

Planning, Partnership and People: Keys to Successful Non-Profit Technology Projects

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1 Introduction

Purpose of this report

This paper has been developed for the 2004 Voluntary Sector Community of Inquiry Symposium, to document general findings from the Volunteer@ction Online Tool and Resource Sharing Project. It aims to capture and share information about how voluntary organizations can most effectively use the Internet. It also includes a number of conclusions that are intended to guide future strategic technology projects within the voluntary sector.

Project background

Starting in 1999, the Government of Ontario has invested in building the technological capacity of voluntary organizations through the Volunteer@ction Online Program (V@O). The program funded non-profit organizations to partner with business and other groups in the community on strategic Internet use. Funded projects were focused around three program objectives: increasing efficiency and effectiveness; recruiting and supporting volunteers; and encouraging collaboration and knowledge sharing.

From 1999 to 2002 the V@O program provided over \$11.5 million to 110 voluntary sector projects with over 975 cross-sectoral partners across the province, leveraging over \$18 million in additional contributions. Funded projects were required to fulfil rigorous application requirements including the development of technical and business plans and were closely monitored for progress.

A program evaluation, undertaken in 2001, has revealed that funded projects have resulted in over 3000 volunteers and staff trained and 85,000 volunteers recruited online. The program has helped create over 3500 tools, resources and make accessible online community information directories benefiting over 10,000 voluntary organizations. These Internet based projects are still having a considerable impact on the work of numerous organizations and on the lives of thousands of Ontarians.

While the impact of the V@O program has been significant, there is still continued need for training, knowledge sharing and funding resources that will help the voluntary sector continue to realize the benefits of the Internet and be more strategic in its use. The aim of the Tool and Resource Sharing Research Project is to share the learning and knowledge from past V@O projects to help address this ongoing knowledge gap.

Project goals

The V@O Tool and Resource Sharing Project began with a clear mandate – find a way to share the valuable materials and knowledge, created by V@O projects, with Ontario's voluntary sector as a whole. Specific goals included:

- Increase and promote broad awareness of all products and content resulting from V@O projects;
- Increase understanding of the potential of sector-wide use of the projects and content produced by V@O;
- Ensure ongoing Ministry capacity to gather, categorize and assess future data gathered on V@O products.

Initially, it was expected that most of the shareable material uncovered through the project would be software tools and written material. As outlined below, it turned out that much more value was found in the best practices and lessons learned generated through V@O projects. As a result, the materials created through this project place a great deal of emphasis on sharing this knowledge with the sector.

Research methodology

From the beginning, this research project had two purposes – first to help understand what useful materials had been created and second to provide content for best practices documentation to be shared with the sector. With these goals in mind, five main research techniques were used:

- **Add detail to existing V@O projects database:** An Inventory Database based on an existing V@O management database was created. During the research process, the project team was able to add additional detail including information about ‘project types’ as well as revised project descriptions.
- **Cluster and prioritize projects to be reviewed:** The research process started with a review of all complete and nearly complete projects. This allowed the project team to cluster projects by type and to identify 60 projects to review in detail.
- **Document available tools and resources:** Information about tools and resources produced by each project was entered into a Tool and Resource Inventory Database (see above). Those that were identified as ‘shareable’ were documented in greater detail. This material was used for project analysis purposes and will also be available for future use on the Ministry web site and elsewhere.
- **Identify shareable ‘lessons learned’ and ‘best practices’:** Valuable lessons learned and best practices were also documented in greater detail and entered into the Tool and Resource Inventory Database. This information included ‘tool recipes’ that show how existing technological tools can be applied to meet the specific needs of the voluntary sector.
- **Interview key voluntary organizations:** Following the inventory process, 10 past V@O grant recipients were interviewed. These interviews helped ensure that case studies entered into the best practices briefs were as accurate and informative as possible.

