



Understanding Civil Society Portals:

Online content and community models for the CSO sector

Based on findings from five in-depth case studies and quick reviews of dozens of sites, this document provides an **overview of civil society portal approaches** and **practical tips for portal builders**. It outlines common approaches and challenges that have emerged from recent CSO portal projects. It also offers a set of basic planning tools that will help organizations in the process of building or upgrading their sites.

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Version 1.0 -- June 11, 2002

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About APC and the Author

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This document was written by Mark Surman. Mark is the president of The Commons Group, leading online community strategy and planning firm. His many projects have included building Canada's most popular progressive news web site (rabble.ca), leading the development of open source software for non-profits (APC ActionApps) and running a national ISP for Canadian NGOs (Web Networks). He has recently released a book entitled *Commonspace: Beyond Virtual Community*.

The Association for Progressive Communications

The Association for Progressive Communications (APC) is an international network of civil society organisations dedicated to empowering and supporting groups and individuals through the strategic use of information and communication technologies (ICTs), especially Internet-related technologies. APC and its members pioneer practical and relevant uses of ICTs for civil society, especially in developing countries. APC is an international facilitator of civil society's engagement with ICTs and related concerns, in both policy and practice.

What is a portal anyway?

Over the past eight years, a plethora of portal sites have emerged to serve civil society organizations and people working in grassroots social movements. There is a great deal of diversity amongst these sites -- they focus on different issues, regions, audiences and communities. They also come with different aims -- amplifying the voice of social movements, making information easier to find, sparking learning and collaboration. In fact, the sites that call themselves 'portals' are so diverse that many people might not even recognize them as all being from the same family.

Yet there are common components and approaches that allow us to say 'yes, that site is a civil society portal'. Mainstream definitions of the word 'portal' point to the most important of these common components:

Links: A portal is a web site that is commonly used as a gateway to other Web sites. (*SCORE strategic uses site - www.distinguishedsolutions.com/temp/score/portal.htm*)

Content: A portal is a web site that offers a great amount of content and services, either on many subjects (a "horizontal portal," such as Yahoo!) or on a specific subject (a "vertical portal," such as WebMD). (*www.clienthelpdesk.com*)

Community: A portal is a web site where the defining characteristic is the concept of belonging. (*Portals from the Higher Education Perspective - ict.emich.edu/ICTInit/characteristics.htm*)

Tools: A portal is a web site or service that offers a broad array of resources and services, such as e-mail, forums, search engines, and on-line shopping malls. (*www.webopedia.com*)

When you boil these common elements down, you might say that **a portal is any site that helps people do more and know more by bringing together a wide variety of people, information and tools**. A civil society portal brings together people and information *and* focuses on issues such as development, the environment, human rights or other social issues.

The rest of this document is devoted to pulling apart this idea of the civil society portal even further – providing a high level overview of the people, ideas, technology and business systems that make successful CSO portals tick.

Why build a CSO portal?

Running a portal site is a lot of work. There is a big initial organizational and technical investment. And creating a constant stream of new content for even a small portal site is a tremendous amount of ongoing work. So, why go to all the hassle, especially if you are already running a stable and successful CSO?

Obviously, the answer to the ‘why?’ question will vary between organizations and sites. However, there are a number of common motivations for building CSO portal sites:

Improving access to information: The problem on the Internet is not too little information, but too much. One common reason for setting up a portal site is to improve access to online information in a particular field by highlighting the best resources and filtering out the bad ones. An example of this approach is ItrainOnline.org, a site that organizes high quality Internet support resources for non-profit organizations.

Creating a voice for social movements: The Internet is a perfect communications platform for grassroots social movements – it is low cost and it allows organizations to tell stories in their own voice. However, it is often difficult for individual organizations to attract the level of online traffic or interest they would really like to receive. ‘Content coop’ portals that collect and highlight information from dozens or even hundreds of civil society organizations are one solution to this problem. These aggregator sites are able to build up large audience and traffic levels and then redirect traffic to interesting information on individual CSO sites. ChangeNet, Rabble.ca and OneWorld are examples of this approach.

Promoting community: Successful social movements are built on a foundation of community – people with common values, vision and friendships. While the potential of the Internet as a platform for this kind of community is often overstated, the power and draw of online communities is still very real. Many CSO portals include successful community components which are not only valuable in and of themselves (people find others with shared values) but also form the foundations for organizing and movement building (contact info for potential campaigners and donors). Examples of successful CSO portal communities include Rabble.ca’s Babble and the Foros Section of UruguayTotal.

Collaboration and knowledge sharing: The Internet can be a powerful tool for organizing, information sharing and collaborative learning across vast distances. While this kind of collaboration often happens on mailing lists, more and more organizations are starting to see the value of ‘collaboration portals’ that organize people, ideas and information flows. Pulling together a mix of news, research resources, person-to-person knowledge sharing and virtual office tools, these sites seem to be especially attractive to large, multi-level NGOs (e.g. Greenpeace), communities of practice (e.g. water pollution researchers) or more formal, established social movements (e.g. unions). A good example of this kind of site is the OneFish.org fisheries and aquatic research portal.

