Technology Planning for Heritage Organizations:
Lessons Learned & Resources from The OHS Reach Project

Sarah McCabe, Project Manager and Librarian
Ontario Historical Society

Presented by The Ontario Historical Society

September 22, 2016

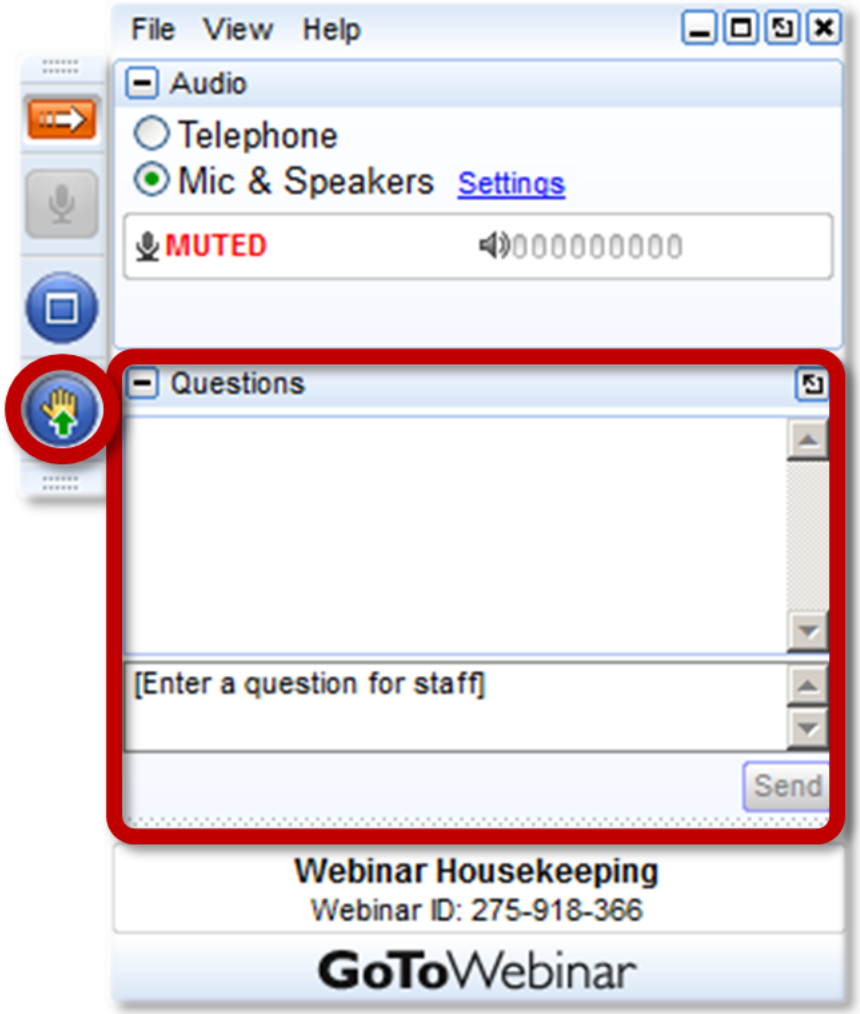
The Ontario Historical Society



The OHS is a non-profit corporation, publisher, and registered charity; a non-government group bringing together people of all ages, all walks of life and all cultural backgrounds interested in preserving some aspect of Ontario's history.

2016 marks the 128th anniversary of the Ontario Historical Society, and the 103rd anniversary of John McKenzie House in Willowdale, our office and home!

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Submit questions and comments via the Questions panel.

Need help? Use the "raise hand" button!

Webinar Speaker



Sarah McCabe

Sarah is the OHS Reach project manager at the Ontario Historical Society. A librarian and researcher, Sarah has spent the past year exploring the potential of the OHS as a provider of programs, publications, and services. Sarah is excited to share all of the lessons learned in technology planning through the OHS Reach project!

Over to Sarah…



Technology Planning for Heritage Organizations:

Lessons Learned & Resources from the OHS Reach Project

Sarah McCabe
Project Manager and Librarian
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September 22, 2016

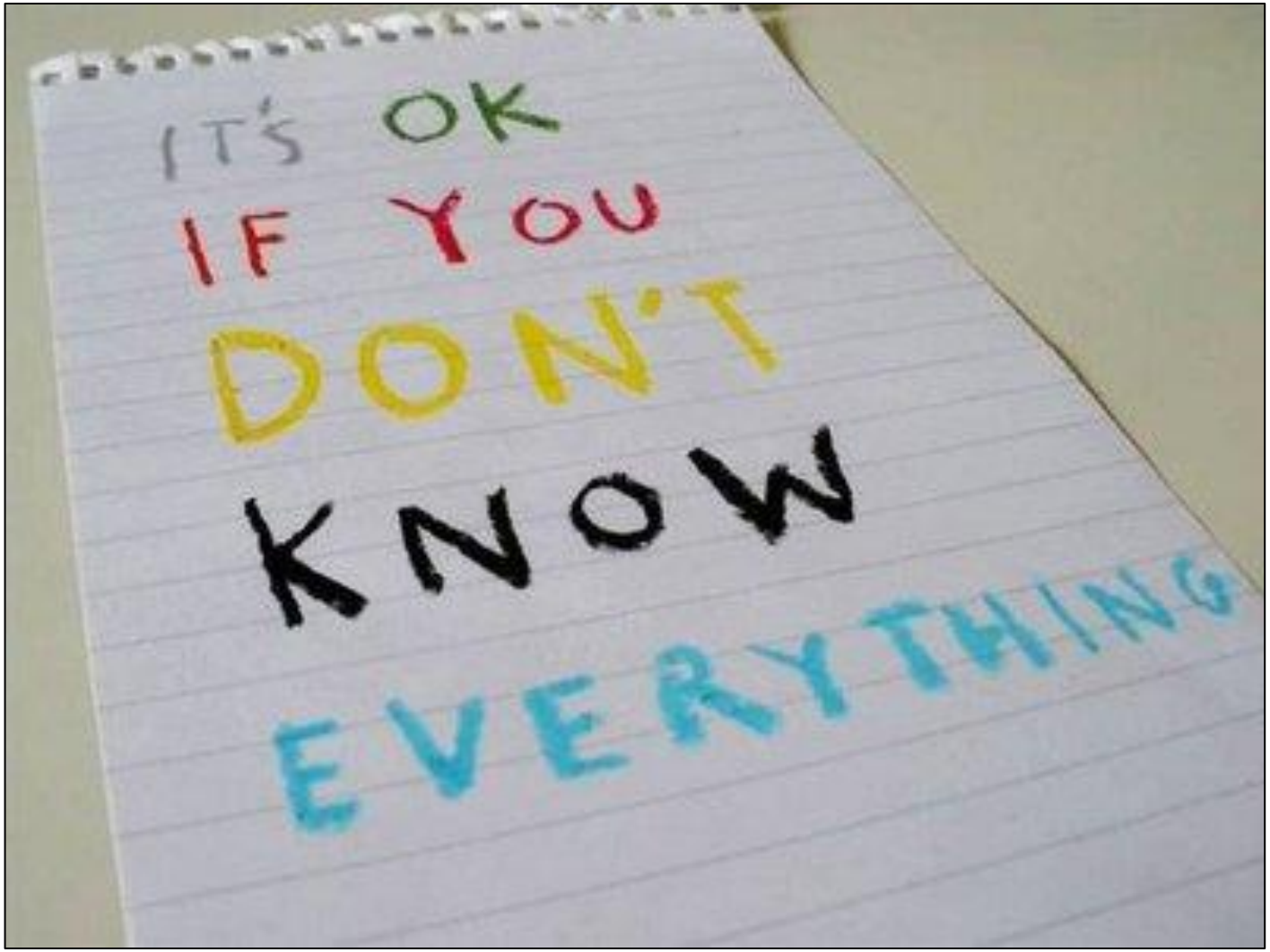
Learning Objectives

1. To share the OHS's technology planning **process** and experience

2. To share the top **resources** we encountered during our project



Disclaimer*
*I Don’t Know Everything



Source: https://whatsupkuwait.files.wordpress.com/2011/07/its-ok-if-you-dont-know-everything.jpg



Source: http://www.blogher.com/haunted-networking-forest

Takeaways

1. An understanding of the process the OHS used, some or all of which you may be able to apply to your organization

2. Selected resources we found useful, to support you in undertaking a similar project yourselves, but starting ahead of where we were a year ago

3. Inspiration!



The Ontario Historical Society

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OHS Launches 'OHS Reach' Project with Ontario Trillium Foundation Support

WILLOWDALE, ON, July 15, 2015 – The Ontario Historical Society (OHS) is excited to announce the launch of **OHS Reach**, the initial one-year development stage of a three-year initiative to transform how the Society interacts with members, subscribers, and other stakeholders, and to furnish the expansion of online services and access.

The Ontario Historical Society was awarded a 2015 Ontario Trillium Foundation (OTF) grant in support of OHS Reach.

Phase One of OHS Reach allows staff to conduct research on best practices for developing an information system to digitize the delivery of *Ontario History*, the peer-reviewed scholarly journal published by the OHS since 1899. Also included is planning for infrastructure upgrades, investigation of relevant copyright law, updating of the OHS strategic plan, and analysis of stakeholder needs through surveys and meetings.



