

CONTENT MANAGEMENT MEETS ASSOCIATION MANAGEMENT

Gilbane DC. June 5, 2007

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CASES

Case One: Centralizing Operations

As part of a restructuring effort, web operations at a DC-based membership organization for philanthropic interests became centralized within the Technical Services Division. The convergence of these changes - and rising expectations for improved web-based communications with members brought by the new CEO - created a situation with several challenges.

- Manage expectations and reactions to change by developing and sharing strategy with staff to channel energy/anxiety brought by change
- Establish web staff as a consultative agency for this communications medium (not just keepers of the keys, but insightful, collaborative decision-makers working with content and communications experts)
- Complete transition to new site design, CMS and AMS (integrated in-house) to improve member experience; help vendor(s) improve product & service
- Pull staff toward new frontiers in technology by piloting small applications - internally and externally - with demonstrable member benefit.
- Negotiate for change that breaks patterns of association management based on antiquated business rules and agreements.

Case Two: Volunteers of America's Brand and Web Transformation

Volunteers of America is one of the country's oldest and largest human services charities. With an operating budget of over \$840 million, staff of 15,000 and a volunteer force exceeding 90,000, the organization serves over 2 million people in 400 communities across the country. The organization structure is made up of 38 independently funded local offices plus the health services division that operates 25 nursing and assisted living care facilities. Each office pays a percentage of its revenue to the national headquarters, located in Alexandria, Virginia, which executes major programs on the full organization's behalf.

In 2005 Volunteers of America undertook a comprehensive brand transformation initiative that impacted all communications vehicles, including its Web program. The goal is to create a unified Web presence for Volunteers of America - consisting of a Web site for each office and fa-

cility - from a collection of independent and poorly maintained or sometimes non-existent Web sites.

Transforming the Web program in line with the branding initiative has been challenging:

- Over 60 separate offices/facilities
- Mostly independent technology platforms or no Web presence
- Minimal staff skills for Web maintenance and Web content development
- Varying resources and priorities
- A cultural bias toward humble service as opposed to marketing and promotion
- An optional participation program. Charter compliance does not even mandate local offices use the new visual identity, much less participate with the new Web program.
- An historical distrust in the national office's ability to deliver a viable product

Working with five willing offices, the initial effort involved developing a Web template that was flexible enough to meet the unique needs of each office, while also building in some of the features the national office deemed mandatory to the overall Volunteers of America brand. Upon completion of the template, the offices were trained on the new content management system, on the brand and message strategy and in writing for the Web. The sites were then turned over for content loading and launch.

Balancing the desire for full participation with the need to ensure offices would adhere to branding precepts involved some strategic decision-making by the national office. The Web site has been offered to all offices at no charge. In exchange for free participation, offices have been asked to sign a Memorandum of Understanding (MOU) that outlines roles, responsibilities and mandatory content features. To ensure ongoing viability of the Web program participants have been asked to participate in a governance group. The national office will also undertake intermittent audits of each of the sites to ensure compliance with the MOU, messaging and branding strategy.

Case Three: Improving Member Service and Reducing Publishing Costs

In an effort to significantly improve member service and reduce publishing costs, a Bethesda-based health care association invested in web infrastructure to: integrate member call center tracking with upgraded membership database; move scholarly content production and presentation (current and archive) to XML; train and grow program staff in production and management of web content on a new CMS with a fresh site design. Successful transition resulted from many factors, including:

- Significant institutional knowledge among staff of web operations unit, making the team able to anticipate and manage potential pain points

- Supportive senior management looking at long-term gains rather than short-term benefit; no volunteer leadership oversight
- Adequate planning (time, resources, objectives) to achieve milestones; in-house and contract-based technical resources made available to complete project pieces as needed

Case Four: Managing Content and Compliance with SharePoint

Like most organizations, Volunteers of America's 38 affiliate offices and the national office are challenged with optimizing productivity. All offices are seeking solutions for sharing information, promoting teamwork and collaboration, automating business processes and managing documents. In addition, the Volunteers of America national office is charged with ensuring all 38 offices maintain compliance with the organization's charter. Finally, each office's board is seeking a dedicated forum to share information among its members as well as connect with other offices' board members on topics of mutual interest.

These somewhat independent business activities could theoretically spawn several disparate systems. However, Volunteers of America has selected Microsoft Office SharePoint Server (MOSS) 2007 to serve as the portal server and framework for meeting the full spectrum of identified business needs.

Accomplishing this ambitious task involves addressing several challenges, including:

- Separate technology platforms – Technology platforms vary among the independently operated affiliates. Network and technology support ranges from part-time in-house staff to fully outsourced solutions. Software products and versions vary, potentially impacting compatibility with SharePoint.
- Redefined charter compliance process - Implementing a standardized charter compliance system for Volunteers of America does not entail automating the current manual (and less effective) process. The national office is seeking to redesign its charter process to more closely monitor compliance. This involves additional planning, a culture shift to accommodate new workflow processes and added staff resources.
- Planning and expectation setting - Affiliate office participation in the Intranet program is optional. To date, each participating affiliate's vision for their new system widely varies from a few document libraries to completely replacing their entire network infrastructure with the exception of email servers. This level of customization will challenge the national office and require consistent communications and expectation setting with the affiliates.

The SharePoint foundation architecture has been defined, the charter system template implemented at pilot offices and baseline Intranet requirements are completed. Project deliverables will be rolled out throughout 2007 and 2008.

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Kathleen McBride has developed the Web strategy for Volunteers of America, the nation's 18th largest charity, and is currently managing the implementation of the organization's 60+ independent Web sites. As a senior communications strategist for the American Chemistry Council, Kathleen helped shape the chemical industry's \$35 million essential2® integrated reputation campaign and managed its Web implementation. Kathleen has more than 20 years experience in technology, communications and issues management working for a variety of government and non-profit organizations including the Central Intelligence Agency, United States Secret Service, INTERPOL, American Chemical Society and the American Plastics Council. Kathleen has a Bachelor of Science, Computer Science, from Rutgers University. She currently owns and operates a consultancy dedicated to helping organizations reach their full online potential.

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David Tauriello has been with XBRL US as its Vice President, Internet Strategies and Member Services since January, 2007. Prior to joining this team, David was at the Council on Foundations, where he served as its Web Director. Mr. Tauriello's non-profit and association web production and management experiences also include positions with the American Speech-Language-Hearing Association and Maryland Public Television. In each of these settings, Mr. Tauriello was focused on creating and using Internet technologies to improve member service. In 2005, David was part of a team winning a Webby Award - considered the "Oscar" of the Internet. He has also been recognized by the Japan - U. S. Education Commission, receiving a Fulbright Scholar Award in 1999.

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C. David Gammel is a noted web strategy consultant who has been quoted in *The New York Times*, *The Washington Post* and *Wired* magazine on issues such as blogging, web security and the impact of the Web on business. David has spoken internationally to Fortune 500, small business and non-profit executives and students on diverse subjects from web strategy and technology to international business assignments and online culture. David's firm, High Context Consulting, helps organizations to use the Web and web-based technologies to create value and achieve their overall goals. David lives in Salisbury, Maryland with his wife Jennifer and daughters Ella and Lily.