Slide 1

Plone and Nonprofits

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www.onenw.org

Agenda

Who are you
Who are we
The nonprofit sector
Nonprofit problems & Plone solutions
Break
Demo: How we do work with Plone
Break
Discussion: What Plone Needs To Do To
Continue to Not Suck™

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Who Are You?

User … Developer

Newbie … Zope God

Not-for-profit … Swashbuckling Capitalist

Who Are We?

"Jon,
Your reply on plone-users prompted
me to click on www.onenw.org for
the first time.

For some reason, I thought you were
with an airline company."

Not An Airline

We deliver innovative tools and strategies to the environmental movement to help them engage people in building a society that will sustain a high quality of life for future generations.
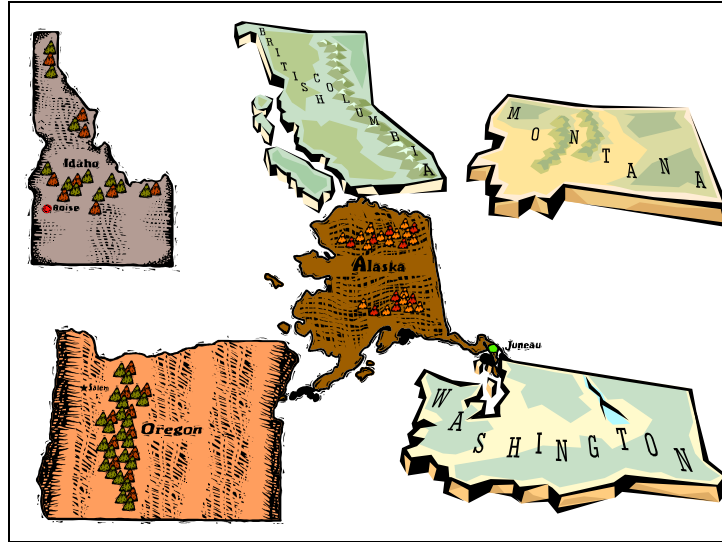
We provide technology and communications strategy help to environmental nonprofits and collaborative campagins in AK, BC, ID, MT, OR and WA.

Web development is only a part of what we do, but it's been booming.

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We're Implementers

Not application developers or hosting providers
See "The Three Pillars of Open Source"
www.movementasnetwork.org

Started doing Plone-powered websites in mid-2004

50+ sites launched to date

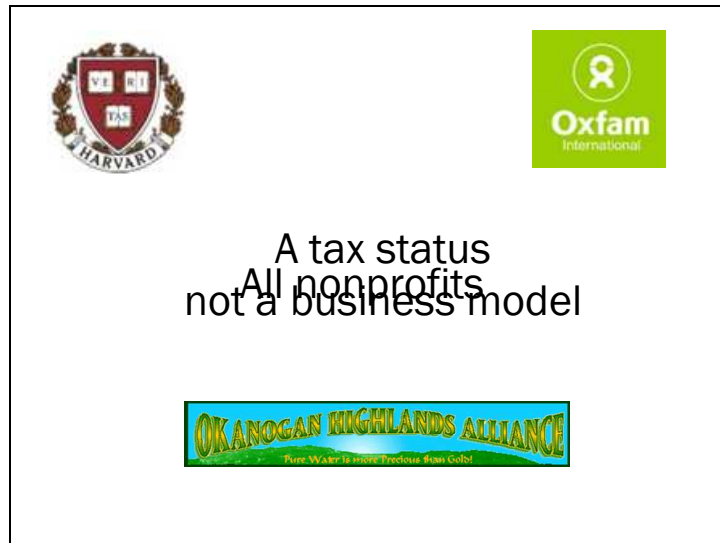We were one of the first nonprofit technology assistance providers to focus on open-source CMS implementation for the nonprofit sector.

The Nonprofit Sector
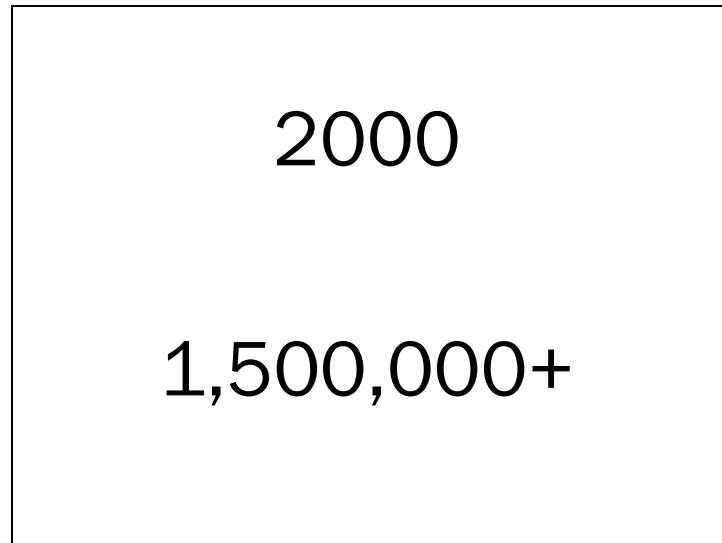
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A tax status
All nonprofits
not a business model