As suggested above, four main information sources were consulted: Ministry of Citizenship and Immigration V@O program staff; project files including final reports; completed project web sites; and interviews with 10 voluntary sector organizations. The quality and depth of information included in project files and on project websites was a major factor in the research team's ability to identify best practices and useful tools. It is possible that useful examples were missed because they were not adequately captured in project reports.

Research outputs

Based on a review of over 60 projects, the V@O Tool and Resource Sharing Project research team produced a series of documents that will be shared with the sector. These include a number of documents that will be posted to the Ministry of Citizenship and Immigration's web site as follows

- Voluntary sector technology **best practices and lessons learned** based on case material gathered from the first 60 projects funded by the V@O program;
- Annotated **lists of software tools and written resources** that were produced through V@O projects and that are of broad value to the voluntary sector;
- A **web project planning framework** that serves as a guide for the planning and implementation of technology based initiatives;

In addition, the research team produced this paper for the Voluntary Sector Community of Inquiry Symposium and an internal report for the Ministry of Citizenship and Immigration. These two documents are based on general findings and recommendations about voluntary sector technology use.

2 Summary of Findings

Volunteer@ction Online was never intended to promote technology for technology's sake. Rather, the aim of the program was always to fund strategic uses of the Internet that enhance the effectiveness and efficiency of voluntary sector organizations. It was hoped that these investments would help to minimize a digital divide between private and public organizations that were investing heavily in new technologies and voluntary sector organizations with limited funds allocated for technology expenditures. The result was a focus on practical projects that used the Internet to solve specific organizational or community problems and that could be replicated or shared with others in the sector. The program did not invest in projects that were strictly focused on hardware and infrastructure.

The research demonstrated that the intent to use technology strategically can lead to useful organizational and community outcomes. However, this intent alone is not enough – there is a need for an engaged community, a strong team, sound partnerships and a smart, flexible technical approach. Around all of this there is also a need for a clear, transparent strategic technology plan. Without the right people and plan, projects tend to struggle and produce only mediocre results. On the other hand, with these things in place, projects thrive and result in useful impacts within both organizations and the communities they serve.

The following is a summary of high-level observations about the ingredients that were found in some of the most successful V@O projects – and which are found in many other successful strategic technology projects in the voluntary sector.

Community consultation and user centered design = well used, effective web sites

According to technology industry analysts at the Standish Group¹, over 65% of software and web development projects go over budget or fail to meet their objectives altogether. Why do so many projects fail? In most cases, these web sites were created on a 'build it and they will come' philosophy where organizational leaders – corporate managers, senior bureaucrats, non-profit executive directors – simply brainstorm what they think a site should do. The people who would actually use the site were often not consulted.

This failure of early 'build it and they will come' web sites has led to a widespread movement towards user-centered design. Built according to the standards of participatory software design, this approach includes users at all stages of the development process – early visioning, testing, evaluation, and ongoing improvement. The result has been sites that are easier to use and more broadly accepted by the audiences they have been built for.

While very few V@O projects spoke explicitly of user-centered design, many used similar approaches – engaging their communities every step along the way. Most of these projects were low-cost, grassroots focused, incremental and iterative in nature. Examples of projects that effectively used community consultation includes the following:

- As a part of its online learning project on volunteer management, the Ontario Community Support Association (OCSA) held **meetings with partners** to discuss existing curriculum and unmet community needs. This input was used to design their online courses that were both user friendly and suited to the specific needs of voluntary sector users.
- The Ontario Association of Youth Employment Centres (OAYEC) employed an **incremental and iterative process of consultation, testing and evaluation** as a part of its Shared Resources Database Pilot Project. The ten OAYEC members participating in the project were heavily involved each step of the way: defining project requirements; reviewing information architecture; testing a draft version of the database; and evaluating the final product. Using a combination of meetings, training sessions and online surveys, OAYEC demonstrated a commitment to collaborative, user-centered design throughout the project.

¹ 2003 CHAOS Chronicles report. <http://www.standishgroup.com/index.php>

- Shelternet.ca's goal of providing online counseling to abused women has required a **comprehensive needs assessment phase**. All project partners agreed that the needs assessment was a major success factor in creating a service that really meets the needs of the organizations and people who would use the service.