Members of the OHS board of directors pose with the Ontario Trillium Foundation plaque at the Society's recent Annual General Meeting held in Toronto, June 2015. Holding the plaque is OHS president Joe Stafford.

The objective of OHS Reach is to build capacity within the OHS and its stakeholder groups and inspire OHS' members and affiliated societies to address similar organizational change projects. The enhancement of OHS programs and services will allow the Society to broaden its role as an advising organization within Ontario's heritage community.

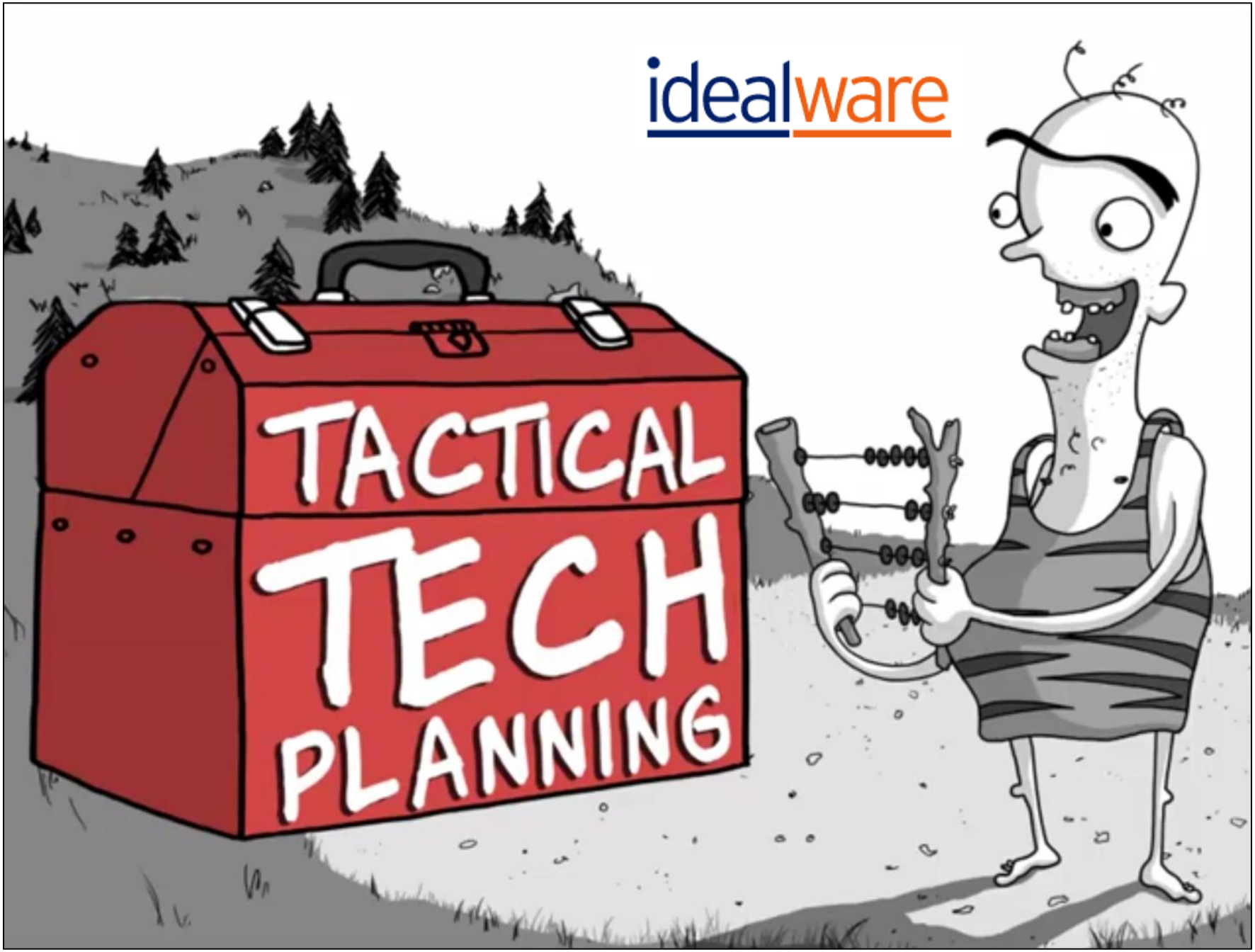
A leading grant-maker in Canada, the Ontario Trillium Foundation strengthens the capacity of the voluntary sector through investments in community-based initiatives. An agency of the Government of Ontario, OTF builds healthy and vibrant communities. For more information, please visit the website at www.otf.ca.

Founded in 1888, The Ontario Historical Society

Ontario Trillium Foundation

Fondation Trillium de l'Ontario

An agency of the Government of Ontario
Un organisme du gouvernement de l'Ontario



Source: http://tacticaltech.idealware.org/

Our Process



1. Initial Planning and Info Gathering

2. Identify Needs
   - Membership Survey
   - Stakeholder Meetings

3. Internal Review
   - Strategic Plan Update
   - Human Resources Plan Update

4. Recruit Tech Consultants

5. Perform IT Assessment

6. Develop IT Build Plan and Timeline



1. Our Process: Initial Planning and Information Gathering

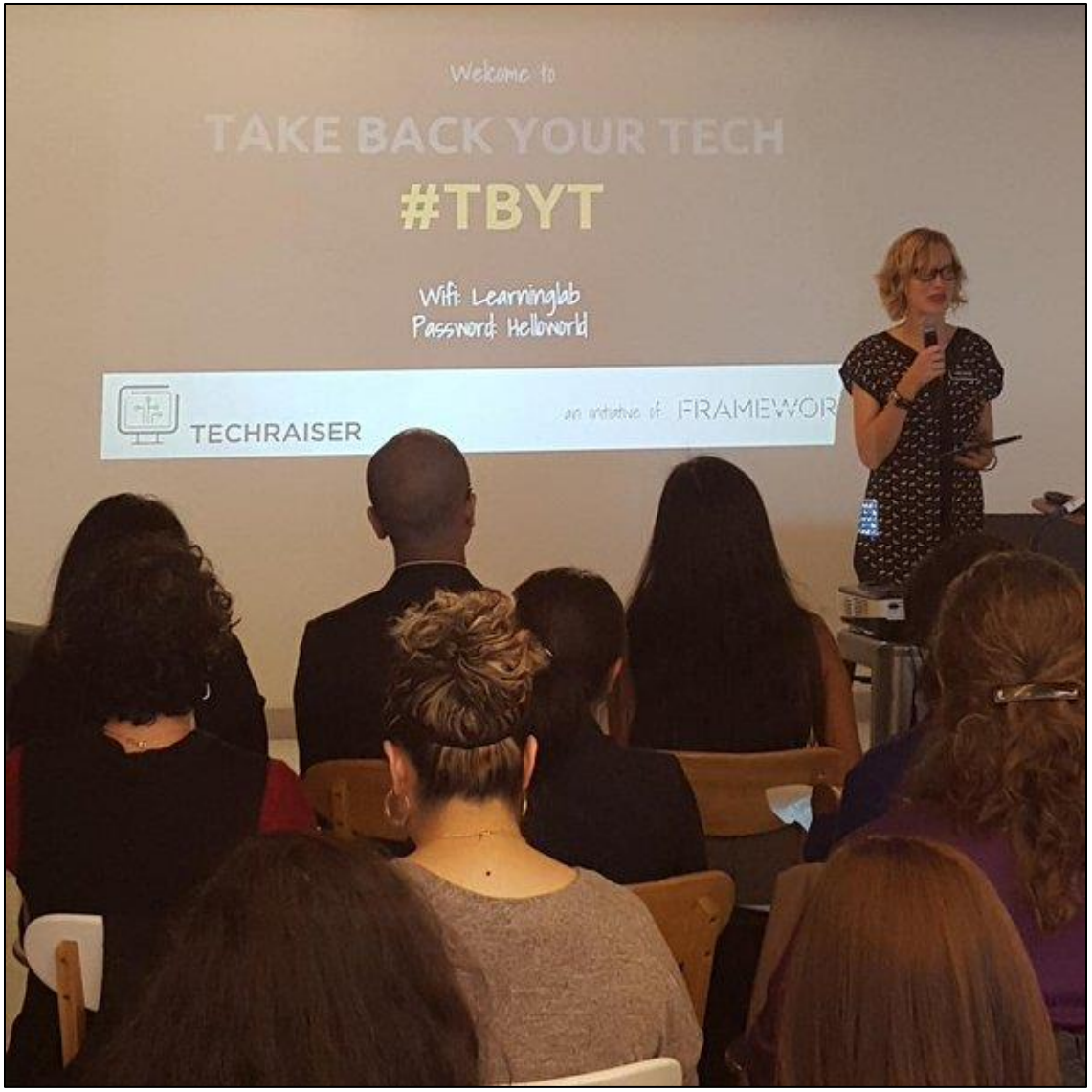
1. Initial Planning and Info Gathering



“Take Back Your Tech” Workshop

- From **TechRaiser**, an initiative of **Framework**, a Canadian registered charity helping non-profits with technology

They do website audits



Source: https://twitter.com/evergreen_dm/status/651393442484846592

What We Learned:

There is (free!) tech support out there for the not-for-profit community.