"The nonprofit community" is every bit as diverse as "the business community" – perhaps even more so.

In other words, anybody who generalizes about "what nonprofits need" is lying.

<div style="border:1px solid black">

2000

1,500,000+

</div>

Over 2000 environmental nonprofits in our region!

Over 1.5 million in the United States!

The U.S. nonprofit sector

Has more civilian employees than the federal government and the fifty state governments combined

Employs more people than any of the following industries: agriculture; mining; construction; transportation, communication, and other public utilities; and finance, insurance, and real estate

Generates revenue that exceeds the gross domestic product (GDP) of all but six foreign countries: Japan, Germany, the United Kingdom, France, Italy, and China.

Accounts for 5 to 10 percent of US economy

Accounts for 8 percent of US noninstitutional civilian employees (Persons 16 years of age and older residing in the 50 states and the District of Columbia, who are not inmates of institutions (e.g., penal and mental facilities, homes for the aged), and who are not on active duty in the Armed Forces.)

Our Communities

Northwest Enviros

Capacity Builders

Nonprofit Techies

Plone! ;-)

Typical Clients/Projects

Staff people: **2-15**

Annual operating budget: **$200k - $2M**

Typical project budget: **~$3k - $15k**

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Insanely overcommitted staff

No programmers

Little experience managing outside technology
consultants

Can't afford projects that fail

Accidental Technologists

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Smart

Passionate

Resourceful

Scrappy

Busy with other job responsibilities

Why Do We Use Plone?

Great usability

Maturity/professionalism of Plone community

Diverse economic base

Clear focus on integrating with external systems

Flexible enough to fit diverse nonprofit business requirements

We can get folks with no HTML skills up and running in 30-60 minutes of training! Clear distinction between content editors and site admins/programmers.

Corporate & government sector investments in/customers for Plone are a huge win for nonprofits because they mean that Plone is not solely dependent on nonprofit sector resources. 80% of nonprofit needs overlap with others.

Important To Nonprofits

Ease of use

Internationalization / multilingual content

RSS (in and out)

Filesystem storage

Events and event listings

Blogging

Increasing interest in multimedia, esp.
podcasting

Ease of use – WYSIWYG editing, TTP configuration, intuitive placement of controls. Task-based controls. Plone's strong separation of user-space and programmer-space is good. Need to push more into user-space. (We'll talk more about that.)

(Also talk about what's less important to typical nonprofits.)

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Typical Small Nonprofit Technology Problems

Managing website content
Sending bulk email
Managing membership & relationship data

Also...
Online donations, e-advocacy, event listings & registration

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As we move into a more networked world, breaking down the barriers between organizations and the outside world is increasingly important. Organizations' most important collaborators are outside their offices!

This is driving a whole new generation of needs for effective systems that can help organizations collaborate with each other, and can help individuals work more effectively together.

Other secondary nonprofit problems

Online donations processing (a subset of general e-commerce)

Online activism -- putting citizens in touch with decisionmakers

event listings & registration, etc.

Emerging Challenges

Energy and power pushed out to networks of
people and organizations

More cooperative efforts

More 'open' organizations

Need a new generation of tools for content,
collaboration and community

The nature of nonprofit work – or at least of social change work – is changing. Organizational barriers are breaking down, and a lot of the most important work is happening between organizations. Example: the "Dear AOL" campaign that is being run by a huge coalition of public interest groups to oppose AOL's plans to create a premium class of email delivery.