Providing a platform for campaigns: Effective political lobbying campaigns require the involvement of thousands of people. A number of organizations have set up portals with the aim of sharing the work of collecting names for online campaigning. The resulting online campaign portals save work for organizations (they aren’t constantly looking for new people to sign petitions and write letters) and increase action opportunities for individuals (they are alerted by e-mail when there is a new campaign that matches their interests). Examples of this approach include the EnvironmentalDefence.org ActionCenter and WildCanada.net.

CSO portal trends and best practices

With almost a decade of civil society portal building behind us, clear trends, lessons and best practices are starting to emerge. For example, many portals learned that aggregating CSO content isn't a path to 'easy content' – running a news aggregator site requires a great deal of editorial effort. Also, simple tools and approaches like e-mail newsletters have turned out to be more important and powerful than most people thought they would be. Some of the things that we have collectively learned about civil society portals include:

User / CSO generated content: Highlighting articles and resources from dozens of different CSO web site makes good sense as a way to generate content for your portal. In fact, many portal sites exist solely for this purpose. However, running a successful site based on user generated content is harder than it sounds. Most organizations won't just post content of their own accord. Rather, content editors need to be actively involved in looking and asking for articles from their CSO partners.

Renewal and responsiveness: Creating a portal site is not a one time activity. Portal managers need to listen to feedback provided by users, responding to their input with updates and changes to the site. The overall structure and look of a site should be reviewed and renewed at least every two or three years.

E-mail is as important as the web: When it comes to getting attention and keeping people involved, e-mail is at least as important as the web. Most portals have discovered that regular e-mail newsletters that include article headlines and links are an essential component of their traffic building strategies. E-mail becomes even more important if your portal is focused on campaigning, community or collaboration. These activities require the kind of regular contact and more individualized communication that can easily be achieved through the combination of e-mail and a database that tracks user preferences and interests.

Mixed business models: Almost every CSO portal reviewed for this project had a mix of business models and revenue streams – grants, partner fees, advertising, individual donations, sponsorship. There was consensus that this 'mixed' approach offered the best chances for stability and long-term sustainability. If one revenue stream drops out or fails to bear fruit, other approaches are already in place to soften the blow.

Staying small: The most common sustainability strategy amongst CSO portals is staying small. Most of the projects surveyed ran on very limited staff, both in overall terms and in comparison to similar commercial portals. This 'stay small and work strategically' approach allows many CSO portals to have significant impact despite their limited budgets.

Expert editors who care: Having the right editorial staff is essential to the success of a portal project. Usually, this means finding people who have *both* media experience and experience working with non-profits or social movements.

Database driven publishing: The days of manually coding HTML pages are gone. Even simple portal sites have moved – or are about to move – to database driven content management systems (CMS) that dynamically combine content with design templates. This approach not only makes it possible for non-technical staff to publish content, but it also makes the process of design changes and site renewal much less costly.

Open source software: More and more CSO portals are turning to open source software to provide the tools they need to run their sites. Open source fits with the values of CSO sites and also provides low cost, high quality tools. There are a number of open source CMS tools now available including APC Action Apps, EZ Publish, PHPNuke and BackEnd.

Emerging trends and opportunities

As we move forward, many people are seeing the need for fresh approaches to portal building. Humans need to become more important than machines in the knowledge sharing equation. Portals need to decentralize and connect to each other in order to effectively help people find the information they need. Relationships will need to become more important than documents. The following is a quick summary of some of the emerging trends in CSO portal building.

Knower-centric learning strategies: Most collaboration or community of practice portal sites are still focused very heavily on documents, lists and statistics. These sites are missing out on the most valuable information resource around – people. Online community users possess huge amounts of factual, contextual and social knowledge. Future collaboration portals will be focused on connecting these users to each other so that they can learn and share knowledge in ways that are far more fluid and powerful today's document centric approaches.

Relationship-centric portal strategies: More outward looking, public portal sites will also be increasingly concerned with people and relationships. The demand for more personalized information and an increase in online campaigns and fundraising will drive organizations that run portals to learn more about the needs and preferences of their users. At a practical level, this will manifest itself in portal platforms that integrate the features of content management systems (CMS) and what the business world calls customer relationship management (CRM) software.

Information trickle: Portals started out as a way to help people handle the information overload of the Internet. While they have been partially successful, people still feel overloaded. Future portal strategies will go even farther to filter out unwanted information, especially at first glance. On the web, this will mean simpler, less busy portal interfaces driven by user preference / CRM databases. It will probably also mean more use of e-mail to slowly push information to people based on a predetermined set of information needs and wants.

Interoperability and XML: In order to succeed in the future, CSO portals will need to connect to each other. This means investing in XML-based standards that allow sites to 'interoperate' or share information. A number of organizations including OneWorld and The Gilbert Institute are already pushing for and experimenting with XML standards that will make it easier for CSO web sites to share information.

Syndication and content sharing: One of the most powerful outcomes of increased interoperability will be the growth of syndication networks and content sharing. Sites will fluidly swap information back and forth, allowing editors to create a more powerful, targeted content mix without all the effort of surfing around the web looking for stuff that is interesting. Custom syndication feeds may also be used to It may also mean 'unportalize the portal' – providing users with custom XML information feeds that they can view and manipulate using their own software.

