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Information Technology for GOLDEN

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The Need

GOLDEN is a global multi-stakeholder network still in its early stages of development. It aspires to be a network of over two dozen research centers and potentially a few hundred companies, as well as other stakeholder. This is a report that aims to identify a development path for:

- 1) The GOLDEN web-site;
- 2) Contact management (CM);
- 3) Document collaboration (DC; and
- 4) Project management (PM).

There are four levels of need:

- 1) The central network hub:** This will grow to consist of a management team of possibly between five to 10 active participants. The team needs:
 - CM access to:
 - Individually contact people and organizations;
 - Contact groups of people and organizations; and
 - Access information in terms of their “status” with the network (from simply being an “identified potential participant” to one that is working with a GOLDEN memorandum of understanding).
 - DC tools to:
 - Co-create documents; and
 - Store and retrieve documents.
 - PM tools to:
 - plan, set milestones, and assign tasks; and
 - track progress.
- 2) The research centers (RCs):** Each research center will lead research with up to a half dozen corporations; each company will be a distinct research site, with its own CM, DM and PM capabilities, working in partnership with a research center. The RCs will potentially need the same tools, but with administrator access as a sub-group.
- 3) Other participants:** There is need for news, meetings and general information as well as access to key documents. GOLDEN will want to keep track of participants to know who is interested in its activities and to contact them for such things as newsletter distributions. The participants may also want to contact each other and form sub-groups around particular discussion topics.
- 4) General public:** There is need for general information which will be provided by the web-site static pages.

The Report Research

To prepare this report, the team:

- Drew on the significant knowledge of Spadewerk;
- Reviewed the experience of GOLDEN to date;
- Contacted over a dozen global networks to investigate their tools; and
- Investigated a number of specific software options.

The Recommendations

1. General Web-site

Recommendation: That when GOLDEN up-grades its web-site, it should consist of a public web-site and facility to sign-up for a newsletter/blog.

This recommendation implicitly proposes not to continue with the community portal. In the current configuration the portal was envisioned as a tool to facilitate connections between individuals and formation of, and exchanges between, community groups. The recommendation not to continue with this derives from observed common communications patterns: people are not currently using the site, except to store documents, which will be handled through a subsequent recommendation. There have been numerous attempts to encourage use of the portal for discussions, but people always revert to emails. This reflects a common experience of other community portals, unless they are actively managed.

However, there is value and no significant cost for GOLDEN to maintain a newsletter/blog mailing list for both participants and the general public. See Appendix A for more on implementing this recommendation.

2. Server Versus Hosted Application

Recommendation: That GOLDEN use hosted software.

There are two ways to provide CM, DC and PM. One is to buy a license to a software and to place that software on a user organization's server. Since GOLDEN has its own server to store research data, this is a low-cost option. However, that strategy is best for organizations that have significant IT maintenance capacity which is the major reason to recommend that GOLDEN use hosted software.

	Server	Hosted
Maintenance	Requires somehow organizing regular maintenance	Up-grades and maintenance part of the service
Cost	Up-front installation cost, then just maintenance (cheaper if maintenance available)	Pay per-user (more expensive, particularly for large volume users)
Customization	Theoretically more customizable, but expensive to do	Increasingly customizable by installing associated applications
Security	Perceived as more secure, but have to take responsibility of security	Greater fears of accessing of data, but in fact the provider's reputation depends upon security
Expansion	Cheap and easy	More expensive and easy

3. The Software

Recommendation: That GOLDEN purchase access to HyperOffice.

The following hosted softwares were considered in this investigation because of their reputation and familiarity with a team member:

- 1) Huddle
- 2) HyperOffice
- 3) Podio
- 4) Salesforce
- 5) Sharepoint
- 6) SugarCRM
- 7) Zoho

