

Evergreen Community Website Planning and Implementation Process

Designing and implementing a community website platform with the participation of multiple organizations presents several challenges, all of which can be met satisfactorily with proper planning. To avoid the hazards of the “big design up front” model of website and web application development, and to encourage feedback from the greater Evergreen community at various stages of development, the planning and implementation processes must be agile, iterative, and transparent. To ensure an effective web presence that helps support the long-term growth of the Evergreen community, input from many stakeholders needs to be sought out through the duration of the project, and close attention paid to how the website satisfies predefined strategic goals. To ensure long-term stability of the platform, planning must extend past implementation and into the maintenance and upgrade cycles of the website and its underlying software.

What do we mean by “agile and iterative?”

For the planning process, we'll be borrowing some concepts from the Agile software development methodology. Instead of having one monolithic planning phase and one subsequent exhaustive implementation phase, we'll have a process that incorporates simultaneous and continuous planning and immediate implementation. In practice, this will result in several “cycles” of development, each concluding with a functional release of increasing sophistication. We'll also use user stories and acceptance testing during the development and implementation phases: in essence, does Feature X satisfy Requirement Y?

How do we ensure the website and associated applications meet our strategic goals?

Ideally, every feature on the website, including content and functionality, will satisfy a strategic goal or requirement in a user-friendly manner. There are a few practices we'll use to keep this strategic focus throughout development. We'll create a broad and inclusive list of our strategic goals for the website, considering the requirements of all of our defined audience groups. As mentioned above, we'll use the “user stories” model to generate our application requirements in plain language, and we can associate each story or requirement with an overarching goal. In addition, a concrete understanding of the strategic goals of the website can help inform the overall architecture of the website and its associated applications.

Organizational Issues

One of the first critical issues to be settled during the initial planning process is to decide who will be involved – and how. As the formal organizational structure of the Evergreen foundation and its relationship to other entities in the greater community is still being finalized, it's not clear exactly who the decision-makers will be. However, regardless of the “formal charter” of the website planning team, everyone involved so far has expressed a desire to keep the process inclusive and as welcoming as possible.

There are many different ways to structure the organization of a team working on a website project such as this, and several roles in the process to consider:

- Site Owners – the decision-makers tasked with planning and building an online platform that meets the needs of the various community groups. This might take the form of a committee or

a project task force, composed of both paid staff and volunteers from various projects. It is very important that questions of authority or about the decision-making process, no matter how inclusive, be solidified during the earliest stages of the project to minimize organizational overhead later on.

- Content Specialists - community members providing content on the site for other users, or performing a curator or editorial role for content provided by the general community.
- Evergreen Community Members – all current and potential users of EG are members of the EG community and their input is critical. This can be obtained in various forms, such as an online suggestion box, an advisory group, focus groups, online surveys, etc. As mentioned above, making the website planning process an inclusive and community-driven one is an explicit goal of the Communications Committee. Multiple feedback opportunities or opinion gathering exercises need to be conducted throughout the process to gather as much community feedback as possible.
- Evergreen Developers – currently, the developers' platforms are linked from the primary site, but one of the expressed goals of this project is to provide tools that allow the non-developer community to more easily interact with the developer community. It will be critical to have a representative of the developer community available to discuss these integration issues in the context of the overall site.
- Site Builders – technical resource available to facilitate planning and development of a potential new platform.

Once a Website Team has been created, the first priorities should be:

- defining roles and responsibilities of the team members
- creating a schedule for the initial planning process
- implementing a framework for collaboration (email list, Basecamp, Google Docs, etc.)
- implementing two-way communication to the overall community:
 - 1) here is what the Web Team is doing, and
 - 2) submit advice/requests/questions to Web Team

Initial Planning Cycle

Identify audiences / visitors – current and future

The Web Team will identify all potential audience groups of the website, including current and future users of Evergreen, other industry members, media, etc. The Team will analyze each group to determine:

- source of visitors (inbound links referring visitors to EG site)
- goals of visitors (get information, solve a problem, etc.)
- projected size of visitor group
- location of visitor group (geographical, language availability)
- web-savvy (to accommodate use of various site tools)

In addition to identifying the visitor goals of each audience group, it's important to consider the perspective of the Site Owners: what constitutes an effective user interaction with the website from our perspective? Are there messages we want to convey to certain audience groups no matter what their goals are for their initial visit? Another way of considering this is to ask – what constitutes success for

this website?

