

DCN Nonprofit Internet Toolkit Pilot Projects Status Report  
Submitted to DCN Board by Vicki Suter, 9/16/08

1.0 *Lessons Learned to Date*

- 1.1 The work of the RAC and webteam has provided an essential foundation for the nonprofit pilots; all are planning on converting their static site to a SimpleSite, with news and events, Mailman, and the community calendar. All of the nonprofits will be using SimpleSite webforms and most are interested in help with integrating Paypal with their SimpleSite. A key “tool” is web-enabling organizational databases through webforms, and we hope to learn a lot from the pilots about that. As it turns out, two of the pilot organizations use Filemaker Pro (Food Bank and STEAC) and their database administrator is the same person (Joy Elson). Filemaker Pro is a popular database for nonprofit use, and we hope that streamlining this integration will provide help to nonprofits in the future. Another commonly-requested item is Volunteer Management “Lite,” (prototyped for DCN by Rian), a more complex slideshow tool, and an online survey tool (at this point, for the purposes of the pilots only, we are using SurveyMonkey—mostly because our nonprofits already know how to use the free version). (See matrix below, “Nonprofit Internet Toolkit Pilots and Tools”)
- 1.2 The direct integration of training and support that has been possible during the pilots has taught us that keeping momentum up after attendance at a DCN class is critical. Both the Food Bank and Yolo Community Foundation were able to set up the basic structure and make very quick progress toward converting their static site to a SimpleSite because the teams each had a working meeting less than a week after the class, the nonprofit staff “ran the mouse” while their technical liaisons stayed in the background (helping when asked, and applying information from the training session). One of the motivations is a regular weekly meeting: it keeps the conversion high on a director’s list of priorities when an hour or so is preserved regularly every week to work on it when someone will be available to help them.
- 1.3 The webteam is incredibly responsive via email; however, the use of online office hours can also provide the opportunity for a nonprofit staff person or volunteer to get a real-time response every day. This can reduce the chain of serial emails that are sometimes necessary for those new to our tools, builds a relationship with the organization that may be more difficult to establish via asynchronous (email) communication, and can be accomplished at relatively low cost in resources. To that end, Vicki Suter has regular online office hours from 7:30-9 AM on M-F using skype, and team members from three of the pilot organizations have set up their skype accounts (Vicki’s is vickinelle.pepperdine), and are taking advantage of the service (in fact, we had an extended online working session with Cath Posehn from Yolo Community Foundation, who got their page banner tuned up with Mo Guzman’s expert web design help). The other plus is the opportunity for “chance encounters,” which will help in the development of the community of practice.
- 1.4 Cath came up with a great metaphor for the conversion from an existing website to new SimpleSite: the “bones” of a site are made up of the basic folder structure; the “muscle” is the content; and the “skin” is the look and feel. When setting up a

site, if you have a strategic communications plan (thanks to Kari), the key audiences and messages help drive the organization of the site (what folders, in what order, for what content) and all design and content decisions. The best way to approach it is: 1) work on the bones (the folder structure) first (and make notes in the description area of the folders about what content you plan on putting there in the second step;); 2) work on the muscles (content) second; and 3) work on the skin (style, branding, look and feel) last. This is actually in reverse order intuitively speaking, and it also helps to understand that no decision is set in concrete, so it is easy to move things around as needed, and to take advantage of any web design help for tweaking things later.

- 1.5 From our testing with Google Sites and Google Apps, Google Sites appears to be a form of a content management system, for setting up organizational web sites (we should keep track of this down the road with regard to our own SimpleSites), and group Google Apps are a special implementation of Google Calendar, Google Docs, Google Chat, etc. (and any number of open source gadgets). The technical liaisons will continue to test this extensively for DCN's use, but although some nonprofits are using Google calendar for reserving facilities, etc., most nonprofits are not ready for integrated use of these tools.

## 2.0 *Brainstorms*

- 2.1 Develop additional free class on strategic communications planning (Kari and Vicki will be doing trial run in November, 2008)
- 2.2 Develop third-tier services (e.g., for-pay) that include:
  - 2.2.1 Half day (weekend?) seminar/workshop on strategic communications planning, to be followed by:
  - 2.2.2 Prep time on part of nonprofit (finalize strategic communication plan, develop content, collect/develop graphics, banners, other items for branding)
  - 2.2.3 Half day hands-on training on setting up SimpleSite (topics same as current classes, but mode of training will be completely hands-on so that at end of class, nonprofit has set up their site structure, content (if converting from existing static site, moved content over to new structure), and begun adding some style elements (banner, etc.). We will be testing the hands-on training approach with the STEAC pilot.
- 2.3 As part of fund-raising for January, 2008, develop "Adopt-a-Nonprofit" so that local businesses can underwrite DCN's efforts for specific nonprofits whose work they wish to support.

