



FREE GUIDE · 2026 EDITION

The Complete Guide to Technology for Charities and Third Sector Organisations in Scotland

A practical guide for Scottish charities: Microsoft nonprofit licensing, cyber security, UK GDPR, helplines, the PSTN switch-off, volunteers and choosing an IT partner.

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Every chapter is also on our website, where links and sources are kept up to date:
indigocomms.co.uk/guides/charity-technology/

The Complete Guide to Technology for Charities and Third Sector Organisations in Scotland

Scottish charities need technology that protects beneficiary and donor data, supports staff and volunteers wherever they work, and costs as little as possible to run. Get five things right: the Microsoft nonprofit licences you're entitled to, cyber security that trustees and funders can see, phone lines ready for the January 2027 switch-off, secure access for volunteers, and a budgeted roadmap. This guide explains each one in plain terms.

Who this guide is for

It's for chief executives, operations and finance managers, digital leads and trustees of Scottish charities, social enterprises and community organisations. It's written by Indigo Unified Communications, a Glasgow-based managed IT, cyber security, connectivity and telephony provider that supports more than 30 charities and third sector organisations across Scotland.

Why technology matters more than ever for Scottish charities

Scotland has more than 46,500 voluntary organisations, including around 23,800 registered charities, employing 136,000 paid staff and supported by over a million volunteers (SCVO, *State of the Sector 2026*, September 2026). Almost all of them now depend on email, cloud files, online fundraising and phones to deliver services.

Three changes make 2026 and 2027 a good time to review your setup:

- **Licensing has changed.** Microsoft ended its free Microsoft 365 Business Premium grant for nonprofits on 1 July 2025. Business Basic is still free for up to 300 users, and paid plans are discounted by up to 75%, but many charities are on the wrong mix of licences.
- **Cyber risk is real.** 28% of UK charities reported a cyber breach or attack in the last 12 months, yet only 38% use two-factor authentication and only 19% have a formal incident response plan (DSIT, *Cyber Security Breaches Survey 2025/2026*, April 2026).
- **The copper phone network closes on 31 January 2027.** Helplines, alarm lines, telecare and door entry that still rely on analogue lines need to move.

At the same time, 79% of charities now use AI in some form (*Charity Digital Skills Report 2026*), so trustees are being asked to make decisions about data, security and AI that they may not feel equipped for.

What's in this guide

1. **What are the biggest technology challenges for charities?** Eight common problems.
2. **How can a charity get good IT on a tight budget?** Microsoft nonprofit offers after 2025, and the real cost of IT.
3. **How should charities protect themselves from cyber attacks and data breaches?** Cyber Essentials, UK GDPR and trustee duties.
4. **How can charities get more from Microsoft 365?** Teams, SharePoint, Intune and Copilot.
5. **What do charities need to know about phone systems, helplines and the PSTN switch-off?** Cloud telephony and the 2027 deadline.
6. **How do charities give staff and volunteers secure access from anywhere?** Accounts, devices and leavers.
7. **How do you choose an IT provider for a charity?** What to look for and ten questions to ask.
8. **Charity technology readiness checklist** 20 yes/no questions to test where you stand.

The biggest misconception we come across

How Indigo does this. Many charities assume good IT is out of reach on their budget. In our experience supporting more than 30 charities from Glasgow, the money is usually already being spent, just in the wrong places: full-price licences where nonprofit ones apply, contracts that have quietly risen, and phones nobody uses. When we reviewed Erskine's estate we found suppliers that had raised prices by up to 1,200%. Fixing that first frees budget for security and support.

Frequently asked questions

Is Microsoft 365 still free for charities?

Partly. Eligible charities can still get Microsoft 365 Business Basic free for up to 300 users. Microsoft ended the free Business Premium grant on 1 July 2025, so Business Premium, Business Standard and E3 are now discounted, by up to 75%, rather than free. Business Basic includes web and mobile Office apps but not the desktop apps, so most charities need a mix of plans.

Do charities need Cyber Essentials?

It isn't a legal requirement, but it's a sensible baseline and increasingly expected by funders, local authorities and public sector commissioners. It's required for some central government contracts. Only 16% of UK charities are even aware of Cyber Essentials (DSIT, 2026), so holding it helps a charity show trustees and funders that its data is protected.

Who is responsible for cyber security in a Scottish charity?

The trustees. The Scottish Charity Regulator (OSCR) has said that acting in the charity's best interests includes addressing cyber security. Day-to-day work can be delegated to staff or an IT provider, but the board should see regular reports. Only 30% of UK charities have a trustee with explicit cyber responsibility (DSIT, 2026).

What happens to our phone lines on 31 January 2027?

Openreach closes the UK's analogue phone network (PSTN) on that date. Lines still on it move to a temporary emergency service with limited features. Check helplines, alarm and telecare lines, lift phones, door entry and card machines, and move them to digital services well before the deadline.

Where to start

Start with a structured review of your licences, contracts, security and phone lines. It shows immediate risks, savings and longer-term improvements before you commit to new systems or suppliers. [Book a free Charity Technology Assessment →](#)

What are the biggest technology challenges for charities?

