Open Beyond Source

http://aspirationtech.org/events/connectingup/2011





Who is this guy?

- Allen Gunn
 - Executive Director, Aspiration
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 - gunner@aspirationtech.org
- In addition to running Aspiration, I am an
 - Interactive event designer and facilitator
 - Computer science instructor
 - Recovering software developer





Who is Aspiration?

- We work with all stakeholders in the nonprofit software food chain:
 - We advise funders on what and how to fund
 - We advise vendors and developers on how and what to build for NGO users
 - We advise NGO tech decision makers on how to employ tech sustainably and affordably
 - MOST importantly, we advise end users on how to apply tech on THEIR terms to achieve impact in their work :^)





Aspiration's Relation to Open

- ▶ We are Open Source users
 - We use Firefox, WordPress, Drupal, Open Office...
 - We enjoy the benefits those communities offer
- We design and run open-themed events
 - Open principles applied to collaborative agendas
- Mozilla Partner for Open Web initiative
 - www.drumbeat.org
- ▶ We advise and support open communities
 - CiviCRM, Joomla!, Creative Commons,
 FLOSSManuals, Open Sim Platform





Overview

- Defining and characterizing "open"
 - What it is not, and what it can be
- Applying open within NGO contexts
 - Challenges, best practices, benefits
- Looking at open in practice
 - Open approaches to project management, web projects, social media
- Bringing it all back home
 - Addressing questions and clarifications





Definition: "Open Source"

- Normally refers to software that
 - Is distributed with complete "source code"
 - Can be copied, modified, and shared by anyone
 - Is created and maintained by a network of contributors, the "community"
- But many of the principles and practices of open source communities can be employed by NGOs in their programmatic work
 - Collaborative processes
 - Transparency and accountability
 - Modes of contribution and communication





Attributes of Open

- Community Process
 - Well-defined, well-documented ways of...
 - Participating, communicating and making decisions and...
 - Submitting and accepting contributions
- Joinable
 - Participation is welcomed, with well-defined ways to gain stature
- Transparent
 - Community members able to track and participate in work and decisions
- Writable
 - Community members can contribute to core assets and channels
- Shareable
 - Community assets and be freely re-used in other realms, contexts





Open Can Be Hard

- Transparency and inclusion take work
 - Communicating and "reporting out" require time, commitment, discipline
 - Incorporating feedback requires synthesis
- Openness challenges existing power dynamics
 - Transparency doesn't come naturally to most managers
- Open processes compel those with authority to better articulate rationales
 - Unilateral decisions are not appropriate or sustainable in open environments





Applying Open at Your NGO

- It's philosophy more than formula
 - But well-defined processes exist
- ▶ There is no orthodoxy
 - No one has a monopoly on what open is
- ▶ There are no magic bullets
 - "Dude, just install a wiki!" is not a solution. At all.
- Organizational culture is key
 - Collaborative attitudes support open approaches
 - You can't force open on the unwilling. Passive aggression will win out.
- It's all about experimenting with an open mind
 - Start small and iterate





Open: So Why Bother?

- Open is about ownership
 - Given better visibility and input, organizational stakeholders care more and invest more
- ▶ Impact: More eyes enables better outputs
 - Perspectives can be offered, assumptions challenged
 - Facilitation is the key marshalling more inputs
- Sustainability
 - With broader understanding and shared ownership comes less dependence on individuals
 - This is also a primary barrier to open: job security





Open in Practice

- Project management
 - Basecamp as an open management tool
- Web site creation
 - Open communications as a fundamental success factor
- Social media
 - Off-the-shelf tools for "thinking out loud" and engaging your base(s)



