Final Technical Report on the development process of the CIVIC 2.0 platform

Introduction

The development of a more advanced platform for CIVIC was at the center of the strengthening of the CIVIC community. The objectives were to use Web 2.0 tools in order to help streamline processes and to support the governance structure of the community.

The working group on the platform development

In order to achieve this goal, a working group was created in April 2008 in order to work on terms of reference to recruit a web developer to develop the new CIVIC web presence, following findings of the survey conducted in 2006 and activities outlined in the CIVIC-approved CARISNET 2 project. The working group also had to finalize the specifications for the development work, following the initial results of a previous working group on that matter in December 2006. The members of the working group were, in no particular order:

- Richard Padilla,
- Stéphane Bruno, coordinator,
- Enrique Piraces,
- Yacine Khelladi,
- Valerie Gordon,
- Vidyaratha Kissoon,
- Rafik Abdesselam,
- Rudi Daniel,
- Andrew Mancey,
- Kevin Harris,
- Chanzo Greenidge,
- Deirdre Williams,
- Chris Halsall, joined later
- Jacqueline Morris, joined later

In the beginning, a lot of exchanges evolved around choosing a methodology to develop the specifications for the developer. The exchanges turned to be very heated over which methodology to use. Two different methodologies were discussed and eventually the group reached a consensus on using both in parallel; one would be leaded by the coordinator of the working group and the other by another member, a systems engineer, who championed the other approach. Hence, the group agreed on producing three documents:

- a Terms of Reference document which outlines the respective contractual responsibilities of the developer and CIVIC
- a "Specifications Document" which outlines in natural language what are the functionalities needed for the web platform
- a "Systems Requirements Specifications" (SYRS) Document, building from the Specifications Document, which proposes a blueprint for the web site and more in-details requirements for the web platform

The terms of reference and the specifications document have been completed. However, the SYRS document which has a more technical nature and was leaded by one of the group members was never completed. The group chose to use the Drupal system for the CIVIC web site, following findings from a previous working group that compared the various options available before choosing Drupal for its flexibility and its infinite customizability.

A prototype web site has also been setup where users could have a first glance and feel of what the final product would look like and suggest what should be included in the Requirements Specifications.

The group also discussed about possible domain names for the CIVIC web site and, after several brainstorming sessions, suggested a list of possible domain names from which the wider CIVIC membership would have to choose by means of a vote. The vote was conducted online using the polling feature of the CIVIC 2.0 web platform, and the domain name civicaribbean.org was chosen.

The selection of the developer

In order to select the developer, the group prepared a selection criteria and a scoring matrix to evaluate the various applicants. The matrix is included in Annex I of this document.

The call for proposal was published on various developer networks throughout the Caribbean and also published on the Carisnet web site. Six applicants responded by sending their proposals. The call for proposal seems not to have attracted more professional developers.

Four members of the platform working group volunteered to evaluate the applicants. Each one of them conducted independent assessments and the aggregation of scores put Rohan Smith, from Exterbox Jamaica, on top of the list. The various individual assessments were practically going in the same direction, with really insignificant differences.

The development process of the CIVIC 2.0 web platform

The CIVIC 2.0 specifications document outlined a number of features that the web platform should implement in support of all and future CIVIC activities and processes.

Each feature taken separately was rather straightforward but it is their integration into a seamless system that proves to be particularly difficult to implement using the Drupal system. Mastering the Drupal system was indeed key to a rapid and effective implementation. Although all applicants had above average experience of the Drupal system, none of them had already done similar work that required harnessing almost all aspects of the system.

In order to ease and guide the development process, a priority list has been submitted to the developer in order for him to work first on the basic functionalities for a lunch during the CIVIC 2.0 event, and to leave the more advanced features and customization for a second phase. The prioritization of the features submitted is in Annex II.

Following a previous demo site produced by a CIVIC member one year earlier using the same Drupal system, it was conceivable to have a working web site with the basic features on time for the CIVIC event. However, the developer did not follow the suggestions and delved right into laying the foundations for the whole system, which seems logical from a developer perspective but proved to be tricky and introduced subsequent delays in the implementation. Moreover, the communication with the developer was inconsistent.