The eight technology challenges we see most in Scottish charities are: tight budgets, unused or outdated charity licensing, sensitive beneficiary and donor data, rising cyber attacks, high turnover of staff and volunteers, trustee and funder scrutiny, ageing phone lines before the 2027 switch-off, and uncertainty about AI. Most share one cause: technology added piece by piece as funding allowed, without a plan.

1. Tight budgets

Every pound spent on IT is a pound not spent on services. Squeezed finances are a sector-wide problem: 44% of Scottish charities spent more than their income in 2025 (SCVO, 2026). Core costs such as IT are also hard to fund through project grants.

Best practice: know exactly what you spend on technology and what each contract delivers, then cut waste before cutting protection. See Chapter 2.

2. Charity licensing that's out of date

Microsoft ended its free Business Premium grant for nonprofits on 1 July 2025. Charities that relied on it now pay a discounted price or have moved to the free Business Basic plan, sometimes without realising Business Basic has no desktop Office apps. Others never registered for nonprofit pricing at all.

Best practice: check eligibility, then match each person to the right licence.

3. Sensitive data

Charities hold safeguarding records, health and support notes, case files, donor details and bank information. Much of it is special category data under UK GDPR, and a breach can harm the people you exist to help.

Best practice: know where sensitive data lives, who can see it, and how it's backed up.

4. Cyber attacks

28% of UK charities reported a breach or attack in the last 12 months, and phishing was involved in almost all cyber crime against charities (DSIT, *Cyber Security Breaches Survey 2025/2026*). Only 38% use two-factor authentication.

Best practice: multi-factor authentication for everyone, email filtering and staff awareness training. See Chapter 3.

5. Staff and volunteers who come and go

Sessional staff, placements and volunteers join and leave often, work from home and in the community, and use their own phones. Accounts that are never switched off are one of the commonest security gaps we find.

Best practice: a simple starters-and-leavers process, with access limited to what each role needs. See Chapter 6.

6. Trustee and funder scrutiny

Boards, funders and commissioners increasingly ask how data is protected. Yet only 30% of UK charities have a trustee with explicit responsibility for cyber security (DSIT, 2026).

Best practice: a named trustee lead and a short, regular IT and security report to the board.

7. Phone lines and helplines before the switch-off

Openreach closes the analogue phone network on 31 January 2027. Helplines, alarm and telecare lines, lift phones and door entry on old lines all need to move.

Best practice: audit every line now. See Chapter 5.

8. AI: opportunity or risk?

79% of charities now use AI, and 56% say a lack of skills is their biggest barrier (*Charity Digital Skills Report 2026*). The questions we hear most are whether Copilot is worth it and whether it's safe with beneficiary data.

Best practice: start with low-risk admin tasks and write a short AI use policy first. See Chapter 4.

What these challenges have in common

They look different, but they usually share one cause: systems were bought one at a time, often tied to a specific grant, and nothing ties them together. The charities that cope best don't necessarily spend more. They know what they have, use the discounts they're entitled to and plan ahead.

How Indigo does this. At Erskine, Scotland's leading veterans care charity, the problem wasn't a lack of technology. It was too many contracts, with some suppliers raising prices by up to 1,200%, and no single view of the estate. Indigo Unified Communications reviewed everything, moved Erskine onto Microsoft charity pricing, removed unused mobiles and prepared lines for the PSTN switch-off. [Read the Erskine case study](#) →

Sources: DSIT, *Cyber Security Breaches Survey 2025/2026*, 30 April 2026

(<https://www.gov.uk/government/statistics/cyber-security-breaches-survey-20252026/cyber-security-breaches-survey-20252026>) · Zoe Amar Digital and Think Social Tech, *Charity Digital Skills Report 2026*, July 2026 (<https://charitydigitalskills.co.uk/>) · SCVO, *State of the Sector 2026: Scottish voluntary sector key trends*, September 2026 (<https://scvo.scot/research/reports/state-of-the-sector-2026-scottish-voluntary-sector-key-trends>).

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How can a charity get good IT on a tight budget?

Start by claiming every discount you're entitled to: Microsoft 365 Business Basic is free for up to 300 users, and Business Premium and Standard are discounted by up to 75%. Buy other software through TechSoup UK. Then review every IT and telecoms contract for unused services and price rises, standardise devices, and put the savings into security and support. A three-phase roadmap keeps spending predictable for trustees.

What changed in Microsoft's nonprofit offers?

On 1 July 2025 Microsoft discontinued two grants: the free Microsoft 365 Business Premium grant (10 licences) and the free Office 365 E1 grant. Existing licences expire at the charity's next renewal date and don't renew. What remains, according to Microsoft's nonprofit programme:

Offer	Position in 2026
Microsoft 365 Business Basic	Free grant for up to 300 users. Web and mobile Office apps, email, Teams, SharePoint, OneDrive and Copilot Chat. No desktop apps
Microsoft 365 Business Standard	Discounted nonprofit price. Adds desktop Office apps
Microsoft 365 Business Premium	Discounted nonprofit price (up to 75% off). Adds Intune, Defender for Business and Entra ID conditional access
Microsoft 365 E3 / E5	Discounted nonprofit price, for larger charities
Microsoft 365 Copilot	Add-on at a discounted nonprofit price
Azure	US\$2,000 of credits per year for eligible nonprofits

Microsoft also expects grants to be used. It sends warnings when fewer than 85% of assigned licences are active in a 90-day period, and can disable nonprofit licences after long periods of inactivity. Unassign licences from people who've left.

