Communication Centered Technology Planning

2nd Edition

Michael C. Gilbert
Author and Editor

Contributing Authors:
T. Butler & D. Coleman
John Grohol
R. Christine Hershey
Jeff Kaplan
Ross Mayfield
Gerry McGovern
Howard Rheingold
Robert Weiner
Dan Willis

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Communication Centered Technology Planning

Second Edition

by Michael C. Gilbert, et al

The Gilbert Center
Vashon, WA, USA

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The Gilbert Center
P.O. Box 2251
Vashon, WA 98070
http://www.gilbert.org/

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-- Michael Gilbert

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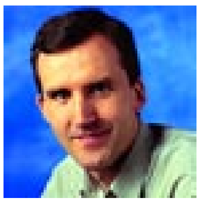
Contributing Authors

Michael Gilbert is the author of "The Guide to Nonprofit Email", and "21st Century Fundraising Resources". He is the Publisher and Editor of Nonprofit Online News, which he started in 1997 as a means to keep himself and his colleagues informed and which has since become a premier newsletter of the field. He is often credited with helping ignite a revolution in nonprofit communication with his Email Manifesto and he is well known for his provocative and incise commentary.
More information: http://www.gilbert.org/about/team/mcg

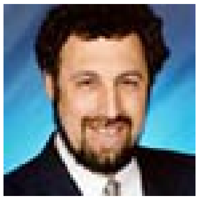


Gerry McGovern is widely regarded as the number one worldwide authority on managing web content as a business asset. He has spoken, written and consulted extensively on web content management issues since 1994. Gerry has written three books and is currently working on a fourth. In 2001, he published two books, entitled: Content Critical and The Web Content Style Guide. Gerry has been nominated as best overall speaker at numerous conferences. He has spoken about content management at hundreds of conferences and workshops in 35 countries.
More information: http://www.gerrymcgovern.com/about_gerry.htm

Howard Rheingold fell into the computer realm from the typewriter dimension, then plugged his computer into the telephone and got sucked into the net. In earlier years, his interest in the powers of the human mind led to Higher Creativity (1984), written with Willis Harman, Talking Tech (1982) and The Cognitive Connections (1986) with Howard Levine, Excursions to the Far Side of the Mind: A Book of Memes (1988), Exploring the World of Lucid Dreaming (1990), with Stephen LaBerge, and They Have A Word For It (1988).
More information: http://www.rheingold.com/howard/

Ross Mayfield CEO and co-founder of Socialtext, the first wiki company and leading provider of Enterprise Social Software that dramatically increases group productivity and develops a group memory. In other words, we adapt wikis (group-editable websites) and weblogs for enterprise use. Most recently, I was VP of Marketing and Business Development at a Fujitsu spinout developing telecom software. I also founded an ISP and a web design company; and served as marketing director for the largest privately held telecom group in Eastern Europe.
More information: http://ross.typepad.com/about.html

R. Christine Hershey Thinking beyond all limits - to the possibilities of what can be - has helped R. Christine Hershey shape two companies that have earned national recognition. Chris consults with CEOs and senior executives throughout the country, advising on questions of positioning, market strategy and brand identity. Her work in the corporate sector, and her commitment to helping nonprofits succeed, were the catalysts for the creation of Cause Communications, Hershey Associate's 501(c)3. The mission of Cause Communications is to help nonprofits succeed using the same tools that Fortune 500 companies use to build market share.
More information: http://www.causecommunications.org/CC/CC2_about_chris.html



David Coleman is the Founder and Managing Director of Collaborative Strategies LLC (CS) and the editor of " Inside Collaboration ". CS is the leading analyst firm covering collaboration technologies and its use. Serving both vendors and end-users of these technologies, CS provides a variety of publications and services that help these populations in being more successful in selling or using collaboration technologies.
More information: http://www.collaborate.com/about/about_staff.html

Timothy Butler is the President/CEO of SiteScape, Inc. and founded SiteScape, Inc. in August of 1995 as a value-added reseller of Internet solutions. Today the company focuses on providing collaboration software, customization and hosting services, and support to government agencies andGlobal 2000 and Fortune 500 companies. Timothy can be reached at: timothy.butler@sitescape.com

Robert Weiner is president of Robert L. Weiner Consulting, he is an independent technology consultant based in San Francisco. He specializes in helping nonprofits make informed, strategic decisions about the selection, use, and management of information technology. He has consulted for a wide variety of organizations.
More information: http://rlweiner.com/experience.html

The Berkman Center for Internet & Society at Harvard University, with the support of IBM Corporation and Oracle, formed the Open ePolicy Group in February 2005 with members from every region of the world to share insights from governments, companies and organizations at the forefront of global technology. Our hope is to provide policymakers, managers and other stakeholders from industry and civil society a user-friendly tool for understanding what open ICT ecosystems are, why they are embraced and how to evolve them. As a result, we hope to change how people see and manage ICT ecosystems and innovation.
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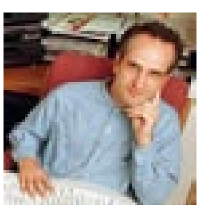