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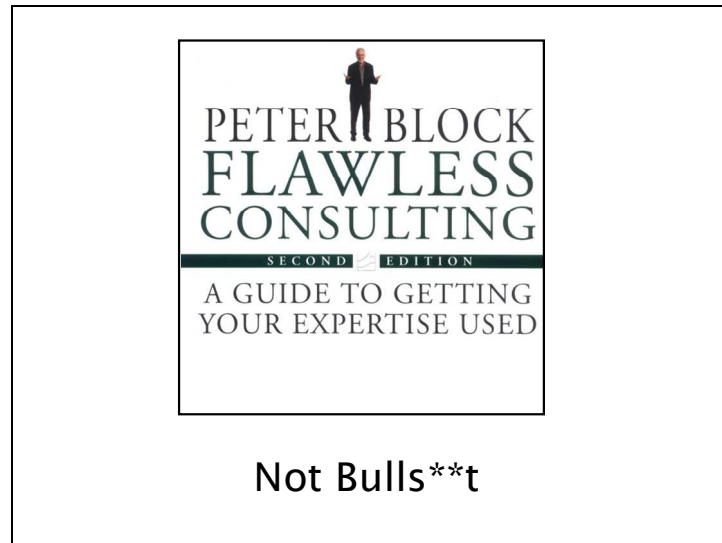
Not Bulls**t

I first read this in 2001 (I think), after doing this work for ~6 years. Holy cow – here was a guy that had written down almost everything I had discovered through trial and error, and put it into a framework that relvealed a whole bunch of things that I'd never thought of before.

Beth Kanter. "Circuit Riders Roundup 2001"

(from the ONE/Northwest website)

Our Consulting Philosophy

ONE/Northwest is a nonprofit organization--we share a common mission with the Northwest environmental organizations we serve. We have done hundreds of projects over the
 past ten years, and in every project we do, we try to bring the following values to the process:

Open, authentic communication
Effective, honest communication is at the heart of everything we do. We try to call 'em as we see 'em, and to be completely open and transparent about what we're doing and why we're doing it. We also believe very strongly in being clear about what we *don't* know, and about the risks that are inherent to every project.

Continuous learning
We treat every project as a learning experience. We always assume that we're going to run into a problem we haven't solved before, and that at the end of a project we'll know more than at the start -- and so will you. We are always looking for ways to build solutions that can be reused across many organizations, and each project we do stands on the shoulders of previous innovations.

Projects as partnerships

We believe that every project is partnership with the organizations we serve.

Long term relationships

Because we and the groups we serve all are part of a broad, vibrant social movement, we focus on building solid long-term relationships that allow our work to grow and deepen over time. Technology projects are complicated and new communications strategies even more so. We try not to do too much in a single project, and to break complex projects down into manageable chunks.

Impact on protecting the environment

Our objective in working with you is not just to make a buck. In fact, we heavily subsidize the work we do for environmental groups because we are mission-driven and our mission is to protect the environment of the northwest corner of North America. We seek out project opportunities that have the potential to build the power of the environmental movement.

Teaching you to fish

Our goal is to build your long-term capacity to be more effective with technology tools and strategies, rather than to be ever-more reliant on outside consultants.

Fusing new tools with new strategies and processes

New technologies often open new possibilities for the way we do our work. When you work with us in adopting a new technology, we will help you explore the new strategies it opens up for you and help you understand the organizational processes you will need to put in place to make the best use of your new capabilities.

Fun

Working for social change should be a source of joy. We try to make it fun to work with us.
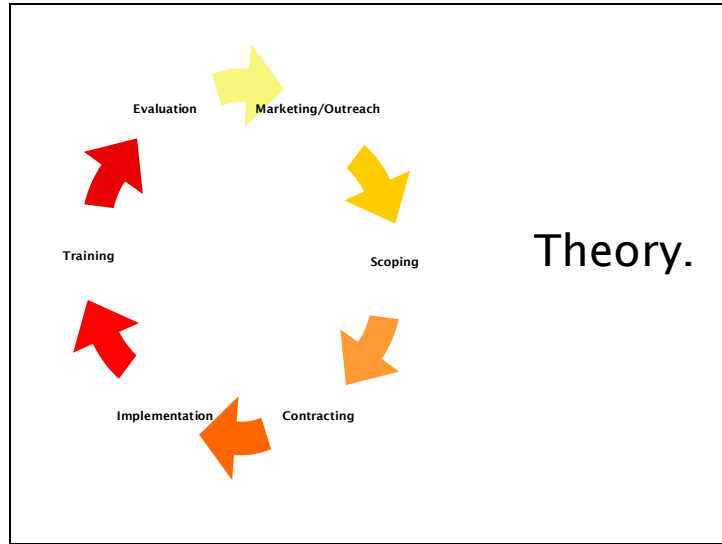
How to Consult "Flawlessly"