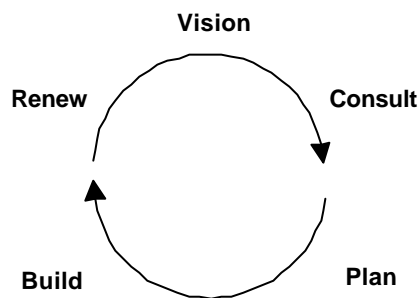
Building (or updating) a CSO portal

Building or updating a portal site is like juggling – you need to keep a lot of different balls in the air in order to succeed. These balls include obvious things like content and technology. But they also include things that are often forgotten in CSO portal projects – the needs of users, ongoing business models and sustainability, and the management and team structures that will support the people working on the site. Building a portal site should not be a daunting task. However, it does require a clear plan that covers all of the balls that you need to keep in the air. This section of the document provides a high level view of how to develop this kind of plan.

a) User centred development – a key to success

Studies show that the failure and cost overrun rate for major web development projects is well over 70%. The reason for this is not poor technology or stupid people, but rather bad planning and project management. More often than not, web site projects are not founded on a solid understanding of stakeholder needs and a clear, written definition of what is to be built. Without these foundations, web projects such as portal sites almost inevitably get into trouble.

As with other major web projects, building or upgrading a CSO portal site requires sound project planning based on the principles of ‘user centred development’. This doesn’t mean you have to write out an encyclopaedia-worth of information about your project. But it does mean that you have to consciously go through the five main stages of project planning and delivery:



Vision: All good web sites start with a compelling idea or vision. More often than not, this vision comes from a small handful of people. In order to kick start the user centred development process, these people should write down their basic concept in a Web Site Vision Document or Project Charter.

Consult: Successful web sites reflect the needs of their stakeholders and users. Using the Web Site Vision as a starting point, project leaders should hold meetings or interviews with as many stakeholders and potential users as possible. The outcomes of this consultation process should be written down in the form of a Community Needs or User Requirements document.

Plan: Using the Web Site Vision and User Requirements as a foundation, project leaders should develop a formal Project Plan. This document should list all of pieces that will be included in your portal – content, community, business model, management systems and technology (see framework below). It should also include a workplan, budget, technical architecture and screen mock-ups.

Build: The Project Plan should be used as a blueprint to build the site. If there are changes to the blueprint along the way (there always are) the project leaders and programming team should discuss them.

Content and community: four types of portals

From a user perspective, the most important parts of a portal are the content it offers and the opportunities for community that it provides. This section of the document provides an overview of four content and community models commonly used by CSO portal sites. Of course, these are not hard and fast categories -- **most sites in the real world are hybrids that combine multiple approaches.** However, it is helpful to have categories to explain the major content and community strategies used by CSO portal sites.

a) Information gateway or clearinghouse

When portals were first built in the mid-1990s, there were almost always envisaged as information gateways or clearinghouses. Sites in this category review, annotate and classify content on other web sites. Usually, they include a visual taxonomy or simple set of categories that helps people find information as well as a search engine. In a CSO context, gateway or clearinghouse sites tend to organize information around a particular issue or topic such as the environment, development or gender.

Defining elements:

- Taxonomy / classification system
- Links with metadata descriptions
- Documents with metadata descriptions
- Content of quality assessed by editor
- Search engine

Other likely elements:

- Ratings
- User annotations
- Events calendar

Mainstream Examples:

- Google Web Directory
- Yahoo
- About.com

CSO Examples:

- ItrainOnline
- WomensNet.org.za
- UruguayTotal

b) News aggregator

Another common portal model is the ‘news aggregator’ – a site that sorts and organizes the deluge of news and information that appears daily on the Internet. The news comes from many different sources, with only a small portion of stories written by portal staff. This model is particularly well developed in the CSO context, as news aggregation works well as a way to increase the voice and profile of grassroots groups with small web sites. There are CSO news aggregators in all parts of the world and focused on many different topics.

Defining elements:

- News summaries on front page
- Full text of stories is often on another site
- Community generated content
- Content changes often

Other likely elements:

- User comments directly appended to articles
- Forums to discuss news
- E-mail news bulletin

Mainstream Examples:

- Slashdot
- Netscape Netcenter
- Yahoo News

CSO Examples:

- One World
- rabble.ca
- ChangeNet
- Choike.org

c) Online community

Online community portals offer people a place to connect, discuss and offer opinion. There are generally two types of community portals – those that pull together a number of ‘communities’ onto a single site (e.g. eGroups) and those that tie communities focussed on a particular topic into a larger portal site (e.g. iVillage). CSO community portals tend to fall into the second category, with online communities tied into large gateway or news aggregator sites.

Defining elements:

- Discussion forums
- Mailing lists
- Personal profiles

Other likely elements:

- Collaboration tools
- Community generated content
- Ratings / peer filtering

Mainstream Examples:

- Slashdot
- iVillage
- eGroups

CSO Examples:

- Rabble Babble
- UruguayTotal Foros

d) Community of practice / collaboration portal

There are an increasing number of portal sites focused around collaboration and information sharing amongst communities of practice or groups with similar interests. These sites organize information of interest to users and provide users with an opportunity to connect to each other. In many cases, some or all of the site is restricted to members only. Up to this point, CSO collaboration portals tend focus on areas where big donor agencies are particularly interested in promoting collaboration. Often, such sites are launched under the rubric of ‘knowledge management’.

