

telecentre.org Online Community Final Report



Prepared by TakingITGlobal for IDRC, October 2006

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Executive Summary

In November 2005, TakingITGlobal received a grant from International Development Research Council (IDRC) to manage all aspects of the telecentre.org community website and online infrastructure.

Key Outcomes:

- Community sites entirely translated into French and Spanish
- Successfully launched a support site for PacTOC and for the telecentre leader forums at the World Summit on the Information Society (phase II)
- Two editors fully trained in blogging culture
- Completed three rounds of formal improvements to the core telecentre.org community website (including a new version of Drupal, two design changes and numerous bug fixes)
- Developed and executed a training strategy for site editors
- Developed and executed an editorial strategy to ensure the telecentre.org is constantly updated with consistent, relevant and fresh content
- Developed and deployed an online engagement strategy to reach out to the telecentre community through mailing lists, the telecentre.org site and external blogs
- Assumed responsibility from IDRC's technical partner (Bryght) and provided technical and documentation support to partners and IDRC staff
- Filled in content gaps created by partners who were late to come on board
- Increased community membership from 61 to almost 1000
- Created the second version of the telecentre.org Online Strategy document
- Provided key input and the redesign of the Support Centre and Library
- Filled management gap and coordinated work between all online partners, including the Support Centre, Library, and Dgroups email lists
- Developed and launched an online version of telecentre.org's book "From the Ground Up"
- Developed and launched an online contest and the required technical infrastructure to both promote the online version of "From the Ground Up" and gather stories from around the telecentre movement to include in the online book

Initial Project Objectives

At the start of the project IDRC laid out nine key general objectives for TakingITGlobal, which revolved around the core objective of developing and maintaining the online components of the telecentre.org project. Specific objectives included:

- Set up telecentre.org support.net.in.a.box and event.in.a.box online platforms, and ensure that new 'sites' are available on an as needed basis.

- Create and maintain a vibrant online community at www.telecentre.org, adding content on a regular basis and developing strong links with sites run by telecentre.org partner networks.
- Establish an ongoing process for sharing current information about the telecentre movement by writing blogs, creating monthly features and gathering content from partner sites.
- Develop an online library that collects the best information available for telecentres, with an emphasis on presenting curriculum that people in telecentres can use in their community.
- Put in place mechanisms that will help telecentre people collaborate, placing a special emphasis on the link between face-to-face meetings and online collaboration.
- Offer online tools and content for use on telecentre network web sites, and help to build community amongst editors and others developing content on partner web sites.
- Evolve and improve the telecentre.org web site and associated platforms on an ongoing basis using continuous feedback from site users.
- Undertake and report on ongoing research about the information needs of the global telecentre movement by monitoring information requested the telecentre.org site.
- Monitor and evaluate the process of information sharing within the telecentre.org network, and develop regular recommendations on how to improve this process.

One of IDRC's key mandates for telecentre.org was iterative and responsive design that adapted to user needs. Therefore, TakingITGlobal and IDRC expected that some of these nine objectives would change or develop based on our experience. As the first year of a five-year project, we needed to determine best practices to inform and set the agenda and goals for the rest of the project's duration. The changes and developments in these project objectives and the key learnings that informed these changes are discussed fully in the narrative summary. The final changes, outcomes and learnings for each objective are also fully summarized on page 17.

Technical Background

The goals outlined above were to be accomplished through an open source content management system (CMS) called Drupal to run all the components of the telecentre.org online strategy, including the Library, Support Centre, blogs, photos and collaborative work spaces. In addition to the core telecentre.org site, our team was to create on-demand sites for events (event.in.a.box) and for telecentre networks (support.net.in.a.box). These sites in a box were to be slightly customized versions of the core telecentre.org site, but with some options turned off.

Alexandra Samuel, a social technology consultant brought on board by IDRC, chose Drupal based on a set of requirements developed from research done by IDRC on the needs of the telecentre community. These requirements stipulated that the telecentre.org online platform needed to be: scalable, customizable and adaptable; and able to aggregate content from around the web via RSS. The platform also needed to have the basic set of tools that come with a CMS, such as easily editable pages and blogging tools. Also needed was an easy way to create new sites on-demand. Based on these needs, Samuel recommended Drupal. Drupal also had the benefit of being a free, open source platform supported by a large community of enthusiasts. This community not only develops new versions of Drupal, but also develops modules which can add new functionality to a Drupal-based site. Samuel and IDRC anticipated that this community would help provide any necessary functionality to the telecentre.org site through development of new or existing modules at low or no cost.

Alexandra Samuel and Raincity Studios set up and designed the beta telecentre.org core site (www.telecentre.org) and the first in a planned series of event.in.a.box sites for the World Summit on the Information Society (wsis.telecentre.org). Bryght provided initial hosting and was to provide technical development and on demand site replication to create the event.in.a.box and support.net.in.a.box network sites. TakingITGlobal's technology team would learn Drupal and work with Bryght on the technical development of the telecentre.org sites. Raincity would also do the design work for telecentre.org to improve the design and usability of the site based on user feedback. In November 2005, management of the first beta of telecentre.org online community site was transferred to TakingITGlobal.

IDRC chose TakingITGlobal for our expertise in online community building and engagement, especially in an international development context. We also provided a close link between our in house technology and editorial teams - something deemed to be a crucial for the first year of a highly iterative and user responsive project. For our online community, TakingITGlobal developed a custom platform which has evolved with user feedback and our learnings over five years. This platform was not selected for the telecentre.org online community because it is not completely open-source, and did not support RSS integration as much as was thought necessary.