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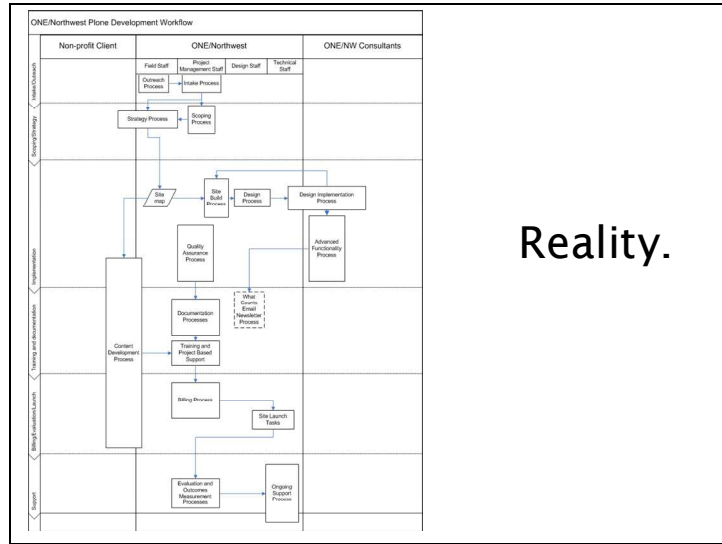|	
Be authentic	Ask lots of questions to clarify expectations
Pay attention to the underlying social & business issues	Seek teachable moments to explain background concepts
Build trust	Avoid jargon
Be approachable	Learn *their* lingo
Share their values	Share the risk, assess it honestly
Be part of their community	Explain the iron triangle
Show that you've solved this problem before	Help clients make sensible tradeoffs
Admit when you don't know the answer	Break projects into small chunks

Expect clients to live up to these values, too.

We've fired clients who don't. (Very, very rarely.)

Our Project Process

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Theory.

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ONE/Northwest Plone Development Workflow

Reality.

> # How We Market
>
> (We have it very, very easy)
>
> Small, coherent community
> Strong relationships with opinion leaders
>
> Word of mouth

Founded by regional enviro funders = instant karma, built-in trust.

Downside: high expectations, hard to say no to projects.

Our work is multi-faceted and constantly evolving – hard for folks to keep up with "what we can do now."

We write an email newsletter (mostly client focused); we blog (mostly to peers)

They're not buying Plone.

They're hiring us.

How You Can Market to Nonprofits

Relationships

Community

Track record

In my experience, small nonprofits don't have the resources to run massive RFP processes. Technology decisions are daunting to them.

They tend to turn to people they trust. Peers. Their current tech consultants. Their spouses.

You have to get on their radar screens.

Best way is to do good work for a group that is trusted and admired by many.

Be out and about in the community; conferences, events, etc.

Write. (email newsletter, blog)

Find local nonprofit tech consulting shops – e.g. NPower, etc.

Many aren't doing much web consulting yet. Seek referrals.

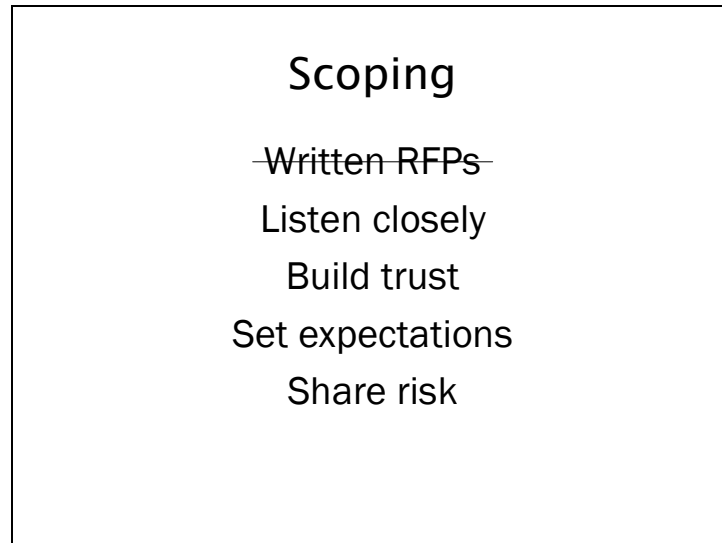Do a few small projects cheap and well. Word will spread.

Participate in the nonprofit technology assistance community

NTEN (annual conference coming up in Seattle March 22nd, very active email lists) -- www.nten.org

TechSoup (discussion forums) – www.techsoup.org

NOSI (nonprofit open source initiative) – www.nosi.net

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│                                         │
│              Scoping                    │
│                                         │
│            ~~Written RFPs~~              │
│            Listen closely               │
│             Build trust                 │
│           Set expectations              │
│             Share risk                  │
│                                         │
│                                         │
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Our clients are fairly similar to each other, and have broadly similar needs. 90% of the time we've done 90% of it before. (Of course the last 10% is always 90% of the work, but that's another story.)