Defining elements:

- Tight focus on a particular issue or area of practice
- Documents and links presented in clearinghouse format, with encouragement for members to post their own links
- Site sections organized around information categories (e.g. biodiversity) rather than function (e.g. discussions)

Other likely elements:

- Virtual office or online work tools
- Mailing lists
- Member profiles
- Events calendar

Mainstream Examples:

- Insurance-Portal.com
- Covisant.com (automotive)

CSO Examples:

- OneFish.org
- Dgroups
- Tech soup

Portal business models

One of the most important things to consider in planning a portal project is the ‘business model’ – how will you finance and sustain your site.

In some cases, the approach may be straightforward throughout the life of the portal project. For example, the portal may be meant as an educational tool or loss leader for an existing NGO or service provider. In this case, both up front financing and ongoing operating costs will probably come from the same source – the existing operating budget of the host organization.

Other approaches are more complex. The site might be built with the intention of generating revenue from partner fees or advertising yet still need up front grants to finance the initial development of the site. Or, the site might mix a number of different business models in order to provide stability and contingencies.

Whatever the case, the business model for the site should be thought through up front and included in the Project Plan. This section of the document describes a number of common CSO portal business models that can be drawn upon.

a) In kind / indirect funding

With this model, funding and resources are redirected from other parts of the organization to fund the portal. This transfer of resources is usually justified by the fact that the portal provides significant benefits to the core operations of the host organization – more profile, a platform for information dissemination, spin off revenue through the sale of other products and services. In some cases, organizations will supplement their own in kind funding with a start up grant from a donor agency.

Advantages:

- No need to do fundraising or sales
- Project can get up quickly as outside funding and investment not needed
- No need for complex ecommerce or billing infrastructure
- Can create profile that leads to consulting or services revenue for host organization

Challenges:

- Portal is not primary business of people running the site
- People working on site may have competing priorities in main job
- Partners or internal stakeholders may lose interest, or resources may dry up

Mainstream Examples:

- portalscommunity.com
- various B2B portals

CSO Examples:

- ItrainOnline

b) Major donor supported

Many CSO portal projects at least start out as major donor or grant supported projects. Projects like this usually begin with the fundraising process, using the Web Site Vision Document and possibly the User Requirements as the foundations of a funding proposal. Funders will often expect other business models to emerge to support the site after the initial grant funds have been used up. Despite this pressure, a large number of CSO portal sites are premised on the assumption that they will always require at least some grants to keep going.

Advantages:

- Donors willing to support information projects that meet real social need
- Deals with the fact that it is hard to charge directly for information
- Funding comes from only a few sources – no need for constant outreach or bill collection

Challenges:

- Need to go back to donors year after year
- Reliance on too few donors makes long term sustainability uncertain
- If funding is pulled and there are no other revenue sources, site may need to shut its doors
- Often not possible to raise enough funds to cover all costs

Mainstream Examples:

- n/a

CSO Examples:

- WomensNet.org.za
- LaNeta Derechos Humanos
- OneWorld

c) Content Coop

With this model, CSO's pay partner fee in exchange for chance to have their materials highlighted on the portal site. Sites built on this model rely on the fact that people working within civil society understand the importance of pooling resources to create a stronger voice. A number of sites including OneWorld and Rabble.ca have successfully implemented this model. However, none of the sites using this model have been able to sustain themselves on partner fees alone. Other revenue streams – usually grants – are also required to support the ongoing operation of these sites.

Advantages:

- The benefits are clearly -- partners are essentially pooling resources for a stronger voice
- Partners have sense of ownership over the site

Challenges:

- Often not enough money to cover whole cost of running site
- Partners with poor content still expect coverage

Mainstream Examples:

- n/a

CSO Examples:

- One World
- Rabble.ca
- ChangeNet.sk

d) Advertising

Advertising is an age old and well proven method for underwriting the cost of producing news and information. However, alternative media outlets have always had a hard time supporting themselves through advertising. Many readers of alternative media see advertising as crass and most advertisers see alternative media outlets as threatening or as a bad investment.

These same problems emerge when looking to use advertising to support CSO portal sites. Banner and pop up ads are not really appropriate in CSO sector, where they are seen as offensive and pushy. However, there are a number of more subtle types of advertising that have worked well for community portals, including job advertisements and service provider directory listings. These approaches work because CSOs themselves are often the ones buying the ads and because users see these ads as informative.

Advantages:

- Diversified revenue stream – can build a pool of different advertisers to avoid dependency
- Traditional / proven mode of supporting media
- Can work well if advertisers believe they are reaching a market that matters to them

Challenges:

- Banner and other kinds of ads often annoy users, especially in CSO sector
- Advertisers increasingly cynical about the value of online ads, forcing rates down and making sales difficult

Mainstream Examples:

- Yahoo
- CNN.com
- Slashdot
- Google

CSO Examples:

- UruguayTotal
- Charity Village (Canada)

e) Ecommerce

Many portals started out with the assumption that ecommerce and online shopping could be used to subsidize content offerings on their site. In the case of commercial sites, the assumption was that the portal would bring users who would in turn spend lots of money buying things online. Non-profit portals were more focussed on selling ‘social goods’ (e.g. fair trade coffee, books, t-shirts) or providing referrals to commercial ecommerce sites would share a portion of each sale. In either case, the information portal / ecommerce connection worked only for a very few sites.

