as well as the current trends and issues facing it.
- Objective 2 – The Circuit Rider understands what the basic characteristics are of individual voluntary and community organisations, both ICT and non-ICT related.
- Objective 3 – The Circuit Rider has more specific knowledge about those basic organisational and ICT specific issues
- Objective 4 – The Circuit Rider has basic consulting skills
- Objective 5 – The Circuit Rider has basic information and communication assessment and problem-solving technology skills

<b>Level 3 ICT Competencies</b>	I am proficient	I need to improve	I am not proficient	I am not sure
Awareness of the basic characteristics of the Voluntary and Community Sector (VCS) and the trends and issues that face it. (e.g. Government regulations, the focus on output, mission-based philosophy, types of VCOs, programme evaluation, etc.)				
Awareness of the basic characteristics of Voluntary Community Organisations (VCO). (e.g. Mission-based				

not-for-profit philosophy, types of VCOs, business systems, marketing, VCO service delivery and advocacy programmes, decision-making and management structures, funding streams, etc.)				
Awareness of the basic challenges VCOs sometimes face which can have an affect on or be affected by ICT. (e.g. Lack of ICT knowledge and leadership, staff turnover, working with a complex mix of stakeholders, change management effects, legislative, dependence on a single funding stream, etc)				
Basic knowledge about the typical jobs titles, roles and responsibilities and what baseline ICT skills are needed to do those jobs.				
Basic knowledge about typical small to medium sized VCO ICT technical support needs.				
Basic knowledge about the ways that VCO staff work together within and/or between departments and/or within teams.				
Basic knowledge about typical VCO business systems such as fundraising, administration, case management, marketing, accounting, publishing, reporting, etc.				
Basic knowledge about the spectrum of ICT tools that VCOs do/could use. (e.g. Desktop and mobile computing, networking, data management, email, digital imaging, blogs, security, etc.)				
Basic knowledge about the ways VCOs use ICT to improve financial and administrative systems, enhance programme delivery, increase stakeholder engagement, build capacity, boost fundraising, strengthen staff qualifications and knowledge, etc.				
Basic knowledge about typical ICT policies and procedures				
Basic knowledge about VCO ICT budgeting, funding strategies and sources				

Ability to detach from technical mindset and be sympathetic to a variety of organisations' interests and needs.				
Ability to gather, analyse, understand and communicate basic non-technical information about a specific VCO being served. (e.g. Strategic plan, staffing structure, programme plans, historical information, third party evaluations, etc)				
Ability to conduct an assessment of organisational use and issues related to ICT. (e.g. ICT infrastructure and staff skills, opportunities for use of ICT to improve programme delivery and, marketing, ICT policies and procedures, ICT related decision making and budgeting, etc.				
Ability to scope an ICT related project. (e.g. Identifying objectives for the project, creating a contract, setting timelines, developing budgeting, determining roles and responsibilities, etc.)				
Ability to apply basic communication consulting skills (e.g. Presenting, facilitation, writing, listening, speaking with a variety of organisational departments (finance, executive, programs, etc.) in non-technical language				
Ability to identify what Level 3 and 4 competencies you do and do not possess and to develop and monitor their ongoing improvement.				
Ability to identify the resources you need to support your attainment of new or improve existing Level 3 and 4 competencies.				
Ability to find VCO friendly ICT resources (e.g. Websites, mailing lists, discussion forums, blogs, other Circuit Riders, discounted and donation schemes etc.)				

## Level 4: Self-Assessment Worksheet – ICT Planning

**VCO Standard:** ICT needs and priorities (e.g. Infrastructure, staff skills, strategic, etc.) for the next one to two years are identified based on an assessment of current practices, activities and future aspirations. These are justified with clear objectives and outcomes specified and timelines and milestones are detailed. Human and financial investments are clearly communicated to all those with a stake in the organisation’s use of ICT.