	Podio	HyperOffice
General	More of a social collaboration tool (for a network)	More of a business collaboration tool (for an organization)
Ease of Use	Requires going to a web-site	Hyperdrive sits on your desktop. This is only for DC, not PM and CM. That requires web access
DM Structure	Lists in terms of document creation with tags (where the industry is going)	Traditional folder structure with search
Cost	Free for non-.goldenforsustainability.org addresses; \$8/employee/month + \$1/admin/month for Golden addresses	See appendix B. About <ul style="list-style-type: none"> • \$640 for 10/year • \$1850 for 25/year
Versioning¹	No	Yes
The Provider	Podio was formerly known as Hoist. The company was founded in 2009 and is based in Copenhagen, Denmark with a San Francisco office also.	<ul style="list-style-type: none"> • Headquarters: Rockville, Maryland • In Business Since: 1998 • Number of Users to Date: More than 300,000 • Target Market: Small to Medium Sized Business Owners (SMB) • Status: Privately held
Expansion	Only charges for "employee" (.goldenforsustainability.org) addresses and only employees can create groups/ workspaces	Need to pay for each additional user
Support	Support by submitting a ticket with email follow-up.	Live on-line support by messaging or phone.
Flexibility	More flexible – new apps can be added	Less flexible – no "apps"; rather, modifications to given lay-outs
Mobile Access	Free	\$600/yr for 5 users

¹ "Versioning" is the ability to keep old versions of a document by the same name.

Note that when you can access HyperOffice through any mobile Web browser. The Mobile Access option allows sharing of contacts, sharing calendars and scheduling tasks.

There is a clear preference for one option that can integrate CM, DM and PM at a reasonable price. There are actually very few that combine these characteristics, and this led to a focus on Podio and HyperOffice. The table below lists major points of difference, with green indicating the strongest software on that dimension.

HyperOffice is recommended because of its ease of use, access and versioning capacity. Its cost is considered very reasonable in comparison with most competitors, but not Podio. Further notes of importance:

- the versioning requires about 1-1.5 minutes to actually synchronize the old version with a new one – this does not mean that you have to keep the doc open, but that you will not be able to access/see the new version for that period of time.

4. Training

Recommendation: That GOLDEN develop a training strategy.

No matter what choice GOLDEN makes, training and orientation are needed. In GOLDEN's case, this can be anticipated to be required for the Management Team when the software is adopted, and as new research centers develop need to make use of the software. Each RC should have a person identified as the key point person.

5. Questions

Following are questions that arose following circulation of the report.

Q: What is our future with our current web-host provider? Should we/can we move our web-site to our own server which is now being used for storing research data? Cost issues?

A: If all you'll need to host is a basic website/blog and a discussion forum there's no need to set up your own server. Hosting is just a couple of hundred dollars a year.

Q: We want a discussion board option...as I understand it, that is still basically the community portal, or is there another good option? The thought is that although no one is currently using it, there still might be some need in a year or so.

A: The portal does a lot of things you'll no longer need that just take up server space and adds clutter so it makes sense to delete it if it is not being used. I don't like the forum capabilities in BuddyPress (the current community portal platform) . We can still lock down the discussion forum to select users but remember that HyperOffice can't share a user database with anything else so if someone needs access to HyperOffice and the Discussion Forum, they'll need 2 user accounts.

Q: We will want both a blog and newsletter...can we have people sign up for both of them and the discussion board with one registration?

A: The newsletter requires a signup if you're building a list through Constant Contact, MailChimp or something else. You need the opt in here to keep legal and CAN SPAM compliant. The blog wouldn't require a signup, unless you mean that the blog is for members only? No public access?

Q: When we redo our web-site, if we initially chose not to have a community portal I presume there is no problem adding it later.

A: Correct. Should be no problem adding it later.

Appendix A: Changing the Web-Site

Recommendation A is associated with three additional actions. First is setting up registration for the blog and newsletter. The second is the removal of the member network from goldenforsustainability.org. The third is the setting up of a separate discussion forum platform. Both of these things can happen independently and do not need to be done at the same time.

Registration Set-Up

Recommendation: That GOLDEN create the Feedburner blog registration and a bulk email tool with templates for a newsletter and announcements.

Registration for the blog can be done through FeedBurner.

Cost: \$60

Registration for the newsletter can be done through one of the bulk email tools (Mailchimp, Campaign Monitor, Constant Contact). This requires creating an account in one of these systems, and a list. I would then embed the form that populates that list into the website. Note that when you use these systems, it's assumed you'll be using it for the actual sending of the newsletter as well. Templates for the newsletter can also be set up. They make it easy to manage sending out the actual email campaigns, point and click for the most part. Note that templates are only really required for sending anything other than plain text (adding any images, a logo, etc.).