Example audience group definition and goals:

Potential Evergreen Implementers need to:

- *learn about proprietary ILS vs. OSLS*
- *learn about Evergreen software*
- *learn about the Evergreen community*
- *interact with the Evergreen community if they choose*

Identify strategic goals and requirements of the website

The Web Team will identify the strategic goals of the website, taking into perspective all stakeholders, such as general community members, developers, site administrators, foundation/outreach team members, etc. This could take the form of brainstorming, simple surveys, or online discussions. A final list of strategic goals will be decided upon and will form the basis of subsequent site planning.

Example strategic goal:

Encourage widespread adoption of Evergreen software.

Example requirement derived from the above strategic goal:

Provide a centralized location for EG- and migration-related information resources for potential Evergreen implementers.

Write and prioritize user stories based on requirements

The “user story” model involves stating website and application requirements in plain language and then ensuring the resulting application satisfies those requirements. Continuing the example started above, some sample user stories for potential Evergreen implementers might include:

- *Users can easily find a centralized and authoritative Evergreen site with a minimum of searching*
- *Users can find a demo “sandbox” implementation of Evergreen to examine*
- *Users can view contextual background information on the topic of Open Source Software*

User stories are prioritized and implemented during a development cycle. Stories are increasingly refined throughout further development cycles, resulting in increasingly sophisticated interim releases.

Initial Development Cycle

Establishment of development environment

Initial work will take place on a private development server until the production cut-over (or “go-live” date). Web Team members will have access to this development environment so they can review the progress made and assist with content migration and functionality testing.

Initial development cycle

As mentioned earlier, the agile development process consists of continuous cycles of planning, development, and refinement. The initial development cycle in a project like this usually results in a working content management framework with key content and functionality represented by placeholders (“stubbed out”). Further requirements for the initial cycle will be determined by the Web Team during the initial planning cycle.

Development Cycle

The prioritized list of user stories / requirements for each development cycle will be jointly reviewed by the site builder team and the overall Web Team at the conclusion of each development cycle. Each user story will be tested and then will be considered satisfied or subject to further refinement. After this joint review of progress, the requirements for the next development cycle will be agreed upon.

Timeline / Schedule Considerations

Until the Web Team is constituted, a precise schedule can't be determined. Progress depends on the amount of resources (dedicated staff, paid consultants, community volunteers) available and each team member's availability. The following schedule is presented for informational purposes only.

- *Web Team Formation* – this can be completed in one meeting if everyone is in agreement and a small initial team is authorized. On the other hand, if this is to involve an open and lengthy recruitment and qualification process, it will obviously impact the following schedule items. This process could take **an hour or several weeks**.
- *Project Scope Definition* – the web team and its chartering organization finalize critical strategic requirements that the website project will satisfy along with any deliverables: are we building a plan, a prototype, or a long-term platform to be used in production as the basis for a community? This process could take **an hour or several weeks**.
- *Initial Planning Cycle* – the Web Team will need to set its own schedule during the initial planning phase, performing the activities described earlier in this document. Depending on the scope of the project, this could consist of:
 - **a day-long workshop** with planning exercises and discussions
 - a series of conference calls and emails over a period of **a few weeks**
- *Initial Development Cycle* – the Web Team will define a development cycle of either **one, two, or three weeks** depending on requirements, available resources, and project scope.
- *Review and Next Cycle* – the Web Team will review the progress with the site builder, in addition to any other stakeholder groups such as the Communications Committee and/or community representatives. Following this review, requirements for the subsequent development cycle can be finalized. The total number of cycles possible is a function of project scope and available resources/funding.