<b>Level 4 ICT Planning Competencies</b>	I am proficient	I need to improve	I am not proficient	I am not sure
<p>Deep knowledge about the challenges VCOs face which sometimes affect on or be affected by ICT.</p> <p><i>You understand challenges related to lack of ICT knowledge and leadership, staff turnover, organisational culture and work style, legislative, dependence on a single funding stream, among other common challenges.</i></p>				
<p>Deep knowledge of VCO organisations and the major differences between them and commercial organisations.</p> <p><i>You understand what the characteristics are of Voluntary Community Organisations (VCO). (e.g. Mission-based philosophy, types of VCOs, financial and administrative systems, marketing, VCO service delivery and advocacy programmes, decision-making and management structures, funding streams, etc.)</i></p>				
<p>Deep knowledge about the spectrum of ICT tools that VCOs do/could use.</p> <p><i>You understand the different tools such as desktop &amp; mobile computing, networking, data management, email, digital imaging, blogs, security, etc.</i></p>				

<p>Deep knowledge of ICT system scalability potentials and limitations.</p> <p><i>You have strong working knowledge/experience regarding the scalability potential of important ICT systems (network designs, data storage solutions, etc.)</i></p>				
<p>Deep knowledge about VCO ICT funding issues, sources and purchasing strategy</p> <p><i>You can target appropriate fundraising strategies/sources that may help realize a strategic technology plan. You can relate these to other financial/funding factors within a VCO.</i></p>				
<p>Ability to develop a requirements specification for an ICT related project.</p> <p><i>You can take information gathered from ICT assessments and from any planning and translate it into the appropriate format and style of language used in a requirements specification or project proposal.</i></p>				
<p>Ability to think strategically and analyse high-level information.</p> <p><i>You are able to work, understand and analyse high-level information and strategic planning materials. You can think strategically across multiple timeframes, work with more "abstract" information and separate short-term goals/wins from long-term strategic decisions.</i></p>				
<p>Ability to detach from technical mindset and be sympathetic to a variety of organisations' interests and needs.</p> <p><i>You can understand, appreciate and work with multiple levels/departments/functions within a VCO. You understand how these groups work together and can communicate using non-technical language and terminology.</i></p>				
<p>Ability to engage interest from senior management and governance levels within a VCO.</p> <p><i>You can communicate with and solicit support/interest from senior management and governance groups (directors, board members, etc.) in terms of ICT. You can summarise information appropriately for these audiences.</i></p>				

<p>Ability to customise assessment and planning materials and to produce clear, detailed documentation for ICT projects.</p> <p><i>You are confident with summarising and integrating multiple sources of information effectively. You can work with documentation templates and a variety of documentation tools/software. You can efficiently summarize complex information into various formats such as memos, plans, presentations, etc.</i></p>				
<p>Ability to coordinate and plan meetings with a variety of VCO staff.</p> <p><i>You can co-ordinate and schedule meetings that include a variety of VCO staff across multiple departments (co-ordinate agendas, schedules and other meeting logistics).</i></p>				
<p>Ability to facilitate meetings with a variety of VCO staff.</p> <p><i>You can oversee and facilitate meetings that include a variety of VCO staff across multiple departments (keep to task, maintain interest for variety of attendees with different perspectives, etc.). You have skills to deal with individuals and groups and the ability to manage conflict resolution as part of this process.</i></p>				
<p>Ability to conduct total cost of ownership analysis.</p> <p><i>You can draft cost/benefit analyses for various ICT strategies and options. Such analyses can effectively take into detailed account the full benefits and total cost of ownership factors. You can communicate effectively with finance staff regarding such analyses.</i></p>				
<p>Ability to find/target champions, "super-users", and leaders within existing staff and co-ordinate them as an ICT planning/implementation team.</p> <p><i>Some staff may be natural skills champions or have unique tech skills and knowledge within a VCO. You can identify these people and coordinate them as part of a front-line technology planning and implementation team. You can construct this group to have fair representation across multiple departments and operational interests.</i></p>				