Dr. John M. Grohol, Psy.D. is an expert in online psychology and behavior, developer, researcher, and author. Kicking around the Internet since 1992, he is the author of The Insider's Guide to Mental Health Resources Online (Guilford, 2003), a published researcher, and he sits on the editorial boards for the Journal of Medical Internet Research and CyberPsychology & Behavior. Dr. Grohol is currently an Associate Director at D.C.-based Revolution Health.
More information: http://psychcentral.com/about/official_bio.htm

Dan Willis is a web consultant in Northern Virginia. He's spent the last eight years launching internet products for major media companies after almost a decade of developing, designing and editing newspapers and magazines. He has more personal websites than he really ought to, including: http://www.dswillis.com (a shameless pitch of his consulting services) and http://www.dswillis.com/draw (another shameless pitch, this one a showcase for his illustrations and cartoons).
More information: http://www.boxesandarrows.com/person/danwillis

Letter From the Editor

Dear Readers,

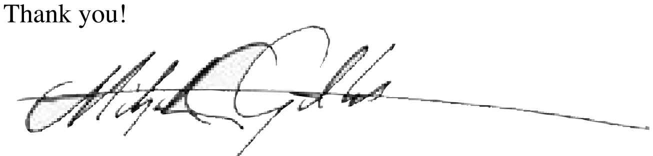
If there is a single topic that has unified my work in the field of technology and capacity building in civil society, it is the concept of communication centered planning. From my campaigns to change the conversations about nonprofit technology to my seminars to my consultations with grantmakers and others, this is the theme that emerged: The guiding light of our projects should be the improvement of communication.

That's easy to say, but hard to do. Technocentrism in general and civil society's focus on issues in particular conspire to take our eyes off of relationships and communication, no matter how dedicated we may be in spirit. We need tools and techniques to sustain that dedication in the face of distraction. It is my sincere hope that this book will contribute to that body of knowledge and practice.

The book is divided into four sections: Strategy and Leadership; Cooperation, Integration, and Listening; Weblogs, Email, and Other Tools; and a large section of Annotated Resources. In every section, we've worked to provide a mix of vision, practical methods, and quick tools. The book can be read from front to back, but is intended for the busy professional who will want to keep the book on hand for inspiration and support. In order to make it a solid reference source, the first three sections are each preceded by a more detailed table of contents, and the annotated resources are catalogued into a range of core topics.

This book represents the combined wisdom of the work of The Gilbert Center and the communities of which it is a part. I hope you are able to build on this work in your own practice and thus bring civil society a little closer to its potential.

Thank you!



-- Michael Gilbert

Introduction:
Asking the Wrong Questions
By Michael C. Gilbert

In every domain in life, the questions we ask shape the responses we get. Our questions reveal our frame of reference and impose that frame on our answers. As a result, much is revealed by examining the assumptions, the reasoning, and the logic models of our questions.

Eye doctors don’t determine how to correct your vision by looking at what kind of glasses you have been wearing recently. They evaluate your vision directly and possibly they investigate some lifestyle or workstyle issues, such as the typical distance of objects that you need to see.

I believe that most practitioners of nonprofit technology planning are asking the wrong questions. Because their questions are largely about technology, the results of these questions are answers dominated by the logic of technology itself, rather than by the mission or methods of the organization.

Many observers will agree that common complaints about technology projects -- resistance to change, long sales cycles, inappropriate technology, unexpected costs, unused tools -- are often the inevitable result of this technocentric planning. The only way to unravel this problem is to go to the source and challenge the questions we ask.

In this short essay, I will touch on three questions of my own: In general, what kinds of questions should planners be asking? What kinds of questions are they actually asking, in the field of nonprofit technology planning? How can we fix this?

What Should Planners Ask?

It’s useful to look at other domains for inspiration about what the right questions might be. Although a proper examination would involve a much larger set of domains, for our purposes today, let’s look at eye doctors and shoe sales-people.

Eye doctors don’t determine how to correct your vision by looking at what kind of glasses you have been wearing recently. They evaluate your vision directly and possibly they investigate some lifestyle or workstyle issues, such as the typical distance of objects that you need to see. Even though your current glasses might reveal something about your eyesight, they don’t use that as a form of assessment. Eye doctors rely on questions about eyes and about seeing, not questions about eyeglasses.

Shoes sales folk don’t do an inventory of your shoes in order to sell you a new pair. Even though it’s true that such an inventory might help them sell to you, even people with such a solid sales agenda focus instead on other things. They measure your feet,

Strategy & Leadership

1. Making Wise Decisions About New Technology

By Michael C. Gilbert

A sailing ship that, over the course of a hundred years, has had every plank and peg replaced is still the same vessel. An organization that has none of its original staff members and has not a scrap of paper left from its early days is still the same organization. The patterns of relationships and functions that persist and evolve over time form the essence of the organization.

These patterns are all about communication. The relationships and functions are performed as a result of people communicating with people, sometimes one on one, sometimes on a large scale. The precise content of your work, the individuals producing it, or the particular people receiving it are incarnations of a deeper pattern of communication and roles: staff, partners, volunteers, supporters, and so forth.

Understanding these patterns of communication is the key to making wise decisions about new technology. Focusing on anything else is a recipe for expensive failure.

Understanding these patterns of communication is the key to making wise decisions about new technology. Focusing on anything else is a recipe for expensive failure. While this lesson applies in some obvious ways to traditional technologies, it applies particularly to the computer mediated communication technologies that have exploded in use during the last ten years.