How to mix licences sensibly

Most charities don't need Business Premium for everyone. A common pattern is:

- **Business Premium** for staff who handle sensitive data or use laptops away from the office, because it adds device management and stronger security
- **Business Standard** for staff who need desktop Word and Excel but work on managed office PCs

- **Business Basic (free)** for paid staff and trustees who mainly need email, Teams and shared files in a browser. Microsoft's free grants don't cover volunteers, so volunteers who need a full account use a discounted nonprofit licence, or join as guests with a personal Microsoft account

Check current eligibility and prices in the Microsoft Nonprofit Hub before you buy. Terms change.

Where else can charities get discounted technology?

Since 1 July 2025, the product catalogue previously run as the Charity Digital Exchange has been managed directly by TechSoup UK (techsoup.uk). It offers donated and discounted software, including Windows 11 Pro licences for eligible charities. Many hardware makers and software firms also have charity pricing. Ask before you buy.

What does IT really cost?

The licence is usually the smallest part. Total cost includes:

- Licences and subscriptions, including ones nobody uses
- Support, whether that's a provider or a staff member's time
- Devices and their replacement every four to five years
- Broadband, phone lines and mobiles
- Backup, security tools and insurance
- The cost of downtime and data loss when things go wrong

Put IT into full cost recovery when you bid for funding. Core costs are hard to fund, but a budgeted, costed plan is easier to justify to funders than an emergency request.

A three-phase roadmap

1. **Stabilise.** Claim nonprofit licensing, cancel unused contracts, turn on multi-factor authentication and back up Microsoft 365.
2. **Modernise.** Move files to SharePoint, manage devices centrally, and move phones to the cloud before January 2027.
3. **Optimise.** Automate admin, improve reporting to trustees and funders, and introduce AI where there's a clear use.

How Indigo does this. Indigo Unified Communications is a Microsoft Solutions Partner for Modern Work with more than 100 Microsoft 365 migrations completed. For charities we start with a licence and contract review, which often saves more than the cost of support. Our dedicated Charity package, supported from our Glasgow office, gives fixed monthly costs that are easy to budget and report to trustees. [IT support for charities →](#)

Frequently asked questions

What happened to the free Business Premium grant?

Microsoft discontinued it on 1 July 2025. Existing Business Premium grant licences expire at your next renewal date and don't renew. You can move those users to the free Business Basic grant or buy Business Premium at the discounted nonprofit price. Plan the move before renewal to avoid losing access or data.

Can volunteers use our free Microsoft 365 licences?

Not the free ones. Microsoft's granted licences, including free Business Basic, are only for paid employees and unpaid executive staff such as trustees. Volunteers can use Microsoft's discounted nonprofit licences, or be invited as guests with a personal Microsoft account if they only need Teams and shared files. Remove licences when volunteers leave, as Microsoft monitors how many assigned licences are actually used.

Sources: Microsoft, *Microsoft for Nonprofits: updates* (July 2025 grant changes) (<https://learn.microsoft.com/en-us/industry/nonprofit/microsoft-for-nonprofits/updates>) · Microsoft, *Grant usage and recurring notifications* (<https://learn.microsoft.com/en-us/industry/nonprofit/microsoft-for-nonprofits/grant-usage-recurring-notifications>) · Microsoft, *Nonprofit eligibility* (licence usage: grants vs discounts) (<https://www.microsoft.com/en-us/nonprofits/eligibility>) · Charity Digital, *Changes to the Charity Digital Exchange, 2025* (<https://charitydigital.org.uk/topics/changes-to-the-charity-digital-exchange-12151>).

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How should charities protect themselves from cyber attacks and data breaches?

Charities should protect themselves in layers: multi-factor authentication on every account, email filtering against phishing, managed and updated devices, tested backups of Microsoft 365, monitoring, and regular training for staff and volunteers. Trustees should own the risk, with a named lead and a written incident response plan. Cyber Essentials is a sensible baseline that funders recognise, and UK GDPR sets the rules for reporting breaches.

How big is the risk for charities?

The UK Government's *Cyber Security Breaches Survey 2025/2026* (DSIT, April 2026) found:

- **28%** of UK charities reported a breach or attack in the last 12 months, around 57,000 charities
- **14%** were victims of cyber crime, and **95%** of that crime involved phishing
- Only **38%** use two-factor authentication
- Only **19%** have a formal incident response plan
- Only **30%** have a trustee with explicit responsibility for cyber security
- Only **17%** ran any staff awareness activity in the year
- Only **16%** are aware of Cyber Essentials

Charities also rely on third-party systems. In August 2026 SCVO published guidance for Scottish charities after a cyber incident at a CRM supplier used by many UK charities, where copies of customer database backups were accessed. Your suppliers' security is part of your risk.