<p>Ability to facilitate an ICT skills and infrastructure audit/assessment.</p> <p><i>You can assess, document and analyse ICT infrastructure and ICT skills of individual staff. You can maintain/update/analyse this information with a database or similar tool on an ongoing basis.</i></p>				
<p>Ability to conduct and report on research.</p> <p><i>You are familiar with and can apply a variety of data gathering techniques (surveys, focus groups, etc.) and analyse the data to extract and report on findings.</i></p> <p><b>Level 5 Links.</b> Potential for specialized research/statistical analysis skills.</p>				
<p>Ability to identify cross-cutting organisational/departmental needs and prioritise ICT needs.</p> <p><i>You can prioritise ICT improvements based on appropriate sequencing and your knowledge about the VCO you are working with.</i></p>				
<p>Ability to create and work with budgets and timetables.</p> <p><i>You can translate ICT planning materials and strategies into budgets and implementation timetables. You can integrate this information within other existing organisational budgets and timetables.</i></p> <p><b>Level 5 Links.</b> Potential for specialised skills/experience related to operational/project administration (budgets, timetables, etc.). May be related to specialised project management skills.</p>				
<p>Ability to formulate <i>measurable</i> objectives, outcomes and success indicators as part of a planning process.</p> <p><i>In order to prepare for, and facilitate future evaluation processes, you can structure information in terms of measurable objectives and outcomes early within a planning process.</i></p>				

<p>Ability to help the organisation identify and plan for training needs.</p> <p><i>You can identify what ICT skills are needed, conduct a staff training needs analysis, develop a training plan and connect the organisation to training resources.</i></p>				
<p>Ability to help the organisation identify and plan for technical support needs.</p> <p><i>You can conduct a needs assessment related to ongoing technical support, identify reasonable tasks that can be handled in-house and those that require external expertise, and connect the organisation to resources to help them handle their ongoing technical support needs.</i></p>				
<p>Ability to help the organisation identify and plan for policy and procedure changes and development related to ICT efforts.</p> <p><i>You can identify policy and procedure information and samples and adjust them to meet the needs of the organisation.</i></p>				
<p>Ability to identify and help the organisation plan how to deal with the 'change management' effects of ICT related projects.</p> <p><i>You have a good understanding of change management and how to implement change in challenging circumstances, taking account of organisational and individual issues in the best interests of medium to long-term mission and the whole organisation. You can work across all levels of the organisation to make this happen.</i></p>				
<p>Ability to train the organisation to carry out continuous learning and ICT decision-making.</p> <p><i>You can assist the organisation to form an appropriately sized team to monitor progress on existing ICT related efforts and foresee future needs. The organisation will also be able to apply assessment and planning tools so they are able to effectively plot future direction and details.</i></p>				
<p>Ability to identify and help plot a strategy for the organisation to help its own staff develop the Level 3 or 4 competencies they want to bring in-house.</p>				



## Level 4: Self-Assessment Worksheet - ICT Infrastructure

**VCO Standard:** Servers, desktop computers, operating systems and other software, network infrastructure, Internet access, peripherals, cabling and all other ICT-related materials deemed necessary are kept in up to date and in good working order and are integrated (interoperable) as deemed necessary.

<b>Level 4 ICT Infrastructure Competencies</b>	I am proficient	I need to improve	I am not proficient	I am not sure
<p>Strong knowledge of multiple system platforms, protocols, and standards.</p> <p style="text-align: center;"><i>You have a working understanding of various software platforms, hardware architectures, communication protocols and standards. You have a basic understanding of important incompatibility factors between them.</i></p> <p><b>Level 5 Links.</b> Potential for advanced or system-specific knowledge and skills (i.e. Windows, Linux or Mac system/networking expert). May include coding skills, special certification for Windows/Linux/Mac networks and/or servers, etc.</p>				
<p>Strong knowledge of multiple data/file/storage standards and cross-compatibility.</p> <p style="text-align: center;"><i>You have a working understanding of various file formats and general data-storage standards/options. You can identify cross-platform storage solutions as well as incompatibilities.</i></p>				
<p>Strong knowledge of data protection tools and principles.</p> <p style="text-align: center;"><i>You understand how data protection tools and principles are applied to enforce and achieve VCO data protection policy - data is protected from loss, corruption, virus, etc. (backup systems, anti-virus software, etc.)</i></p>				