The Perils of Planning From Technology

"Look What We Can Do!"

The first and most dangerously flawed method that organizations have been using to make decisions about new technology is a reactive approach I call "Look What We can do" or, less casually, Planning From Technology or Technocentric Planning.

This approach can result from the influence of the sales and marketing efforts of vendors, the virtuosity of technology staff and their desire to impress, or even the well meaning, technology-centric efforts of internal and external technology planners and consultants. But however it comes about, it is misdirected. It focuses attention on the capabilities of specific technology, rather than on the communication needs of the organization, with expensive and dysfunctional consequences.

4. Are Useful Requirements Just a Fairy Tale?

By Dan Willis

I've heard of a fantastic land far, far away where magical people called "project managers" collect something called "requirements." These requirements so clearly, concisely, and completely describe work to be done that all the villagers involved share a common understanding of a project's goals. Before a single pixel is plotted in this amazing world, villagers are able to agree to what a project will (and will not) accomplish.

In many of the real worlds I've worked in, however, requirements either didn't exist or, if they did, they existed in a state that made me wish they didn't.

Where requirements didn't exist, it was usually because the company's culture had wished them away. Every suggestion to collect requirements was met with a heavy sigh and an exaggerated glance at a wristwatch. When requirements were produced despite the resistance, the same people impatiently flipped through a few pages before choosing a couple of requirements to argue about for the life of the project.

It comes down to simple math: it's been my experience that a blurry definition of what a project needs to accomplish leads to a lot of extra work. So much extra work, in fact, that revisions end up taking much more effort than helping the team nail down useful requirements earlier in the process.

In the culture of the other worlds, people didn't really believe in requirements so much as they agreed to accept that requirements, in fact, might exist.

In some cases, this resulted in spotty requirements that only vaguely described parts of the challenge. These requirements lacked credibility and people tended not to pay much attention until they saw the user interface. Because of this, even points of conflict described well in the requirements weren't addressed until the design was near completion.

Sometimes, companies with only tepid support for requirements bring in consultants who are zealots. I worked at a place that hired an engineering-centric third party. The consulting engineers produced requirements that were so extensive and detailed that nobody else could get past the first few pages of the thick documentation. I suspect this was the consultant's intention all along because, throughout the project, their response when anything was brought into question was "Well, it's right there in the requirements documentation."

But why should an information architect (IA) care about requirements when it's not his or her job to collect or create them? It comes down to simple math: it's been my experience that a blurry definition of what a project needs to accomplish leads to a lot of extra work for the IA. So much extra work, in fact, that revisions end up taking much more effort than helping the team nail down useful requirements earlier in the process.

An IA who generates requirements just to satisfy his own selfish needs actually serves the team quite well. But the IA may not produce the kind of detailed requirements an engineer would need for coding. These UI-related requirements

5. The Role of the Executive Director in Nonprofit Technology

By Michael C. Gilbert

"Elegant solutions will be predicated upon the uniqueness of place."
-- John Todd

In the last ten years, nonprofit leaders have faced a series of sophisticated decisions related to the opportunities and challenges of information and communication technology in their organizations. Because nonprofit leaders rarely have the time for conferences or workshops outside their issue areas, the potential to make the same mistakes over and over continues to be an issue for many organizations.

What is the role of the executive director in nonprofit technology? I will explore three topics in order to answer that question: controlling the conversation, creating requirements, and managing change.

The primary responsibility of the executive director is to control the conversation so that new technologies serve the communication needs of the organization.

Controlling The Conversation

I would summarize the role of the executive director as follows: The primary responsibility of the executive director is to control the conversation so that new technologies serve the communication needs of the organization.

In order to understand what this means, we can start by defining what it does not mean. It does not mean that the executive director must be a technology expert or that they must speak the typical language of the technology implementors. In fact, I think that if they find themselves moving in that direction, they have already lost control of the conversation.

Why do I think this conversation needs to be managed? Because it is still, despite the years it has had to become more sophisticated, a very unbalanced conversation. Despite the wisdom and experience of the technologists, it is still far too easy for a nonprofit organization to be in a disempowered role when it comes to adopting new tools. This disempowerment is not the result of their lack of technological sophistication, rather it is the result of a frame of reference that says that technological sophistication is the only legitimate language in which to conduct the conversation.

What is needed to balance out that conversation is a certain sophistication about communication, not technology. Getting sucked into the technology frame of reference will never work in putting the organization and its communication needs in charge of the conversation. The organization needs to be in charge in order for the conversation, and therefore the resulting technology, to be functional.

6. Communications Toolkit
Where Do You Want To Go?
By R. Christine Hershey

The indispensable first step to getting the things you want out of life is this: DECIDE what you want.

-- Ben Stein, author and comedian

Introduction

If you know where you are going and what you hope to accomplish for your organization through your communications efforts, it becomes much easier to plan the most efficient and appropriate route. So your starting point is really your destination. Consider what success would physically look like and then work backward to develop a plan of action to get you there.

How do you want your target audience to perceive your organization? What actions do you want them to take?

In this chapter, we'll show you how to develop a communications plan, what to do in an emergency, how to create a strong brand and visual identity for your institution, and how to develop and frame key messages to drive it all home.