Partnership background

A key mandate of the project is to develop and support an ecosystem of distributed partners from the telecentre community to make the project vision a reality. These partners would span the world and would be involved in such a way that would both leverage and grow their pre-existing expertise. They would provide news and stories from the ground, documentation and staff, content and technical infrastructure for online components such as the Library and Support Centre. These partners would be identified, hired, and directly managed by IDRC and would work in collaboration with TakingITGlobal to accomplish the initial objects laid out for the project.

Narrative and Key Milestones

This section provides a narrative summary of the key milestones and outcomes for the online component of the telecentre.org project.

October and November 2005: WSIS

In November 2005, the telecentre.org ran a series of “telecentre leader forums” at the World Summit on the Information Society (WSIS) that brought together telecentre leaders and practitioners from around the world. telecentre.org and TakingITGlobal also unveiled the first “event.in.a.box” site for WSIS as well as the core telecentre.org website. Through the site’s blogging tools, the aim of the site was to document the telecentre.org leaders forums and workshops at WSIS and to help connect telecentre leaders and continue their conversations well beyond the conference. There was also the goal of feeding the best stories into the core telecentre.org site, as well as driving members who attended WSIS to use the main telecentre.org site.

TakingITGlobal played a number of key roles both in the preparation for WSIS as well as during the event itself. Staff took part in the final site sprint by providing feedback and implementing site improvements. We also designed and organized community building initiatives such as providing participants with digital cameras to visually document their experiences at WSIS on the website.

During the event, TakingITGlobal delivered hands-on blogging workshops to train participants. Staff also gathered usability feedback on the site through one-on-one feedback sessions. Despite many logistical challenges, these training sessions were quite successful and produced a large volume of quality content on the telecentre.org event site for WSIS.

As well as supporting the participants in documenting their experiences, TakingITGlobal was contracted to create daily video blogs that were posted on the WSIS site and shown during workshop sessions. At the end of the

conference, we produced a ten-minute documentary that summarized all the workshop sessions. The video blogs were very well received during the summit and helped to generate even more enthusiasm about telecentre.org.

TakingITGlobal also provided support in addressing many of the unexpected challenges that arose during WSIS. For example, the open WiFi at the IDRC booth was overloaded, making it very difficult for participants to use the telecentre.org site, TakingITGlobal transferred the blogging training and usability sessions to its booth. We provided the participants with technical support for issues relating to the WSIS site as well as general problems with internet connectivity and software issues. We also identified and documented a number of significant bugs that emerged during the summit.

The launch at WSIS served as a useful beta test for the telecentre.org sites, especially since most of the connectivity at the summit was limited and intermittent, thus mimicking the reality most of the sites audience would face when using the site. The first key learning from this initial phase of the project was that as a result of limited internet and computer access in developing countries, telecentre leaders and practitioners were not as advanced in their online knowledge as was expected. This knowledge gap was not only in terms of understanding technology, but understanding new online and “web 2.0” culture and concepts, such as blogging, wikis and tagging. These new types of online tools represent a huge paradigm shift from static web pages to interactive and collaborative spaces, so even those with basic internet experience may have trouble understanding them.

The second key learning from the hands-on training sessions was that Drupal is not easy to use or administer, especially for people with only basic computer experience working in challenging connectivity conditions. After the summit, it became clear that having a core site and separate event site without an intuitive integrated login or content sharing between them (users had to put their username plus an @ and the domain at which they registered at) served to segregate content and the userbase. Participants who registered on the WSIS site and blogged during the summit eventually stopped posting and unfortunately did not start using the core telecentre.org site as we had hoped. Also, the planned use of RSS feeds to move content from WSIS to the core site did not meet project expectations due to technical limitations. This meant that much of the excellent content that had been generated during WSIS did not get showcased on the core telecentre.org site. This learning led to a later decision to stop deploying Drupal sites for events and to encourage people to blog on the main site instead.

November and December 2005: Training, Hiring and Site Improvements

The final months of 2005 represented a period of intense and useful learning for the project.

Technology

Based on the feedback gathered at WSIS and the usability issues associated with Drupal, TakingITGlobal created a proposal to implement the first round of site improvements and bug fixes with the help of Alexandra Samuel and Raincity.

TakingITGlobal implemented many parts of the proposal, including a new design for the core site. However, more challenges emerged and limited what TakingITGlobal could achieve with the site. Ongoing communication challenges around expectations prevented Bryght from effectively responding to TakingITGlobal's development requests. Additionally, the assumption that the Drupal community would provide much of the necessary modules and support proved false. Many of the existing modules required custom coding to install and get working in the way we needed, work that is unrealistic to expect anyone to do for free at a low cost. For example, the Aggregator2 module which was required to gather content from other websites and display it on the core telecentre.org site was provided to us from a community member, but was unfortunately full of bugs and still to this day does not work properly.

To enable it to assume development responsibility, TakingITGlobal's technical team focused its energy on building in-house Drupal capacity. Drupal development proved more challenging and time consuming than anyone had originally expected. We also discovered that the changes we could make to the telecentre.org sites were constrained by the limits and design of the Drupal platform. It was also apparent that overcoming the technical limitations of Drupal could compromise the benefits. In order to develop features for the website that met the needs of the community and project objectives, a great deal of customization was required, however, in order to fully take advantage of the modular nature of Drupal and the possibility of installing ongoing upgrades, it is necessary to minimize 'work-arounds' and custom development.