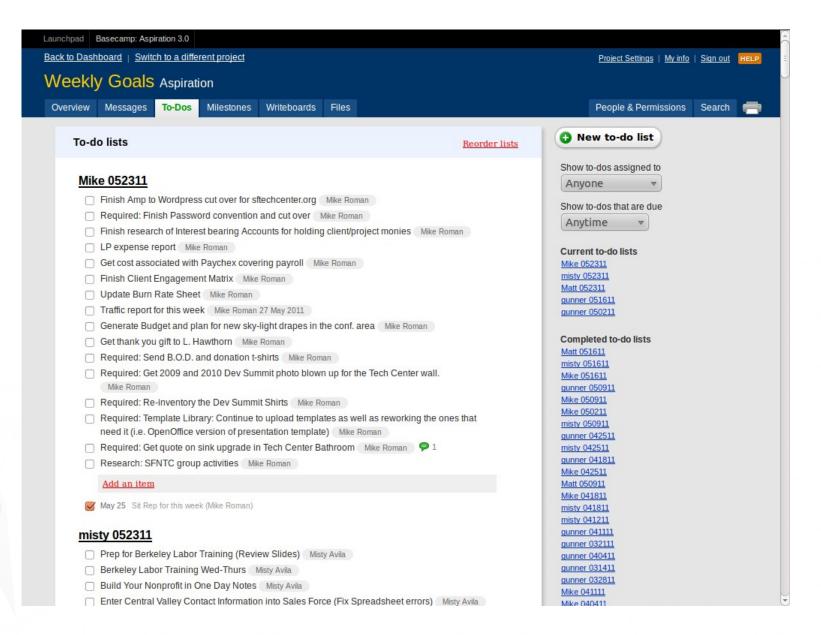


Case Study 1: Basecamp

- Basecamp is a hosted project management tool
 - Ironically, it is not open source :^)
 - www.basecamphq.com
- ► It is brain-dead simple
 - It is nigh unto impossible to play possum
- ► It is a glorified to-do list manager
 - With the benefit of collaborative editing and
 - The benefit of collective transparency











Basecamp: So?

- Too many project management tools are selected by techies and project managers
 - This leads to unfriendly wonk-tastic tools that no one uses
- Basecamp is accessible to the broadest range of non-techies.
 - It enables focus on the work, not the management tool
- When the broadest range of stakeholders are able to look at a common dashboard of who's signed up for what and when it's due...
 - A more open work environment is established





Basecamp: How?

- Tools like Basecamp don't magically populate themselves
 - Tool must be incorporated into weekly workflow
 - We use it as the agenda tool for staff meetings
- There must be consequences for non-participation
 - Enabling "silent fails" dooms adoption
- Management must play
 - "Do as I say not as I do" won't work
 - Managers have "ah-ha" moments when forced to articulate their own deliverables and not just tell others what to do :^)
- When management is accountable in the same way as staff...
 - A more open work environment can emerge





Case Study: Web Site Process

- ▶ NGO Web site creation is an understudied art
 - Too often, NGO's outsource to "techies"
- "Pizza Delivery Pathology" is common
 - Essential organizational development should not be outsourced
- Following a "community garden" metaphor is an excellent alternative
 - "Come help us plant and water this thing"





Open Web Site Creation

- Web sites are for users
 - NGOs too often make web sites about themselves
- Users rarely see a web site before it is ready
 - That is a tragedy, as it's rarely what they need
- An open approach yields better results
 - Engaged from the start, users get a more valuable resource they'll actually utilize
 - They feel more co-ownership of the site and tend to participate and contribute more moving forward





Open Web Process: How?

- Know who you're building for
 - Identify your audiences by name
- Recruit actual users from your network
 - Build a lightweight advisory group
 - Draw it from the target audiences
- Think out loud, via email, phone, blog:
 - What can the site do for you?
 - Are these the right features?
 - Are we forgetting anything?
 - What do you NOT want?





Open Web Process: How?