Communications Plan: A Roadmap

Your organization's mission and the research you've conducted are the starting points for developing your strategic communications plan. Ideally, your plan should be linked to your organization's overall strategic direction. At the least, it must define your unique position in the market and frame your organization and its key issues in a way that resonates with your audiences.

In writing your communications plan, avoid generic goals such as "raise awareness" or "increase media coverage." Be specific. Which audience do you want to make aware of your organization – community leaders, those you want to serve, prospective donors? Even if it's all of the above, you need to segment those audiences and develop strategies to effectively reach each target group. What actions do you want your audiences to take?

Your goals must be measurable. If you run a theater company and your goal is to boost attendance, state how many people you want to attract. If you want more media coverage, identify the number and quality of placements (e.g., one placement each month in major national media).

Now it's time for a reality check. Do your goals match your available resources? Are you being realistic about what you can achieve and how much it will cost? Do you have the wherewithal to support the increased volume if your communications efforts are wildly successful?

7. Models of Collaboration

By Timothy Butler and David Coleman

In this guest editorial we examine five models for collaboration that vary from barely interactive to intensely interactive. Granted the Computer Science definition for collaboration requires some level of interaction by two or more people, and in the past we have said that reciprocal data access (such as you would find in a library or repository) is not collaboration, we have also said that technology, content and process are critical for any type of collaboration. This being the case we are expanding our definition of collaboration (slightly) to include content libraries as most of the vendors in this area have added collaborative functionality. In addition, content is often critical for a collaborate interaction to occur…David Coleman

Introduction

Based on the experience of working with many different organizations we have been able to categorize the majority of collaborative environments to fit into one or more of five primary collaboration models:

- Library
- Solicitation
- Team
- Community
- Process Support

The goal of this article is to help you determine which model(s) of collaboration are important to your organization. Figure 1 (below) shows how each of these models relates to each other based on the size of the population that uses them and the level of interactivity. As you can see we go from the Library model, which is really reciprocal data/content that can be accessed by a large number of people and not really inter-active, to the Team and Process Support Models, which usually are used by smaller and more interactive groups of people. Each of the model types is explained in greater detail below.

8. Seven Knowledge Management Mistakes

By Michael C. Gilbert

In our recent series of workshops on nonprofit knowledge management, we taught a session entitled The Logic of Learning, in which we explored the foundations of solid reasoning and planning for knowledge management projects. By way of illustration, we explored seven common knowledge management mistakes that we have seen recur in our own practice over the years. I would like to share those seven mistakes with you here.

1. Let's Go Shopping!

It is very easy to end up making large lists of features available in various so called "knowledge management" applications and then end up using those lists as your framework for selecting tools and even informing your practices.

You know better than to go to the grocery store, informed by your hunger but without a list, either on paper or in mind. But we often do exactly that when it comes to the technology that supports knowledge management. What might be just as bad, however, is that when we finally do draw up a list, it is based not upon the menus and recipes that we have carefully developed to satisfy our hunger and our palate, but instead it's based upon the contents of the shelves in the store, the brands, the slogans, and the language of marketing.

It is very easy to end up making large lists of features available in various so called "knowledge management" applications and then end up using those lists as your framework for selecting tools and even informing your practices. In other words, the dynamics of shopping (selling and buying software), rather than the dynamics of learning, define what knowledge management is.

2. Taxonomy Too!

When we find ourselves having to navigate a very large volume of content, or helping other people navigate such content, we naturally turn to categorization as a tool. This is especially true when we need to touch on the same content more than once, because otherwise a chronological schema would work just fine. As a consequence, people with responsibility for planning knowledge management initiatives are especially interested in categorization.

At its best, categorization is a powerful tool for communication and learning. If two or more people agree on a category, then they can help each other learn things. That even applies to the same person using their own unique categorization scheme that is consistent over time: Their past self can help their future self learn things.

At its worst, categorization can get in the way of communication and learning. This happens under three conditions: (1) The categorization scheme or taxonomy is too

Cooperation, Integration, & Listening

9. Applying Tools for Maximum Impact

By Robert Jones, Robert Oyung, and Lise Pace

Identifying and using the best tools for each situation is a key to maximizing the effectiveness of every virtual team. In many cases, people often start by selecting a tool, try to use it for every situation, and end up frustrated or confused.

Early on, we mentioned that technology won't solve all problems related to virtual teams. In fact, basic meeting management and project management skills and techniques are actually more important than trying to use the most sophisticated tools. For example, if you don't have a meeting agenda with specific topics to discuss, identified decisions that need to be made, and owners for action items, the best virtual meeting tool is not going to automatically do those things for you. At the same time, if we didn't have the tools we have today, virtual teams would not be possible, and the speed of business would be driven by how many face-to-face meetings we could squeeze into our schedules. Identifying and using the best tools for each situation is a key to maximizing the effectiveness of every virtual team. In many cases, people often start by selecting a tool, try to use it for every situation, and end up frustrated or confused. This is not surprising, since it's like going to the kitchen, pulling out a bag of flour, and thinking, "Now what can I do with this?" rather than deciding you want to bake some bread and what you really need is bread flour. Let's look first at what we want to do and then identify the most appropriate tool for that task.

We've grouped tasks into four major categories. This was not done after many years of scientific research; there are as many ways to categorize tasks as there are tools to perform those tasks. We came up with these groupings based on the most common things people want to do in a virtual team.