<p>Strong knowledge of ICT system scalability potentials and limitations.</p> <p><i>You have strong working knowledge regarding the scalability potential of important ICT systems (multiple facility solutions, network designs, etc.)</i></p> <p><b>Level 5 Links.</b> Potential for advanced or system-specific knowledge and skills (i.e. Windows, Linux or Mac system/networking expert). May include coding skills, special certification for Windows/Linux/Mac networks and/or servers, etc.</p>				
<p>Strong knowledge about proprietary and Open Source software factors, issues and debates.</p> <p><i>You know basic terminology; concepts and ideas surrounding proprietary and open source software solutions/options and can identify pros and cons of each on a case-by-case basis.</i></p> <p><b>Level 5 Links.</b> Potential for focused involvement, skills and interest in the open source community (e.g. ability to work directly within open source projects, coding skills, etc.). Also potential for specific proprietary skills and knowledge (e.g. coding skills for Windows platforms/applications).</p>				
<p>Strong knowledge of software licensing concepts and options</p> <p><i>You have working knowledge of the costs, restrictions, timeframes and administration of proprietary software licensing.</i></p>				
<p>Strong knowledge of common VCO organisational financial and administrative systems and office productivity solutions and the hardware and software needed to support them.</p> <p><i>You are familiar with financial and administrative systems (databases, groupware, etc.), general office productivity tools. You are familiar with their applications, and system requirement factors necessary to support them.</i></p> <p><b>Level 5 Links.</b> Potential for focused/advanced, system-specific skills regarding business systems and office productivity tools (expert regarding specific tool, database, system, etc.).</p>				

<p>Strong knowledge of data security tools and concepts.</p> <p><i>You are familiar with relevant technical/system solutions (encryption, physical security concepts, etc.) that can be employed to enforce a VCO data security policy.</i></p>				
<p>Ability to evaluate, manage and facilitate site-wide hardware/software updates, upgrades and full-scale premises moves</p> <p><i>You can plan for, manage and oversee important hardware/software update and upgrade considerations such as testing/evaluation, downtime, new training needs, etc.</i></p>				
<p>Ability to troubleshoot, analyse software problems and carry out routine housekeeping and maintenance.</p> <p><i>You are familiar with a wide variety of software tools/applications used within a VCO, and have a strong set of transferable software troubleshooting skills. You can quickly learn new software applications across various OS/platforms and perform general software maintenance, cleaning and troubleshooting.</i></p> <p><b>Level 5 Links.</b> Potential for focused/advanced skills regarding specific software solutions that a VCO might use. This could entail expert-level knowledge of common software tools (i.e. Office productivity, basic business systems) or very sector-specific tools knowledge (for example, specialized broadcast software within a community radio).</p>				
<p>Ability to troubleshoot and analyse hardware and various hardware installations</p> <p><i>You are comfortable troubleshooting basic hardware problems (e.g. Take systems apart, test/swap-out components, etc.)</i></p> <p><b>Level 5 Links.</b> Potential for specialized skills regarding unique hardware systems (wireless, RAID/storage, etc.). Also potential for special/expert skills regarding specific architectures (laptop, desktop, Mac, Windows, Linux etc.)</p>				

<p>Ability to facilitate an ICT infrastructure audit</p> <p><i>You can assess, document and analyse ICT hardware, software and general infrastructure (on and off-site as applicable). You can maintain/update/analyse this information with a database or similar tool on an ongoing basis.</i></p>				
<p>Ability to perform hardware and software cost/benefit and environmental analysis.</p> <p><i>You can draft and work with a cost/benefit analyses for various hardware and software options (products, equipment quantities, etc.) and take into account environmental issues (e.g. Hardware recycling, energy use, ethics/environmental record of the manufacturer, etc.). Such analyses can effectively take into detailed account total cost of ownership factors. You can communicate effectively with finance staff regarding such analyses.</i></p>				
<p>Ability to carry out an ICT risk assessment</p> <p><i>You can assess the organization's ICT infrastructure, analyse and prioritise the risks, plan for mitigation and draw up a basic disaster recovery plan.</i></p>				
<p>Ability to liaise with hardware and software suppliers.</p> <p><i>You can find and negotiate affordable, accessible and effective supply sources (regular suppliers, recycling and refurbishing programmes, discount or donated software programmes, etc) on an ongoing basis.</i></p>				
<p>Ability to help an organisation become more ICT infrastructure self-sufficient</p> <p><i>You can assess an organisation's general ongoing technical support needs, identify internal and outsourced supports and develop a cost/benefit analysis and budget for support. You can help the organisation identify what infrastructure items it may want to handle in-house and teach the appropriate staff to deal with basic 'at your desk' ICT infrastructure improvements and maintenance related to hardware and software. You can develop basic materials for 'at your desk' problem solving to provide staff with as much independence as possible resulting reduced reliance on other staff and outsourced support. Some staff may be natural skills champions or naturally excel in technical trouble shooting tasks within a VCO, you can identify these people and coordinate them into an overall ICT technical support</i></p>				