TechSoup
is your friend.

1. Initial Planning and Information Gathering



Source: www.techsoup.ca

1. Initial Planning and Information Gathering



YouTube

TechSoup Webinar Videos

Titles including:

- "Working with Tech Consultants"
- "How to Select the Right Computer Hardware for YOUR Organization"

Source: https://www.youtube.com/user/TechSoupVideo/videos

What We Learned:

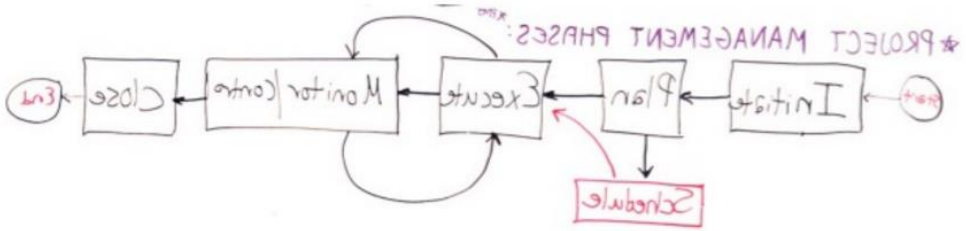
The Value of Reaching Out

*i.e. Your **friends** are your friends. Make more friends.*

Project Management

THINK LIKE A PROJECT MANAGER...

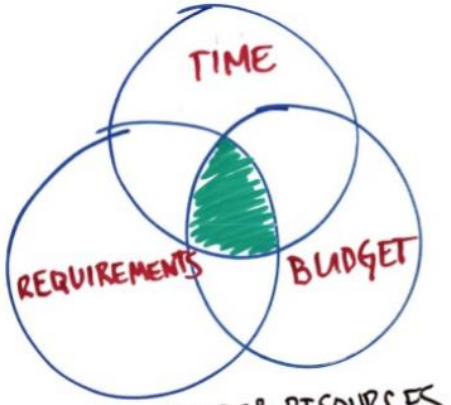
...Act Like A Library Leader





EMILY CLASPER, MLIS, PMP

SUFFOLK COOPERATIVE LIBRARY SYSTEM





NO SCOPE CREEP



Source: http://www.slideshare.net/eclasper1/ala2015-pm

What We Learned:

Planning is your foundation.

Time spent planning is time well spent.*

*Allow extra time.

What We Learned:



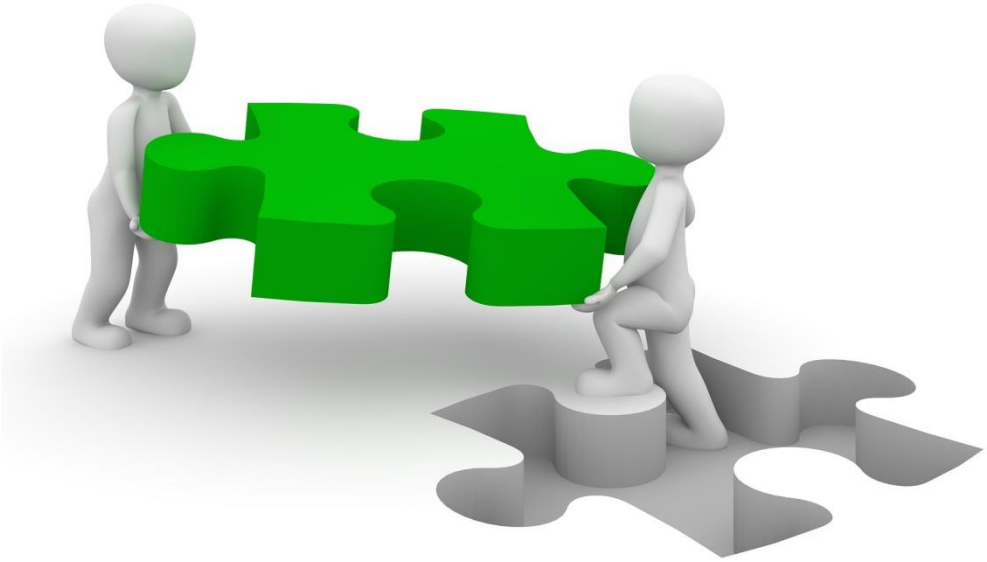
Source: http://www.quotationof.com/first-step.html

2. Our Process: Identify Needs

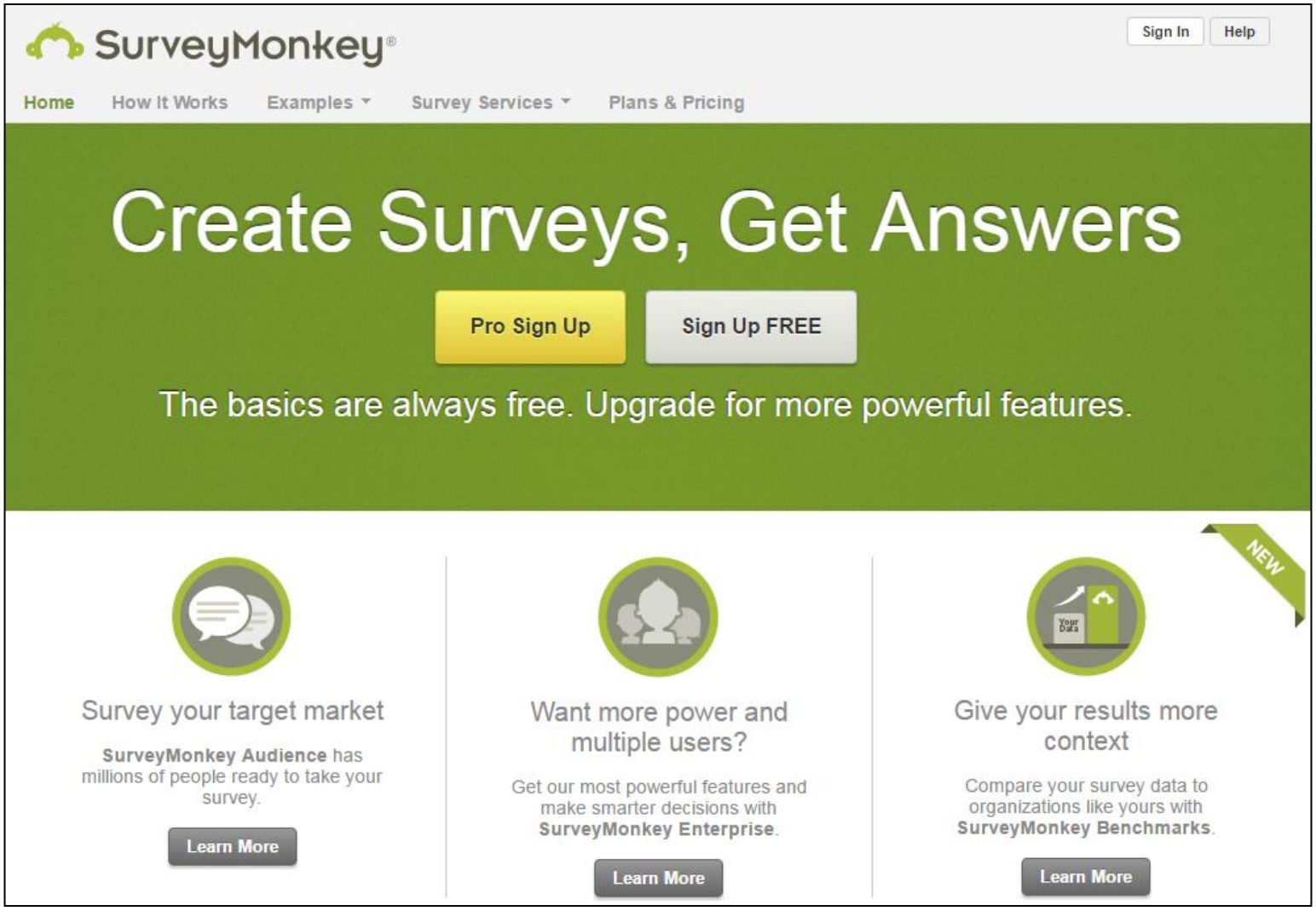
1. Initial Planning and Info Gathering

2. Identify Needs

- Membership Survey
- Stakeholder Meetings



Membership Survey



Source: https://www.surveymonkey.com/

What We Learned:

Best practices for running a medium-sized survey, using online and print (mailed) forms:

HOW you ask the question matters.

Stakeholder Meetings



… with New Sudbury Historical Society, Sudbury, Ontario

3. Our Process: Internal Review

1. Initial Planning and Info Gathering

2. Identify Needs
   - Membership Survey
   - Stakeholder Meetings

3. Internal Review
   - Strategic Plan Update
   - Human Resources Plan Update



4. Our Process: Recruit Tech Consultants



1. Initial Planning and Info Gathering

2. Identify Needs
   - Membership Survey
   - Stakeholder Meetings

3. Internal Review
   - Strategic Plan Update
   - Human Resources Plan Update

4. Recruit Tech Consultants



What We Learned:

The best referrals came from personal recommendations,
from word of mouth.

- It takes time to find the best fit.

The nature of the IT industry is fragmented (who does what?).