Conversations

Conversations can be real-time live conversations either through voice or text. They can involve two or more people, but usually, if you have more than four people involved, three to four people at most will participate actively in the conversation. In some situations, speed of information exchange is most important, while at other times, ease of joining the conversation is most important.

Document Storage

In the physical world, document storage would be in filing cabinets or libraries. In the virtual world, you still need a place to store your documents and make them available to the people who need to have access to them and protect them from those who should not. These people may be inside or outside of your team, department, organization, company, subsets, or combinations of them all. Secure storage and easy access to authorized team members is the most important aspect here.

10. Fear, Greed and Social Software

by Ross Mayfield

Enterprises are adopting social software out of both fear and greed. Fear is the primary driver for corporate blogging, while greed is driving adoption of social software within the enterprise. I have used this metaphor to explain what I see in the market lately, so here it is in one place.

Fear Drives Corporate Blogging

Fear is a powerful emotion for the corporate animal. An early adopter wave of non-brand-centric tech companies from Sun to Microsoft to SAP saw opportunity to engage developers with the tools they use. Today most every F500 company is looking into blogging, particularly brand centric companies, but they do so differently. All those revolutionary bloggers having conversations about their brands and influencing others is pretty scary. Suddenly your brand is being watched, augmented, de-located.

Corporate executives unfortunately fear their employees more than they trust them. An even greater risk to their brand, they fear, comes from within. Since the advent of email, employees have had the ability to message and forward the influencers, the press, regulators, anyone.

Corporate executives unfortunately fear their employees more than they trust them. An even greater risk to their brand, they fear, comes from within. Since the advent of email, employees have had the ability to message and forward the influencers, the press, regulators, anyone. Further, the hierarchical structure of commands flowing down and information flowing up enabled horizontal flow of information.

What is new are cases like Microsoft discrimination policy being Scobleized and the Los Alamos National Laboratory revolt. Here the heterarchy transcends the firewall and pressure can be applied from without. Sometimes business follows developments in politics. When Reagan ran into resistance from a Democratic Congress in the 1980s (lobbying or institutional pluralism failed him), he leveraged the media for mass appeal to fax representatives (individual pluralism). In other words, he was Going Public, in a way similar to how employees can through blogs when institutional mechanisms to influence executive decisions fail them.

In practice, only a few employees (e.g. Scoble, Tim Bray) have gained enough of a following to consistently lead through Going Public. However, the emergent attention forming structure of the blogosphere can take a fit message and self-organize around it with a moment's notice. While extremely rare, this pattern gives employees the notion of empowerment by pulpit that can be ignorantly abused. Nobody gets fired for blogging, the real role of a blogging policy isn't a policy itself, but an opportunity for education and re-engaging employees in a more common sense.

Fearing these scenarios, the corporate animal uses it's fight or flee instincts. No better way to keep your employees from blogging than to sue other bloggers. When conversations aren't going your way, carpetbomb them. View the people in these

12. Roadmap for Open ICT Ecosystems

From The Berkman Center for Internet & Society at Harvard Law School

Our hope is to provide policy makers, managers and other stakeholders from industry and civil society a user-friendly tool for understanding what open ICT ecosystems are, why they are embraced and how to evolve them.

Introduction

Technology's transformative power has always been a source of great expectations and challenges. Today, globalization, fueled by information and communication technologies (ICT), is rapidly changing every society. Our drive towards globalization creates a new set of unique demands on government, business, and our everyday lives. Increasingly, decision makers in all fields are looking to technology to provide solutions and drive desired changes by commingling local, national and global resources in innovative ways.

The fusion of technology and globalization has also produced a new way to adapt, innovate and grow in our changing world. A potent combination of connectivity, collaboration, access and transparency – or openness – is emerging. Governments and enterprises around the world are embracing it. This openness is helping governments, companies and individuals respond to the increasing requirements of our on-demand, high-speed world. As openness impacts an ICT ecosystem, it becomes a catalyst for unleashing newfound comparative advantage, invention, social development and market opportunities.

The Berkman Center for Internet & Society at Harvard University, with the support of IBM Corporation and Oracle, has facilitated the creation of this Roadmap for Open ICT Ecosystems. Our hope is to provide policy makers, managers and other stakeholders from industry and civil society a user-friendly tool for understanding what open ICT ecosystems are, why they are embraced and how to evolve them. As a result, we hope to change how people see and manage ICT ecosystems and innovation.

To do this, we needed global perspective from those with on-the-ground knowledge and hands-on experiences in such activities as developing ICT architectures, establishing government policies and studying global technology trends. We formed the Open ePolicy Group in February 2005 with members from every region of the world to share insights from governments, companies and organizations at the forefront of global technology.

By gathering compelling case studies and lessons learned from governments, industry and other stakeholders across the globe, members have provided practical insights that can help everyone move toward openness. The Roadmap presents a coherent set of principles, best practices and case studies that can help create and sustain open ICT ecosystems.

I am grateful to each member of the working group for their support of this important project. They are truly the authors of this document, as well as the architects and visionaries for open ICT ecosystems.

15. Usability and Listening to Customers Have Limits

By Gerry McGovern

Listening to your customers doesn't mean following your customers. Management is about making the right decisions. Sometimes the customers don't know what they want.

