Capacity Building projects 2015 Report

GLEN-Powerline project: quality engagement for equality

0. **The Story in numbers**

Dates	1st April – 31st August 2015 software development 6th May 2015 Survey on DARE Forum members' technology use and needs 1st April – 1st May 2015 GLEN strategy process online discussion to study technology use and online engagement in action 10th September 2015 1st webinar 11th September 2015 2nd webinar
Number of Participants	72 participants

Type of Participants	Software development
	   1 software developer
	   1-1 project coordinators from Powerline and GLEN
	   1 project manager from GLEN Latvija
	
	DARE Forum CSO actors *"engagement technology"* survey
	   28 survey forms filled in
	
	GLEN strategy process – studying technology and online engagement in action
	   27 young Europeans from the alumni and partners of GLEN from 8 countries,
	   1 GLEN Strategy Process coordinator,
	   4 Working Group facilitators
	   7 GLEN member organization representatives
	   1-1 project coordinators from Powerline and GLEN Latvija
	
	Webinars
	   1-1 project coordinators from Powerline and GLEN Latvija
	   1 member of the DEEEP Project team

Outcomes achieved	Out of the outcomes envisioned in the applications, the following outcomes were successfully realized: 1) Through the experience of the GLEN strategy exercise and through creating space for involvement for the DARE Forum members during the project time frame, an increase in functionality of the Powerline platform to serve the needs of the DE sector. 2) Through the lessons learnt, an increase in the Powerline platform functionality to a) share knowledge and experience effectively, b) boost participation in communities of practice, c) enable more frequent and meaningful democratic engagement of constituencies for NGOs and

	grassroots movements while using less resources, hence becoming more capable to serve the corresponding needs of the European and World Citizens Movements as well, d) become more responsive to the needs and priorities of the civil society sector. 3) To gain a better understanding on the learning objectives previously defined.
Partners involved	Organisations that took part in the activities mentioned above are Zavod Voluntariat, Slovenia PAH Polish Humanitarian Aid, Poland Hungarian Volunteer Sending Foundation, Hungary Engagement Global gGmbH ASA Programm, Germany GLEN Slovakia, Slovakia INEX-SDA, Czech Republic BRECI, France Association GéCo, France DARE Forum DEEEP office, Belgium Impuls e. V., Germany Development Perspectives, Ireland

(Please provide a short summary on the quantified indicators achieved – 50 words max.)

Main focus was the software development, to study engagement technology and share with stakeholders. Quantified indicators well represent this sequence with primary activity: software development (4 people engaged), and secondary activities: the DARE Forum survey, the GLEN online discussion (41 participants) and the webinars with 3 participants (growing as webinar video is published).

1. **Introduction and Taking Action:**

Background info: where did the idea started, what impulse it, who was involved in its conceptualization? Explain how this story began.

Powerline
Today, most online social network and community engagement technology is not designed for the needs of civil society. It's not designed for the nuances of democratic participation, for learning, or for individual and collective action in and across communities. Although some of these current technologies may have had some sort of intended purpose at one point, almost none of them were intended to serve civil society and its many critical goals. Civil society needs a technology that is specifically designed to strengthen democracy, civic engagement, and civil society that can align with the values and principles of civil society as much as possible. The collaboration between GLEN and Powerline was born out of a mutual recognition in the need for such a technology to better understand civil society and for civil society to help shape a technology designed specifically for civil society.

Unfortunately, despite lowering general operating costs for many organizations around the world (due to technology), building custom technology remains painfully or prohibitively expensive for many civil society organizations. However, if a technology could be open, scalable, global, local, and valuable to multiple

stakeholders and CSO types, a common civil society network technology could help reduce this sector-wide waste on in-house technologies and patchwork solutions to strengthen the space as never before. The collaboration between GLEN and Powerline was born to explore this.

GLEN

GLEN has started a comprehensive process to re-visit its mission and operations two years ago, which was designed to be an open, democratic and participatory process, including the voices of the ca. one thousand-member European alumni, the ten member organizations and over sixty partner organizations from around the globe. The quality online engagement of the stakeholder groups' representatives posed challenge in-between costly physical meetings, however, was crucial for their perspectives to be truly valued and included. GLEN therefore tested and used a wide range of online communication and collaboration tools, including Buddypress based online social and collaboration platform called GLENweb (glen-web.org) and the online discussion with the Bublaa plug-in on the Wordpress platform, along with many others.