What do trustees in Scotland need to know?

Trustees are responsible. OSCR has said it's the responsibility of every trustee in Scotland to act in their organisation's best interests, and that this must include cyber security (OSCR, November 2025). In practice that means:

- A named trustee or board lead for cyber and data protection
- Cyber risk on the risk register, reviewed at least yearly
- A short report to the board on incidents, training and progress
- A written incident response plan the board has seen

OSCR replaced its "notifiable events" process on 1 April 2024. Trustees are expected to deal with serious incidents themselves and use OSCR's "raise a concern" route where issues can't be resolved. Check OSCR's current guidance when an incident happens.

What does UK GDPR require?

If a personal data breach is likely to put people's rights and freedoms at risk, you must report it to the ICO within 72 hours of becoming aware of it. The ICO has an online self-assessment tool to help you decide. Beneficiary health, support and safeguarding records are often special category data, so they need tighter access controls.

Under the Data (Use and Access) Act 2025, charities can now use a "charitable purposes soft opt-in" for email and text marketing to people who've expressed interest in or supported their cause, from 5 February 2026, if strict conditions are met (ICO, April 2026). Check the ICO guidance before relying on it.

Is Cyber Essentials worth it for a charity?

For most charities, yes. It covers five controls, firewalls, secure configuration, user access control, malware protection and software updates, which block the most common attacks. It's required for some central government contracts and increasingly asked for by councils and funders. The NCSC's free Cyber Action Toolkit and guidance for small organisations are a good place to start.

The layers every charity needs

- **Identity:** multi-factor authentication for every staff member, volunteer and trustee account
- **Email:** filtering against phishing, impersonation and fake invoices, and a rule that bank detail changes are confirmed by phone
- **Devices:** encrypted, updated and centrally managed, with remote wipe
- **Data:** permissions on sensitive folders and separate backups of Microsoft 365
- **Monitoring:** someone watching for unusual activity, ideally around the clock
- **People:** short, regular training for staff and volunteers

What to do if something goes wrong

Follow your incident plan. Contain the problem, tell your IT provider, inform trustees, assess whether to report to the ICO within 72 hours, and report crime to Police Scotland on 101. Scotland's Cyber Incident Response Helpline, run by the Cyber and Fraud Centre – Scotland, is 0800 1670 623 (weekdays, 9am to 5pm).

How Indigo does this. Indigo Unified Communications holds Cyber Essentials Plus and ISO 27001:2022 itself. Our Charity package includes Kaseya 365 endpoint protection, INKY email security, multi-factor authentication, Microsoft 365 backup with Datto SaaS Protection, security awareness training and a 24/7 security operations centre. We take charities through Cyber Essentials, usually starting with multi-factor authentication, device management and access reviews. [Cyber security services](#) →

Frequently asked questions

Do we have to report a cyber attack to the ICO?

Only if personal data is involved and the breach is likely to put people's rights and freedoms at risk. Then you must report it within 72 hours of becoming aware of it. The ICO's online self-assessment helps you decide. Record every breach internally, even ones you don't report.

Is there free cyber security help for Scottish charities?

Yes. SCVO has a cyber resilience programme with free advice, a template incident response plan and awareness materials. The NCSC's Cyber Action Toolkit is free, and Scotland's Cyber Incident Response Helpline (0800 1670 623, weekdays 9am to 5pm) gives practical help during an incident, free for charities with fewer than 20 employees.

Sources: DSIT, *Cyber Security Breaches Survey 2025/2026*, 30 April 2026

(<https://www.gov.uk/government/statistics/cyber-security-breaches-survey-20252026/cyber-security-breaches-survey-20252026>) · OSCR, *Building cyber resilience in Scotland's third sector: a strategic call to action*, 5 November 2025 (<https://www.oscr.org.uk/news/building-cyber-resilience-in-scotland-s-third-sector-a-strategic-call-to-action/>) and *The Notifiable Events process has been replaced*, 1 April 2024 (<https://www.oscr.org.uk/news/the-notifiable-events-process-has-been-replaced-changes-in-the-way-charities-report-important-issues-to-oscr/>) · ICO, *72 hours: how to respond to a personal data breach* (<https://ico.org.uk/for-organisations/advice-for-small-organisations/personal-data-breaches/72-hours-how-to-respond-to-a-personal-data-breach/>) and *Charities given new flexibility to contact supporters under data law change*, 28 April 2026 · SCVO, *Beacon CRM cyber incident: what Scottish charities should do now*, 4 August 2026 (<https://scvo.scot/p/106392/2026/08/04/beacon-crm-cyber-incident-what-scottish-charities-should-do-now>) · NCSC, *Cyber security advice for small to medium sized organisations* (<https://www.ncsc.gov.uk/section/advice-guidance/small-medium-sized-organisations>) · Cyber and Fraud Centre – Scotland, *Incident Response* (<https://cyberfraudcentre.com/community/incident-response>) · CyberScotland, *Third Sector Cyber Resilience Bulletin May-July 2026* (<https://www.cyberscotland.com/third-sector-cyber-resilience-bulletin-may-july-2026/>).