Many V@O funded projects also undertook user focus groups, online discussion forums, web site testing with real end users and evaluation focus groups to engage the communities they aimed to serve. The projects that used techniques like these stood out not only because they reached out to their communities but also because these community consultations seemed to lead to more user centered web sites. These successful projects have strong support and buy in from their stakeholders. More importantly, the sites tended to be used longer, with most sites still producing active participation today. The message is clear – consultation is a way to ensure people are engaged in your project and will want to continue to be involved once it launches and matures.

The skills and makeup of the project team have a tremendous impact

Clearly, the people who are involved in delivering a web project have a huge impact on its success. The wrong team can be detrimental to the most perfectly conceived project in a number of ways – losing sight of user needs, going too slowly, going too fast and choosing the wrong technology. Some key learnings about web teams from V@O projects include the following:

- It is essential to have a **project manager who understands the voluntary sector and web projects**. It was this combination of knowledge that guided the Community Information Online Consortium (CIOC) through a long and sometimes bumpy project. They hired a project manager who had years of experience running an information referral centre and managing technology projects. With this experience, she was able to keep a constant eye on community needs amidst a context of changing staff, partners and technology.
- A good web project team is a **partnership between end users and technology people**. The Ontario Community Support Association (OCSA) partially credits the success of its course in advanced volunteer management on the guidance of its online education consultants. Instead of just assuming that they knew what e-learning tools would be right for the project, the consultants worked hand in hand with OCSA staff to select a mix of software that was well suited to a unique set of user needs.
- **Private sector enterprises and voluntary sector organizations often have very different work cultures**. While private sector companies may be more accustomed to working with tight timelines, many voluntary sector organizations require much more extended timelines to accommodate the participatory nature of their work and environment. This was experienced during the development of Shelternet.ca, the online resource for abused women. Project staff commented: “The difference between the two operating cultures took some time to understand... It is one thing to sign a contract outlining the scope and technology. It is a more complex thing to define the communication practices and “fit” with the two parties.”
- It is important to have people **who know technology at the core of your project team**. A member of the Community Information Online Consortium noted during the research process: “If you do not understand the stages that a web development project should go through yourself, you could be led down the wrong path by hired hands or partners who claim to have the experience and knowledge that you don't have. Better to invest in some in-house knowledge before you embark on a technology project.”

Of course, it is essential to have a clear definition of roles within the team – project manager, content provider, programmer, designers, tester and so on. Also, it is useful to ensure that the entire team, and not just the project manager, is responsible for the overall success of the project. This means developing a contingency plans and designating a back up project manager in case there is a change in team structure. Clear roles and shared leadership were both identified as major success factors in leading V@O projects.

The Internet can provide a platform for innovative approaches to partnership

Every V@O funded project had a partnership component. This included everything from partnerships with private sector technology companies to online collaborative work amongst non-profits to content sharing systems that interconnected the web sites of many voluntary organizations. Many of these partnerships met with tremendous success, showing that the Internet can be a powerful innovative platform for collaboration. However, other partnerships struggled with constant challenges. Key ingredients for the most successful of these partnerships included:

- **A real and concrete benefit for all partners.** A Commitment to Training for Women (ACTEW)'s online content sharing network provides a perfect example of this. By participating in the project, all partners received job and event listing content that they could automatically include on their web site, and provided similar content to others in return. The benefits of this included less time spent searching for new content and a bigger audience for listings that normally would only be seen on one site.
- **Clear expectation of all partners** from the beginning. For example, the Ontario Centre for Environmental Technology Advancement (OCETA) was interested in customizing a matching tool previously developed for In-Kind Canada. However, while recognizing the benefits of sharing and/or utilizing web-based tools already developed for other community-based projects, OCETA's needs were very specific. As a result, the project required significantly more customization and time to reconfigure the tools than previously anticipated. The fact that the partners had proceeded with work while having significantly different expectations put major stress on the project.
- **Continuity within the partnership** is also important. Several projects included key private sector partners who were impacted negatively by the dot.com crash. In a number of cases, this meant that new partners had to be found or major changes to the technical direction of the project were required. This resulted in some major delays in project delivery and, in a few cases, impacts were weaker than would normally have been expected given the strength of the original project plan and team.