So, our intake process is mostly focused on figuring out how and where those needs diverge from our "typical" use cases.

Special Needs might include
Custom Content Types
Custom views
RSS feed display
Permissions and workflows
Private workspaces

We have "template" project scopes for small, medium and large projects, which roughly correspond to about $4k, $8k and $12-15k.

We use these as the base for individual adjustments to generate fixed price scopes, sometimes with add-on options for new or risky things.

Our general philosophy is "shared risk" -- i.e. we take some risk on every project, and so does our client. The goal is to make sure that we all have our eyes wide open.

Trust is assumed -- because we operate as part of a community, we have a strong incentive to be open, honest and transparent with our clients, and they with us -- and we all know it. Allows us to avoid typical

"conflict-based" client/contractor dynamic, which helps us keep costs low.

We have on occasion, had to fire clients who were not capable of this kind of relationship with a consulting organization. :-0

Contracting

Scope + signature

Near-zero legalese
(Trust is assumed)

Doesn't work if you have clients who are trying to "squeeze" consultants – we don't have many, and are pretty good at smelling them out during scoping.

Resourcing Projects

It's hard.
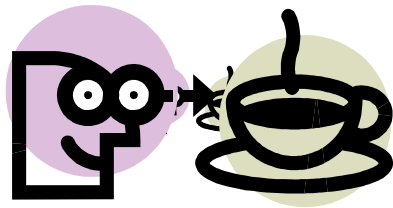
We use a mix of staff & consultants

Our Current Web Team

2 developers

~5 "project managers"

.5 graphic designer

3-5 contractors
(and looking for more!)

Intake
Scoping
Strategy & planning
Client interaction
Training
Production help

Archetype development
CSS implementation

Plone needs more
good consultants

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(Time for a break)

Implementation

- After initial discussions nailing down the client's needs, we come up with a **project scope**
- It lays out the logical steps towards devising, creating, and launching a site
- Among our non-technical core competencies is working with the client to come up with a **site map** that clearly articulates what the group does to the people they determine care the most
- Depending on the budget line item for strategy, this is the product of one or more phone discussions exploring the client's audiences and their program areas
- We then turn a back-of-the-envelope site structure into a spreadsheet that we can use to bootstrap the creation of the site's skeleton
- Most clients want some level of **custom graphic design**
- Let's face it: Plone out of the box is... plain. And there aren't enough high quality default themes. (But the community is rallying, I think.)
- One of the best moves we've made was to bring on a half-time graphic designer, Laurie Kellogg.

- We do graphic design cycles that range from about $500 to over $3000.
- Our sweet spot is about $1000.
- Price varies depending on:
- Degree of deviation from Plone out of the box
- Extent of customization -- sometimes we have a different feel for separate parts of the site. Also customizations can get very granular, for instance, or have a variety of different looking portlets
- The end product of the graphics phase is a Photoshop psd file
- Translating the graphic design into **CSS and customized Plone templates** is usually a local dev effort
- We are turning to consultants for the process of CSSing and site customization.
- The CSSer (in house or out) is responsible for image slicing from the psd.
- We usually use DIYSkin for sites that don't have much custom Python coding.
- We keep everything under subversion source control; the live products are working copies.
- We *do* modify templates. Ideally, pristine copies are checked in to make upgrading easier down the road.
- We use a few FireFox extensions to make CSSing easier
- Web developer toolbar
- Most of our CSSing happens to be done on Macs. Browsercam is very handy, since we all know what the most popular browser is; it happens to be the one with the most radical interpretation of CSS standards.
- Almost any site of ours involves some **integration with outside systems**
- Almost all sites involve some type of **email newsletter integration**
- Plone -> Newsletter signup
- Plone -> Newsletter content