Early 2015, GLEN network officer Andras Martoni read Jesse Chen's Powerline partner search for this call through DEEEP communication channels. They quickly identified the commonalities in the two organizations' goals as well as that they shared similar visions on the need for more advanced technology in civil society. They decided to cooperate in the framework of this call to study this need more in-depth during GLEN's multi-stakeholder process as well as to put joint effort in advancing Powerline technology in accordance with the findings. Diana Stendzeniece, member representative of GLEN Latvija offered to host the project on GLEN's end, and to provide project management support.

2. Rising Action:

How did you prepare the activity? Who was invited and involved? What were your expectations, fears, assumptions?

During the initial design of this project, GLEN and Powerline collaborated to identify key requirements and activities that would be needed to achieve the objective of building a better technology for civil society. This involved several meetings among GLEN's Diana Stendzeniece, Andras Martoni and Powerline's Jesse Chen to plan milestones, share stories on struggles, and identify areas of common understanding.

These conversations were not always easy as we soon realized, we had different concepts of what the main focus of the software development should be. Jesse Chen thought the bulk of the resources should be devoted to building Powerline's European Union compatibility and server need, whereas Andras Martoni thought they should be devoted to software development associated to the needs identified during the "online discussion". Once confronted with that difference, we understood that actually both of these approaches are included in the project application so we moved forward by focusing on areas of common interest. The mission of the project provided an anchor for trust and commitment.

From a Powerline perspective, we planned on developing a few features in the original proposal and our only fear was time. We assumed that our mutual agreement of the proposal would remain unchanged and so we made certain internal decisions based on the expected work to come.

From a GLEN perspective, we were also worried about the timing as the planned "online discussion" to roll out and test Powerline took place between 1st April and 1st May, very early from the project's perspective. Additionally, it is common to our stakeholder groups to be rather critical of consumer society, therefore many of them don't use smart phones or have too old ones to be compatible with the required Android version to use the Powerline mobile application. Once we realized that the web application was unrealistic to desire by April, we agreed to focus on closely examining the "online discussion" from a technical engagement point of view, with the aim to learn about civil society engagement, indentifying opportunities and obstacles, crystallizing needs. This proved to be a successful approach and an enriching exercise with Jesse Chen, who is an expert of this field.

3. Climax:

What happened? What went wrong, right, unexpected? Who participated?

We proceeded forward with the project in May 2015 when we began with the initial civil society technology research survey. All DARE Forum participants on the May event in Riga, Latvia filled in a form to analyze their organizations' use of and attitude towards technology as a means to communicate, collaborate and engage target groups. Findings were drawn from the 28 filled-in forms by Jesse Chen, disseminated by Andras Martoni and is attached as a separate document to this report.

After the survey completion, a majority of the time was focused on technology design and development. Understanding the nuances of certain problems so that the appropriate solution could be created was a challenge. Ultimately, it was our goal to create stronger technology for civil society and a stronger understanding of how civil society could benefit from technology. As a result, we changed from our original scope to a revised set of requirements that could better serve the needs we had identified. This change resulted in an unanticipated schedule impact that was not expected, but we found a way to work through the issue to keep the project moving forward and, more importantly, to keep pursuing the original project objectives beyond the original established timeframe of the project.

4. Falling Action:

What Changed? Were the capacity needs answered? What did the participants felt (their evaluation)?

Due to the fact that Powerline was not at the point of technological readiness to be used during the GLEN Strategy Process, we had to figure out a way to change the original plan while keeping our original goals intact. As mentioned previously, the technology scope was the primary component that changed. A new set of features and technology development was pursued to be more responsive to civil society's needs. This was a frustrating change for both parties, but it was important for the long-term best interests of creating a technology that could be broadly useful to the civil society space.

We remain fiercely in belief that technology is not just an option for civil society, but a requirement in a world where so many citizens are becoming Internet consumers without any meaningful outlet for virtual democratic engagement. A technology platform is needed that is broadly designed to enable civil society to engage with its own community members within and across different silos and thematic foci. In fact, the slow but

purposeful effort undertaken as part of this effort to create capacity-enabling and capacity-building technology specifically for civil society is required for any true systemic change effort. We were forced to question pre-existing notions of what was required and what was needed as we went through this project and we found a better path as a result of this experience. Now, although delayed, our project will result in a stronger, more meaningful impact over the long term for civil society.