Advantages:

- Commercial activities subsidize free content

Challenges:

- In most cases, ecommerce revenues have been too small to support content
- High up front and ongoing costs in setting up ecommerce infrastructure

Mainstream Examples:

- Yahoo Stores

CSO Examples:

- UruguayTotal Libros

f) User / audience supported

In North America, some CSO portals have started to ask users to make small donations to underwrite the cost of running the site. This is a model that has been used successfully by community radio and public television stations for years. In an online context, it usually involves a mix of e-mail solicitations, web site pitches and direct snail mail letters targeted at

supportive readers. This approach only works well when readers believe that a site is doing politically important work or is providing them with valuable information they would not get elsewhere.

Advantages:

- Dedicated readers and users are need not be convinced of the value of the site – they already see it as useful
- Diversified funding source – if one reader stops donating, you still have others to turn to
- It is possible to build ongoing revenue streams through monthly credit card or bank debit campaigns
- If done right, readers / donors develop a sense of ownership and involvement

Challenges:

- Constant attention to fundraising campaigns and collecting donation promises
- Readers and users may feel harassed by donation solicitations
- Online donations are still difficult, especially outside North America – still need to rely on snail mail as part of fundraising
- In many countries, users simply don't have the money to donate

Mainstream Examples:

- Public television and community radio in North America

CSO Examples:

- Rabble.ca

g) Subscription

With the subscription model, users pay a monthly fee for access to content or special privileges. Online subscription models have done very poorly ever since the emergence of the World Wide Web. The exception is sites with very high value, specialized content such as charity fundraising and grant databases. As a result, most sites abandoned the idea of subscriptions in the mid to late 1990s. However there is a new wave of subscription-based services that are tied to different types or levels of service. For example, Slashdot and Salon have introduced subscriptions allows users to turn off banner ads. It is not yet clear whether this new approach will work.

Advantages:

- Steady form of month to month revenue
- People who use the content pay for the content

Challenges:

- Few people willing to pay to read content
- Need for billing and customer service infrastructure
- If user numbers are low, admin costs may be higher than subscription revenue

Mainstream Examples:

- Slashdot
- Salon

CSO Examples:

- Znet mailing list

Managing your portal

While content and business models provide the basic foundations for a portal project, they are of little value without competent staff and management who can make them come to life. Editors and technicians are needed to build and maintain the site. Finance and marketing people are needed to ensure that the money flows and traffic grows. Strong organizational and governance structures are needed to house the overall operating. This section of the document describes four management / organizational approaches commonly used in CSO portal projects.

a) In-house project

Many portals are built as in house projects of existing civil society organizations. With this approach the portal exists as a project or department within the host organization. The portal is usually tied quite tightly to the mission of the host, offering benefits in terms of increased reach, impact or profile. Resources and staff often shared between portal and other aspects of host organization's operations.

Staffing:

- Staff work for organization hosting portal
- Staff may report to Executive Director from host organization or to manager specifically in charge of portal project
- In many cases, staff work on both the portal project and other projects of the host organization

Benefits:

- No new organizational overhead for portal project – build on existing finance, management and outreach systems
- Provides organizations with platform for education and broad communications
- Leverages existing members and organizational credibility

Challenges:

- Tied to existing mission or focus of an organization – portal team may feel constrained if they want to grow their project
- Portal can take over / seem all important, distracting from host organization's original mission
- Many portal business models may be a stretch for existing CSOs

Governance:

- Board of directors for host organization oversees portal
- May have advisory board, editorial board or steering committee tied to the portal project

Finance:

- Funds handled through main budget / accounting systems of host organization
- If portal is tightly tied to host organization's mission, core funds often used to underwrite portal costs

Examples:

- ChangeNet.sk
- Environmental Defense ActionCenter

b) Consortium or partnership

As portals focus on pulling information together from a variety of sources, it is quite common for a group of organizations to come together to create a site. These groups are usually motivated by some sort of shared need – a common issue, a desire to pool resources, the need to reduce duplication. In some cases, these sorts of joint projects are created through a push from donors who want to see a common front amongst CSOs working in a particular area. Portal partnerships and consortia usually start out informal, with more formal agreements and structures emerging over time if the site is successful.