Finding and Working with Tech Consultants

techsoup

United States

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Home > Support > Articles and How To's > How to Choose and Work with Technology Consultants

How to Choose and Work with Technology Consultants

Figuring out what your nonprofit needs and how much it will cost



Dan Rivas - March 06, 2015

Nonprofits often get by with versatile staff members willing to tackle new challenges and a lot of help from reliable volunteers. But sometimes you need a level of expertise or experience only a consultant can offer.

Idealware is a small nonprofit that helps other nonprofits make smart decisions about software. For more information, visit www.idealware.org.

Consultants can provide a wide range of benefits to your organization if you understand your goals and exactly how an outsider can help meet

RELATED LINKS

What Are Managed IT Services and When Should You Use Them?

Other TechSoup Articles:

- "What Every Organization Needs in Its IT Consulting Contract"
- "Choosing the Right Consultant"

Source: http://www.techsoup.org/support/articles-and-how-tos/how-to-choose-and-work-with-technology-consultants

5. Perform IT Assessment

1. Initial Planning and Info Gathering

2. Identify Needs
   - Membership Survey
   - Stakeholder Meetings

3. Internal Review
   - Strategic Plan Update
   - Human Resources Plan Update

4. Recruit Tech Consultants

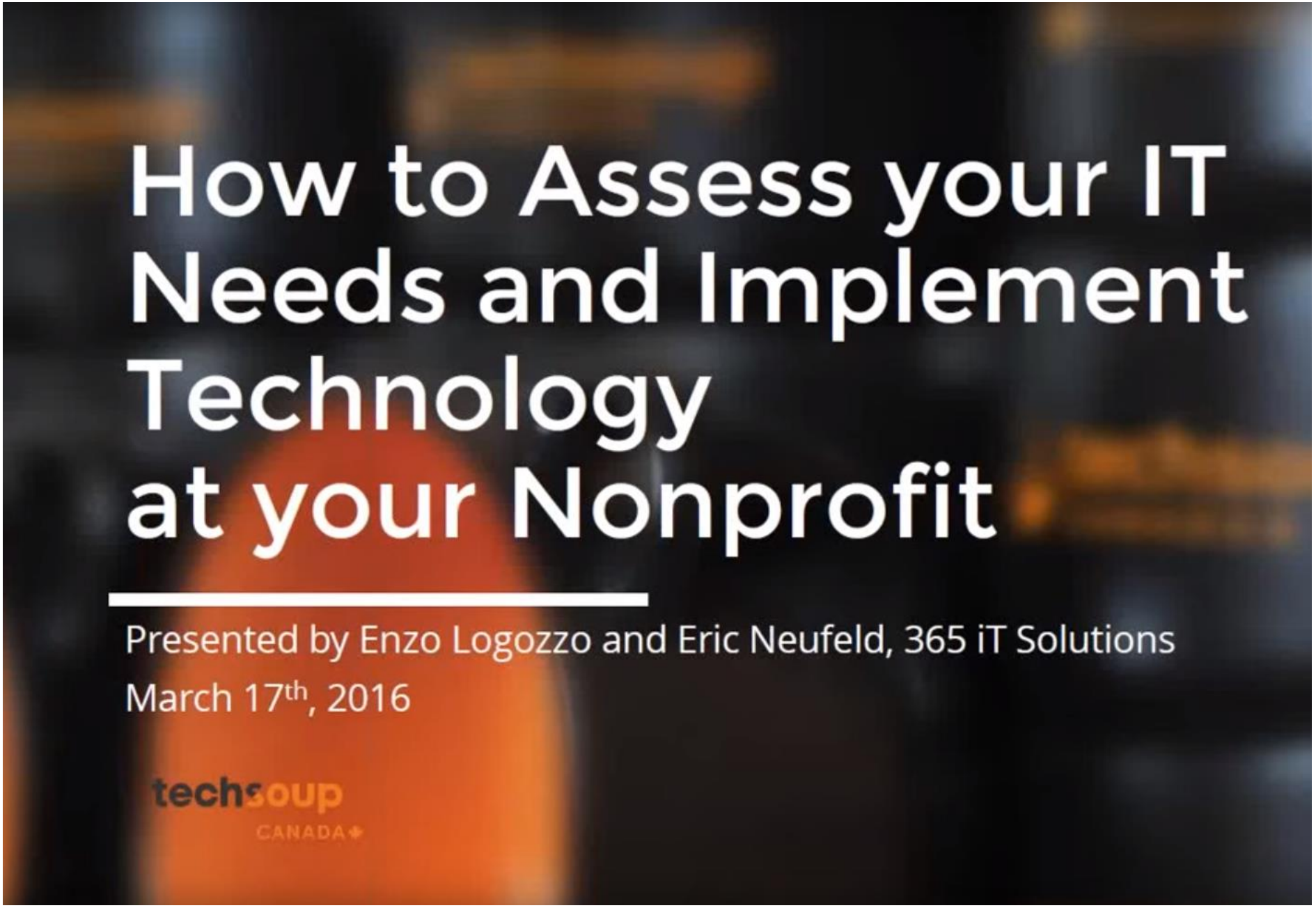
5. Perform IT Assessment



What We Learned:

An IT assessment is a review of technology infrastructure, including data management, software & online tools, and computer hardware.

5. Perform IT Assessment



Source: https://youtu.be/xzzbet0vc4E

5. Perform IT Assessment

Are your Technology Priorities in Order? Take the Tech Self-Assessment

Technology Planning

by Tierney Smith, Mar 14, 2013



Have you ever wondered: How does our nonprofit's technology shape up? Are we taking advantage of the technology available, or are we missing out on key capabilities that other organizations take for granted?

Last year, I introduced the technology self-assessment and the house metaphor for your organization to help you reflect on whether your technology is a strong foundation... or more like a leaky basement.

You gave me some good feedback, in particular: how do I assess our technology (e.g. our file system, or our website) without knowing what's possible? Maybe I think what we have is awesome, but there's actually something way better out there that we could be using? Or maybe we are chasing after the latest shiny when we're actually doing pretty well?

I thought this was an excellent question, so I updated the technology self-assessment to provide a better idea of what it means to be at each "level". For example, here's the assessment for sending emails or e-newsletters to supporters:

	Chaotic	Reactive	Proactive	Integrated	Superstar
Do you give your supporters email updates?	Email is not used to communicate with supporters.	Yes, using our standard email program (e.g. Outlook).	Yes, using an online system that allows us to send email to large groups.	Yes. Our mass email system allows us to track how many people opened and clicked on our email. It also lets us manage multiple lists and create segments to target our emails.	Yes. Our mass email system is integrated with our CRM, so we can see which of our supporters frequently open our emails and what types of content interest them.

If you are using Outlook to send out emails to large groups, you not only risk being blacklisted as a spammer, but you are missing out on valuable metrics you could be collecting to learn about how your supporters are reading and engaging with your message. This is why we recommend using an online newsletter tool such as Vertical Response or MailChimp, which Jane and I reviewed in our TechSoup Battles series.

Ready to get started? The technology self-assessment is free for any nonprofit to use in their organization. You can view and download it here: https://www.box.com/s/jgubixfi0x12qjydexqq

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Tasty Tech Tweets

Follow 6,667 followers

TechSoup Canada Retweeted

SmartCause Digital @SmartCause

How to Get Subscribers for Your Blog: 7 Fresh Ideas via @lkolo25 bit.ly/2c6nxxK

Source: https://www.techsoupcanada.ca/en/community/blog/are-your-technology-priorities-in-order-take-the-tech-self-assessment

6. Develop IT Build Plan and Timeline

1. Initial Planning and Info Gathering
2. Identify Needs
   - Membership Survey
   - Stakeholder Meetings
3. Internal Review
   - Strategic Plan Update
   - Human Resources Plan Update
4. Recruit Tech Consultants
5. Perform IT Assessment
6. Develop IT Build Plan and Timeline