<p><i>strategy.</i></p>				
<p>Ability to oversee and manage other staff that may be involved in ICT operations and technical support.</p> <p><i>You can work directly with other people (internal and external to a VCO) and effectively delegate/share responsibilities regarding the management and maintenance of ICT systems.</i></p>				
<p>Ability to make independent ICT infrastructure improvement and maintenance judgments in the best interests of an individual organization, its current staff and key stakeholders.</p> <p><i>You have a strong understanding of organisational capacity (time and skills) needed to identify, decide upon and independently handle ICT improvement and maintenance improvements.</i></p>				
<p>Ability to carry out ICT system analysis and problem solving.</p> <p><i>You are very familiar with common ICT systems and networks, and can easily dissect them, identify bottlenecks and perform general troubleshooting tasks. For example You can interact with an office server to perform basic tasks (reboot, user management, manage configuration files, install new services, etc.). You have basic skills using a command-line interface.</i></p> <p><b>Level 5 Links.</b> Potential for focused/advanced server administration skills and experience regarding specific platforms (Windows, Linux, etc.) and server applications such as SharePoint, SQL and Exchange. May include coding skills, special certification for Windows/Linux networks and/or servers, etc.</p>				
<p>Ability to help the organisation identify and plan for policy and procedure development specifically related to ICT infrastructure.</p> <p><i>You are familiar with the typical policies that VCOs establish related to an organisation's ICT infrastructure. You can identify policy and procedure information and samples and adjust them to meet the needs of the organisation.</i></p>				

## Level 4: Self-Assessment Worksheet - ICT Implementation & Management

**VCO STANDARD:** Implementation and ongoing management of ICT related infrastructure and/or strategic ICT initiatives is handled in a manner that emphasises integration with existing human and technical systems, leaves room for ongoing adjustments and takes into consideration user accessibility, change management, environmental, legislative and health and safety needs. Appropriate attention is paid to the involvement and/or needs of staff and the clients, activists, members and/or others they serve to assure appropriate and sustainable use of ICT. There is internal and/or external knowledge and support available at reasonable cost when required to ensure ongoing operation of mission-critical ICT hardware and software.

<b>Level 4 ICT Implementation &amp; Management Competencies</b>	I am proficient	I need to improve	I am not proficient	I am not sure
<p>Deep knowledge of risk management and disaster recovery concepts.</p> <p style="text-align: center;"><i>You can perform a risk management analysis regarding information and asset loss risks within a VCO. You can use this analysis to help structure policies and systems that can facilitate effective disaster recovery.</i></p> <p><b>Level 5 Links.</b> Potential for expert level knowledge and skills regarding data protection systems and disaster recovery (centralized server backup/virus/spam tools, etc.). May also include (if applicable) enterprise-level skills (zero downtime systems, virtualisation, office mirror strategies).</p>				
<p>Deep knowledge of ICT insurance policies, usage and limitations.</p> <p style="text-align: center;"><i>You are familiar with basic insurance options a VCO might use to protect assets (limitations, making claims, cost/benefit analysis of risk factors, etc.)</i></p>				