Listening to customers and making sure your website is usable are important to website success. It is much more important, however, to have a website that delivers real value both to the organization and the reader. Going for value can sometimes mean going against customer feedback and usability best practice.

When asked, Amazon.com customers seemingly didn't want one-click ordering. Jeff Bezos, founder of Amazon.com, felt otherwise. From his experience, he knew that people hated purchase processes. I read about this a couple of years ago and it really made me think. Here was someone who did not listen to his customers' wishes, gave them something that they said they didn't want, which after a while they really got to like.

Listening to your customers doesn't mean following your customers. Management is about making the right decisions. Sometimes the customers don't know what they want. You need to be able to have the ability to analyze feedback and make a reasoned decision that reflects a clear strategy and set of objectives.

The United Kingdom Department for Transport was commended in a recent usability study for saving £130,000 by relocating its employee newsletter to the intranet. The report entitled "Ten Best Government and Public Sector Intranet Designs" is by the Nielsen Norman Group.

Why do you have a staff newsletter in the first place? To inform staff. Why do you want to inform staff? So that they will become more productive, and so that they will become more loyal because they feel the organization cares enough about them to keep them up-to-date on key issues.

The core objective of the intranet should not be to save costs, but rather to create value. It should be focused on making staff more productive and loyal. Placing the print newsletter on the intranet is not necessarily achieving any of these objectives.

I have come across internal communications departments that see the intranet as an easy and cheap way to get stuff out. If they get it up on the intranet, then their job is done. In proper communication, your job is not done until people have read, understood and acted upon what you have published.

If putting a newsletter only on the Web was such a good idea, then why haven't all the commercial newspapers and magazines saved costs and dropped their print editions and published only on the Web? Because it is blatantly obvious to them that the majority of people still like to read a lot of content in print.

16. Anonymity and Online Community: Identity Matters

By John M. Grohol

Many popular websites such as Wikipedia offer little differentiation between the experience and tools available to registered users and to anonymous visitors. Many active users of such websites may, therefore, be virtually unknown to their hosts. As most party hosts knows, it's usually the people who just "show up" and that you don't know who can create the biggest headaches. As Wikipedia's recent scandals demonstrate, this decision poses several site-management headaches. Well-designed membership systems can allow community managers to head off trouble before it hits the national news. This article provides an understanding of why online identity matters and offers six steps to help you build stronger online communities.

Anonymity is a double-edged sword when it comes to an online community. While anonymity may allow people to feel more free and disinhibited to discuss otherwise embarrassing or stigmatizing topics, it can also be a community's biggest enemy.

Anonymity Can Wreak Havoc in a Community

Anonymity is a double-edged sword when it comes to an online community. While anonymity may allow people to feel more free and disinhibited to discuss otherwise embarrassing or stigmatizing topics, it can also be a community's biggest enemy. Anonymity allows people to hide behind their computers while saying whatever they want with little ramification. Psychologists know that online community is far more disinhibited than face-to-face communications. [1], [2], [3] Pair that disinhibition with anonymity and you have a recipe for potential disaster.

Some websites have discovered fairly innovative ways to allow for anonymity, but still filter out the disinhibited negative behaviors that often come with it. Slashdot, an old technology community weblog, has long had a moderation system that allows registered users to vote on the quality of comments in an article. So even if a user chooses to post something anonymously (for whatever reasons), that comment may still be considered of sufficient quality to be read by others.

Pseudonymity—anonymity that hides a person behind an online persona via a username—is common online. Many internet users have a number of different identities they use online, to allow them to explore different aspects of their persona, interests or hobbies. But pseudonymity is also the key to membership systems as well, as it allows members of the community to learn to identify other members they like or dislike based upon their behaviors and personality. Pseudononymous systems strike a balance between people's needs to obscure their identities online, while still allowing them to build reputations in those usernames. These systems have been shown to work very well for an online community.

People build reputations in their usernames, and so their reputation becomes something they value and want to protect. Members who have an investment in something within your community are far less likely to blow that investment through inappropriate, negative behavior.

Weblogs, Email, & Other Tools

18. Nonprofits and Weblogs

By Michael C. Gilbert

I get the impression nonprofits are getting interested in weblogs. But since I started blogging before the term was invented, it's been a little hard to tell when this idea started catching on. The fact that Beth Kanter recently interviewed me *on the subject of blogging clued me in. This article is derived from that interview.*

Introduction

90% of the ongoing cost of publishing this blog is my own cost of staying informed and reflecting on what I learn. That was a cost I was already paying and would always be willing to pay.

I have been blogging longer than anyone else online except for Dave Winer, an inspirational curmudgeon and software developer, who started his Scripting News weblog on the same weekend in April of 1997 as I started Nonprofit Online News. Dave has been in the center of the blogging revolution, while I am over here in the nonprofit sector, so the histories of blogging never mention me or my blog. But I do take some pride in the fact that Nonprofit Online News is tied as the oldest weblog still being published, period.

The origin of Nonprofit Online News is one of those sweet Internet accidents, that always reminds me that networks are infrastructures of natural abundance. Let me explain by telling the story of how it got started.