To address these issues, TakingITGlobal began to look at other options and technology solutions. First, we considered hiring a Drupal expert with deeper knowledge of the technology capabilities and limitations, but quickly discovered that the cost involved greatly exceeded the budget laid out for the project. We then considered using the custom platform that TakingITGlobal had developed for the Digital Divide Network as the platform for the telecentre.org site instead of Drupal. This solution would leverage our in-house expertise and would enable the team to quickly and easily adapt and improve the platform based on user feedback and project requirements. However, IDRC would not allow us to take this step unless we would release our technology source code, which we were

not willing to do, as we felt this would have jeopardized our organization's financial sustainability. During this problem solving and exploration phase, TakingITGlobal worked closely with IDRC to find a suitable solution. We agreed that it was worthwhile to more fully explore Drupal as the platform since so much had already been invested and the community of Drupal developers is growing which gives promise for longer-term sustainability. To increase our Drupal development capacity, IDRC provided us with a Drupal expert named Alan Dixon to provide ongoing technology support.

As well as site improvements and bug fixes, TakingITGlobal also started working with IDRC to bring an open source mailing list platform called Dgroups to the telecentre.org Drupal platform.

Capacity Building and Knowledge Transfer

Another key activity during November and December was capacity building and knowledge transfer for both the TakingITGlobal and IDRC teams. When we assumed management of the site, no formal knowledge and responsibility transfer or training mechanism existed, and the timeline remained tight. Challenges arose around accountability and task coordination with partners such as Bryght and Raincity whose contracts were created by Samuel before TakingITGlobal became involved. Specifically, ambiguity existed as to who held these partners accountable as the contracts were not directly with TakingITGlobal. There was also a lack of clarity about what had been decided with respect to site design, future plans and who was making those decisions.

We worked with IDRC to extend Alexandra Samuel's contract to enable her to provide training, capacity building and create documentation for the telecentre.org sites. TakingITGlobal also worked with Samuel to deliver training to staff at IDRC on how to edit and administer the sites. TakingITGlobal, as a result, completed the task of providing training and support for users and staff while at the same time being trained itself.

A key learning here for future projects is the importance of a formalized knowledge transfer process that is allocated a reasonable amount of time in the project timeline. Additionally, a formalized process to ensure a proper transfer of responsibility is desirable to ensure accountability between partners.

Staffing

During this very busy time, TakingITGlobal initiated the hiring process for the French and Spanish Website Editors and Community managers. We developed job descriptions, promoted the positions extensively and began to interview a large number of potential candidates. The ideal candidate for the position would have a combination of ICT4D, telecentre or international development experience as well as editorial capabilities and first and internet/computer technology experience. These editors would also preferably be from the communities they would serve (i.e. Francophone and Latin American).

January to February 2006: Preparation for the launch of PacTOC

After returning from the winter holidays, TakingITGlobal immediately began preparing for the next big milestone – the launch of the first support.net.in.a.box. The site, called PacTOC (Pacific Telecentre Online Community), would provide a network site for the telecentre community in the South Pacific. PacTOC would be launched during a three-day hands on workshop in Auckland, with the support of thirty telecentre leaders from all around the South Pacific.

Staffing

In November and December 2005, we discovered that the technology side of the project demanded more than anticipated. So, we concluded that this launch (which was also on a very tight timeline) required more staff support. Up until this point, the only fulltime staff member working on the project at TakingITGlobal was Kate Raynes-Goldie. She worked extensive hours of overtime in order to prepare for PacTOC by addressing the technology issues on the site; providing technology support for end users and IDRC staff; and hiring the rest of the team.

TakingITGlobal then helped to meet another unexpected need – that of partnership management and coordination between the various editorial, content and technology partners such as Ugabytes and Bellanet. This created a need for staff to ensure that the execution of English language and over-all editorial responsibilities on the site were taken care of.

In addition to managing improvements to the technology, a great deal of time was spent on partnership management and the coordination between the various editorial, content and technology partners such as Ugabytes and Bellanet. As a result, a new staffing structure was developed to ensure that the English language editorial and online community engagement needs were prioritized with the addition of a new staff member.

The new staffing structure included a Technology Manager and an English Editor to enable Raynes-Goldie to assume a team management role. TakingITGlobal hired an interim English Editor named Steph Berntson to provide content and editorial support for the core site and a Technology Manager named Leigh Honeywell to work with Alan Dixon to manage technology issues; address bugs; and manage technology partners such as the port of Dgroups to Drupal by Bellanet.

Technology

With new staff members in place, TakingITGlobal set to work on the PacTOC site. IDRC's original plan for creating the PacTOC site was to have Bryght use their Drupal provisioning platform to create a new PacTOC site. This would be a relatively easy and straightforward solution and would not require much technical work from TakingITGlobal's end. Unfortunately, we discovered that for various logistical and technical reasons, this was not possible. We would have to figure

out another way of creating the site for PacTOC. TakingITGlobal immediately started working with Alan Dixon to come up with a solution so that PacTOC could indeed be launched on time and meet initial project expectations.