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How can charities get more from Microsoft 365?

Most charities already have Microsoft 365, often free or discounted, but use little beyond email. The biggest gains come from organising Teams and SharePoint around services and projects, locking down sensitive records with permissions, managing devices with Intune, giving volunteers the right accounts and backing everything up. Once that's in place, Copilot can save time on reports, minutes and funding bids, with clear rules and a person checking the output.

Why Microsoft 365 is more than email

For a charity, Microsoft 365 is a secure workspace for staff, volunteers and trustees wherever they are. It replaces shared drives, personal Dropbox folders and email attachments, and it's the platform most other charity systems connect to.

How charities use each Microsoft 365 tool

Microsoft Teams

A team for each service, project, region and the board. Conversations, files, meeting notes and calls stay in one place, and trustees can join board meetings and read papers without separate systems. Guest access lets partner organisations collaborate on a shared project without full accounts.

SharePoint and OneDrive

Shared documents live in SharePoint, with version history and permissions. Sensitive areas, such as safeguarding, HR and case records, get their own sites with access limited to named people. Personal working files stay in OneDrive.

Microsoft Intune

Central management of laptops, tablets and phones: security policies, encryption, updates, software and remote wipe. For volunteers using their own phones, Intune app protection can keep charity data inside Outlook and Teams without taking over the whole device. Intune is included in Business Premium.

Security and compliance

Business Premium adds conditional access (for example, blocking sign-ins from unmanaged devices), Defender for Business and sensitivity labels that mark and protect confidential documents.

Automation

Power Automate handles approvals, expense claims, volunteer sign-up forms and notifications. Microsoft's nonprofit programme also includes Power Apps free for up to 10 users, useful for simple data-collection apps.

How should charities use Copilot and AI?

79% of charities now use AI in some form (*Charity Digital Skills Report 2026*), often through free tools where staff paste in information. That's the main risk: beneficiary data ending up in a tool the charity doesn't control.

Microsoft 365 Business Basic includes **Copilot Chat**, which works inside your Microsoft 365 account with enterprise data protection. **Microsoft 365 Copilot**, which also works across your own emails, files and meetings, is a paid add-on available at a discounted nonprofit price. Practical uses:

- **Meetings:** board and team meeting summaries and action lists
- **Funding:** first drafts of bids and reports to funders, reviewed by a person
- **Admin:** summarising long documents, drafting letters and newsletters
- **Information:** finding policies and past reports quickly

Before rolling out Copilot, tidy up SharePoint permissions. Copilot can surface anything a user already has access to, so an over-shared folder becomes an over-shared answer.

Using AI responsibly

Write a short AI use policy covering which tools are allowed, what data must never be entered, and that a person reviews anything AI produces. Tell trustees how AI is used, and consider whether beneficiaries should be told too.

How to measure success

Less time searching for documents, faster volunteer onboarding, fewer emailed attachments, higher licence usage (Microsoft expects 85% of assigned nonprofit licences to be active), fewer support requests and simpler board reporting.

How Indigo does this. Indigo Unified Communications is a Microsoft Solutions Partner for Modern Work, based in Glasgow, with more than 100 Microsoft 365 migrations completed. For charities we check nonprofit eligibility, move people onto the right licences, set up Teams and SharePoint around how your services work, and manage devices with Microsoft Intune. Microsoft 365 is backed up with Datto SaaS Protection, because Microsoft's own retention isn't a backup.

Frequently asked questions

Can volunteers have Microsoft 365 accounts?

Yes, but not on the free grant. Microsoft's free Business Basic grant is only for paid staff and unpaid executive staff such as trustees. Volunteers can have discounted nonprofit licences, or join as guests with a personal Microsoft account. Give each volunteer their own account, never a shared login, limit access to what their role needs, and turn the account off when they leave.

Is Copilot safe to use with beneficiary data?

Copilot Chat and Microsoft 365 Copilot work within your Microsoft 365 account's security and data protection, unlike free consumer AI tools. The bigger risk is over-shared files, since Copilot can show anything a user can already access. Fix permissions first, write an AI use policy, and keep a person reviewing the output.

Sources: Microsoft, *Technology and software grants and discounts for nonprofits* (<https://www.microsoft.com/en-us/nonprofits/offers-for-nonprofits>) · Microsoft, *Grant usage and recurring notifications* (<https://learn.microsoft.com/en-us/industry/nonprofit/microsoft-for-nonprofits/grant-usage-recurring-notifications>) · Microsoft, *Nonprofit eligibility* (licence usage: grants vs discounts) (<https://www.microsoft.com/en-us/nonprofits/eligibility>) · Zoe Amar Digital and Think Social Tech, *Charity Digital Skills Report 2026*, July 2026 (<https://charitydigitalskills.co.uk/>).

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What do charities need to know about phone systems, helplines and the PSTN switch-off?

Openreach closes the UK's analogue phone network on 31 January 2027, so every charity should check its phone lines, helplines, alarm and telecare lines, lift phones and door entry now. Most charities are best served by a cloud phone system with call queues, out-of-hours routing and call recording, so staff and volunteers can answer from the office, home or a mobile. Keep your numbers by porting them.