- (e.g. WhatCounts SmartGet)
- Tighter WhatCounts integration in the works (PloneWhatCounts: site login governs site *and* newsletter preferences; data stored offsite)
- Most sites also involve **donation processing**, and sometimes online payments
- **Advocacy Integration** (Write-your-senator, for instance)
- CRM integration is coming in the near future
- Democracy In Action wrapper - Enfold
- GetActive integration (if possible) - Enfold
- Salesforce.com integration - ONENW + Enfold
- **Stats** - AWStats, Webalizer, Google Analytics
- **Poi** - We use it for issue tracking internally, but also have been turning to it for higher functioning clients on bigger projects. An issue tracker will live inside their site to be used to track issues with the site itself.
- We use two key **internally-developed products**
- **ONENWTemplate**
- Sprawling set of customizations including:
- A suite of customizations in the form of:
- ***Site setup policy***
- ***A few customized templates***
- ***A set of basic generic CSS styles (such as support for Kupu's right and left images)***
- **Kickstart** -- (very) quick-and-dirty wireframe generation script
- ***Creates folders, their homepages, portal_actions***
- Two stock email newsletter signup options (Sympa list and WhatCounts)
- **Pigeonhole**
- Extensions to the basic ATContentTypes with a few axes of metadata
- A few extra simple content types ("quizzes", "quotes")

- Drives portlets so that they're more targeted to the audience and topic of the current page
- Strongly tied to the site strategy process we coach groups through at the beginning of the project
- We also frequently enlist (and customize) **third-party products**
- PloneFormMailer
- Blogs
- Slideshows
- TextIndexNG
- PlonePortlets
- CompositePack
- We sometimes do some **custom programming** as well
- We've done custom content types to represent...
- Lectures
- Customized press releases
- Canadian Legislators
- Camps and classes
- We sometimes use custom content types to simulate a more typical LAMP searchable database

Post-Implementation

Hosting

2 dedicated managed servers at Zettai.net

$15/month

40-50 sites per server

We host most of our projects.

Started with a "corporate" account at Zettai (they've since changed plans), then quickly moved to dedicated managed servers when we got past about 10 sites.

We charge clients $15/month. Not a profit center.

Now: 2 servers, 3 instances per server.

Server can hold 40-50 small sites.

JonB & Andrew to talk about server management.

Training

Plone basics: 60-90 minutes
(Usually a followup/refresher, too)

Get folks building real content right away

Avoid the ZMI

Typically we do one ~90 minute training session with lead client contact or small group. Usually a followup/refresher at some point during the process.
Plone's usability has saved us (and our clients) countless hours here! Big win.
We generally don't train on anything in the ZMI, except for our most sophisticated clients who want to tweak their CSS or something.

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Documentation

Plone needs better docs for end-users

Task-oriented

With pictures

We're excited about "Content Management With Plone"

Our first attempt

http://staging.onenw.org/documentation

Round two

http://learnplone.launchpad.onenw.org

A collaborative effort by
ONE/Northwest
NetCorps
NPower Seattle

Still a work in progress, this will have generic end-user documentation targeted at typical small nonprofit users. Should be applicable to most any small Plone project.

Will have custom skins for each organization, so we can seamlessly brand it for end-users.

Current focus: building out screencasts for common Plone tasks.

Evaluation/Closeout

At project close: "How'd we do?"

6 months out: "What's changed for you?"

As a nonprofit, we care a lot about long-term results.

The Real "Long Tail"

Support can really kill you.

Important to set boundaries.

Three kinds of calls: bugs (our fault); feature requests (new scope); training questions (ambiguous).

This is where documentation really counts. So much easier to refer people to it. But it has to exist, and it has to be understandable.

As our coding gets better, our tails get shorter.

If you don't have a trouble ticket system, you need one. We use Salesforce.com, because we were already using it for CRM, it's pretty simple, and it works pretty

well. Lots of other good stuff out there – some of our peers swear by RequestTracker. Allows multiple people to cover.

Our non-technical clients are not that comfortable with bug trackers – even ones as nice as Trac and Poi. Too much tech jargon. We use them internally only.
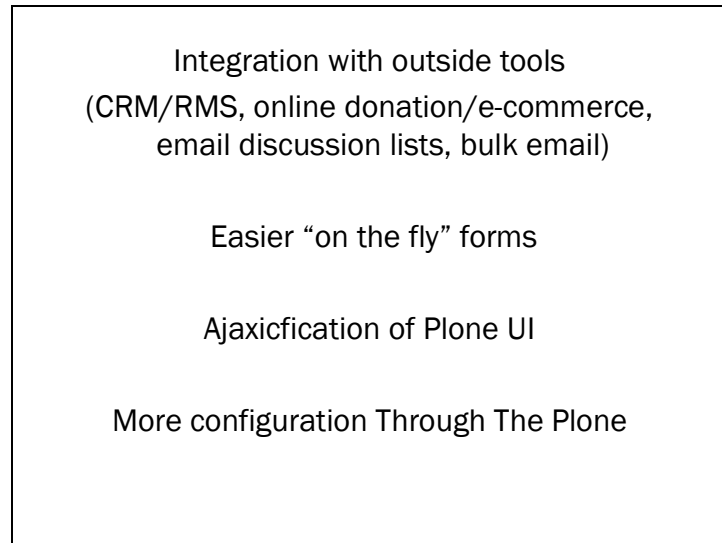
What Plone Needs To Do To
Continue To Not Suck™

