

Open Beyond Source

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

Who is this guy?

- ▶ Allen Gunn
 - Executive Director, Aspiration
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- ▶ 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.basecamp.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

Launchpad
Basecamp: Aspiration 3.0

[Back to Dashboard](#) | [Switch to a different project](#)
Project Settings | My info | Sign out HELP

Weekly Goals Aspiration

Overview
Messages
To-Dos
Milestones
Writeboards
Files

People & Permissions
Search

To-do lists
[Reorder lists](#)

Mike 052311

- ☐ Finish Amp to Wordpress cut over for sftchcenter.org Mike Roman
- ☐ Required: Finish Password convention and cut over Mike Roman
- ☐ Finish research of Interest bearing Accounts for holding client/project monies Mike Roman
- ☐ LP expense report Mike Roman
- ☐ Get cost associated with Paychex covering payroll Mike Roman
- ☐ Finish Client Engagement Matrix Mike Roman
- ☐ Update Burn Rate Sheet Mike Roman
- ☐ Traffic report for this week Mike Roman 27 May 2011
- ☐ Generate Budget and plan for new sky-light drapes in the conf. area Mike Roman
- ☐ Get thank you gift to L. Hawthorn Mike Roman
- ☐ Required: Send B.O.D. and donation t-shirts Mike Roman
- ☐ Required: Get 2009 and 2010 Dev Summit photo blown up for the Tech Center wall. Mike Roman
- ☐ Required: Re-inventory the Dev Summit Shirts Mike Roman
- ☐ Required: Template Library: Continue to upload templates as well as reworking the ones that need it (i.e. OpenOffice version of presentation template) Mike Roman
- ☐ Required: Get quote on sink upgrade in Tech Center Bathroom Mike Roman 1
- ☐ Research: SFNTC group activities Mike Roman

[Add an item](#)

☒ May 25 Sit Rep for this week (Mike Roman)

misty 052311

- ☐ Prep for Berkeley Labor Training (Review Slides) Misty Avila
- ☐ Berkeley Labor Training Wed-Thurs Misty Avila
- ☐ Build Your Nonprofit in One Day Notes Misty Avila
- ☐ Enter Central Valley Contact Information into Sales Force (Fix Spreadsheet errors) Misty Avila

+ New to-do list

Show to-dos assigned to

Anyone

Show to-dos that are due

Anytime

Current to-do lists

- [Mike 052311](#)
- [misty 052311](#)
- [Matt 052311](#)
- [gunner 051611](#)
- [gunner 050211](#)

Completed to-do lists

- [Matt 051611](#)
- [misty 051611](#)
- [Mike 051611](#)
- [gunner 050911](#)
- [Mike 050911](#)
- [Mike 050211](#)
- [misty 050911](#)
- [gunner 042511](#)
- [misty 042511](#)
- [gunner 041811](#)
- [Mike 042511](#)
- [Matt 050911](#)
- [Mike 041811](#)
- [misty 041811](#)
- [misty 041211](#)
- [gunner 041111](#)
- [gunner 032111](#)
- [gunner 040411](#)
- [gunner 031411](#)
- [gunner 032811](#)
- [Mike 041111](#)
- [Mike 040411](#)

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
<u>eNewsletter</u>		X		X	X
Event Announce	X	X	X	X	X
Action Alert	X	X		X	X
<u>Fundraising Appeal</u>		X		X	X
Blog Post			X	X	X
Press Release	X			X	X
New Staff	X	X		X	X

Social Media Dashboard

The dashboard is titled "Aspiration's Social Media Dashboard" and features a navigation bar with the following tabs: Aspiration, Social Source Commons, SSC Blog, Answr, Fundraising, NPTEch Blogs, Nonprofit Software Dev. Summit, OTT, and Central Valley.

T (6) Topsy - aspirationtech

- @aspirationtech looking fwd to ur online media class! Still room for #labor organizers w @NCCRC, @IFPTE21 & @seiu1021 <http://bit.ly/jPmrTn> yesterday
- Can't really blame for missing our call today. Jail bird for a good cause: yesterday
- Tools to Introduce Online Communications Best Practices | Social Source Commons Blog 3 days ago
- @WaterProofWeb Daily 3 months ago
- Answr 1 year ago
- Aspiration | Better Tools for a Better World 2 years ago

Twitter Search: 'aspirationtech'

kanter: @aspirationtech yes that would be really useful. - yesterday

aspirationtech: @kanter Definitely. Do you see a lot of use of another dashboard tool besides iGoogle? Maybe a more general "Add Feed" button might help - yesterday

kanter: @aspirationtech It is on the resource list - as a time saver - one issue is that not all orgs use netvibes ... - yesterday

aspirationtech: RT @UCBLaborCenter: @aspirationtech looking fwd to ur online media class! Still room for #labor organizers w @NCCRC, @IFPTE21 & @seiu1021 <http://bit.ly/jPmrTn> - yesterday

CANFIT: CANFIT on road working w/ LA youth around e-advocacy. Thx @aspirationtech for showing us the way. - 2 days ago

Recent Uploads tagged aspirationtech

prev next

April 6, 2011: We just finished a great day at the BGClubFC with a workshop about starting your nonprofit on social media.

B (3) Comment Search for "aspirationtech"

(8) aspirationtech - Social Mention

- Who is the maven of nonprofit, nonprofit technology, technology ... 3 days ago
- Where do I find technology funding for a non-profit environmental ... 5 days ago
- Can you help me spread the word about the 2008 Nonprofit Software ... 1 week ago
- Would you kindly suggest me interesting reading material on Web 2 ... 1 week ago
- Who is an expert in mobile/web technology in Africa? LinkedIn ... 2 weeks ago
- Gerardo Capiel 10 months ago
- "Język polski jako obcy" - Spoleczne Pracownie 1 year ago

older

Twitter Search: 'nptech'

jcbivins: How To Use Correlate, #Google's New Data-Mining Tool <http://ow.ly/53zml> (I'm sure some #nptech-ies can use it, too!) - 4 minutes ago

socialbrite: Want your nonprofit to get more strategic? Study how the Hope Institute is integrating social media. <http://bit.ly/iNbsYf> #nptech - 37 minutes ago

NolandHoshino: Great tips RT @charityestrella: Social Fundraising Is About Them, Not You: <http://ow.ly/53tjy> #nonprofit #nptech #fundraising - 42 minutes ago

mikesnusz: What are your tips for turning

Aspiration Facebook

<http://www.netvibes.com/aspirationtech>

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!