What is the PSTN switch-off?

The PSTN is the copper-based analogue phone network. Openreach is closing it on 31 January 2027 and confirmed that date again in September 2026. New analogue lines are no longer sold. Around 350,000 business premises had still not moved by September 2026 (Openreach, reported by ISPreview).

Lines still on the old network after the deadline will be moved to a temporary "emergency voice access" service with limited features, at a wholesale price from £35 a month per line. It's a last resort, not a plan.

What in a charity is affected?

More than phones. Check:

- Helpline and office numbers on analogue lines or ISDN
- Intruder and fire alarm lines
- Telecare and community alarms in supported housing or care settings
- Lift emergency phones
- Door entry systems
- Card machines and franking machines on phone lines
- Broadband that runs over an old phone line

Ask each equipment supplier whether it works on a digital line. Take the free PSTN switch-off check →

What should a charity helpline phone system do?

- **Never miss a call:** queues, overflow to a second group, and clear out-of-hours messages

- **Answer from anywhere:** staff and volunteers use a laptop app or mobile app, without giving out personal numbers
- **Call recording** for safeguarding, training and quality, with access limited to named people and a retention period set in your data protection policy
- **Reporting** on call volumes, waiting times and missed calls, for funders and trustees
- **Keep your numbers:** well-known helpline numbers are ported to the new system

Tell callers when calls are recorded, and record only what you need. Recordings are personal data under UK GDPR.

Which platform suits a charity?

Common choices are 8x8, 3CX and Microsoft Teams Phone. Teams Phone suits charities already working in Teams. 3CX is cost-effective for larger teams. 8x8 has strong contact centre and reporting tools for busy helplines. The right choice depends on call volumes, how many people answer calls and budget.

How to plan the move

1. List every line and what it's used for, including alarms and lifts
2. Check contract end dates and early termination costs
3. Choose the platform and design call flows for the helpline
4. Run the new system alongside the old one, then port numbers
5. Train staff and volunteers, and test out-of-hours routing

How Indigo does this. Indigo Unified Communications supports charity phone systems on 8x8, 3CX and Microsoft Teams Phone, from our Glasgow office. Fully hosted lines start from about £10 per user per month, and for teams of around 30 users or more a SIP-based system is often cheaper, so we price both. New phones run alongside the old system with no downtime, number ports are scheduled by Openreach during working hours, and your phone system review arrives within 2 working days. For Erskine, we reviewed legacy phone lines, alarms and faxes ahead of the switch-off. [Phone systems for charities →](#)

Frequently asked questions

Will our helpline number change when we move to a cloud phone system?

No. Your existing numbers, including freephone and 0300 numbers, can usually be ported to the new system. Ports are scheduled by Openreach and happen during working hours. Running the new system alongside the old one first means callers don't notice the change.

Can volunteers answer helpline calls from home?

Yes. With a cloud phone system, volunteers answer on a laptop or mobile app, and the caller sees the helpline number, not a personal one. You control who is in each queue and when, and calls can be recorded and reported on.

What happens to telecare and alarm lines after January 2027?

Telecare, alarm and lift lines that rely on analogue signals may stop working reliably on digital lines. Check with each equipment supplier whether it's compatible or needs replacing, and do it now, as lead times for replacement equipment can be long.

Sources: ISPreview, *Openreach confirm post-January 2027 measures for UK analogue phone switch-off*, 24 September 2026 (<https://www.ispreview.co.uk/index.php/2026/09/openreach-confirm-post-january-2027-measures-for-uk-analogue-phone-switch-off.html>) · Openreach, *Switching off PSTN across the UK* (<https://www.openreach.com/big-switch-off>).

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How do charities give staff and volunteers secure access from anywhere?

Give every person their own account with multi-factor authentication, and access only to what their role needs. Manage charity-owned devices with Microsoft Intune and protect charity data on volunteers' own phones with app protection. Use a simple starters-and-leavers checklist so access is switched off the day someone leaves. For community venues and outreach, a managed 4G or 5G router gives a reliable, secure connection within days.

Why volunteer access is different

Over a million people volunteer in Scotland (SCVO, 2026). Volunteers join and leave often, may give a few hours a month, use their own phones and laptops, and may work from community halls, shops, outreach vans or home. Many handle personal information about the people you support. The goal is quick access for the right people and none for anyone else.

Accounts: one person, one login

Shared logins, such as a single "volunteers@" mailbox everyone knows the password to, are one of the commonest gaps we find. You can't tell who did what, you can't use multi-factor authentication properly, and you can't remove one person's access.

- Give every staff member and volunteer their own account. Microsoft 365 Business Basic is free for up to 300 paid staff and trustees under Microsoft's nonprofit offers; volunteers need discounted licences or guest access
- Turn on multi-factor authentication for everyone, including trustees
- Use groups by role, so access follows the role and not the person
- Use Teams guest access for partners, rather than full accounts

Starters and leavers

A simple, written process prevents most problems:

- **Starters:** account created from a request by a named manager, added to role groups, training on phishing and data protection in the first week
- **Leavers:** account blocked on the last day, licence removed, charity data wiped from their devices, shared passwords changed
- **Every quarter:** review who has access to sensitive folders and remove anyone who shouldn't

Microsoft's nonprofit programme monitors licence use and warns when fewer than 85% of assigned licences are active, so leavers' licences should be removed promptly anyway.