<p>Deep knowledge about accessibility/special-needs factors, regulations and solutions.</p> <p><i>You are aware of the current legislative framework affecting accessibility issues (e.g. Health and Safety, Disability Discrimination Act, W3C standards) and the potential software and hardware solutions.</i></p>				
<p>Deep knowledge about the typical job titles, roles and responsibilities and what baseline ICT skills are needed to do those jobs.</p> <p><i>You are aware of the range of job roles within a typical VCO and appropriate ICT to enable the organisation to function.</i></p>				
<p>Deep knowledge about the ways that VCO staff work together within and/or between departments and/or within teams.</p> <p><i>You have knowledge of VCO staffing structures and how ICT can assist with their interactions.</i></p>				
<p>Deep knowledge about typical VCO business systems such as fundraising, administration, case management, marketing, accounting, publishing, reporting, etc.</p> <p><i>You are aware of the range of technologies available to assist organisations in their day-to-day activities.</i></p>				
<p>Ability to act as a coach to staff with different parts of the organisation.</p> <p><i>You can relate to and interact with various VCO departments (including senior levels) as both a coach and formal solutions provider. You can facilitate improved ICT implementation and maintenance progress through coaching.</i></p>				
<p>Ability to oversee and manage other staff that may be involved in ICT operations and plan implementation.</p> <p><i>You can work directly with other people (such as a strategic technology implementation team) and effectively delegate/share responsibilities regarding the management and implementation of a technology plan.</i></p>				

<p>Ability to follow, track and report on the progress of a strategic ICT plan or train the organisation to do so independently.</p> <p><i>You can oversee the budget and timetable administration and physical implementation of a strategic plan (track/analyse progress, make plan modifications, produce effective reports, etc.)</i></p>				
<p>Knowledge/experience of working with budgets and timetables.</p> <p><i>You can translate ICT planning materials and strategies into budgets and implementation timetables. You can integrate this information within other existing organisational budgets and timetables.</i></p> <p><b>Level 5 Links.</b> Potential for specialised skills/experience related to operational/project administration (budgets, timetables, etc.). May be related to specialised project management skills.</p>				
<p>Ability to conduct and document a formal process evaluation.</p> <p><i>You can identify a proper scope and methodology for evaluation, develop and customize evaluation tools and analyse and document the results.</i></p>				
<p>Ability to find/target champions, “super-users”, and leaders within existing staff and co-ordinate them as an ICT planning/implementation team.</p> <p><i>Some staff may be natural skills champions or have unique technical skills and knowledge within a VCO. You can identify these people and coordinate them as part of a front-line technology planning and implementation team. You can construct this group to have fair representation across multiple departments and operational interests. Ability to target tech-savvy individuals within existing VCO staff.</i></p>				
<p>Ability to identify and handle change barriers within an organisation.</p> <p><i>You can identify and be sympathetic to common change barriers (both social and physical) within a VCO. You can target their root causes and can utilise change management processes and techniques to assist the adoption and implementation of an ICT strategic technology plan.</i></p>				



<p>Ability to facilitate ongoing/changing ICT skills and infrastructure audit/assessments.</p> <p><i>You can assess, document and analyse ICT infrastructure and ICT skills of individual staff. You can maintain/update/analyse this information with a database or similar tool on an ongoing basis.</i></p>				
<p>Ability to help an organisation become more ICT infrastructure self-sufficient</p> <p><i>You can assess an organisation's general ongoing technical support needs, identify internal and outsourced supports and develop a cost/benefit analysis and budget for support. You can help the organisation identify what support it may want to handle in-house and teach the appropriate staff to deal with basic 'at your desk' ICT infrastructure improvements and maintenance related to hardware and software. You can develop basic materials for 'at your desk' problem solving to provide staff with as much independence as possible resulting reduced reliance on other staff and outsourced support. Some staff may be natural skills champions or naturally excel in technical trouble shooting tasks within a VCO, you can identify these people and coordinate them into an overall ICT technical support strategy.</i></p>				
<p>Ability to locate and negotiate service agreements in terms of service set-up, options and general support</p> <p><i>You can help the organisation to identify local tech support providers and technicians who handle basic hardware technical support needs, software upgrades, hosting, etc.</i></p>				
<p>Ability to observe office logistics and co-ordinate ICT resources and data sharing and protection policies accordingly.</p> <p><i>You can observe employee schedules, office space, common working patterns/locations, and generate policies (usage, access, storage, etc.) that efficiently support these logistics. You are familiar with specific ICT systems that may help enforce these policies.</i></p>				
<p>Ability to write basic policy documentation and adapt existing templates.</p> <p><i>You can draft and update basic organizational ICT policies and/or adapt existing templates (existing or from external sources) for the needs of specific VCOs.</i></p>				

<p>Ability to understand and translate ICT policies in a practical way for all levels of VCO staff.</p> <p><i>You can communicate, in practical terms, ICT policies, rules and guidelines to all levels of VCO staff (anyone that may use ICT resources). You can facilitate the enforcement of these policies.</i></p>				
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## Level 4: Self-Assessment Worksheet - Staff and other Internal Stakeholder Communications

**VCO STANDARD:** There is a strategy in place for efficient and effective information sharing between staff, volunteers, trustee board members and others who work within the organisation.