During 1995 and 1996 I found myself in the position of being the person best informed about the Internet in my professional nonprofit circles. The growth of the web and mailing lists was explosive and I was very interested in remaining well informed about what was happening in all those conversations. So I developed some information consumption tools and habits that would scale well with the rapidly increasing volume of new material coming my way everyday. And on the side, I was sharing interesting links, articles, and conversations via personal email with people who I thought might be interested.

Then someone (I don't remember who) suggested that I go ahead and publish those interesting bits on the web. I was already very interested in automation at this point and built a small content management system for the purpose of publishing those bits. As a result, in April 1997, I became a blogger.

The reason I think this is a classic Internet story is that 90% of the ongoing cost of publishing this blog is my own cost of staying informed and reflecting on what I learn. That was a cost I was already paying and would always be willing to pay. As I see it, staying informed and thoughtful reflection are part of my job. The incremental cost of sharing the results with anyone with a browser is very small. If I had had to publish through paper and postage, it would never have happened.

23. The Email Newsletter Marketing Model

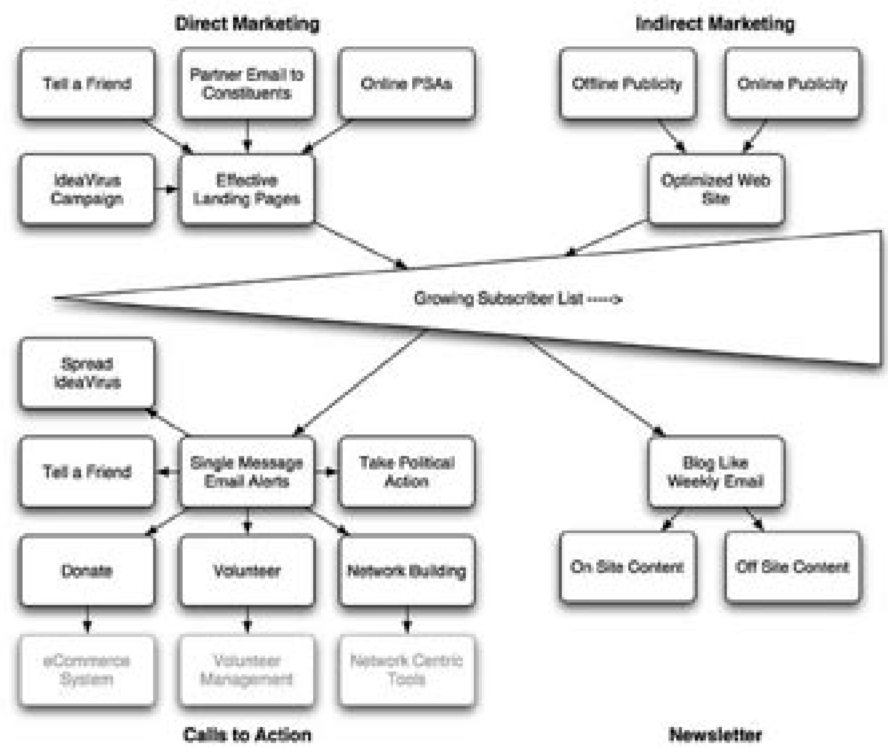
By Michael C. Gilbert

I had the privilege of developing an online marketing strategy for Talk to US, an innovative international public education campaign. As part of that work, they agreed to let me share my description of that approach with my readers. The following article has been edited so as to be more generically applicable to any nonprofit organization.

Many nonprofit organizations are now using an email newsletter as the backbone of their online campaigns. The key reason for this is that without a person's email address and permission to correspond with them, we are in a much more difficult position to ask them to do anything - make donations, take action, volunteer, forward information to friends, and so forth. I recommended this classic, email-centric approach to Talk to US.

Effective Landing Pages: These are unique pages for each direct marketing effort, so that their effectiveness in converting people from 'viewers of the page' to 'people who sign up' can be measured.

The flow of communication can be represented roughly in two dimensions. In the accompanying diagram, the horizontal dimension is used only to represent the increasing number of supporters, as captured by the number of newsletter subscribers. The vertical dimension represents the flow of users from a variety of first contacts at the top, to the newsletter relationship in the center, to various actions taken at the bottom.



(See end of article for larger version of this flow chart.)

26. Ten Common Mistakes in Selecting Donor Databases
(And How to Avoid Them)

By Robert Weiner

How do you choose a donor database that will support successful fundraising? The software is only half the story. Fundraising technology strategist Robert Weiner addresses ten common mistakes that can prevent you from selecting the right database and managing it effectively.

Picture, if you will, two nonprofits. The first has a donor database that is full of bad data. Donors are getting the wrong receipts or no receipts at all. The organization cannot use the database to plan their fundraising strategies or track their effectiveness. The few reports they can get are useless. Staff members complain that no one trained them, and they get no technical support. For obvious reasons, they hate the system. The second organization loves its database. Their data is clean, their donors get timely, accurate mailings, the organization has a good handle on its fundraising activities, and staff get the reports they want. New personnel are trained on the database before they ever log in, and someone on staff helps them resolve any problems and questions that come up.

The techies should be there to advise on whether a system will fit into your organization's technology strategy and be supportable in the long term, but they should not make the final decision.

Both nonprofits are using the same software package.

How can this be? Perhaps the first organization has outgrown its old system. But it is quite likely that the organization never had the right software to begin with, and then proceeded to use it incorrectly. They made a series of bad decisions and have been struggling with them ever since.

