

# **Cultivating Diverse Leadership in the Nonprofit Sector:**

**Building Information Sharing Tools with  
Content Management Systems**

*A partnership between the University of Michigan School of  
Information and the W.K. Kellogg Foundation*

**Sara Alloy**, [salloy@umich.edu](mailto:salloy@umich.edu)

**Jill Griffiths**, [jillmg@umich.edu](mailto:jillmg@umich.edu)

**Jessica L'Esperance**, [jalz@umich.edu](mailto:jalz@umich.edu)

**Lev Rickards**, [lrickard@umich.edu](mailto:lrickard@umich.edu)

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## Executive Summary

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Current research<sup>1</sup> predicts an impending deficit in the areas of nonprofit leadership and diversity, based on retirement trends of high-level sector leaders and the homogeneity of the sector as a whole. Further study demonstrates reluctance from current nonprofit employees to assume these leadership roles. This deficit provides an opportunity to encourage a more diverse group of new leaders to pursue careers in nonprofits.

Using Drupal, a tool for organizing web content, a site has been created to address these issues by collecting information targeting the 18 to 35 year old demographic, specifically within communities of color. With this site, Kellogg will be able to interact directly with the target demographic through online conversations. The site will function under the supervision of a Kellogg Content Manager and will consist primarily of the Content Manager's blog<sup>2</sup> posts and polls and visitor responses. While the site has been designed to allow visitor-submitted resources regarding the leadership/diversity deficit problem, it should function primarily as information-gathering tool. Based on its current design, the site has potential to function as an interactive, digital environmental scan or, with some design alteration, an e-community (see Appendix B for further information on the e-community option).

To run the website, Kellogg will need to designate a Content Manager, System Administrator and invite target visitors from its social networks to visit and respond to the Content Manager's blog posts and polls. The Content Manager will be responsible for creating content on a regular basis, and may also be responsible for inviting visitors to the site. The System Administrator will be responsible for the technical aspect of the site and should be familiar with Drupal, PHP, MYSQL<sup>3</sup> and additional relevant web tools. The site is currently designed for public use; non-Kellogg designated visitors will be able to participate in site discussion and contribute resources.

The site is ready for Kellogg's implementation. It is designed with the intent of requiring minimal moderation and maintenance and will aggregate demographic information about visitors, issues and organizations relevant to the nonprofit sector and the leadership/diversity deficit. By combining a collection of currently available digital resources with newly generated visitor thoughts and ideas, the website has strong potential to facilitate a conversation about diversity and leadership in the nonprofit field; in effect, it will quickly and directly "get inside of the minds" of Kellogg's target demographic.

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<sup>1</sup> Young Nonprofit Professional Network survey, Preliminary Findings reported March 2007.

<sup>2</sup> The word "blog" is a truncation of the phrase web log, and usually takes the form of an information-seeking post to which users can respond. See the glossary for further terminology.

<sup>3</sup> Druapl: <http://www.drupal.org>; PHP: <http://www.php.net>; MYSQL: <http://www.mysql.com/>

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## Problem Statement

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An impending leadership/diversity deficit in the nonprofit sector is anticipated as the current leadership retires and young people choose to go into the commercial and academic sectors. This deficit is as an opportunity to encourage a group of diverse new leaders.

The first step in encouraging new leadership is to gather information. W.K. Kellogg staff interested in addressing this problem have suggested using an environmental scan to survey current sentiments regarding the leadership/diversity deficit. Traditionally, an environmental scan surveys potential areas of funding and can take several months to a year. The ultimate goal of the scan is to produce extensive research on current work within a certain funding area, including a review of current organizations and people involved, as well as future work opportunities.

The leadership/diversity deficit project is currently in the preliminary stages of development; the project has yet to receive full support of Kellogg as an organization. There is an opportunity to use current content management system (CMS) technology to address the deficit issue, especially targeting individuals ages 18 to 35 within communities of color. A Kellogg staff member will assume the role of Content Manager and this individual will use the CMS, Drupal, to conduct a pre-scan of the environment. The site will ask visitors directly why they are or are not choosing careers in nonprofits, what factors affect their decisions, and what other professional opportunities draw their interest.

The CMS will assist in gathering information from this new group of potential nonprofit leaders. It will gather background information on visitors and allow them to contribute information about themselves, share the news sources and blogs they read, and communicate directly with the Content Manager through the site.

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## Site Rationale

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The desire to collect information rapidly and through direct channels drove the development of the CMS site and shaped many of the design decisions.

### Project Goals

In specific, the site aims to:

- Support open communication between the Content Manager and future nonprofits leaders
- Collect data on organizations active in this space
- Collect data on individuals interested in this issue
- Collect issue-relevant resources (such as blogs, news articles and other documentation)
- Require little moderation from the Kellogg Foundation

### Design Constraints

Due to the exploratory nature of the project, the site is designed to operate with a minimal time commitment for management and moderation.. As resources are limited to moderating forums and directly responding to visitors, the site is designed to encourage dialog and learning through visitor submissions and involvement.