Dixon's presence at this time was fortunate as he developed and implemented a technical strategy to manually create PacTOC. As the idea behind the sites in a box was to have them be slightly customized versions of the core site with some features turned off, we decided that we could create PacTOC by manually 'cloning' and customizing the core telecentre.org site. The two challenges we faced were first, figuring out a way of migrating the telecentre.org Drupal install from Bryght's servers to ours so we could make the necessary changes and second, figuring out how to do the replication and customization of the core site. We also had to ensure that the core site had the most up to date bug fixes and improvements before we cloned it.

During this process, TakingITGlobal initiated a consultation with the PacTOC leaders to create a custom site design. We added custom colours, designed a logo and ensured the proper branding was included on the site. We also populated the site with initial content, such as useful resource manuals and blog entries. Despite all these unexpected challenges with Drupal, TakingITGlobal launched a customized site for PacTOC on time, as well as an improved version of the core telecentre.org site.

Editorial and Training

In addition to providing the technical infrastructure for the PacTOC launch, TakingITGlobal provided on-site content and training support at the launch itself as well as consulting with the design of the event. On site, Raynes-Goldie provided tech support; delivered blog and general online community site training; tracked and documented bugs; gathered feedback from participants and also helped to facilitate. TakingITGlobal also provided technical and content support from our Toronto offices.

The key learning from this phase of the project revolved around the issues of the support.net.in.a.box model both from a technical and partnership angle. We learnt how demanding the original plan to replicate sites on-demand was. We also learnt at the launch the shortcomings of an outside organization who provides an out-of-the-box solution to a group of people who were not closely involved in the development process. TakingITGlobal created a report with our findings from PacTOC and a set of recommendations. For a full discussion of these findings, please see page 20.

March to May 2006: Editor Training, Online Strategy and Multilingual Sites

During the launch of PacTOC, TakingITGlobal completed its hiring process by hiring the Spanish and French Website Editors and Community Facilitators (Fernan Sepulveda and Simon Gargonne). We also hired a permanent English Editor named Adam Clare who assumed responsibility from Berntson. TakingITGlobal then initiated the design of the training and orientation week for the new editors in preparation for the translation of the site for launch at the Global Knowledge Partnership (GKP) Annual meeting in Sri Lanka.

Technology

Creating multilingual functionality on a Drupal site requires the installation of a number of modules. However, the version of Drupal we had (4.6) was not compatible with some of the required modules. To address the issue, we upgraded to the latest version of Drupal (4.7). We then found that our version of Drupal that was not the “vanilla” version of 4.6, but a special custom version that Bryght had created when they initially created the site. This special Bryght version of Drupal could not be upgraded to 4.7. Alan Dixon’s expertise was again indispensable as he developed a work-around where he exported the data from our 4.6 version into a new install of Drupal. Dixon then installed the necessary modules, which still required some custom development. This need arose because the modules had either not been updated by the Drupal community to work with 4.7, or because the modules were not designed to work together.

In addition to adding multilingual functionality to the site, TakingITGlobal completed another round of site tweaks, bug fixes and improvements to prepare all three language versions of the site for the launch at the GKP meeting. In partnership with Ugabytes, we also launched an integrated Support Centre page on the core site that enables users to send questions to the Ugabytes support team. We also unveiled a new and simplified front page that focused on the site’s most popular feature – blogging.

Editorial and Content – Translations

After we delivered training, the editors translated the site into French and Spanish. Like the cloning of the core telecentre.org site for PacTOC, translating the site using our custom Drupal configuration was groundbreaking work. Since we had no precedent or strategy to follow, we developed our own translation strategy. Additionally, the ‘hacked together’ nature of the modules we were using combined with the usability issues with Drupal, meant that the editors faced an unclear and confusing set of translation interfaces that assumed knowledge of advanced concepts. Despite these challenges, the team fully translated the site within a month. In May, the French and Spanish versions of the telecentre.org core site were ready to be unveiled at the GKP meeting.

Online Strategy

While the preparations for the GKP meeting took place, Raynes-Goldie worked on the update to IDRC's extensive Online Strategy document at the request of Mark Surman. The update was to reflect TakingITGlobal's increased responsibilities and include our recommendations from our experience with the PacTOC launch. Raynes-Goldie did a significant reworking and updating of much of the document and added a Roadmap section which outlined proposed solutions to many of the identified issues we had experienced up until that point.

Partnerships – Content, Library and Support Centre

Since the beginning of the project, TakingITGlobal had gradually taken more responsibility and filled in for partners that had not yet been brought on board. One of these areas was ensuring that the site was filled with relevant and quality content that reflected the pulse of the telecentre movement. Originally, IDRC proposed to have an ecosystem of partners who would provide documentation, news, support resources and library materials in the form of blog entries and other types of content. Since this ecosystem had not yet fully developed, TakingITGlobal developed other ways of getting information, stories, resources and news that was relevant to the telecentre movement to include on the site. This included finding and monitoring email lists, RSS feeds and forums. By July 2006 (as discussed in the next section) we had fully deployed our content strategy.

TakingITGlobal also filled in with respect to documentation and technology support for partners, especially regarding the Library and Support Centre. TakingITGlobal worked with Social Source Commons to create the next version of the Library. To this end, TakingITGlobal created wireframes, a user story, and requirements for the Library.

As well as the Library, TakingITGlobal worked closely with the English Support Centre partners, Ugabytes, to improve their technology and integrate it with the core telecentre.org site. In working with Ugabytes, TakingITGlobal recognized a need for increased technical and documentation capacity and provided that support. The key outcome was that by the GKP launch, Ugabytes had an improved Support Centre site that provided seamless support request functionality from both its page and from the telecentre.org core site.