Devices: charity-owned and personal

Charity-owned laptops and tablets should be enrolled in Microsoft Intune: encrypted, updated automatically, protected by endpoint security and able to be wiped remotely if lost.

Volunteers' own phones don't need to be fully managed. Intune app protection policies keep charity email and files inside Outlook, Teams and OneDrive, stop copying into personal apps, and let you wipe only the charity data when someone leaves.

Shared devices in drop-in centres or shops should use separate sign-ins and lock automatically.

Connectivity for community sites and outreach

Community venues often have poor or shared WiFi. Options:

- A managed 4G or 5G router for temporary or outreach sites
- Full fibre (FTTP) for permanent offices and shops where it's available
- Separate guest WiFi for visitors and service users, kept apart from staff systems
- Secure remote access to any systems still in the office

Training that fits volunteers

Volunteers won't sit through an hour-long course. Short, regular modules on phishing, passwords and handling personal data work better. Only 17% of UK charities ran any cyber awareness activity in the last year (DSIT, 2026), so even a little puts you ahead.

How Indigo does this. Indigo Unified Communications sets up staff and volunteer accounts, role-based access and Microsoft Intune for charities across Scotland from our Glasgow office. Our Charity package includes setting up and removing accounts quickly, Intune for shared and personal devices, and security awareness training. Every support ticket gets a first response in under 30 minutes (28 minutes on average in August 2026), and managed 4G and 5G connectivity for new sites is usually live within 2–3 working days.

Frequently asked questions

Should volunteers use their own phones for charity work?

They can, if charity data is protected. Microsoft Intune app protection keeps charity email and files inside approved apps like Outlook and Teams, blocks copying into personal apps, and lets you remove only charity data when a volunteer leaves. It doesn't give the charity control of the volunteer's personal photos or messages.

How quickly should we remove a leaver's access?

On their last day, or immediately if they leave suddenly. Block the account, remove the licence, wipe charity data from their devices and change any shared passwords they knew. Review access to sensitive folders every quarter to catch anyone missed.

Sources: SCVO, *State of the Sector 2026: Scottish voluntary sector key trends*, September 2026 (<https://scvo.scot/research/reports/state-of-the-sector-2026-scottish-voluntary-sector-key-trends>) · DSIT, *Cyber Security Breaches Survey 2025/2026*, 30 April 2026 · Microsoft, *Grant usage and recurring notifications* (<https://learn.microsoft.com/en-us/industry/nonprofit/microsoft-for-nonprofits/grant-usage-recurring-notifications>) · Microsoft, *Nonprofit eligibility* (licence usage: grants vs discounts) (<https://www.microsoft.com/en-us/nonprofits/eligibility>).

Book a free Charity Technology Assessment →

How do you choose an IT provider for a charity?

Choose a provider that already supports charities and can show it, understands Microsoft's nonprofit licensing, holds recognised security certifications itself, publishes its response times, can handle phones and connectivity as well as IT, and reports in a way trustees understand. Compare what's included and the outcomes, not just the monthly price, and ask the ten questions below before you sign.

Seven things to look for

1. Charity experience

Volunteers, trustees, safeguarding data, funder reporting and nonprofit licensing are problems many business-only providers rarely see. Ask how many charities they support and for a case study or reference from one your size.

2. Licensing knowledge

A good provider will check your Microsoft nonprofit eligibility, explain the July 2025 changes and put each person on the right licence. That alone can save more than the cost of support.

3. Security they practise themselves

Check whether they hold Cyber Essentials Plus and ISO 27001. Ask how they protect Microsoft 365, whether monitoring runs 24/7, how backups are tested and whether they can take you through Cyber Essentials.

4. IT, phones and connectivity together

Separate suppliers for IT, broadband, phones and mobiles tend to blame each other when something breaks. With the PSTN switch-off on 31 January 2027, a provider who can handle your lines as well as your laptops saves time.

5. Published response times

Ask for their average first response time and their service levels by priority. Ask who answers the phone and whether you'll have a named contact.

6. Reporting for trustees

You should get regular reports you can take to the board: tickets, security status, licence use, risks and a costed plan.

7. Value, not just price

Compare what's included, response times, security, advice and customer satisfaction. The cheapest provider is rarely the best value, and every pound lost to downtime or a breach is a pound not spent on services.

Ten questions to ask an IT provider

1. How many charities do you support, and can we speak to one?
2. How will you check our Microsoft nonprofit licensing?
3. What cyber security is included as standard?
4. Do you hold Cyber Essentials Plus and ISO 27001 yourselves?
5. How do you back up Microsoft 365?
6. How do you handle volunteers, starters and leavers?
7. Can you manage our phones, helpline and connectivity too?
8. What's your average first response time?
9. What will you report to our trustees, and how often?
10. What does success look like after 12 months?