6. Develop IT Build Plan and Timeline



Source: https://cira.ca/digital-capacity-canada%E2%80%99s-not-profit-sector

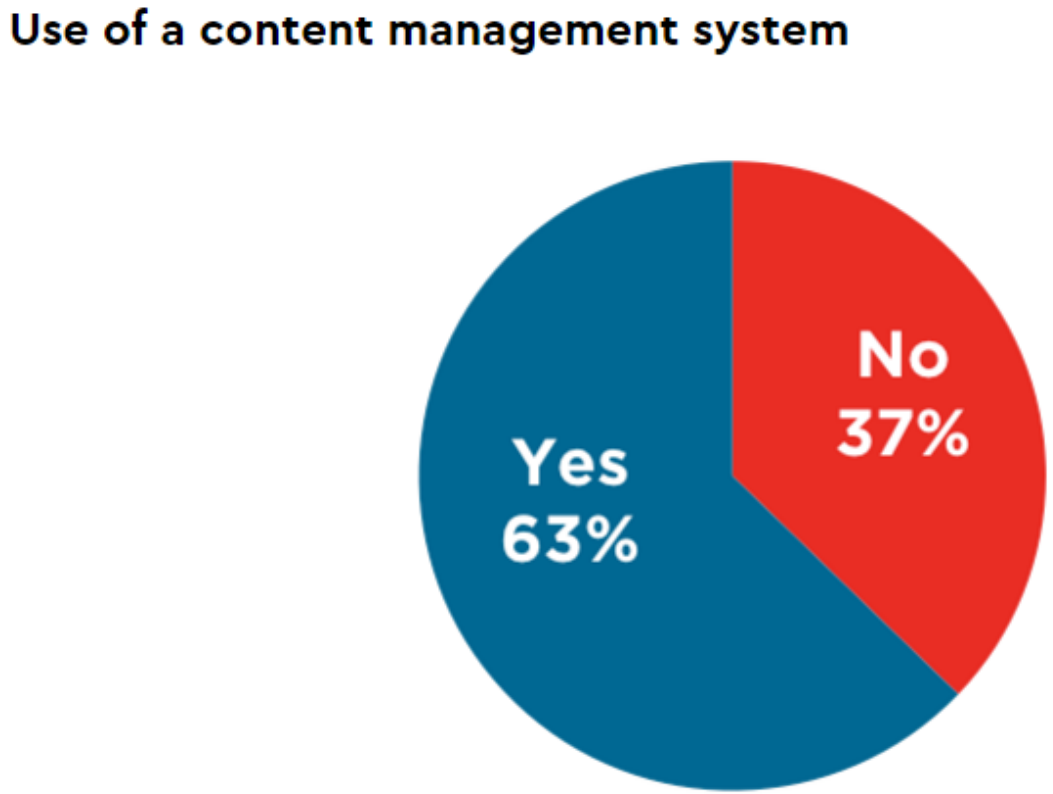
What We Learned:

What's a content management system (CMS)?

"Generally speaking, a CMS is a software package that lets you build a website that can be quickly and easily updated by your non-technical staff members."

Source: Idealware, "A Consumers Guide to Content Management Systems for Nonprofits"

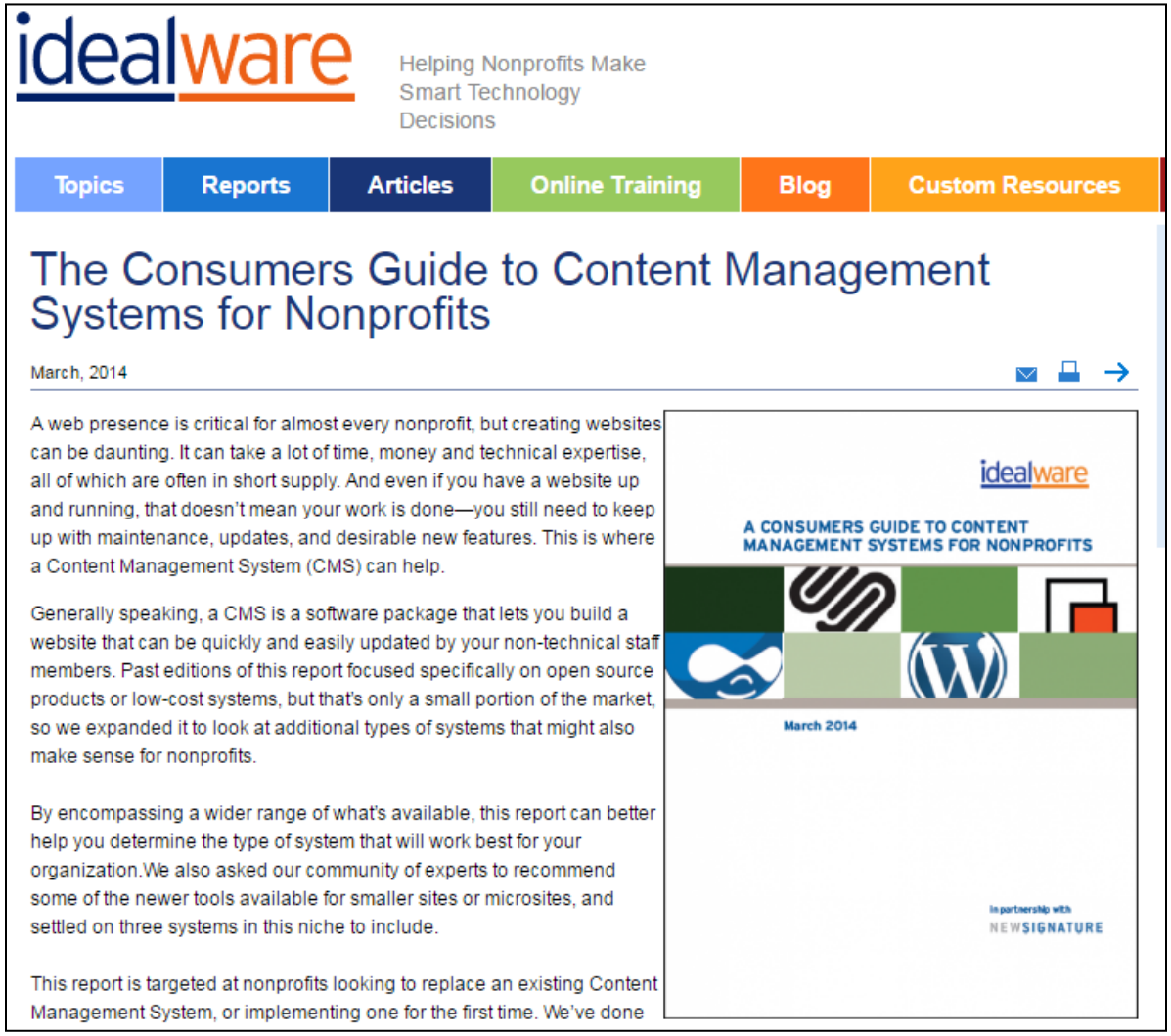
From the CIRA/Framework study:



Nearly two-thirds of the organizations studied use a content management system to keep their websites up-to-date.

Source: https://cira.ca/digital-capacity-canada%E2%80%99s-not-profit-sector/sophistication-web-presence

Choosing a Content Management System



idealware

Helping Nonprofits Make Smart Technology Decisions

Topics | Reports | Articles | Online Training | Blog | Custom Resources

The Consumers Guide to Content Management Systems for Nonprofits

March, 2014

A web presence is critical for almost every nonprofit, but creating websites can be daunting. It can take a lot of time, money and technical expertise, all of which are often in short supply. And even if you have a website up and running, that doesn't mean your work is done—you still need to keep up with maintenance, updates, and desirable new features. This is where a Content Management System (CMS) can help.

Generally speaking, a CMS is a software package that lets you build a website that can be quickly and easily updated by your non-technical staff members. Past editions of this report focused specifically on open source products or low-cost systems, but that's only a small portion of the market, so we expanded it to look at additional types of systems that might also make sense for nonprofits.

By encompassing a wider range of what's available, this report can better help you determine the type of system that will work best for your organization.We also asked our community of experts to recommend some of the newer tools available for smaller sites or microsites, and settled on three systems in this niche to include.

This report is targeted at nonprofits looking to replace an existing Content Management System, or implementing one for the first time. We've done

The Idealware report looks at 14 popular available Content Management Systems:

- Drupal, Ektron, Evoq, ExpressionEngine, eZ Publish, Joomla!, Luminate, NetCommunity, Plone, Squarespace, Weebly, Wix, WordPress.org, and WordPress.com.

Source: http://www.idealware.org/reports/consumers-guide-content-management-systems-nonprofits

6. Develop IT Build Plan and Timeline



Website Tips for Nonprofits: How to Choose a CMS, Accept Donations and Set Up Email on your Domain

SEO | Websites | Mobile | Databases & Constituent Relationship Management (CRM) | Email

by TechSoup Canada Guest Author, Jul 14, 2016

By: *Jason Faber, Product Marketing Manager at CIRA*

You've gone ahead and registered a .CA domain name for your nonprofit. Now what? The obvious answer here is to build a website, but that can feel overwhelming for most people. In the past, building a great website was only possible with a large budget and deep technical skills. Nowadays, price and technical difficulty are still two of the most common misconceptions when it comes to getting online. In reality, it's never been easier (or cheaper) to build a great website and get your brand online.

Here are our tips for building your website and how to leverage your .CA domain.