June and July 2006: E-book, Contest and Blogging

During preparations for the PacTOC launch in February, TakingITGlobal began work on a strategy to further increase participation and user submitted content on the core telecentre.org site. This strategy included a contest which asked people to submit their best stories about community and telecentres. As we prepared for the contest, IDRC had also contracted TakingITGlobal to create an online version of their "From The Ground Up" book that documented the telecentre movement.

So, IDRC requested that we link the contest in with the launch of the book as a promotion and excitement building mechanism. Based on IDRC's requirements, we designed and executed an interactive online contest that would gather the best stories about the telecentre movement. Entries to the contest were not only be eligible for a prize, but would also be included in the online version of the book which was aptly named "The Living E-Book."

Like the other phases of this project, the resources needed for the e-book contest exceeded project expectations. The project required coordination across a team of designers; technical people and editors and tight integration of the various components of the interactive contest pages, contest marketing materials and the e-book itself. In July, we launched the contest. By the time it closed, we had over a hundred contest entries in four languages (English, French, Spanish and even Hungarian!)

July was also the month that Fernan Sepulveda, our Spanish Editor, traveled to the Dominican Republic for the Caribbean Community Telecentres Workshop. Sepulveda provided hands-on blog training, technology support, simultaneous translation and promoted the e-book contest. Sepulveda also covered the workshop through photography, blogging and podcasting.

August to October 2006: Online Community and Content

In mid-June, all of the telecentre.org team at TakingITGlobal participated in a three-day orientation and planning workshop in Ottawa with the rest of the telecentre.org team. A key outcome of this meeting was a decision to have TakingITGlobal return to its original mandate of building online community. Up until this point, TakingITGlobal had taken on roles that were originally intended to be fulfilled by other partners, such as managing the technology design and implementation for the entire project; managing online partnership coordination; evolving the Online Strategy; usability and technology consultation and support for online partners and documentation support. TakingITGlobal had also been working with almost no content support as the documentation, news, Support Centre and library partners had still not been brought on board by IDRC. TakingITGlobal had not been allocated additional resources to accomplish an increased mandate, so we were challenged to fulfill all project requirements. So, in order to better leverage TakingITGlobal's expertise and to enable us to achieve the project's core goals, IDRC decided that TakingITGlobal would spend the rest of the contract focusing entirely on online community and content development, which was meant to be the focus from the beginning, but was unable to be prioritized given that the project was in such an incubation stage.

TakingITGlobal then developed a plan to refocus our energies on building the online community and developing content on the site. We designed and executed a week-long training and brainstorm session with the editors. TakingITGlobal

brought in the expertise of online community experts from both inside and outside TakingITGlobal. From that week, we developed an engagement strategy focused around our most popular feature – blogs – and combined it with outreach to the email lists which is the technology most familiar to the telecentre movement. We also developed a standardized set of content features to appear on the site each week, including interviews; news summaries; bridge blogs; podcasts; weekly photos and spotlights. These features highlighted the best and most interesting content relevant to telecentres from around the blogosphere and on email lists. We also built in strong linkages between our blogs and the mailing lists by exchanging the best content between them. We also ensured that the best content was shared across the three language sites through bridge blogging. To better reach out to the community, we sent out personalized emails to every single new member of the site.

Towards the end of the summer, TakingITGlobal launched a pilot project to gather on the ground information to share on the site. We contracted Malick Sawadogo, a telecentre leader from Burkina Faso, to travel to nearby telecentres and take pictures of and blog about each one. At the end of the project, Malick had documented ten different telecentres and shared the information on the site.

Another decision that was made at the meeting in Ottawa was to move the core telecentre.org site to community.telecentre.org and turn www.telecentre.org into a splash page that directed visitors to different telecentre.org initiatives. TakingITGlobal designed and coded this splash page and handled the subdomain transfer.

Summary of Outcomes Relative to Initial Goals

GOAL: Set up telecentre.org support.net.in.a.box and event.in.a.box online platforms, and ensure that new 'sites' are available on an as needed basis.

Accomplishments:

PacTOC and WSIS sites launched.

Changes:

This strategy was put on hold following the feedback from WSIS and PacTOC.

Learning:

- Don't sell "vapourware" – these sites were promised to many partners by IDRC before they were actually developed. When the decision was made to put this strategy on hold, some partners were disappointed.
- Some networks already have sites they would like to improve, rather than installing an entirely new site (which is what would happen with this strategy). So, a useful strategy moving forward would be to provide solutions for partners who have pre-existing sites and those who do not.
- The proposed method of creating PacTOC was not viable, and the alternative was time consuming and resource intensive.

GOAL: Create and maintain a vibrant online community at www.telecentre.org, adding content on a regular basis and developing strong links with sites run by telecentre.org partner networks

Accomplishments:

- We launched the online community site in French and Spanish.
- We grew site from 60 to almost 1000 members across all language sites.

Changes:

- This became main role of TakingITGlobal in the later stages of the project.

Learning:

- Without the outside support and introductions, it is a challenge to get TakingITGlobal editors connected with on the ground networks.

GOAL: Establish an ongoing process for sharing current information about the telecentre movement by writing blogs, creating monthly features and gathering content from partner sites.