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## Site Implementation: Recommendations and Timeline

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Launching the site will involve both technical and human resources; details on the technical transfer and installation of the site are provided in the “Site Transfer Guide” on page 60. Details on the System Administrator’s and the Content Manager’s tasks can be found in the “Using and Managing this Site” section, beginning on page 15.

### Timeline

April 15, 2007	Site Transfer CD delivered to Kellogg Foundation
April 20, 2007	Seek System Administrator and Content Manager
May 15, 2007	Hire/Identify System Administrator and Content Manager
May 20, 2007	System Administrator begins installation
May 30, 2007	Site is fully functioning

### Next Steps

For the site to be most effective, we recommend the following actions:

1. Hire from outside, or from within, a System Administrator.

The System Administrator will be responsible for:

- Initially installing the site on Kellogg’s servers
- Technical maintenance of the site
- Modifications as necessary in Drupal

The System Administrator should:

- Commit approximately 5-10 hours in the first several weeks to complete site installation and work out initial bugs in implementation
- Commit approximately 2-3 hours a week to regular site maintenance
- Have a working knowledge of Drupal, PHP and MySQL

2. Hire from outside, or from within, a Content Manager.

The Content Manager will be responsible for:

- Creating content, including weekly blogs and polls
- Lightly moderating blog comments
- Handling visitor questions and complaints
- Approve visitor-suggested blogs, news feeds and web sites
- Harvest and compile information gathered through the site in a way that is useful to the Kellogg Foundation

The Content Manager should:

- Be familiar with html and mark up languages
- Have strong writing and communication skills
- Spend 7-10 hours a week working with the site

3. Work with the System Administrator to ensure that the follow technical capabilities are met:

- PHP4 (4.3.3 or greater) or PHP5 (<http://www.php.net/>)
- MySQL (<http://www.mysql.com/>)
- Apache web server



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## Site Overview

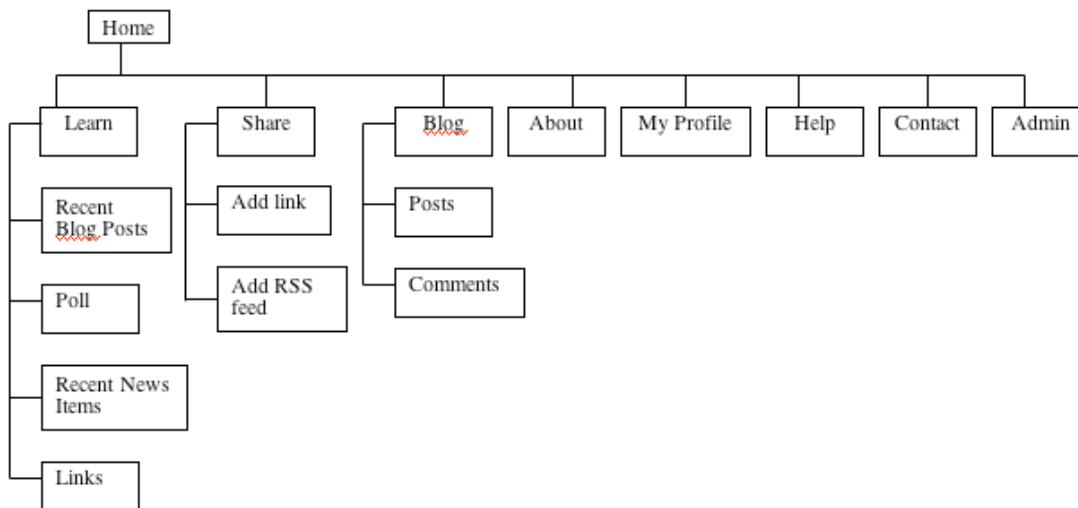
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### Creating a Conversation

While the site aims to facilitate a dialog between the Content Manager and visitors with minimal moderation, the Content Manager should expect to devote enough time to write blog posts and polls and receive the aggregated data. The site will provide an environment to gather information resources from visitors regarding the leadership/diversity deficit; these resources will be published on the website and may include individual and organizational profiles, visitor-submitted blogs<sup>4</sup> and news articles, websites and other similar items available on the internet.

The overall tone of the site is casual and is meant to depict the Content Manager eager to interact with potential diverse leaders in the nonprofit sector. While the primary channel of communication is the blog and associated comments, the site also provides a venue for visitors to submit resources and follow links to relevant articles.

### Site Map



**Figure 1.** Site Map of the Diversity Surfacing Site.

### Site Structure

There are three main components of the site: **Learn**, **Share**, and **Blog**. These three pages allow multiple streams of information to travel in multiple directions.

