



Philanthropy Australia

Using open source software for community benefit

Philanthropy Australia is the peak national body for the philanthropic sector, representing over 220 family, private, community and corporate grantmaking trusts and foundations.

Each year the sector distributes tens of millions of dollars to the community, with most of the money going to social services and welfare, health, education, the arts, housing and community development and medical research.

It is a member-focused organisation aiming for growth in philanthropic giving in Australia. It uses ICT to provide services and resources for members and to attract potential members.

To improve its services to members across Australia, Philanthropy Australia decided to redevelop its website and membership databases, reorganise its resource centre, and create an online catalogue of its holdings.

Using open source library software to improve access to information

Philanthropy Australia is a national body and must be able to provide services to its members and other sectoral players nationwide. The general public is regarded as an important but secondary audience.

It has used ICT for several years but until 2001 development had been spasmodic. It ran internal

office applications, email and maintained a basic website. The resource centre was poorly organised and there was no catalogue of its holdings.

Providing better access to the material held in the resource centre was a priority.

The organisation demonstrated its commitment to this by engaging a librarian, who later became the project manager for ICT developments. The project aimed to create and manage a specialised library and research service.

Since 2001, Philanthropy Australia's ICT environment has improved significantly. The membership and contacts database has been redesigned and the website upgraded. It now includes a wide range of information and resources and provides online access to the organisation's resource centre, a members-only area containing restricted access documents, an online version of *The Australian Directory of Philanthropy*, and interactive features for members such as email listservs.



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Open source software is used for both the members-only listserv service (Sympa) and the public access catalogue (Koha). The website is now a significant repository of information and resources, used by staff to conduct research and answer queries as well as by members and the public.

Although its own philosophy attracted it to the idea of using open source software, Philanthropy Australia recognised that open source software comes with its own cost structure, and needed to be convinced that using Koha was the most appropriate choice for its situation.

A number of costs had to be taken into consideration: the initial purchase and

licensing price, the cost of customisation, and the cost of ongoing maintenance. Koha was the cheaper purchase option, but separate costs were involved for customisation and installation. It is maintained through a general IT service level agreement.

In terms of ongoing costs, Koha had a strong advantage. There is no tied regular upgrade cycle or annual maintenance fee; such a fee would normally be between 10 and 20 per cent of the purchase price. Koha was not only the most philosophically aligned to the spirit of Philanthropy Australia but also the closest to their needs, and it was the best value for money.

Two part-time staff worked with selected ICT management consultants to develop a strong relationship with an information technology support group, Strategic Data. Strategic Data did all the development work, and now helps with general ICT advice and provides ongoing information technology maintenance.

Philanthropy Australia is planning to develop an online knowledge bank: a members-only repository of shared resources, including policy documents, guidelines and evaluations. It hopes the facility will encourage the exchange of knowledge and information within the sector.



The key benefits of using open source are its cheaper long-term costs and the fact that in using and developing open source products you are contributing to a resource which is freely available for others to use and build upon, for general community benefit, not profit.

Louise Arkles, Philanthropy Australia research and information manager



Benefits and success factors

This project has delivered significant benefits to Philanthropy Australia. They range from helping it meet short-term goals like increasing the use of material in the resource centre, to helping it achieve the much broader objective of contributing to a shift in the sector's culture of privacy towards information sharing.

Implementing Koha and reorganising the resource centre enabled the organisation to provide members with an excellent national research and information service. Before Koha, the resource centre was a collection of books and documents in the Melbourne office. The online service facilitates members' access to these resources regardless of where they are.

The website provides key support for staff, an information service for members and a tool for educating the public. It is also proving to be a platform for raising the organisation's profile. This is demonstrated by the fact that journalists are making more use of Philanthropy Australia's resources.

The successful redevelopment of its ICT base has contributed to the development of more positive attitudes to the use of ICT in the philanthropy sector and created more operational transparency.

It is important to remember that, although open source software is free, it must be installed and maintained and may require customisation. This will often require several parties to work together, which needs to be managed well.

Philanthropy Australia identified the following factors as contributing to the project's success.

- It is essential to have supportive management.
- Staff must understand the organisation and its requirements and have a skills base suited to the project's requirements.



- Insist on good design and branding. It is important to present a consistent corporate image. This creates a better overall impression of the organisation and can contribute to a greater sense of ownership by the members. Websites that are easy to navigate, clean and intuitive will produce better results.
- Select ICT consultants carefully. Consultants need a good understanding of the organisation's needs and to establish good working relationships with the staff. Although Strategic Data had no previous experience with library systems, it understood the needs of nonprofit organisations and was able to provide solid ICT skills and support. It also had experience in working on projects that used open source software.

Barriers

Philanthropy Australia had to overcome a sector-wide lack of experience with ICT to realise the benefit of the new services. Until recently, the prevailing culture of the philanthropic sector was one that neither understood nor encouraged the use of ICT. Most foundations are small, private concerns that have not needed to adopt ICT for their internal use and so have been slow to take it up for their external communications. Philanthropy Australia cannot change this culture on its own, but by using the technology to allow members to share information and experience it has made an important contribution.



Another, more immediate problem faced by staff at Philanthropy Australia has been a lack of time they have to devote to ICT projects. This is a common refrain in small organisations and reflects shared responsibilities, the need to multitask and large workloads. Management may not realise how much work is required—and how much pressure that creates—until a project is underway. Being careful about specifying and securing adequate resources ahead of time can smooth the development process.

Key lessons

- Open source is a viable and healthy alternative to commercial software, of particular benefit to nonprofit organisations.
- Thorough planning and ongoing evaluation of ICT projects is vital.
- Developing a relationship with the right ICT consultants helps enormously.

References

Philanthropy Australia www.philanthropy.org.au

Koha software www.koha.org

Sympa software www.sympa.org

COMMUNITY CONNECTIVITY

More information

In these case studies, communities, nonprofit organisations and groups share their experiences and lessons they have learnt using ICT: enhancing capability and service delivery; supporting and building communities, networks and connections; and overcoming barriers and challenges.

Australia's Strategic Framework for the Information Economy 2004–2006 emphasises the need to ensure that all Australians can participate in the benefits of the information economy.

Key strategies in 2004–06 will be to strengthen collaboration and capabilities in nonprofit organisations, facilitate the creative use of ICT for building stronger communities and social cohesion, and develop networks, capabilities and tools to enable participation by people who are facing economic, geographic or social barriers.

For more information visit the DCITA website www.dcita.gov.au or email community.connectivity@dcita.gov.au.

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