During the CIVIC event, most of the features were there, independently, but their integration was not done, and most were not yet functional. In order to implement the CIVIC 2.0 platform as outlined in the specifications document, extensive customizations were necessary, mainly:

- The implementation of the channels concept, using the group module of Drupal,
- The integration of the old clearinghouse from the CARISNET 1 project to the new CIVIC platform,
- The implementation of a truly multilingual web site, not only of the menus and navigation, but of the content as well,
- The integration of mailing lists with online forums to accommodate the preferences of each CIVIC member,
- The segmentation of the web site and of the navigation by theme, sector and country,
- The integration of the automatic translation to mailing lists as well as online forums,
- The ability to have a control panel to manage all those features without requiring technical expertise

A lot of time was spent to implement and debug the above features, particularly the integration of online forums with mailing lists and the implementation of the channels concept.

The automatic translation of emails

Parallel to the development of the CIVIC web site, a software was developed to automatically translate email communications between CIVIC members. The automatic translation should work on mailing lists standalone or mailing lists linked to online channels via the online forums feature of the web site. The software worked fine with the mailman mailing list manager but would not work with the majordomo mailing list manager. The majordomo mailing list manager was the manager currently used to moderate the current CIVIC mailing lists because of the fact that it allows editing of member postings during the approval process.

After many attempts and hours to debug the software with majordomo, the problem could not be resolved. In the process, it seems that Majordomo was not totally compliant with the MIME standard and caused a weird interference with the approval process which also used a process that involved the editing of member postings.

Finally, the decision was made to go forward with the mailman mailing list manager.

The current state of the platform

In order to officially start the use of the CIVIC platform, a channel has been created for the discussions on the strategic planning and governance of CIVIC. This channel has also a mailing list associated which supports automatic translation. This channel will be used to start familiarizing CIVIC members with the new tools and based on their feedback, we are going to progressively move all discussions to the new platform.

All the channels mentioned during the CIVIC event have already been created, all CIVIC member accounts have been created on the platform; all the clearinghouse content has been migrated.

There is remaining work to do to complete the multilingual aspect of the web site, as well as some fine-tuning of some features and content. The platform will be improving on an on-going basis, but the foundations are already there to start using it.

ANNEX I – Selection criteria and scoring matrix

CRITERIA	SCORING (1-Low, 2-Medium, 3-High) (1 or 0 for yes/no questions)	FACTOR WEIGHT (1-Low, 2-Medium, 3-High)	TOTALS
Proposed Web Developer Selection Criteria & Scoring Matrix			
Experience in web development in general		3	
Experience in developing similar web sites (i.e. online community web site with CMS)		3	
Experience with Drupal and MySQL		3	
Caribbean national (1-yes, 0-no)		1	
Relevant Work Skills / Quality of past work		3	
Language skills (monolingual-1, bilingual-2, trilingual-3)		2	
ICT4D Work Experience		2	
CIVIC member (1-yes, 0-no)		1	
BONUS	**SCORING (+ 2)**		
Female (2-yes, 0-no)			
Other_____			
OVERALL SCORE			

FEATURES OF THE CIVIC 2.0 PLATFORM
* Priority is measured on a scale of 1 to 5, 1 being the top priority which means
    that the feature must be available for the first launch

	Feature	Description	Priority*
1	Navigation	Navigation on the web site must be possible by theme, by sector, by country	1
2	Integration of clearinghouse	Clearinghouse must be integrated into the web site and allow people to search and submit items into the clearinghouse, respecting the editorial policy of the clearinghouse	2
3	Multilingualism	Navigation and content of the web site must be available in three languages : English, French, Spanish; navigation must be automatically translated and content translated manually	1
4	Thematic sections	Site should be organized mainly by thematic, so that visitors can readily access resources that are of interest to them; other means of access must allow other "views" of the same content (see feature 1)	1
5	Mailing list - online forums integration	Possibility to link the current mailing list to online forums, so that users may choose the most appropriate mean to participate in exchanges depending on their particular taste	2
6	Adhesion of new members	The actual mechanism for joining the CIVIC community will have to be adapted and integrated to the web site	2
7	Activity registration management	Module that would allow the CIVIC community to manage the registration of members to activities organized by CIVIC	3
8	Resource section	Section to submit resources for members. Resources can be searched by type, content, subjects, full-text search, countries; must be linked to clearinghouse	1
9	News section	Section to share news about what is happening in the region in the field of ICT4Dev; can be updated manually by members submitting news resources and have syndicated content aggregated there from other news sources	1
10	Voting mechanism	Mechanism to allow the community to conduct voting on specific issues, to give mandates, etc.	1