Product stuff

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Integration with outside tools
(CRM/RMS, online donation/e-commerce,
email discussion lists, bulk email)

Easier "on the fly" forms

Ajaxicfication of Plone UI

More configuration Through The Plone

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Integration

This is Plone's ace in the hole. Plone/Zope have pretty good assumptions about playing nice with other systems. PlonePAS is a shining example of this.

 Less well known, but hugely important to the nonprofit sector is some of the work that Enfold has done on integrating with nonprofit-specific tools such as Democracy in Action (online activism, email blasting, online donations), and Get Active (ditto). We're about to release pyWhatCounts, a python wrapper for WhatCounts, one of the best bulk emailing providers out there.

CRM integration. (Salesforce.com and CiviCRM)

Online donations / e-commerce integration. (Being able to drive the PayPal Pro system would be amazing.)

Email discussion list archiving/integration

PloneFormMailer – quick-and-dirty forms TTW. Needs more UI polish, ability to dump to a CSV file.

Usability

Ajaxification of UI

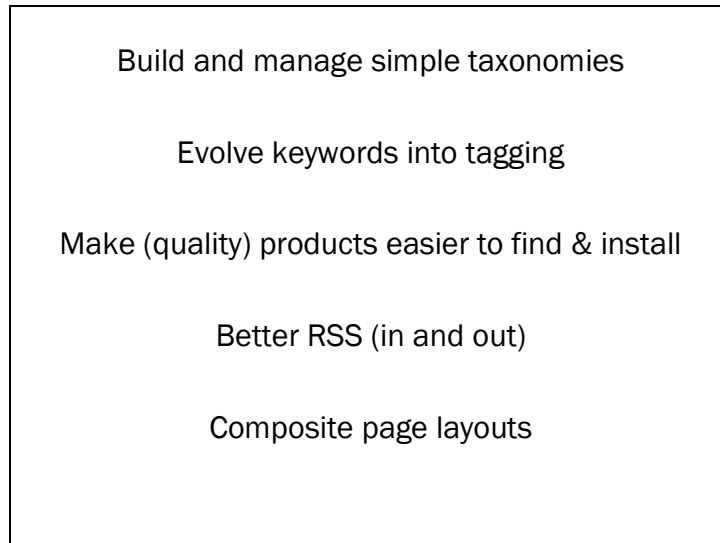More control panel configlets, and "Through The Plone" in general

Access to stylesheets through the Plone would be especially nice!

Making Plone friendlier for accidental technologists. Put more hands in non-programmer "power users." Examples: Plone Keyword Manager, Kupu configlets. safe_html configlet in Plone 2.1.2.

Don't force people onto the filesystem before they're ready. It's OK to tweak some stuff in ZMI and then dump to the filesystem.

Build and manage simple taxonomies

Evolve keywords into tagging

Make (quality) products easier to find & install

Better RSS (in and out)

Composite page layouts

Make it easier to build and manage simple taxonomies

Make products easier to discover and install without filesystem access.
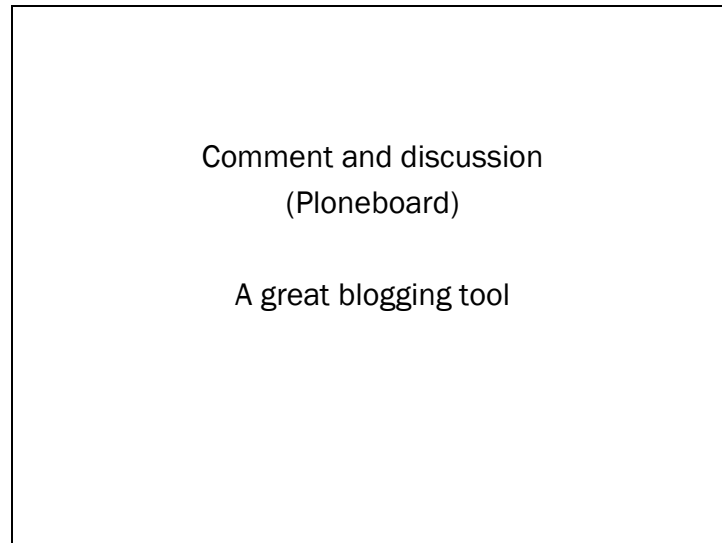
More modern RSS feeds in the core product.