Looking at the experience of V@O funded projects, it seems clear that the Internet provides tremendous potential for innovative approaches to partnerships – but these partnerships can be challenging and require constant nurturing.

It is not the tools that matter, but how you use them

There are clearly non-profit sector 'business needs' -- volunteer management, donor relationship management, community based learning -- that are not effectively addressed by existing software tools. A number of V@O projects set out to address needs like these. While a few of these projects created new software to address these needs, most projects focused on the creative combination and adaptation of existing software tools. Put more simply, most projects created 'software recipes' rather than 'software tools'. Key findings in this area include:

- **Technology recipes that 'mix and match' different pieces of software** are often more useful than one size fits all solutions. When embarking on their e-learning project, OCSA discovered that a collection of simple e-mail lists, discussion forums and web forms was just as effective and less costly than dedicated course management software. Sue Davidson, Director of Training and Marketing recalls, "Our consultant advised us to be very straightforward in our approach – and not let technology get in the way of the learning process. While there were many 'Cadillac versions' of online learning software available, many were costly and took too much time to learn." Using this 'tech recipe approach', they were able to deliver an excellent e-learning experience and free up more money for curriculum. A similar approach was used by many V@O projects.

- **Developing shareable software is more difficult than most organizations think.** A number of V@O funded projects set out to develop volunteer management and recruitment software that could be shared broadly within the sector. In all but a few cases, these organizations found that while they were able to produce web applications that met their own needs it was not so easy to transfer their technology to other organizations. In the end, the code they produced became more of a 'recipe' that others could learn from, rather than a replicable software tool.
- **Collaborative development can produce more replicable software.** The Community Information Online Consortium (CIOC) is one of the few V@O funded projects to produce software that is now widely used by a large number of organizations. CIOC's information and referral, and volunteer recruitment systems has been created using a collaborative open source development and licensing model. This means that all members play an ongoing role in development and have the right to use the final product. It seems that this approach is well suited to developing replicable software as it assumes that many organizations will be able to run and modify the software at the end of the project.
- **Open source software provides flexible raw material** for meeting specific organizational and community needs. A significant number of V@O projects used open source software as a way to gather building blocks for their web projects – databases, e-learning tools, discussion forums, content management systems. For example, both A Commitment to Training for Women (ACTEW) and the Council of Agencies Serving South Asians (CASSA) used an open source content management system call the APC Action Apps to create content sharing networks. These tools provided a foundation that made it possible to get up and running quickly while at the same time providing the flexibility for customization to meet organizational and user needs.

As some of these examples illustrate, open source software is gaining currency in addressing the technology needs of the voluntary sector. This reinforces the idea that what most organizations need are 'recipes' rather than tools – open source provides the building blocks for an almost endless number of strategic technology project ideas. Of course, there are some areas, such as e-service delivery for example, where new software tools are still needed. Based on the V@O experience, the development of these tools is probably best achieved through collaborative development using a model similar to CIOC or by conventional software development firms.

3 Conclusions

The strategic use of networked technologies like the Internet clearly has the potential to improve the capacity of voluntary organizations to pursue their social goals and service communities. However, the research conducted for the V@O Tool and Resource Sharing Project demonstrates that effectively implementing a strategic web project is a complex undertaking. The right people, ideas and technology need to be in place throughout the life of a project for it to succeed. Without the right mix, what once had the potential to be a really good site can become a ghost town.