Build your website

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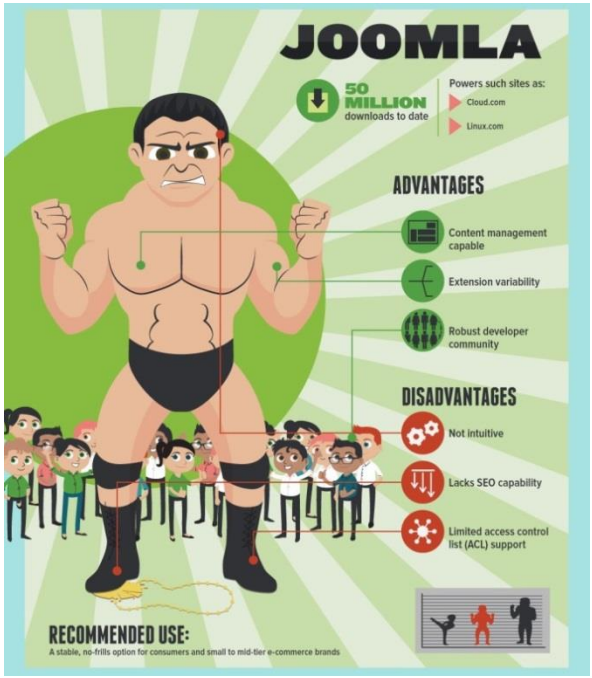
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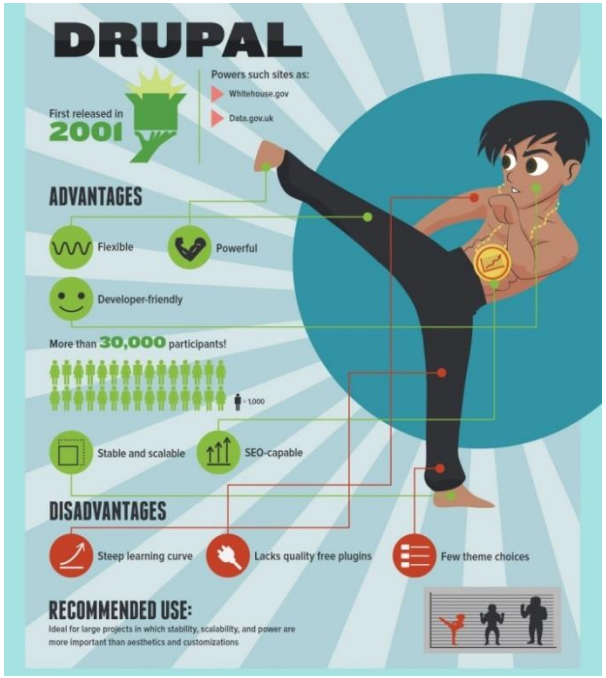
SmartCause Digital
@SmartCause

Source: https://www.techsoupcanada.ca/en/community/blog/website-tips-for-nonprofits-how-to-choose-a-cms-accept-donations-and-set-up-email-on

6. Develop IT Build Plan and Timeline





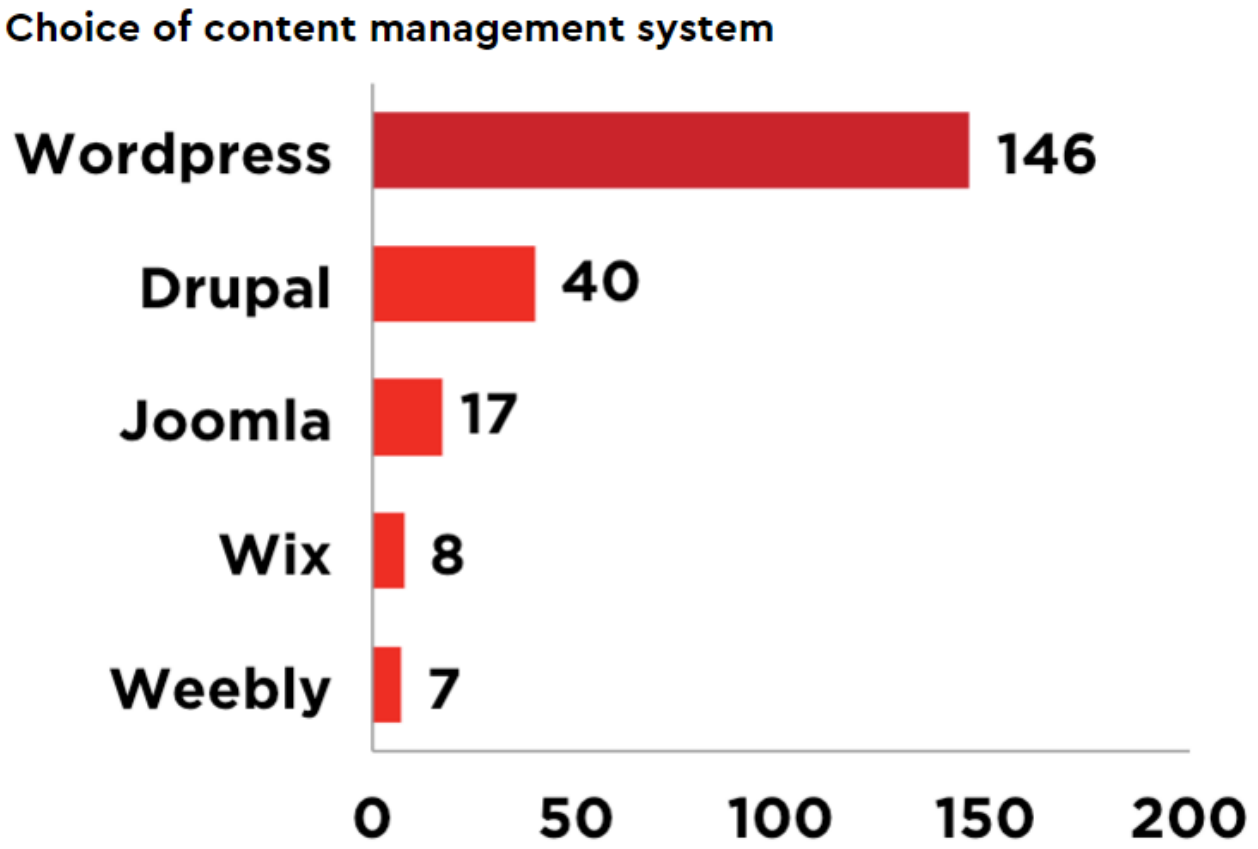






Source: https://blog.udemy.com/drupal-vs-joomla-vs-WordPress/

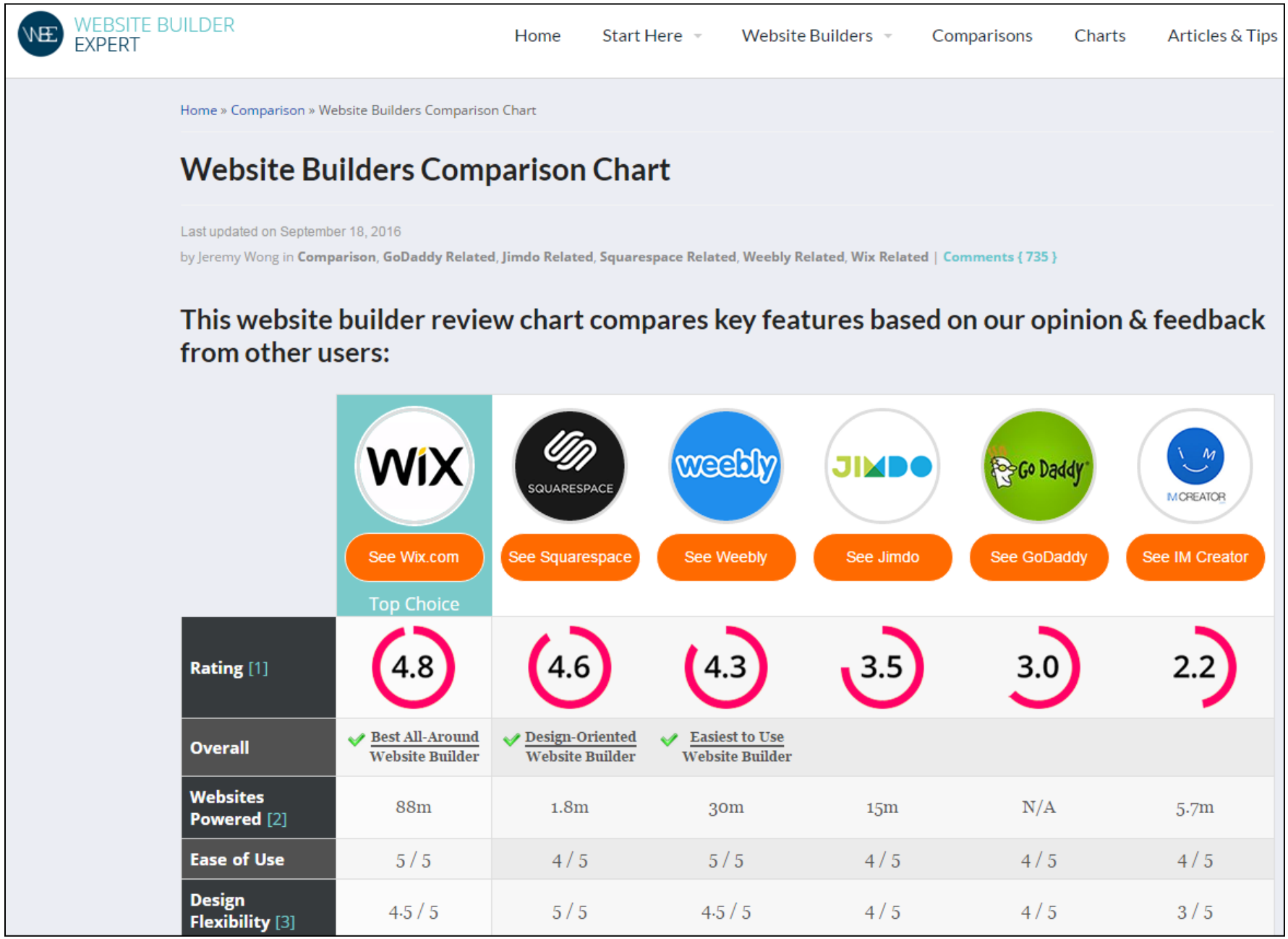
From the CIRA/Framework study:



Wordpress is by far the most popular content management system.