Accomplishments:

- TakingITGlobal developed and executed a strong engagement strategy with numerous informative and relevant blog postings being created by editors in three languages each week.
- Featured Topics were created to highlight and encourage content on sharing telecentre experiences. This has now evolved into mailing list summaries where over 30 have been created (10 in each language)
- We developed and executed a contest to gather the best stories from around the telecentre movement.
- We spearheaded and managed an initiative with a telecentre leader to document local telecentres in Burkina Faso through photos and blogs.
- Initial partnership discussions have taken place with i4d Magazine

Changes:

- Many of the partners to support this goal (for example, documentation and news partners) never came on board, so much of the anticipated content from partners' sites was not forthcoming. Thus, the main blogging was done by TakingITGlobal editors.

Learning:

- Website editors need more connections with partners and those on the ground.
- IDRC staff and partners need to blog to increase diversity of voices

GOAL: Develop an online library that collects the best information available for telecentres, with an emphasis on presenting curriculum that people in telecentres can use in their community.

Accomplishments:

- TakingITGlobal developed wireframes and requirements documents to create online library using Social Source Commons

Changes:

- From the start, it was unclear who was responsible for implementing the technology and content for this goal. This is now a goal for year two.

Learning:

- Drupal is not one stop shop it was thought to be, so we need to use another platform or create custom technology to run Library.

GOAL: Put in place mechanisms that will help telecentre people collaborate, placing a special emphasis on the link between face-to-face meetings and online collaboration.

Accomplishments:

- TakingITGlobal provided content and technology support at meetings in Tunisia (WSIS Phase II), New Zealand (PacTOC) and The Dominican Republic (Caribbean Community Telecentres Workshop). These meetings served to build stronger connections between the online community site and people on the ground which resulted in an increase of locally created content on the site.

Changes:

- Plan to support these meetings with event.in.a.box put on hold, based on feedback at WSIS and PacTOC.

Learning:

- People need to blog or at least be trained during face-to-face meetings otherwise they will not get involved with the online community site.
- TakingITGlobal editors need to be enabled to attend more on the ground events – only two out of five staff members attended events.

GOAL: Offer online tools and content for use on telecentre network web sites, and help to build community amongst editors and others developing content on partner web sites.

Accomplishments:

- TakingITGlobal worked closely with Ugabytes to revamp and improve their support centre technology.
- Based on our experiences in year one, we have a clearer idea of what exactly these tools are and how they will be implemented.

Changes:

- Due to resource constraints, this stopped being a TakingITGlobal role.

Learning:

- Email is a more familiar technology to telecentre people so it needs to be used much more to increase participation and engagement.
- Most of the project partners do not have editors or content developers, so it is hard to build content partnerships with them.
- If people are not comfortable using the tools we provide, they will not provide content. So, we need to make our tools as easy and friendly as possible.

GOAL: Evolve and improve the telecentre.org web site and associated platforms on an ongoing basis using continuous feedback from site users.

Accomplishments:

- TakingITGlobal completed three rounds of site improvement based on user feedback at WSIS and PacTOC.

Changes:

- Early on, TakingITGlobal assumed responsibility for technology development on the site from Bryght. Later in the project, IDRC took on this responsibility. This was done to free up our limited resources so we could focus entirely on leveraging our expertise in community building.

Learning:

- IDRC's expectations of RSS were too high. Although this was one of the main decision-making criteria, Drupal sites do not connect as well as anticipated with RSS, so other aggregation solutions need to be found.
- There are issues with Drupal as a platform. Please see the section on Drupal on page 19 for the full details.

GOAL: Undertake and report on ongoing research about the information needs of the global telecentre movement by monitoring information requested the telecentre.org site.

Accomplishments:

- We created a Roadmap based on learning up until March 2006.
- TakingITGlobal did a significant update to the telecentre.org Online Strategy document.
- We tracked and analyzed page views on the online community site to determine which types of resources were in most demand from the telecentre movement. See the recommendations section on page 22 for a summary of our findings

Changes:

- This goal likely become a role for Support Centre partners, such as Ugabytes, to fill.

Learning:

- It is much easier to get this type of information from in-person events than from the website. So, in the future, the online community site and its editors need to be much more connected with people on the ground.

GOAL: Monitor and evaluate the process of information sharing within the telecentre.org network, and develop regular recommendations on how to improve this process.

Accomplishments:

- TakingITGlobal developed and executed a blogging initiative to foster a community of blogging by leading through example.
- There is a growing number of telecentre people blogging on the online community site.

Changes:

- Blogging has been the main tool of accomplishing this goal thus far.

Learning:

- IDRC over estimated the culture of storytelling and information sharing within telecentre communities. More needs to be done to encourage this practice if the online community site is to be of optimal use for telecentres.

Key areas of learning

Drupal

Throughout the duration of the project, TakingITGlobal developed reservations about the use of a Drupal-based solution for the online component of the telecentre.org project. We based these reservations on the experiences of our own editors who had to use the administrative interface of the site; our technical team who had to develop for it, but most importantly, feedback from people in the telecentre movement who struggled to use it. We received feedback via email and at in person events, such as the launch of PacTOC in February 2006. Overall, Drupal did not live up to project expectations with respect to scalability; cost effectiveness, customization and adaptability and content aggregation.

Usability

The core issue arises from unclear workflows and problems with “findability.” As blogger and Drupal user Nick Lewis put it in his analysis of Drupal, “Everything is organized in accordance to how it functionally relates to Drupal. Not how it relates to a user's tasks, much less goals.”¹ This made it difficult for users to perform basic tasks such as registering, logging in, blogging and uploading pictures. All in all, Drupal is hard to use, especially for people who already face a number of other barriers to getting online. The telecentre.org site should make things easier for users, not more difficult.