Make it easier to do composite page layouts

Email addresses as user IDs

Lots of these things are already in progress! :-)

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Comment and discussion
(Ploneboard)

A great blogging tool

Ploneboard – commenting and discussion

One great blogging tool. ;-)
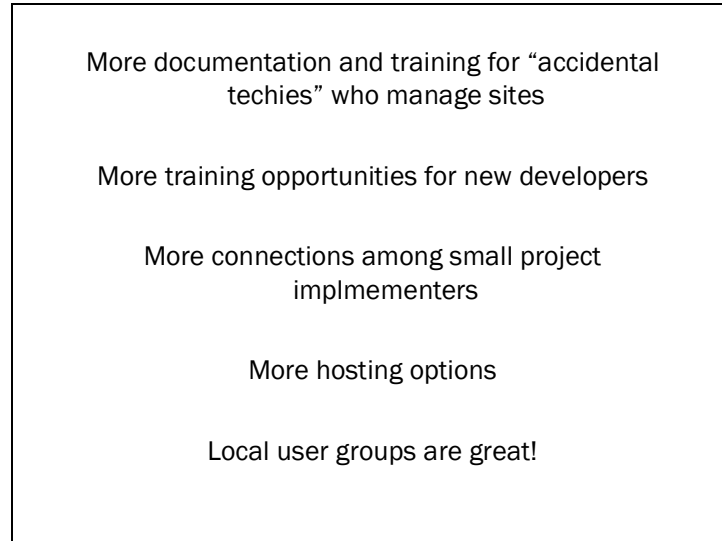 -- blogging is often the first step towards CMS for nonprofits

Simple event registrations

Process Stuff

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More documentation and training for "accidental techies" who manage sites

More training opportunities for new developers

More connections among small project implmementers

More hosting options

Local user groups are great!

Process stuff

Training opportunities for "accidental techies" who manage sites day-to-day

One of the best things about the Plone community is that the leading Plone firms seem to have a very collaborative relationship with each other. We need to think of ways to extend that so that the Plone community itself is doing things that create and nurture new developers, new consultants, and new businesses. We all have too much work, which means we need to create more peers to do the work.

Maybe some specific training targeted at dissatisfied PHPers? ;-)

More conversation among implementers serving small clients (esp. nonprofits)

More options for hosting – especially for small sites.
        While many large Plone customers host in-house, that's not an option for small nonprofits.
        Zope & Python are niche platforms, there aren't a lot of hosting providers that support them. (But there are some good ones.)
        Need more redundancy & choice in hosting market. Market "feels" too small.
        We also need cheap (<$20/month) hosting for a single site with simple custom products (skins, subclassed archetypes, etc.) (Zope doesn't make this terribly easy from a server resource point of view, we know.)
        Maybe some outreach to large Windows hosting providers to deploy Enfold's stuff?

Local user groups -- Seattle Plone has been very catalytic for our practice – has helped us meet our Plone peers, organize a Boot Camp, etc. Smoothes the path for new consultants.

Remember small projects when marketing – Plone has an amazing story for small projects (too!) and this is where a lot of customers and developers will first come in the door.   (Drupal is starting to move up-market from small projects to larger ones… Plone could do better at trickling down.)

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Resources

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Documentation

- Martin Aspelli's *RichDocument: Creating Content Types the Plone 2.1 Way* - **http://plone.org/documentation/tutorial/richdocument/**

- Joel Burton's: *Plone Best Practices* - http://plone.org/documentation/tutorial/best-practices

- An online copy of Andy McKay's *Definitive Guide to Plone* is hosted online by Raphael Ritz along with some of his own really good dev documentation: **http://docs.neuroinf.de/**

- Live search and recent improvements in structure, content, and PloneHelpCenter have made **http://plone.org/documentation** a real resource as well.

Our open source software

- All available at **http://www.onenw.org/open-source**

- **ONENWTemplate** - Site setup policy plus wireframe-generating kickstart

- **Pigeonhole** - metadata extensions for basic content types (plus a two new ones) and portlets. Based on an audience-centric site strategy.

- **PyWhatCounts** - pure Python wrapper for email newsletter WhatCounts' web API.

- **PloneWhatCounts** (soon to be released)- Integration of a site member's preferences and their WhatCounts newslet