Source: https://cira.ca/digital-capacity-canada%E2%80%99s-not-profit-sector/sophistication-web-presence

6. Develop IT Build Plan and Timeline



WEBSITE BUILDER EXPERT

Home | Start Here | Website Builders | Comparisons | Charts | Articles & Tips

Home » Comparison » Website Builders Comparison Chart

Website Builders Comparison Chart

Last updated on September 18, 2016

by Jeremy Wong in **Comparison**, **GoDaddy Related**, **Jimdo Related**, **Squarespace Related**, **Weebly Related**, **Wix Related** | Comments { 735 }

This website builder review chart compares key features based on our opinion & feedback from other users:

	Wix	Squarespace	Weebly	Jimdo	GoDaddy	IM Creator
	See Wix.com Top Choice	See Squarespace	See Weebly	See Jimdo	See GoDaddy	See IM Creator
Rating [1]	4.8	4.6	4.3	3.5	3.0	2.2
Overall	✔ Best All-Around Website Builder	✔ Design-Oriented Website Builder	✔ Easiest to Use Website Builder			
Websites Powered [2]	88m	1.8m	30m	15m	N/A	5.7m
Ease of Use	5 / 5	4 / 5	5 / 5	4 / 5	4 / 5	4 / 5
Design Flexibility [3]	4.5 / 5	5 / 5	4.5 / 5	4 / 5	4 / 5	3 / 5

Source: http://www.websitebuilderexpert.com/website-builders-comparison-chart/

6. Develop IT Build Plan and Timeline

Hosting Facts | FIND BEST HOSTING | ABOUT US | REVIEW PROCESS (?) | GUIDES & TOOLS

Web Development & Design 101

Introduction to web development & design – 8 chapters



Want to know the basics of Web Development and Design? Awesome...

But there's a problem with this line of thought, or a number of them actually...

- **What's the purpose of having a website?** Does everyone really need one?
- **If so, how do you build a quality website?** Or in other words, how do you learn basic web development and design that would allow you to build that quality website yourself?
- **More importantly, can you build a quality website on your FIRST try?** Or do you need years of experience behind you, before you can hope for any result above dreadful?

Let's answer all of that in this **beginner's guide to web development and design**.

[Spoiler alert. Yep, you can build a quality website on your first try.]

Source: https://hostingfacts.com/web-development-101/

What We Learned:

"**The cloud** is your friend."

Tierney Smith, GrantBook,
Mentor at TechRaiser "Take Back Your Tech" Workshop



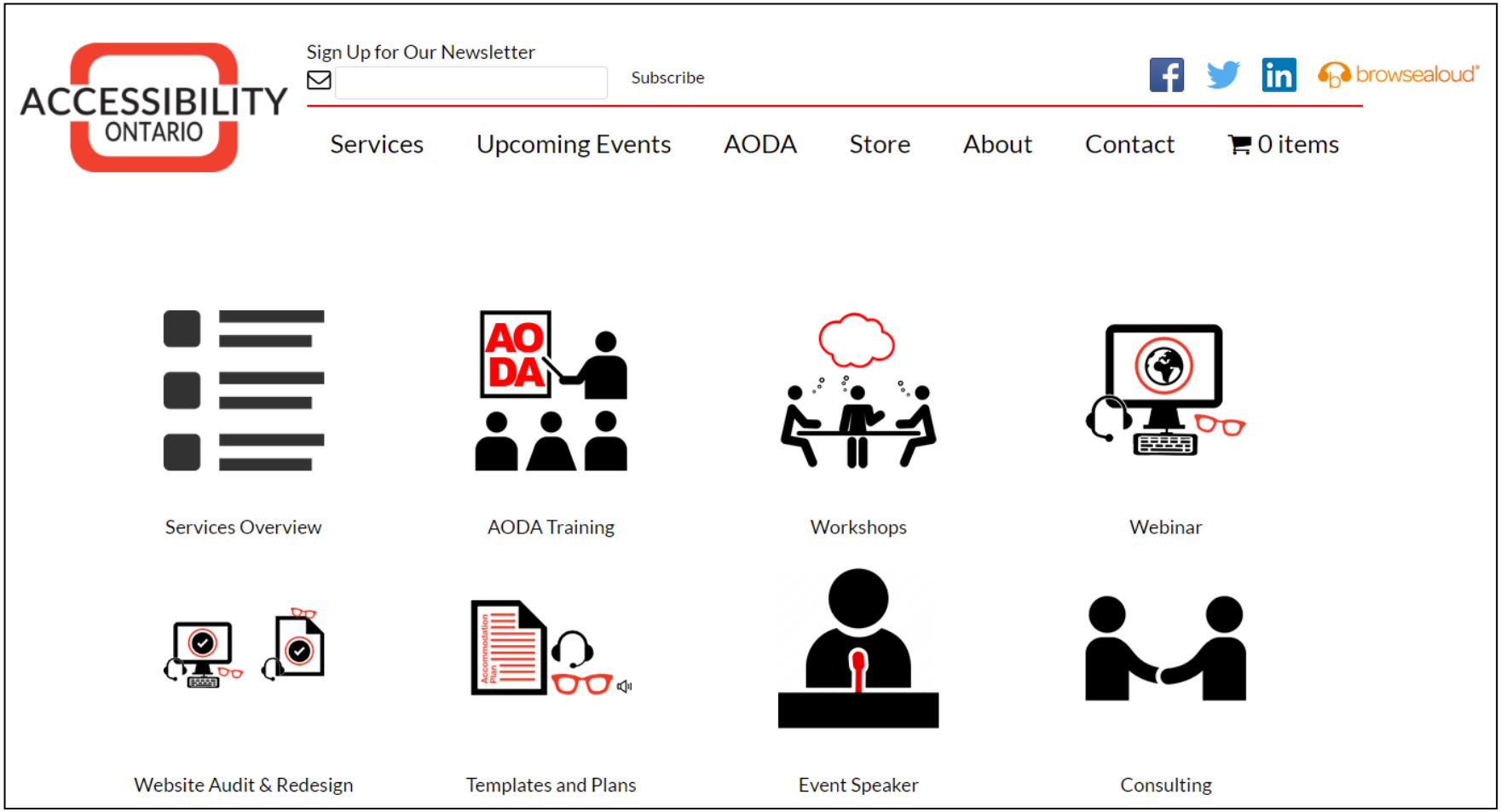
Image source: https://www.quora.com/Will-we-be-forced-to-go-to-the-cloud

What We Learned:

The only constant in technology is change.

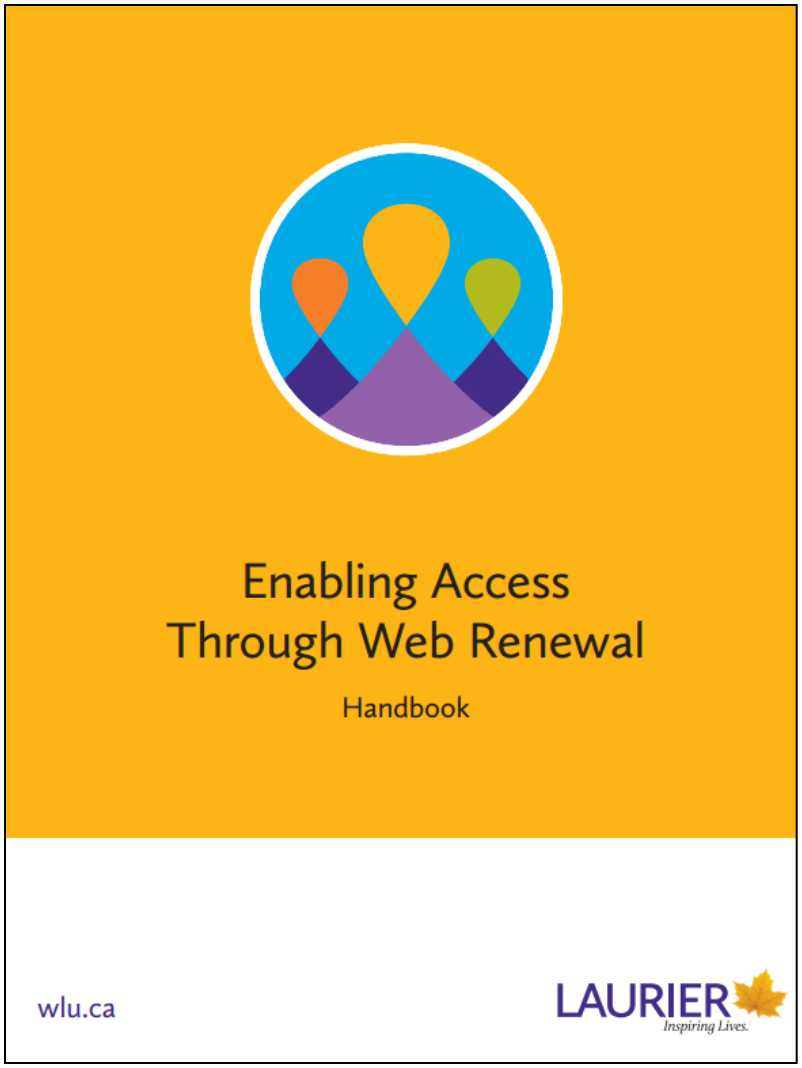
… Most of these resources didn't exist when the OHS wrote the OHS Reach project grant application in 2014!