¹ <http://www.nicklewis.org/node/837>

Drupal also poses challenges for editors. As we experienced, site editors are often faced with technical issues that obstruct their editorial tasks. For example, translating the site required the use of advanced interfaces and knowledge of programming concepts such as “strings.” It also required a great deal of trial and error by the editors, as the workflow was not straightforward. Basic formatting on the site can also lead to technical issues. These technical issues are frequent and require that editors either learn intermediate internet/computer skills (troubleshooting, bug reporting, html, coding basics such as variables etc.) or seek technical support. These technical challenges are not only frustrating for editors, but create the need for more technical support overhead.

Customization and Adaptability

One of the benefits of and reasons that Drupal was chosen was also one of its weaknesses. Drupal provides a core set of functionalities which can be augmented with modules developed by Drupal’s open source community. While these modules make it Drupal highly adaptable and upgradeable, they are often a challenge to install and integrate with the core Drupal system and other installed modules. This is because Drupal modules are developed by many different people who do not necessarily coordinate the development of their modules with other existing modules. Furthermore, many modules are only compatible with certain versions of Drupal. If a new version of Drupal comes out, previously existing modules may no longer work, while newer modules will only work with the latest version. This can lead to a situation that TakingITGlobal experienced during the development of the multilingual functionality where two modules are required to meet a certain project objective, but each module works on a different version of Drupal from the other. The result is that custom work is often required to get different modules to work together or to work with different versions of Drupal. Once the modules are customized, it then becomes harder to benefit from ongoing upgrades and integration of new modules.

Another downside to Drupal’s adaptability is its instability. One small change on one part of the site would have an unexpected effect on another. Parts of the site would often stop working, or formatting on certain pages would suddenly be incorrect. As a result, the site required constant monitoring by the editors and fixing by technical staff.

We also discovered that there were limits on customizing core Drupal functionality, such as the user profile feature. To change these core features to make Drupal easier to use or add certain features would mean that our install of Drupal would not be compatible with other Drupal modules. Since one of the reasons for choosing Drupal in the first place was its modularity, we were instructed to not customize core Drupal code. This greatly restricted the amount of work we could do improve the usability of the site.

Cost effectiveness

IDRC initially believed that the Drupal community would provide modules and customization work at little or no cost. This presumed community support combined with the modularity of Drupal made it a very appealing solution as it meant essentially free development work. However, neither of these assumptions were actualized. Drupal developers are expensive and most people in the Drupal community will not work for free. In sum, while there is some momentum behind the Drupal community, the level of support expected was unrealistic.

Content Aggregation

Another key selling point for Drupal was its ability to aggregate content from around the web and remix it and reuse it on the core telecentre.org site via RSS. This functionality was not a core Drupal feature, but could be accomplished with a module called Aggregator2. This module was provided for free by a member of the Drupal community. Unfortunately, the functionality of this module never lived up to project expectations. The module was buggy and stopped working entirely in the middle of the project. When it did work, the module had a difficult to use admin interface which made editing and showcasing aggregated content very time consuming (and nearly impossible to use in poor connectivity situations, as we experienced at WSIS). Not only does this demonstrate a shortcoming with respect to aggregation, but also serves to demonstrate the challenges of working with Drupal modules.

event.in.a.box/support.net.in.a.box model

The first launch of a network site (PacTOC) in February 2006 and the preparation leading up to it were an excellent testing ground and feedback mechanism for both the core telecentre.org site as well as our strategy for deploying and supporting future event.in.a.box and support.net.in.a.box sites. It gave us a better idea of how much work is actually involved in launching and supporting partner sites. Based on feedback, requests and observing how participants used the site during the launch, we also gained a better and more concrete idea of what kinds of tools are most useful to users of the site.

Interestingly, much of the learning the launch of the PacTOC site and feedback from the launch participants was echoed in an Interim report by April Pojman.

Users of the site wanted:

- More of a focus on good (local, relevant, easily accessible) content and less on “website templates or hosting space.” (Interim Report)
- More input into planning
- Support for local and multiple languages
- Facilitation of contact and communication between people and telecentres
- A lower technical entry barrier to using and administering the site

As the launch of PacTOC demonstrated, developing, launching and supporting partner sites with Drupal requires a large investment of time and resources – a bigger investment than was originally anticipated.

The result is that most of our time and energy is invested in supporting these sites so that improvements which fulfill the other requests take much longer to fulfill, even if those requests are more important and make more of a difference to our stakeholders.

Furthermore, TakingITGlobal was only given the resources to support and create “out of the box” solutions when partners often want something much more customized to their needs. As we saw at the PacTOC launch, this lack of customization can create ownership issues where the users of the site do not feel they have a stake in creating or using it.

As Meddie Mayanja (Program Officer for Africa at IDRC) has reported, many telecentres and telecentre networks already have websites and are reluctant to switch over to an out-of-the-box solution when their existing website already does what they need. There are also challenges with transferring the existing data from the old website to the new out-of-the box solution. Furthermore, maintaining a sense of ownership and momentum can also pose a challenge when switching from a website made by a group of people at an organization to an unfamiliar one which was created by an outside organization. But most importantly, the goal of the telecentre.org online strategy is to build on existing websites, rather than replacing them. We need to support the work and momentum that already exists. As it says on the first page of the telecentre.org Online Strategy Document:

“telecentre.org should not create ‘a big portal’. Rather, it must find ways to build on and extend existing web sites, mailing lists and other online resources for telecentres.”