Staffing:

- Work done by partner staff or consultants
- Partner staff take time from primary job or are seconded to work on the project
- Consultants hired to work directly for the partnership or consortium on a time limited basis
- May need dedicated management team if project grows – this could be seconded staff or consultants

Benefits:

- No new organizational overhead – build on finance, management and outreach systems of partners
- Economies of scale / reduced duplication through working together
- Partners all bring something different to the table including diverse approaches and content

Challenges:

- Working together is usually harder and takes longer than initially expected
- Waning partner commitment or interest can threaten long term portal viability
- Conflict resolution and ownership difficult if things go badly

Governance:

- Most projects of this nature have a steering or management committee made up of partners
- Ideally, partnership agreement should be drafted to govern the project

Finance:

- One or more partners manage funds in informal partnership
- Separate accounts set up if partnership becomes more formal
- Flow of money / who gets what should be worked out in writing for grant funded projects

Examples:

- ItrainOnline.org
- Dgroups

c) Independent organization

In the commercial world, most portals were set up as independent companies. These companies had their own management, staff, financial systems, offices and boards of directors. While a few of the larger and more successful CSO portals have set up their own organizations, this is more the exception than the rule. Most people starting community portals do not have the resources or do not want to take on the risks associated with setting up a new organization. In many cases, the extra overhead and risk of creating a new organization is simply not warranted for a small CSO portal project.

Staffing:

- Staff work directly for the organization
- Requires dedicated people for finance and marketing that wouldn't exist on in house portal projects

Governance:

- Board of directors or other body oversees portal organization
- May have separate editorial board

Benefits:

- Organization has only one goal – the success of the portal
- Flexible – not tied to the whims and needs of host organization
- Culture of organization can be build around the web site

Finance:

- Own set of accounts, finance staff and billing infrastructure

Challenges:

- Lots of overhead to carry
- High risk
- Must establish credibility / brand from scratch
- Needs adequate capitalization and strong business plan
- New organizations find it hard to get donor funding

Examples:

- UruguayTotal
- OneWorld

d) Springboard / incubation

Many CSO portals have opted for an organizational approach that falls somewhere between the in house project and setting up a new organization – the springboard or incubation approach. With this model, the portal is set up as an independent project or unit within an existing organization. The portal has its own budget, branding, editorial staff and management. Yet, it is able to leverage the existing infrastructure of the host organization – financial systems, office space, web hosting, board of directors, donor relationships. Usually, the aim is to spin off a new organization once – or if – the portal project has become successful.

Staffing:

- Staff housed within host organization but ‘work for’ the portal project
- Some positions like finance and marketing may be shared with host organization
- Probably have senior manager / executive staff dedicated directly to portal

Benefits:

- Benefits of both independent and in house models – flexible + low overhead
- Portal can spin off to become its own organization when and if it is ready

Challenges:

- Host organization may see portal as a drain on its resources if not going well
- Complicated to manage, with roles and authority sometimes confusing
- Existing staff and infrastructure might not be right for portal, especially if it includes semi-commercial business models

Governance:

- Direct oversight by steering committee or other group focussed on the portal
- Indirect oversight by host organization board of directors

Finance:

- Separate chart of accounts within host organization
- Probably uses finance staff within host organization

Examples:

- WomensNet.org.za
- rabble.ca

Technology options

Technology is often the first thing that people think about when they start off on a portal project. Really, it should be the last. The technology used to create a particular portal should be chosen based on the content, community, business and management models that underlie the site. These things will drive the features and technical architecture that will have to be put in place.

This section of the document briefly provides an overview of the major categories of software that are available to organizations building or upgrading portals. For those wishing more detailed information about software options, a comparative review of five leading content management systems is included in Appendix A.

a) Content management frameworks (CMF)

Content management frameworks (CMFs) provide an overall set of tools for creating automated web sites – security, templating, workflow. The advantage of a CMF is that it is incredibly flexible, allowing for the creation of automated versions of almost any kind of site. The disadvantage is cost and complexity – CMFs require a heavy investment in technical staff or consultants during the initial set up phase of the project. Marketed at large commercial portals, most commercial CMF's cost over \$100,000 for the software and hundreds of thousands more to customize and set up.

Defining elements:

- Overall framework or building blocks for managing content
- Usually includes modules for templating, workflow and security
- More like a programming language than a piece of software
- Costly to set up, especially if using commercial software

Uses / applications:

- Very big commercial portals that require large degree of flexibility and scalability

Commercial Examples:

- Vignette
- Broadvision
- Documentum

CSO / Open Source Examples

- Zope

b) Content management systems (CMS)

Content management systems (CMSs) are one step down from the big framework applications like Vignette – they provide all the tools necessary to create an automated web site but not quite as much flexibility. Like frameworks, CMSs use a combination of databases and blank design templates to automatically create pages on the fly. However, CMS software usually relies more heavily on predefined modules for common portal components such as news articles, events listings, resource directories and search engines. This provides for faster set up and lower costs but also limits flexibility to some degree.

Defining elements:

- Automated management of large numbers of articles
- Predefined modules for common tasks / sections of site
- Creates pages from database using templates
- Limited workflow focused on approval by editors
- Will often include some form of search engine
- User manager, at least for people creating content

Uses / applications:

- News magazines and aggregators
- Some kinds of knowledge management and collaboration sites

Commercial Examples:

- RedDot
- Atomz

CSO / Open Source Examples

- APC ActionApps
- IndyMedia Active
- EZPublish
- BackEnd

c) Links / directory databases

Some sites are composed primarily of links or directory listings. For these sites, there are a number of simple 'web directory databases' that can be used. These packages include both a database for collecting metadata as well as a category system for organizing information.