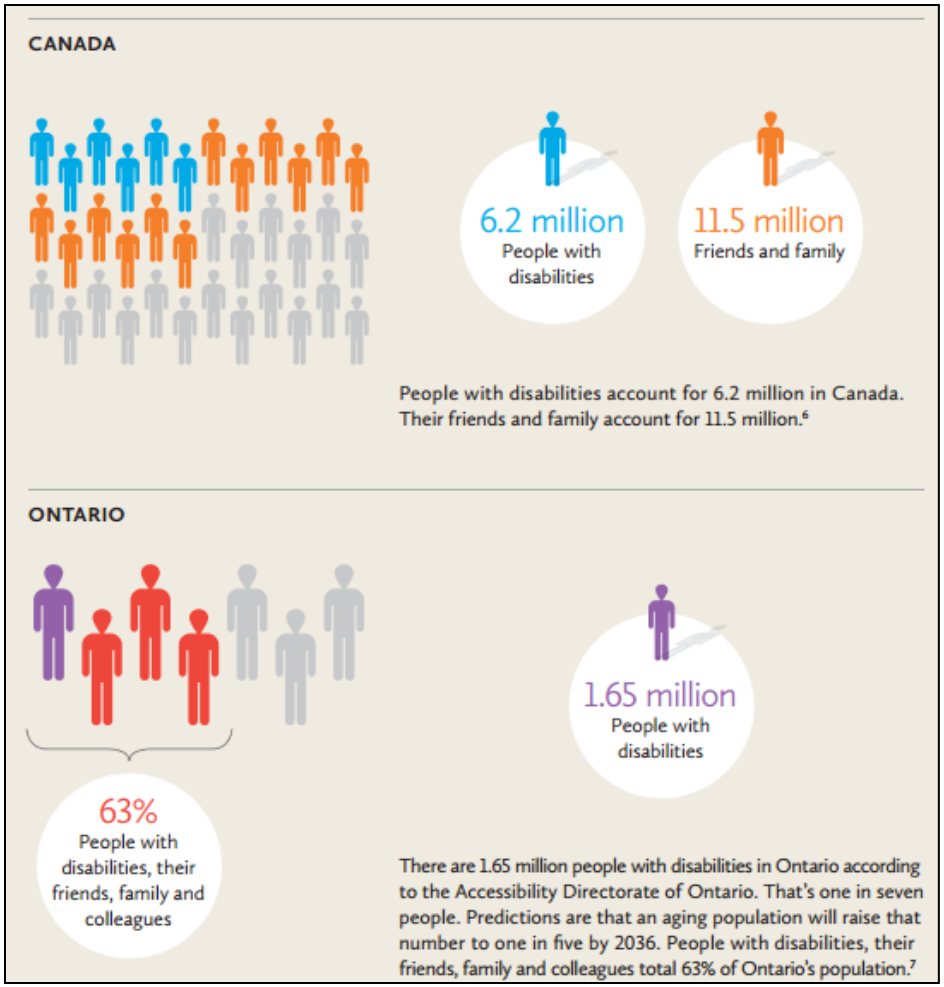
Website Accessibility



Source: https://accessontario.com/

Website Accessibility

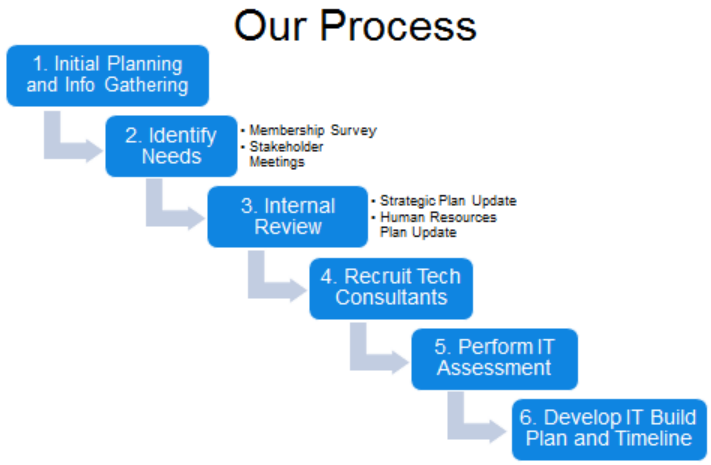




Source: https://wlu.ca/docs/EnablingAccessHandbook_online.pdf

Summary: Today's Learning Objectives

1. To share OHS's technology planning process and experience



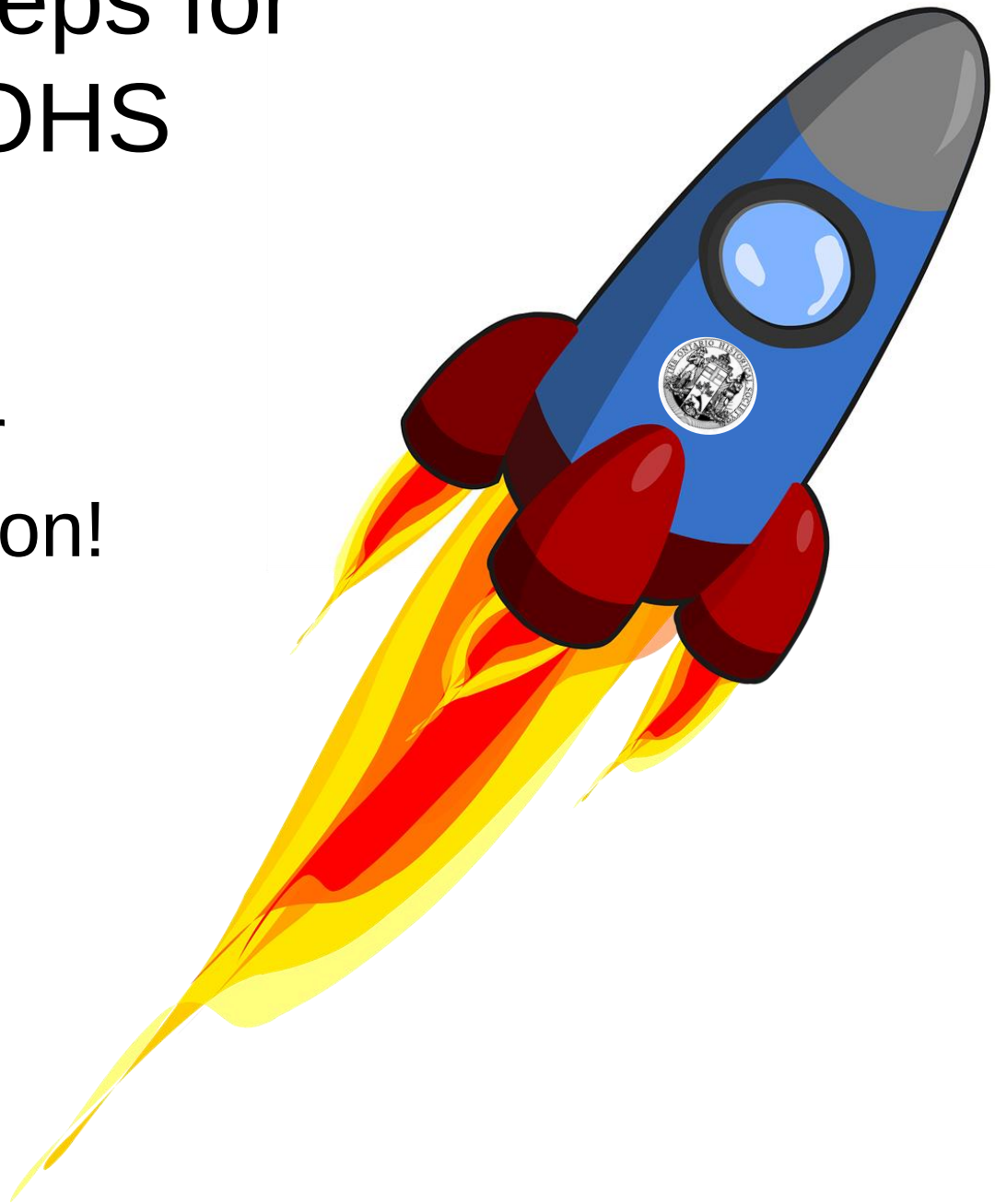


2. To share the top resources we encountered during our project

Next Steps for the OHS

Preparing for implementation!







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Project Manager and Librarian
The Ontario Historical Society
(416) 226-9011
smccabe@ontariohistoricalsociety.ca

Follow the OHS on Twitter @OntarioHistory and Facebook

Questions?

Post-Webinar Feedback

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we'd like to hear from you!

You will receive an email with a link to a post-webinar evaluation survey -
please take a few minutes to fill it out and provide valuable feedback.

Feel free to email us with comments,
questions, and suggestions for future webinars!

Email Sarah McCabe at smccabe@ontariohistoricalsociety.ca

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Become a member of the Ontario Historical Society today!
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- 4 annual issues of our **newsletter**, *OHS Bulletin*
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Email Membership Coordinator **Christina Perfetto**
at members@ontariohistoricalsociety.ca or
visit www.ontariohistoricalsociety.ca for more information.

Thank you!

Sarah McCabe
smccabe@ontariohistoricalsociety.ca