The best way to accomplish this while addressing the issues outlined above is with better integration between the main telecentre.org site and the content on it with existing websites, rather than providing out of the box solutions. As a result of these findings, TakingITGlobal recommended in March 2006 that the creation of these network sites be put on hold. We also recommended a shift away from focusing our resources on providing support-net-in-a-box sites to developing better content and tool “plug-ins”; providing “skinnable” services and creating simple and user customizable minisites within the Drupal platform. These tools and services are much more sustainable and can be easily “remixed” in different combinations by telecentre people in ways that best serve their purposes and needs.

Recommendations

TakingITGlobal has two key recommendations for year two of the project. The first is that the choice to use Drupal should be revisited. The second is that the editorial team needs to be based on the ground.

Technology

Based on our experience with Drupal and its failure to live up to project expectations, we strongly recommend an exploration of other technology solutions, or a partnership with an existing successful community, such as DigitalDivide.net, to fulfill the community component of the telecentre.org strategy. Drupal was chosen as a one-stop solution to host the Library, Support Centre, events, blogs, and all other aspects of the online strategy. Since the Library and Support Centre are now slated to be implemented with other platforms and the telecentre.org core site is largely a blogging site, there is much less of a reason to use Drupal. Other platforms, such as Wordpress, offer extremely simple to use solutions that are easy to maintain and deploy.

If the choice is made to stay with Drupal for year two, TakingITGlobal recommends that the telecentre.org site be hosted and supported by a Drupal solution provider with extensive experience in utilizing Drupal tools to support other vibrant online communities.

Resources

Based on the number of views on individual pages across the English, French and Spanish community sites, we believe that the following issues are of interest to the telecentre movement. This data can be used to guide Library and Support Centre resource planning and development in year two and beyond. The areas listed below are listed by highest page views, in descending order.

English

- Keeping up with technological innovations (solar energy, WiFi, antenna etc.)
- How to use online technologies (RSS, Drupal, audio tools)
- Reports about events in the telecentre community and event promotion strategies
- Specific telecentre issues (sustainability, gender issues)
- Best practices in telecentres

Spanish

- How to use the telecentre.org online community site
- Information on events
- Information on online Events

French

- Practical resources (Business plan, how to start a telecentre, survey, marketing plans)

- Keeping up with technological innovations (solar energy, WiFi, cantenna etc.)
- Localized telecentre content (telecentre spotlights, interviews)
- Information about existing networks in Africa
- Social technologies (wikis)
- ICT national policies
- Community-based initiatives (community radios)

Editorial

Since this was a first experimental year of a ground-breaking five year project, TakingITGlobal felt very strongly that the technology and editorial teams needed to work closely together. This would ensure an iterative and responsive design process that would ensure a tight feedback loop between editors, users and the technology. As the teams continue to grow, we feel that the relationship between technology and editorial remains essential, as does the need to extend the editorial team on the ground for year two. This need is even more pressing since the ecosystem of partnerships that was expected to be developed to provide news and documentation directly from telecentres is still yet to materialize. Without this content support, it was and is a challenge for editors housed in Canada to best reflect the pulse of the telecentre movement.

As blogging and Web 2.0 culture is still very new to the telecentre community, we recommended that this distributed editorial team be supported and managed by two blogging and Web 2.0 experts housed at TakingITGlobal or another partner with online community building experience.

We also recommend a stronger integration between the IDRC and the telecentre.org site. IDRC staff need to become more involved in site by blogging about their work and showcasing their experiences on the ground. IDRC can and needs to set an example for the telecentre community if a strong culture of storytelling is to emerge.

Proposed ToR For Editorial Team in Year Two

The telecentre.org online community needs regionally based blogger-editors who are embedded in existing ICT4D or telecentre related organizations. Priority regions should be aligned with the priority regions for the broader telecentre.org initiative.

These blogger editors must:

- Be bilingual in English and their regional language
- Be experienced bloggers (understand the blogosphere, online promotion, RSS etc)
- Be respected in the telecentre movement

Core goals

- Showcase the best practices, most important news and most interesting stories of interest to the telecentre movement

- Reflect pulse of telecentre movement
- Create connections between telecentre people
- Encourage and promote storytelling within the telecentre movement
- Increase awareness about and within the telecentre movement
- Build a greater sense of community and togetherness within the movement
- Encouraging and supporting the use of online tools
- Strengthening and continuing to build connections made at on the ground events

These goals will be accomplished by the following daily/weekly tasks:

- Bridge blogging, both individually and in cooperation with other regional blogger editors
- First hand reporting of local and regional events of interest to the telecentre movement
- Creating summaries and commentaries on issues in the blogosphere related to telecentres
- Creating weekly news roundups; spotlights on telecentres or telecentre projects; interviews with telecentre leaders and summaries of mailing list discussions
- Promoting and showcasing contributed content
- Actively finding and keeping up to date with telecentre or ICT4D resources (blogs, mailing lists, forums etc)
- Participating in relevant mailing lists
- Leaving comments and trackbacks on relevant blogs

General tasks include:

- Recruiting and training local bloggers and encouraging a culture of storytelling in their region
- Attending weekly meetings with the managing editor and other regional editors
- Advising the managing editor about regional and local needs and feedback
- Provides some translation support