Defining elements:

- Yahoo-style links database
- Ability to create visual taxonomy / list of categories
- Will often include a search engine
- Focus on metadata rather than documents

Uses / applications:

- Information gateways and clearinghouses
- Other sites handling large numbers of off site links

Commercial Examples:

- None known

CSO / Open Source Examples

- Gossamer Threads
- APC ActionApps

d) Community systems and blogs

Many small news aggregator web sites have started to use a web log – or blog – approach to organizing content. The focal point for these sites is the front page, where editors post informal news summaries and links. Users are then invited to rate and comment on articles using a community annotation function built into the site. The popularity of this approach stems from its original use for personal web log sites. Sites like Slashdot took blogging from individual pastime into an important approach for community portal building. The growth of community blogging has resulted in a number of good software packages.

Defining elements:

- Front page is main hub of content – other sections serve as archive
- Users can post or suggest content for the site
- Users can comment on or annotate articles
- Often includes other modules like discussion forum and calendar

Uses / applications:

- Community sites
- Simple news site
- Simple NGO web site

Commercial Examples:

- None

CSO / Open Source Examples

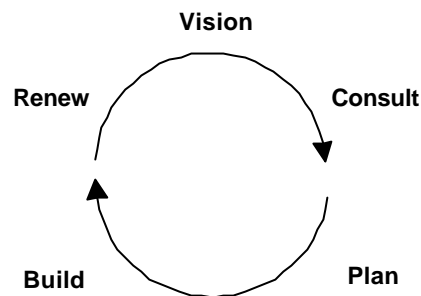
- Slash
- PHPNuke
- PostNuke

What's next?

What's next depends on where you are.

If you are already running a portal or large web site, you may be able to incorporate some of the ideas discussed here and in the case studies into your own day-to-day work. You might even want to take a shot at writing up your own case study as a way to reflect and share your experiences with others.

If, on the other hand, you are just beginning to build or upgrade a CSO portal site, you should start down the road to planning and building your site. As outlined above, the best place to begin is with a cyclical, user centred planning and development process:



The most important thing in this process is to constantly be moving back and forth between writing things down and listening for feedback. Write down your vision, and then ask people if they think it is sound. Write out your Project Plan, and then listen to feedback from staff and programmers as they implement the site. Write down your plan for renewal, and then ask users what else they would like to see you do. This process doesn't have to be a lot of work, but you do need to stick to it.

The materials above are meant to provide some food for thought as you go through this portal planning or renewal process. In particular, the Portal Framework can be used as a loose checklist to make sure that you have covered off all aspects of your portal when doing your planning. If you want a more formal planning framework, you may also want to check out the web site of the State Michigan Project Planning Office (www.state.mi.us/cio/opm/index.htm). This site includes useful project planning templates.

Appendix A – CMS comparison

The following CMS comparison chart was prepared for the APC in summer 2001. While a number of new open source or CSO-centric packages have become available since that time, the following is still a useful guide for organizations choosing a CMS.

Many companies and organizations are moving into the area of automated content management. The approach, features and costs of these services vary widely. Some tools present themselves as a 'portal in a box'. Other tools offer an open-ended platform for page creation using templates. Still others focus on the delivery of modules for specific types of content (events, news, what's new).

The following section provides a brief overview of leading content management tools in each of these categories. The products reviewed are all 'out of the box' solutions that require only a small amount of customization to get up and running. More generalized content management frameworks like Zope and Vignette are not reviewed as they require a great deal of custom development to get up and running.

For more information and a list of open source content management packages, see:
<http://www.cmsinfo.org/>

a) IndyMedia Active Software

The IndyMedia Active software is a package that has been developed to create 'out of the box' Independent Media Centre web sites. Located in various centres around the world, these web sites provide a platform for progressive news written from an activist perspective.

The software focuses on simple forms based publishing tools that allow anyone to post news. It includes very little in the way of additional modules beyond news posting. Because Active is tied very closely to a grassroots / open content approach, it has very little in the way of moderation controls or editorial workflow. As the Active docs say: " There is no editorial approval process - items submitted over the web show up immediately on the web pages. Some people consider this a feature, others a bug!"

*URL: tech.indymedia.org
License and cost: GPL/free*

b) PHPNuke

Based on the SlashDot model, PHP Nuke provides everything that is needed to create a self-contained weblog / portal site. The main purpose of such a site is to present a constant stream of 'news' articles on the front page and to allow users to comment on these items. Unlike the original Slash software, PHPNuke also includes many add-on modules that allow for other content types to be included in a site (e.g., calendars, discussions, etc.).

If you need to create a complete news-style web site from scratch, PHPNuke is probably the simplest and fastest option. It is also the most rigid and limiting. Sites created with PHPNuke are tied to the content management and presentation style used in Slashdot-style weblogs. While the PHPNuke developer community is constantly adding new content types, new modules tend to use this weblog approach to content presentation.

*URL: www.phpnuke.org
License and cost: GPL/free*

c) Rhythmyx Content Manager

Rhythmyx Content Manager is one of the better 'low end' (under \$100,000) commercial content management systems. Instead of the section or content-type used by Active and PHPNuke, Rhythmyx uses an open, page-based approach to managing content. This makes Rhythmyx a good choice for managing large sites with very diverse content types where each page is different. It is not a good choice for sites delivering large volumes of structured content (events listings, links, etc.).