How do you avoid this fate? Selecting and managing a donor database is never easy, but if you avoid the mistakes on this list, you can start out on the right foot.

1) Letting Techies Make the Decision

In the early days of computing, programmers created all donor databases. Their role was to turn fundraising concepts into software programs. But since most fundraisers did not (and still do not) want to be involved in the detailed decisions and testing required to design a database, programmers usually drove the project.

Although the market for donor databases has changed significantly over the past three decades, techies still make many of the purchasing decisions. However, few techies have experience with fundraising. This makes it critical to get input from the people who will actually use the database. You don't need to include every staff member, but you should get input from all levels of the organization (management, departments, end users), fundraisers from all areas of Development (direct mail,

28. Book Reviews

By Michael C. Gilbert

Envisioning Information

Buy at Powell's | Buy at Amazon

Edward Tufte's Envisioning Information is a classic in its field, as are its precursor and successor volumes. I have slowly been learning to give myself the time to work on good diagrams and illustrations for my lectures, workshops, and articles. I enjoy the work immensely and there can be tremendous payoff for my audiences if I get it right, but there isn't the numerical satisfaction of a word count at the end of the day. But I am always reassured about my investment when I return to Tufte. I find that deadly text based slides are still too common at the conferences I attend and I wish most presenters would simply do without. But if you must have slides, consider three or four well developed images rather than thirty or forty bullet points. In this book, I recommend the section on Color and Information, for those of you who are wondering if your use of color is undermining your message. Because I am often trying to explain processes and dynamic systems, I suspect I'll be spending a lot of time in the coming months studying the chapter on Narratives of Space and Time.

Going Virtual: Distributed Communities of Practice

Buy at Powell's | Buy at Amazon

Paul Hidreth's Going Virtual: Distributed Communities of Practice studies the concept of communities of practice and explores one such community that crosses international boundaries. Just the opening chapter on What is Soft Knowledge is worth the price of the book for anyone who wants to get clear on the history of the concepts involved. Because of its origin as a doctoral dissertation, the book has a fantastic bibliography. Finally, the appendix includes some methodologies on Flow Models and Sequence Models that deeply complement our work on Communication Centered Technology Planning.

IT Ethics Handbook

Buy at Powell's | Buy at Amazon

Stephen Northcutt's IT Ethics Handbook is a very valuable resource. This isn't because it clearly answers the hundreds of ethical questions it raises -- from the responsibilities of programmers and system administrators to the privacy of email -- but because it so clearly identifies these issues and calls out the range of possible answers. I can't think of a single issue that didn't have some bearing on the role of nonprofit technology professionals or the leaders responsible for setting policy in their organizations.

29. Annotated Resources
for Communication Centered Technology Planning

By Michael C. Gilbert
Editor, Nonprofit Online News

Architecture & Classification

Taxonomy for the Technology Domain

http://www.powells.com/partner/30561/biblio/1591405254

Lawrence Tomei's Taxonomy for the Technology Domain has as its purpose the design of a comprehensive framework for teaching new technology. I don't think we'll know if he succeeded until this is applied in the field, but I do find his model compelling. The book is intended for teachers and I see it as being relevant to anyone working on digital divide issues. He defines technology as a fourth domain of learning, with cognitive, affective, and psychomotor skills and knowledge being the first three. He then presents six levels of technological learning: literacy, collaboration, decision-making, infusion, integration, and, as the final level, something he calls tech-ology. (This highest level refers to the ability to judge the impact, values, and implications of technology use.) I recommend this book to anyone designing or funding programs that involve helping people up the technological ladder of skills and knowledge.

A Cognitive Analysis of Tagging

http://www.rashmisinha.com/archives/05_09/tagging-cognitive.html

Tagging of content (especially in contrast to classification) is all the rage right now. It's great to see some thoughtful work such as Rashmi Sinha's cognitive analysis of tagging . As is the case with many other tools, tagging is popular because of the lower "cognitive costs", in essence meaning that there are fewer mental steps required to assign the metadata. I think her diagrams in particular are helpful in thinking this question through in more general terms.

Readings in Information Visualization: Using Vision to Think

http://www.powells.com/partner/30561/biblio/1558605339

I have been wallowing joyfully in the theoretical and practical insights that I'm finding in a massive anthology entitled Readings in Information Visualization: Using Vision to Think . I'm someone who often takes important phone calls while pacing in front of a white board, where I will draw diagrams and conceptual maps for my own benefit during conversations. There are roughly 50 different articles in this tome, organized into sections on topics such as the creative tension between focus and context, data mapping, and information workspaces. This is a treasure trove of research and inspiration for anyone who likes to think about thinking or wants to build tools to help people be smarter. I highly recommend it. Just don't drop it on your foot.

Conversation Mapping

http://www.cynefin.net/kbase/29_Conversation_Mapping_BMcK_0605.pdf

Bruce McKenzie's guide to Conversation Mapping (8 page PDF) provides one of the better step by step instructions for using visual mapping to help track and understand a complex conversation. If visual thinking appeals to you, this is a nice little resource to consider.

The Gilbert Center Publishing
PO Box 2251
Vashon, WA 98070

http://www.gilbert.org
distribution@gilbert.org

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