Signs you've outgrown your current IT provider

- They only contact you when there's a problem
- Nobody has reviewed your licences since the 2025 Microsoft changes
- Security advice only comes after an incident
- You chase them for ticket updates
- Suppliers blame each other when things go wrong
- There's no plan for your phone lines before January 2027
- Trustees ask questions about IT that nobody can answer

How Indigo does this. Here are our answers. Indigo Unified Communications supports more than 30 charities and third sector organisations, including Erskine, from Glasgow. We hold Cyber Essentials Plus and ISO 27001:2022 and are a Microsoft Solutions Partner for Modern Work. Our average first response is under 30 minutes (28 minutes in August 2026, with 63% of tickets resolved within two hours), we keep 95% of our clients and score 4.98/5 from post-ticket surveys. Our Charity package includes a 24/7 security operations centre and helpdesk hours of 09:00–17:00, Monday to Friday.

"This review has been transformative. Not only did we uncover significant savings, but we now have full visibility over our IT and telecoms estate." **Eddie Foy, Digital Change Consultant, Erskine**

Frequently asked questions

Do IT providers offer discounts for charities?

Some do. Indigo's Charity package is close to our top Platinum package, adapted for charities and priced at charity rates, and it includes Microsoft 365 Business Premium licences and a 24/7 security operations centre. Whichever provider you choose, ask whether charity pricing applies and whether it covers the same service as their business packages.

How long does it take to switch IT provider?

With Indigo, onboarding usually takes about two weeks. The new provider documents your systems, takes over admin access and monitoring, and checks backups. A good handover from the old provider helps, so give notice in line with your contract and ask for passwords and documentation in writing.

Sources: DSIT, *Cyber Security Breaches Survey 2025/2026*, 30 April 2026 · Microsoft, *Microsoft for Nonprofits: updates* (<https://learn.microsoft.com/en-us/industry/nonprofit/microsoft-for-nonprofits/updates>) · Indigo service desk data, August 2026.

[Book a free Charity Technology Assessment →](#)

Charity technology readiness checklist

Answer these 20 yes/no questions to see how ready your charity's technology is. They cover strategy and budget, licensing, cyber security, data protection, phones and volunteer access. If you answer "no" to three or more, there are likely to be quick savings and security wins. If you answer "no" to any cyber security or phone line question, start there, because those carry the biggest risk and the 2027 deadline.

Strategy and budget

1. Do we have a written technology plan with costs that trustees have approved?
2. Is our technology reviewed at least once a year?
3. Do we know every IT and telecoms contract we pay for, and when each one ends?

Licensing

4. Have we registered with Microsoft's nonprofit programme and checked our licences since the July 2025 changes?
5. Is each person on the right licence, with leavers' licences removed?

Cyber security

6. Is multi-factor authentication turned on for every staff, volunteer and trustee account?
7. Are all charity-owned devices centrally managed and encrypted?
8. Is Microsoft 365 backed up separately, and have we tested a restore?
9. Do staff and volunteers get cyber awareness training at least once a year?
10. Do we hold Cyber Essentials, or have a plan to get it?
11. Do we have a written incident response plan that trustees have seen?
12. Does a named trustee have responsibility for cyber security?

Data protection

13. Do we know where beneficiary, safeguarding and donor data is stored, and who can access it?
14. Do we know how to decide whether a breach must be reported to the ICO within 72 hours?
15. Have we checked the security of suppliers that hold our data, such as our CRM?

Phones and helplines

16. Have we listed every phone line, alarm, telecare, lift and door entry line affected by the 31 January 2027 switch-off?

17. Can staff and volunteers answer calls from anywhere without using personal numbers?

Staff, volunteers and AI

18. Does everyone have their own login, with no shared accounts?

19. Is access removed on the day someone leaves?

20. Do we have a written AI use policy that says what data must never go into AI tools?

What your score means

- **17–20 "yes"**: you're in good shape. Keep reviewing yearly.
- **12–16 "yes"**: solid foundations with gaps. Start with any cyber security or phone line "no".
- **Under 12 "yes"**: there's real risk and probably real savings. A structured review will show where to start.

What next?

Indigo Unified Communications, based in Glasgow, runs a free Charity Technology Assessment covering all 20 areas. We review your licences, contracts, security, data protection and phone lines, then give you a prioritised, costed plan you can take to trustees. We support more than 30 charities and hold Cyber Essentials Plus and ISO 27001:2022. [Book a free Charity Technology Assessment](#) →

Sources: DSIT, *Cyber Security Breaches Survey 2025/2026*, 30 April 2026 · ICO, *72 hours: how to respond to a personal data breach* · Openreach, *Switching off PSTN across the UK*.

Back to: [The Complete Guide to Technology for Charities and Third Sector Organisations in Scotland](#)

Talk to Indigo

Indigo Unified Communications provides managed IT support, cyber security, connectivity, phone systems and business mobiles to organisations across Scotland, from offices in Glasgow and Livingston. We hold Cyber Essentials Plus, ISO 27001:2022 and ISO 9001:2015.

Book a free technology assessment: 0141 442 0202 ·
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