- Pre-development communications strategy is a primary success factor in site creation
 - It's like asking folks what they want for dinner instead of serving pizza yet again
 - AND inviting them into the kitchen!
- Communication can mingle with negotiation
 - "What should we build for you" leads naturally into "How will you participate?"
- Open processes also drive org development
 - Explaining thinking before building is priceless
 - Listening before building even more so





Case Study 3: Social Media

- A key trait of open is "thinking out loud"
 - Move from thinking "I need to solve this" to "we can solve this"
- Channels like Facebook and Twitter support this type of engagement
 - Ready-made venues for posting thoughts and questions, inviting feedback and contributions
- Open organizations benefit from more active audiences and richer support
 - Collaboration drives co-ownership





Social Media: Concerns

- ▶ Bandwidth
 - "We don't have time for silly chit-chat"
- ► Focus
 - "We don't want staff dithering all day"
- ▶ Targeting
 - "We don't know which services to use"
- ► Impact
 - "How will we know it's working?"





Social Media Evolution

- ▶ Phase 1
 - "Announcement Service": Tell 'em what's up
- ► Phase 2
 - "Value delivery": Post news they can use
- ► Phase 3
 - "Dialog": Active engagement w/ response
- ► Phase 4
 - "Production": Co-create Answers, Priorities,
 Stories, whatever





Social Media: Approaches

- Start small
 - Focus on a single channel, such as Twitter or a blog
- Incorporate into existing workflow
 - E.g., make Twitter updates an incremental step in web updates, event announcements, shout-outs of allies
- Listen
 - Notice which types of updates folks are responding to
- As you get the hang of it, employ well-defined processes for scaling and tracking
 - Publishing Matrix
 - Social media dashboard





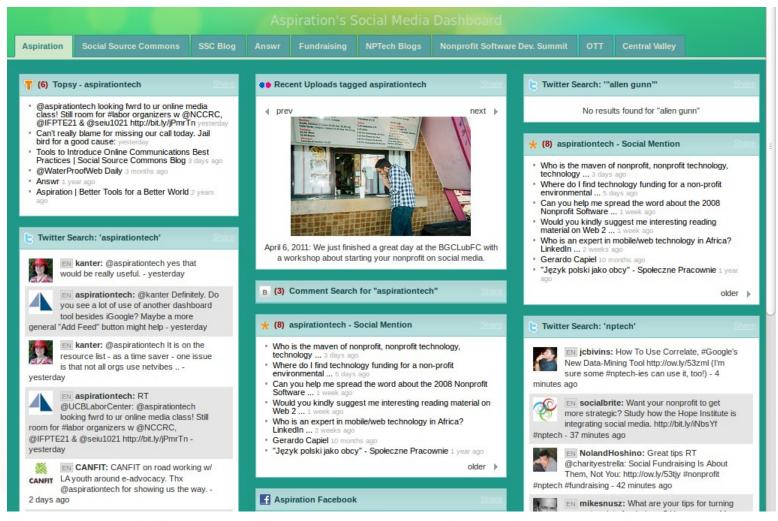
Publishing Matrix

Content Types	Communications Channels				
	Web Site	Email List	Blog	Facebook	Twitter
eNewsletter		X		X	X
Event Announce	X	X	Χ	X	X
Action Alert	X	X		X	X
Fundraising Appeal		X		X	X
Blog Post			Χ	X	X
Press Release	X			X	X
New Staff	X	X		X	X





Social Media Dashboard







Social Media: Benefits

- Richer relationships with online constituents
 - Humanizes your work, draws people in
- Realize serendipitous benefits
 - Answers and opportunities come to you
 - Your messages propagate and reach more eyes
- Develop leadership in your network
 - Invitations to guest blog or co-maintain pages give supporters a stronger sense of association
 - Diverse voices and perspectives in your online messaging can buttress and strengthen perceptions





Last things

- Open is an approach, not a formula
 - Start small and see how your org responds
- There are many ways to apply open
 - Your mileage is guaranteed to vary
- Open takes work but yields benefits
 - Employ discipline, keep communicating
- Open activates community dynamics you are not aware of
 - Both inside and outside your NGO





Thank You!