As Ontario's voluntary sector continues to move forward in its strategic use of technology, there is a need for continued creativity and capacity building. Important ideas and issues to focus on in the coming years include:

- **Technology is not about technology:** Technology is not a panacea in itself and will not solve community problems. Rather, it provides tools that can be used as part of more holistic efforts to build communities and help people in need. Technology projects need to be seen in the broader context of the social purpose and strategies of voluntary organizations.
- **A project is a project is a project:** The fundamentals of good project management are the same whether technology is involved or not – clear vision, community buy-in, good planning, good people. Projects with a significant technology component need to be managed using the same techniques that work within the context of other voluntary sector projects. Similarly, the challenges that threaten all types of projects – high staff turn over, lack of funding, poor planning, community tensions – are also the biggest challenges for technology projects.
- **People are the most important ingredient:** The main issue with technology is having the right people at the table. This not only means having people with the right technology and project management skills but also involving organizational leaders and end users. These people must work collaboratively as a larger team with shared responsibility for building a site that is engaging, relevant and usable.
- **Good planning is essential:** A clear road map needs to be in place at the beginning of any web project and needs to evolve throughout the project. This road map should include information about community needs, organizational needs, technology approaches, roles and relationships and the use of resources. Projects that do not develop, update and follow a project plan have a lower rate of success.
- **We still need success stories:** Learning from the increasing number of successful strategic technology projects in Canada's voluntary sector will only happen if we document the best approaches that are being used. We need more success stories that help organizations replicate what has worked for others. These stories should be based on the adaptability and the feasibility of available tools, such as open source software.

Looking at 60 of 110 projects funded by V@O, the Tools and Resource Sharing Project has provided the opportunity to begin to document strategic technology project patterns and best practices. This work will continue with the review of the 50 remaining projects as they come to a close in 2004/05. These more recent projects had access to more evolved Internet technologies and were able to build on the experience of other projects. It is expected that there will be even more learning that can be drawn from these projects regarding best practices and practical recipes for the voluntary sector. It is hoped that this work has made it possible for more voluntary organizations to use technology strategically and effectively.

4 Appendix – Sample Case Studies

The following is a section of three sample case studies from the best practices briefs produced through the V@O Tool and Resource Sharing Project. They have been included here to illustrate the type of ‘technology recipes’ that are included in the briefs. These briefs will be posted to the Ministry of Citizenship and Immigration’s web site.

Case Studies - The Ontario Community Support Association (OCSA)

The Ontario Community Support Association (OCSA) supports 360 home and community care agencies in Ontario that helps people live at home. Building the capacity of member agencies is a key mandate of the organization. Several years ago OCSA partnered with Humber College to deliver a classroom course in volunteer management across Ontario. The experience led OCSA to explore ways it could deliver an advanced version of its course to those currently working within the sector, given the fact that these people could not necessarily converge for a face-to-face course.

Goals

- Develop the organizational capacity of not-for-profit organizations.
- Provide a cost effective alternative to people who did not have the time or money to travel to a central location for a face to face course;
- Develop curriculum for advanced volunteer management;
- Develop its own capacity to deliver additional online training programs to the voluntary sector in the future;
- Share best practices and lessons learned in developing Internet-based learning with other voluntary sector organizations.

Approach

OCSA's trainer first wrote the course curriculum in consultation with a steering committee. After consulting with its stakeholders and receiving a positive response, OCSA decided to offer the course online. One of the first challenges was the selection of the right technology to run the course. Sue Davidson, Director of Training and Marketing recalls, “Our consultant advised us to be very straightforward in our approach – and not let technology get in the way of the learning process. While there were many 'Cadillac versions' of online learning software available, many were costly and took too much time to learn.”

OCSA chose to take the best concepts of the 'Cadillac version' and integrate them into their 'do- it-yourself' online course. The course material was shifted to a web site by a technical provider, who worked closely with OCSA's trainer to make sure the curriculum was organized, readable and easy to navigate. Discussion forums and web forms added an extra level of interactivity where students could respond to challenging questions raised by the instructor or submit exercises.

Accessibility was a priority. The interactive elements and organization of the course demand a minimal learning curve and can operate in any browser. In addition, a prerequisite course in online learning was offered. This 'pre-course' proved to be a tremendous success, giving people an understanding of concepts related to online learning before they began the course in volunteer management.