Like most commercial content management systems, Rhythmyx places a lot of emphasis on approvals and workflows. Editors can assign tasks, track changes and review content before it becomes live.

Rhythmyx makes extensive use of XML and XSL to structure and deliver content. This makes it very useful for the delivery of content in multiple formats (HTML, WAP, PDA).

URL: www.percussion.com

License and cost: \$80,000+

d) RedDot

RedDot is another leading commercial content management package. Similar to Rhythmyx, it uses a page-based content management metaphor and includes relatively extensive workflow tools.

The main difference between the systems is in the content editing / navigation interface. RedDot uses a series of graphical 'red dots' to indicate which content can be edited. Clicking on a red dot brings up a web form for that specific element. While this is intuitive, it is also slower than using a single form to edit a whole item or page. There are other small differences, mostly related to the power and flexibility of the software. For example, RedDot's workflow tools are not as flexible as those in Rhythmyx.

RedDot is a good choice for web sites that need a page-based content management system with some workflow abilities.

URL: www.reddotsolutions.com

License and cost: \$20,000 + \$2000/user

e) APC ActionApps

The ActionApps offer a middle ground between the fixed content type approach of Active and PHPNuke and the page-based approach that is more common in commercial systems. A basic ActionApp installation can easily and quickly deliver fixed content types like news and alerts. If additional content types are needed, these can easily be created using the ActionApp field editor function. Of course, even this ability to create custom content types does not offer users the same flexibility as a page-based approach (which can be a good or a bad thing, depending on the situation).

Unlike all of the other products here, ActionApps lend themselves to both creating a large dynamic web site and dropping a small dynamic section into an existing site. The ability to drop an ActionApp into an existing site makes them perfect for site upgrades and for small organizations. It also makes them a good option for APC members wanting to set up ASP services.

The ability to share content between sites is the other major difference between the ActionApps and other products listed here. At present, complex content such as events, bibliographical records and even full articles can be easily and automatically shared between any number of ActionApp sites. Most of the other products here are limited to sharing headlines using RSS 0.9 (see below).

URL: www.apc.org/actionapps

License and cost: GPL / free (ASP pricing varies)

Product Comparison Chart

The following chart provides an overview comparison of the software described above.

	ActionApps	Active	PHP Nuke	Rhythmyx	RedDot
Purpose					
Add dynamic sections to existing site	Yes	No	No	No	No
Create complete portal site / large web site	Yes	Yes	Yes	Yes	Yes
Provide content management for multiple sites with one software install	Yes	No	No	No	No
Content Creation					
Content creation based within:					
Browser interface	Yes	Yes	Yes	Yes	No
Offline client	Under development	No	No	No	No
Windows client	No	No	No	No	Yes
Can post HTML content to forms	Yes	Yes	Yes	Yes	Yes
Ability to use categories to organize content	Yes	Limited	Limited	No	No
Custom template design	Yes	Yes	Yes	Yes	Yes
Complexity of template customization	Simple	Moderate	Moderate	Moderate	Moderate
Multibyte language support for international character sets	Yes	Yes	Yes	Yes	Unknown
Pre-existing content modules					
News / articles	Yes	Yes	Yes	Yes	Yes
Events calendar	Yes	No	Yes	n/a	n/a
Resource list / links list	Yes	No	Yes	n/a	n/a
User polls	No	No	Yes	No	No
Discussion forums	No	No	Yes	No	No
Comment on stories	No	Yes	Yes	No	No
Open ended content types / page-based content management	No	No	No	Yes	Yes

Content Sharing					
Complex sharing between sites	Yes (between ActionApp sites)	Yes (between Active sites / text only)	No	No	No
Category mapping for shared content	Yes	No	No	No	No
Field mapping for shared content	Yes	No	No	No	No
Headline sharing (RSS 0.9)	Yes	Yes	Yes	Yes	Unknown
Workflow					
Create multiple groups of users with designated rights	Yes	No	No	Yes	Yes
Basic approval process	Yes	No	Yes	Yes	Yes
Complex approval workflow (multiple approvals / revision tracking)	No	No	No	Yes	Yes
Roles-based authentication	Yes	No	Yes	Yes	Yes
Implementation					
Estimated implementation time	Single App from ASP - 3 hours / full portal - 2 weeks	1 week	3 days	4 weeks	2 weeks
Operating systems supported	Linux, various Unix	Linux	Linux	Solaris; Windows NT, 2000	Windows NT, 2000
Web servers supported	Apache	Apache	Apache	Any	IIS
Databases natively supported	MySQL	MySQL	MySQL, Postgres, others	ODBC databases	ODBC databases
Browser-based site administration and set up	Yes	Yes	Yes	Yes	No (custom client)
Create new 'applications' or databases on the fly	Yes	No	No	Yes (templates)	Yes (templates)
Other					
Software cost	Free for software / end user ASP pricing varies	Free	Free	\$80,000+	\$20,000 + \$2000/per user
Licensing	GPL	GPL	GPL	Proprietary	Proprietary