<b>Level 4 Staff and other Internal Stakeholder Communications Competencies</b>	I am proficient	I need to improve	I am not proficient	I am not sure
<p>Deep knowledge of the different ways that VCO staff, Trustees, volunteers, and other in the organisation work together, share information, communicate, build knowledge and/or content for internal or external consumption.</p> <p><i>You can identify common working groups within a VCO, the type of work they collaborate on, the type of data they need to share (as well as the common tools they use/need to accomplish this)</i></p>				
<p>Deep knowledge of organisational financial and administrative systems and knowledge management tools and techniques related specifically to information collection, organisation, management sharing, analysis and storage</p> <p><i>You are familiar with financial and administrative systems (databases, Intranets, groupware, etc.), and the general tools used in these systems.</i></p> <p><b>Level 5 Links.</b> Potential for focused/advanced, system-specific skills regarding business systems and office productivity tools (expert regarding specific tool, database, system, etc.).</p>				

<p>Deep knowledge regarding shared information that may be considered sensitive/secure and the ability to assess solutions to protect this data.</p> <p><i>You can identify and structure information in terms of importance, sensitivity and vulnerability and know how such information flows and is shared within a VCO. You can structure strategies and access rules to ensure this data is correctly controlled and related policies are met.</i></p>				
<p>Deep knowledge of data security and protection tools and concepts.</p> <p><i>You are familiar with relevant technical/system solutions (encryption, physical security concepts, backup resources, virus protection etc.) that can be employed to enforce a VCO data security and protection policy.</i></p> <p><b>Level 5 Links.</b> Potential for expert level knowledge and skills with digital security concepts, data protection and strategies (specific security/encryption tools/systems, VPN, cross-platform authentication systems, centralized server backup/virus/spam tools, etc.)</p>				
<p>Deep knowledge of network topologies, security and related technologies.</p> <p><i>You are familiar with terminology, concepts, security and related hardware and software requirements surrounding networking and file-sharing/hosting across multiple platforms.</i></p> <p><b>Level 5 Links.</b> Potential for advanced or system-specific knowledge and skills (i.e. Windows system/networking expert, Linux system/networking expert). May include coding skills, special certification for windows/Linux networks and/or servers, etc.</p>				
<p>Ability to map the flow of information and communication, identify bottlenecks and other technical and/or human system challenges and then identify opportunities for improvements.</p> <p><i>You are able to audit how an organisation's information flows and make suggestions for change or improvement.</i></p>				
<p>Ability to observe office logistics and coordinate ICT resources and data sharing accordingly.</p> <p><i>You can observe employee schedules, office space, common working patterns/locations, and allocate ICT resources, data storage locations and data sharing strategies to support these logistics.</i></p>				

## Level 4: Self-Assessment Worksheet - External Constituent Communications

**VCO STANDARD:** Information and knowledge can be efficiently shared for marketing, engagement and/or other purposes with members, funders and supporters, media, volunteers, VCOs and others deemed important to the organisation.

<b>Level 4 External Constituent Communications Competencies</b>	I am proficient	I need to improve	I am not proficient	I am not sure
<p>Deep knowledge of strategic communication (online and offline) VCO approaches and issues VCOs face</p> <p style="text-align: center;"><i>You have a conceptual understanding of effective marketing strategies, messages, delivery methods and content products. You can advise on high-level marketing ideas.</i></p> <p><b>Level 5 Links.</b> Potential for advanced strategic communication skills and experience specific to VCO/civil-society applications (focused skills and/or training related to marketing strategy, specific tools/systems).</p>				
<p>Deep knowledge regarding shared information that may be considered sensitive/secure and the ability to assess solutions to protect this data.</p> <p style="text-align: center;"><i>You can identify and structure information in terms of importance, sensitivity and vulnerability and know how such information flows and is shared externally to a VCO. You can structure strategies and access rules to ensure this data is correctly controlled and related policies are met.</i></p>				
<p>Deep knowledge of information licensing options and structures.</p> <p style="text-align: center;"><i>You are familiar with a variety of information licensing techniques (full copyright, creative commons, public domain, etc) and</i></p>				