Results

The course's key strength has been the quality of the curriculum, which is backed up by an intuitive site architecture and easy-to-use interactive tools, such as email, discussion forums and web forms. The use of simple, affordable features – as opposed to specialized e-learning software – has allowed OCSA a great degree of control over all costs associated with building and maintaining the course. “*The sector now looks at online learning as a*

real option,” commented Sue Davidson. This gives OCSA good reason to continue to offer the course while planning for future improvements to the way it is delivered.

Case Study – A Commitment to Training for Women (ACTEW)

A Commitment to Training for Women (ACTEW) is an organization that helps women find the training they need to find jobs. A firm believer in the concept of collaborative publishing, ACTEW runs an ActionApps²-based content constellation. Organizations participating in this constellation share news, events and job listings between their web sites.

Goals

- Link up to 15 employment and training organizations into a content constellation
- Ease the burden on web masters by providing them with a pool of content
- Increase profile for partner organizations by posting their material to multiple sites

Approach

Initially, ACTEW had no plans to share the content on their web site. They had chosen the ActionApps software as a simple yet effective content management tool for publishing news, events, and job listings on its own web site. The idea of publishing to multiple websites, or collaborative publishing, was something ACTEW stumbled upon later when it noticed other employment and training organizations such as ONESTep and the Possibilities Project were using the same ActionApps software. With the help of their web developer, these three organizations turned on the content sharing functions in the Action Apps software to create a 'content constellation' – a network of interconnected web sites sharing content. With the content sharing features turned on within ActionApps, each participating organization could post content not just to their own websites but also to other sites in the constellation. Five organizations subsequently joined this group, all benefiting in terms of increased access to both employment and training content and a larger audience for their own materials.

Result

The success of the content constellation has motivated ACTEW and its partners to work towards growing the network to fifteen organizations by 2005. Based on an upgraded version of the same ActionApps software, this expanded network will operate in a slightly more formal manner than the original initiative. Clear guidelines about what content to post and how to write good material for the web will be provided to the partners. ACTEW's executive director, Jennifer Liptrot, is excited about the potential that this next phase of growth offers. “As we have seen, when new organizations join the constellation, the amount of content and the size of the audience just grows and grows.”

Case Study – Ontario Association of Youth Employment Centres (OAYEC)

The Ontario Association of Youth Employment Centres (OAYEC) supports and advocates for a sustainable youth employment delivery network. OAYEC runs a shared database of employment resources that its members can include on their web sites. .

Goals

- Make it easier for youth to find online employment resources
- Provide regularly updated content that OAYEC members can add to their sites
- Find a low cost technical approach that doesn't create ongoing costs for members

Approach

² APC's ActionApps software is an open source web content management system that includes a number of tools for collaborative publishing developed specifically for use by voluntary organizations.

With the aim of providing a collection of online resources that all members could feature on their own site, OAYEC decided to create a 'shared database'. Developed specifically to meet the needs of youth employment agencies, the database appears on the OAYEC site as well as the partnering youth employment centres' web sites. While all members can post to the database, content is reviewed and approved by a central content editor at OAYEC. All sites receive the same content and are not able to pick and choose which resources to feature.

Result

OAYEC and its members have found the resources database to be a useful tool. With little effort and cost, members have a constant feed of updated online content that they can provide to the youth they serve. As E-Strategy Coordinator Deanna Yerichuk stated: "The whole concept of sharing the technology – of economies of scale – made it possible to do something that we couldn't have done alone. The process was less scary because we were collaborating. Also, it saved both money and time – you put in a few resources and get 10 times the number back." While some have found the inability to choose and select content to be too constraining, most members seem to feel the 'take the whole database' approach is a good way for resource-strapped voluntary organizations to keep their web sites up to date. Of course, at least one partner must continue to invest resources for this model to work. In this case, updates happen only because the editor at OAYEC makes them.