Cost for setting up the list: \$60

Cost for templates: A few hundred dollars, depending upon sophistication.

Removing the Network

Recommendation: That GOLDEN remove the Buddypress community portal installation.

Having multiple locations to store information can easily cause confusion, and therefore it is recommended that the community portal be removed. Removal of the networking component involves the removal of the Buddypress installation from goldenforsustainability.org. Buddypress is the Wordpress Multiuser install that runs the basic website at the front part of the site as well as everything that accessed when members log in. Because the networking component can not simply be lifted out, a new Wordpress installation and importing all existing posts and other page content are required. This will still give the option of using Wordpress as the CMS to manage content, as well as maintain the existing blog on the website. Note that removing the networking component also removes the user driven data that has been uploaded as well. If any of this should be retained, a backup can be made of the leaf data (PDF files, uploaded docs) and archived.

After this work is done, the website will function as a CMS with all content open to the public. Should any need arise to lock down any of the content to members only, a membership system can be installed that will protect content for specific user accounts.

Cost: \$550

Setting up a Discussion Forum

Recommendation: That a PHPBB discussion forum be established.

There are a couple of options for a discussion forum. Both allow for basic threaded forum functionality. Users will be able to create and respond to threaded discussions. Both systems will allow for formatting of the post, attachments and embedding links. The first option BBpress offers a

good integration with Wordpress. Because it shares the same codebase and user table, it can install in the same database and may be easier to manage. BBpress sits inside your existing website so the look and feel is similar to that of the website.

The second option PHPBB is a little more powerful, but it is not a Wordpress application so it requires learning a different admin system. PHPBB is a dedicated forum application, not an add-on, and it is more secure. It also does a lot more, and the added functionality is perceived important to support GOLDEN's sub-groups. It allows users to subscribe to posts so if there is a topic they are tracking, they can subscribe to it through email. You can also allow users to private message each other, if you wish. It provides for moderation to message the entire board, which is good for telling people about site wide updates or posts. It also offers the ability to create discussion groups. However, PHPBB would also require a separate database install and a fair bit of design work to the templates to match the look and feel of the site. This adds a fair bit of cost.

Bbpress features - <http://bbpress.org/about/features/>

demo - <http://bbpress.org/forums/>

Cost: \$650

PHPBB features - <http://www.phpbb.com/about/features/>

demo - <http://www.phpbb.com/demo/>

Cost: \$1200

Appendix B: Pricing

	Core Collaboration as low as \$7 per user/month START FREE TRIAL	Enterprise Collaboration as low as \$15 per user/month START FREE TRIAL	A La Carte starts at \$3 per user/month START FREE TRIAL	Save 20% with an annual plan
Calendars	✓	✓		
Contacts	✓	✓	Not available	
Forums	✓	✓	as	
Reminders	✓	✓	stand-alone	
Voting	✓	✓	modules	
Wikis	✓	✓		
Documents ¹	✓	✓	\$3	
Projects		✓	\$3	
Email ²		✓	\$3	
Publisher		✓	\$3	
Outlook Sync		✓	\$3	
Mobile Sync			see plans below	
Web Databases			see plans below	

All plans start at 5 users.
Setup charge: \$49.99

¹ Included document storage: starts at 250 MB/user.
² Included email storage: 5 GB/user.

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Monthly plans	Core Collaboration	Enterprise Collaboration	Projects	Documents	Email	Publisher	Outlook Sync
5 users	\$44.99	\$99.00	\$15.00	\$15.00	\$15.00	\$15.00	\$15.00
10 users	\$79.99	\$179.00	\$30.00	\$30.00	\$30.00	\$30.00	\$30.00
25 users	\$184.99	\$419.00	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00
50 users	\$359.99	\$829.00	\$150.00	\$150.00	\$150.00	\$150.00	\$150.00
100 users	\$649.99	\$1,500.00	\$300.00	\$300.00	\$300.00	\$300.00	\$300.00
> 100 users	Call us for pricing: 1.800.434.5136						
additional user	\$9.00	\$19.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00

Save 20% with an annual plan