5. Resolution:

What happens next? What did you learn that could be useful for other readers?

While we had intended to report lessons learned on the technology and funded project itself, we have identified a couple of high level "meta" lessons learned that are worth highlighting:

On CSO-Powerline Partnerships - Back in March 2015, Powerline was not yet an open source software platform. As a result, only a certain developer agency was capable of making technological contributions to the Powerline codebase under an exclusive relationship. Consequently, GLEN contracted the software development directly with Powerline, and Powerline worked with this subcontractor to deliver the agreed scope. This subcontractor approach resulted in a number of challenges that, in hindsight, could be avoided in the future with a different approach. We have identified a more effective model that Powerline will be adopting moving forward and that all CSOs should consider in working with any third-party technology solution.

Moving forward, Powerline will offer project management and advisory services to CSOs for a small fee. The CSO, under advisement from Powerline, will contract directly with a developer under a separate "fixed price" contract using internal budget or grant-specific funding to make a contribution to Powerline's open source codebase. On behalf of the CSO, Powerline will manage the developer's efforts and contributions. This establishes direct contractual accountability between the developer and the CSO (removing Powerline from the middle) and establishes direct contractual accountability between the CSO and Powerline (removing developer issues from the middle). This approach also allows any civil society organization to utilize general budget for freelance or consultant-based technology support/development for an open-source project, which is far easier (at least in the United States context) to manage financially and legally than to secure dedicated grant funding for Powerline specifically. From a Powerline perspective, this approach reinforces the open-source model and provides Powerline with a clear delineation between project management responsibilities and separate development efforts for third-party interests.

On Technology Outsourcing - In general, a number of different industry standards and best practices exist across different countries and cultural contexts. For example, in the United States, it is not uncommon for a technology project to take one of three invoice forms: 1) time and materials (costs are variable; timelines are dependent on hours worked; can be a very affordable way of managing work), 2) fixed bid pricing (costs are fixed in advance; timeline is rarely guaranteed), and 3) value-based billing (cost of the project is based on the approximate revenue-generating potential/expectations of the project). When contracting work to be addressed with a third-party developer, it is critical that both the civil society organization and the developer be in agreement in the following areas: 1) scope (what work is to be done exactly), 2) price (how much will it cost), 3) schedule (when will it be completed), and, to a lesser extent, 4) quality (how strong will the output be?). The invoice/pricing approach and the contracting details need to be in sync, and both parties need to be

in agreement on expectations. For example, if it most important for the CSO to have items A, B, and C be completed in 3 weeks, then the CSO should expect that either increased price or decreased quality will come as a tradeoff. If scope changes at some point, the entire re-evaluation of the schedule and price need to be fully re-analyzed and discussed as well.

It is generally recommended that civil society organizations contract using a fixed pricing approach to avoid cost overruns. This is substantially easier and more realistic to get a third-party developer to agree to when the technology is setup as an open source project (with all appropriate documentation, reference materials, etc.). However, as noted above, the tradeoff here is that the fixed cost may result in schedule overruns. For the purposes of this project, we learned first-hand how difficult this can be to manage given the nature of the fixed schedule of the DEEEP project. Fortunately, the mutual commitment by both GLEN and Powerline to the general spirit and intent of this project ensures that these challenges can be overcome.

Since you are telling a real story, please provide the following documents attached.

- **List of participants**

    Including first name, family name, the organization they come from and signature.

We attached (Ms Word format) to this report print screens of the GLEN strategy online discussions and the GLEN Powerline: Project Overview webinar as proof of participants. The survey was filled-in anonymously on the DARE Forum meeting in Riga, Latvia on on 6th May 2015.

- **Experts contacts**

Attached (Ms Excel format).

- **Contacts for more information**

    Name and reference of person in charge within the national platform and other useful contacts.

Contacts for more information are the same people as in "Experts contacts" of the project.

- **Presentations/Material used**

    This last section can be presented as an annex to the report.

Attached are two presentations of the webinars: Project Overview and Powerline Demonstration. The first webinar is also available at https://youtu.be/PxPpoifB00k

Relevant background documents and links

Attached is 1) the report of the findings coming from analyzing the DARE Forum survey in *DARE Forum engagement technology survey.docx* and 2) survey data (answers gathered) in *DARE Forum responses.xlsx*