<p><i>understand the pros and cons of each and which licenses may be best applied to different types of VCO information.</i></p>				
<p>Deep knowledge of digital information and communications systems, tool, methods and strategy.</p> <p><i>You have a working knowledge of the tools and technologies(e.g. Email, mobile phones, web sites, blogs, RSS, CMS and CRM, etc.) that VCOs use to communicate with external audiences. You have a strong understanding of how a VCO can create an effective Internet presence (website planning/strategy, hosting options, CMS options, etc.) and how this relates to other external communication strategies (such as email).</i></p>				
<p>Deep knowledge of local connectivity and ISP options.</p> <p><i>In terms of external connectivity (Internet and WAN) you are familiar with different physical connection options and ISPs available to a VCO. You can understand and analyse how these options are applied in different contexts, what access limitations may apply (bandwidth restrictions, blocked data, etc), and how this relates to Intranets/communication systems.</i></p> <p><b>Level 5 Links.</b> Potential for expert skills/knowledge of remote connectivity and networking solutions (e.g. SSL solutions, community wireless, etc.).</p>				
<p>Ability to collect and analyse information about an organisation’s current digital information sharing and communication practices</p> <p><i>You can identify stakeholder communication characteristics and needs and different approaches used to communicate with them.</i></p>				
<p>Ability to develop an ICT communications plan</p> <p><i>You can collect data related to information and communications with external audiences and translate that into a plan that includes clear measurable objectives and outcomes, timelines and budgets.</i></p>				
<p>Ability to liaise with third party services providers related to external communications.</p> <p><i>You can interface and negotiate with external third party providers (ISPs, hosting services, ASPs, web design services, etc.).</i></p>				

## Personal Learning Plan (PLP) Worksheet

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

We encourage you to work with a colleague, mentor or advisor as you develop your PLP. Use the Level 3 and 4 self-assessment tools to determine what competencies you want to develop or improve upon. Follow these steps:

1. Review the results of your Level 3 core competency self-assessment. List on this worksheet all the competencies for which you need to develop or improve proficiency.
2. Review the results of your Level 4 specialized competency self-assessment. List on this worksheet all the competencies for which you need to develop or improve proficiency. We suggest you do this in the following sequence:
  - List competencies you need to develop for the VCO standards you focus or wish to focus your work on
  - List competencies you need to improve your proficiency for the VCO standards you concentrate on
  - List competencies you need to develop and improve upon for the VCO standards you do not focus on explicitly but for which there would be great benefit if you were to improve.

Competency	Level	Importance to my work? (Essential or Desirable)	This is a competency I need to... (Develop or Improve)	Resources I'll use to develop this competency (Observe others, reading, field practice, working with a mentor, taking classes, etc.)	What do I need to do next to start my learning?	Comments

<b>Competency</b>	<b>Level</b>	<b>Importance to my work?</b> (Essential or Desirable)	<b>This is a competency I need to...</b> (Develop or Improve)	<b>Resources I'll use to develop this competency</b> (Observe others, reading, field practice, working with a mentor, taking classes, etc.)	<b>What do I need to do next to start my learning?</b>	<b>Comments</b>



<b>Competency</b>	<b>Level</b>	<b>Importance to my work?</b> (Essential or Desirable)	<b>This is a competency I need to...</b> (Develop or Improve)	<b>Resources I'll use to develop this competency</b> (Observe others, reading, field practice, working with a mentor, taking classes, etc.)	<b>What do I need to do next to start my learning?</b>	<b>Comments</b>

<b>Competency</b>	<b>Level</b>	<b>Importance to my work?</b> (Essential or Desirable)	<b>This is a competency I need to...</b> (Develop or Improve)	<b>Resources I'll use to develop this competency</b> (Observe others, reading, field practice, working with a mentor, taking classes, etc.)	<b>What do I need to do next to start my learning?</b>	<b>Comments</b>