## 3.0 *Status Update on Current Pilot Projects*

- 3.1 *Summary:* Most of the pilot organizations have completed review of their individualized strategic communications plan, project plan, and have finalized their Memorandum of Understanding with DCN. Classes on SimpleSites, Mailman, and SimpleSites tools have been presented by DCN's Steve McMahon (thank you Steve!), and most technical liaisons have attended and pilot organizations have been represented at these classes. Most teams have set up their regular weekly meetings with their DCN technical liaison.
- 3.2 DCN (Primary Contact, Vicki Suter; DCN Technical Liaison, Tsui Chang; Team Members: Sheila Evans, Mo Guzman, Alex Murch, Kari Peterson, Beverly Sykes). Although DCN already has a full plone site, the team is experimenting extensively with "SimpleSite Plus," and has set up a site currently being used as a

team site, and a sandbox to learn and test the full range of tools associated with SimpleSites. Additional tools we are experimenting with are collaborative and communication tools (we are using skype for real-time chat for our regular online meeting on Monday evenings, from 7-8 PM, and have set up a Groups GoogleApps site). We have recruited a database expert, Alex Murch (see item 4 for introduction) to work on the Salesforce contact management system for DCN, with the aim of being ready to do a small low-key pilot in mid-October, on volunteer recruitment and agency/organization information collection (for UCD community services faire, 10/22/08).

- 3.3 The *FOOD BANK team* (Jose Martinez, Debbie Frietas and Steve Bauman plus DCN technical liaison Vicki Suter) set up regular weekly meetings (Wednesdays, 10:30 AM at the Food Bank in Woodland) and are proceeding according to the approved project plan. So far, Jose has attended the first two September classes, set up their SimpleSite structure, and copied much of their content from their existing web pages, and the team developed on an online survey (at this point we are using SurveyMonkey as part of the experimentation, mostly because this is a familiar application to team members). The team met with Joy Elson, the Food Bank's database administrator, who has already developed the process of downloading from a website into a spreadsheet and then into Filemaker Pro databases. We will be looking at "web-enabling" three of the Food Bank's databases through the use of webforms on their SimpleSite, downloaded into spreadsheet(s), then imported into the organizational databases: donors, and agencies, and volunteers (through a SimpleSite Volunteer Management "lite" web page, which is the next item on the project plan).
- 3.4 The *STEAC team* (Susan Simon and Jana Tuton, plus DCN technical liaison Mo Guzman and primary liaison Kari Peterson) set up their regular meetings on Fridays at 2:00 PM at Crepeville. The team reviewed the latest draft of their strategic communications plan, amended per 8/20 meeting, and sent comments for final version Friday 9/12/08. The team drafted their project plan, and Mo is completing the final draft. With the strategic communications plan and the project plan, the Memorandum of Understanding will be reviewed by the STEAC Board on Tuesday, 9/16. The next steps are one-on-one hands-on training in setting up a SimpleSite, and converting their static website.
- 3.5 The *TREEDAVIS team* (Charles Filmer and David Robinson plus DCN technical liaison, Bev Sykes and primary liaison Kari) is setting up their regular team meetings. Their Board has reviewed the individualized strategic communications plan: timing has allowed integration with their overall organizational strategic plan. Team member David attended two September training classes. The next step is to meet to draft the workplan for implementing tools, including training (and congrats to Bev on her family celebration!), and setting up their SimpleSite.
- 3.6 The *YOLO COMMUNITY FOUNDATION team* (Cath Posehn, DCN technical liaison, Mo Guzman and primary liaison Kari) set up regular team meetings (every Friday at 1 PM), finalized the strategic communications plan and the project plan, completed the basic site design and Cath has copied much of the content from their existing static website. Cath attended all of the September training sessions, and has taken full advantage of the daily online office hours.

4.0 *Introduction of new volunteers- please welcome them via an email, if you can*

- 4.1 *Mo Guzman* ([emailme@nameismo.com](mailto:emailme@nameismo.com)): Mo is serving as the technical projects liaison for both STEAC and Yolo Community Foundation, and was recruited by Kari via twitter. He works for Oracle Corporation, and is always online, using twitter and his Blackberry. He is an experienced web applications developer and designer, with strong marketing experience in that area. When he joined us, he was essentially doing R&D for Oracle, looking at the potential uses of different technologies, and developed a strong interest in social networking technologies. His intro: "Mauricio Guzman was born to a family of five in the southern region of Mexico. Mauricio and his family migrated to the US in search of better education and ample opportunities. At the age of fifteen, he enrolled in high school learnt the language and developed a passion for technology. Always in search of new challenges he took on the career of computer engineer and worked through university in several corporations (including a short lived start up of his own). Mauricio pursued new challenges and took on a career change to Marketing and Web Technologies. Mauricio's family has had a history of serving the community in Mexico dating four generations through organizations like the Rotary/Lions/College outreach amongst others." For more, see <http://www.linkedin/in/nameismo>
- 4.2 *Alex Murch* ([alexmurch@gmail.com](mailto:alexmurch@gmail.com)) will be working on the Salesforce database project. He was recruited via our on-line volunteer form. From Alex: "I am happy to join DCN as a volunteer partner, focused on developing opportunities with Salesforce.com. Presently, I work as a business analyst at Sacramento Logistics, a subsidiary of C&S Wholesale Grocers. I am responsible for designing Microsoft Access databases to track warehouse metrics and also Excel tools for financial analysis. Prior to living and working in California, I was a Peace Corps volunteer in the East African nation of Tanzania. For two years, I worked at a teachers training college where I taught basic computer classes to students and staff. I helped set up four computer labs at the college and I also worked at a secondary school and a rural hospital on other IT projects. All of my work was centered on skill transfer and sustainability. I look forward to applying the same approach to my work with DCN." Alex and I are meeting for a half hour online each week (Mondays, 6:30 PM) before the technical liaisons meeting. At our first meeting, we reviewed the Salesforce training, and he committed to completing the first ten hours of training in the certification program and begin looking at existing templates for volunteer management in the next two weeks. Once he has provided a reference, I will upgrade his account to a site administrator.