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<sup>4</sup> These blogs are separate from the Content Manager's blogs; these blogs may be written by the users themselves, or simply blogs they have come across on the internet.

The **Blog** page will contain blog posts published regularly by the Content Manager, commenting on the leadership/diversity deficit and sharing anecdotes, thoughts, and questions. Blog posts may be pre-written and scheduled to publish weekly, or as often as the Content Manager deems appropriate. This system will assist in automating the Content Manager's contributions, decreasing the time commitment for moderation. Visitors may then comment on the blog posts and engage in a conversation with one another as well as with the Content Manager.

By distributing the task of creating content between the Content Manager and the site's visitors, the site may contain a more complete sample of available resources. Users may contribute through the **Share** page. Once contributions are approved by the Content Manager, the content will appear on the **Learn** page. Additionally, on the **Share** page, visitors may add blog and news feeds relevant to the leadership/diversity deficit

## Site Visitor Experience

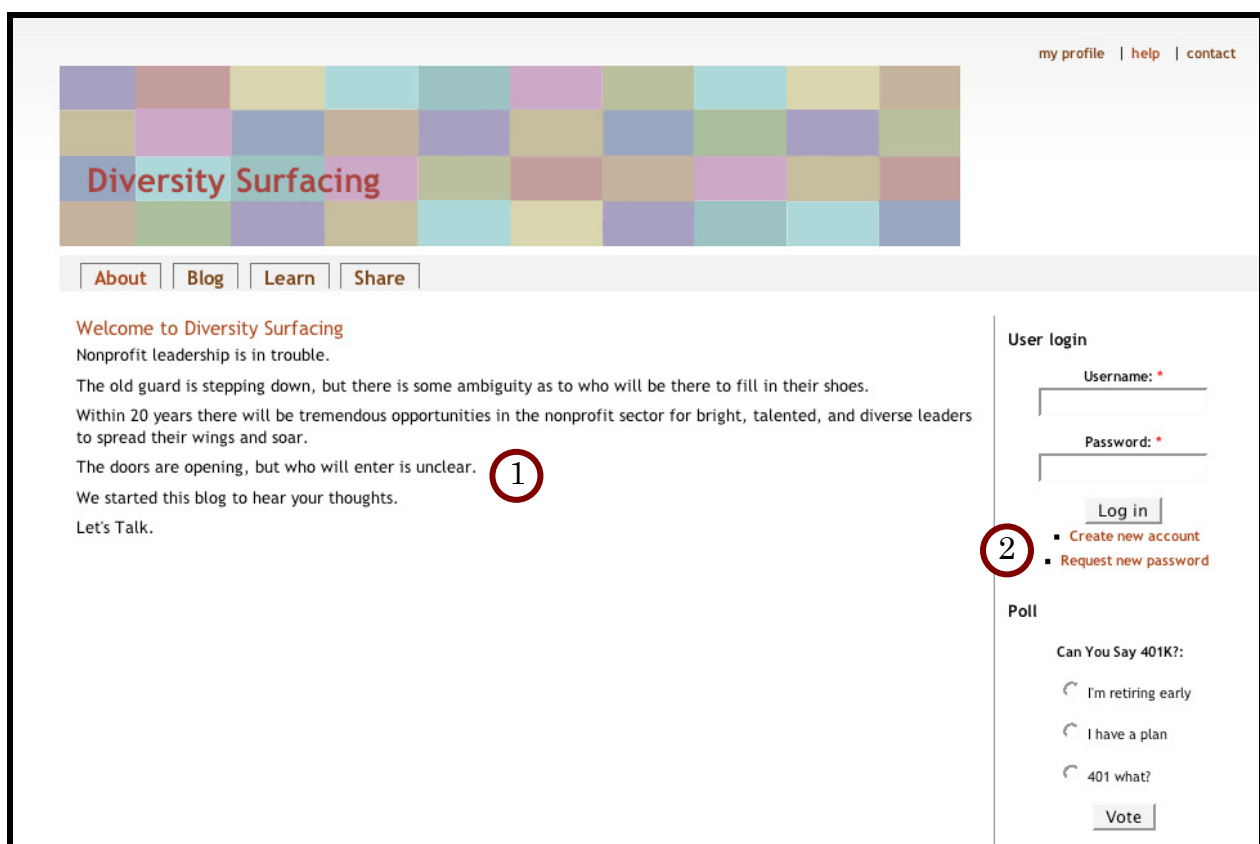


Figure 2. Homepage

The first page the visitor will see is a welcome page that briefly describes the site (1) and introduces the problem of the leadership/diversity deficit. From there, visitors can **Login** or **Create an Account (2)**; creating an account will asks for demographic info, including background and nonprofits experience.

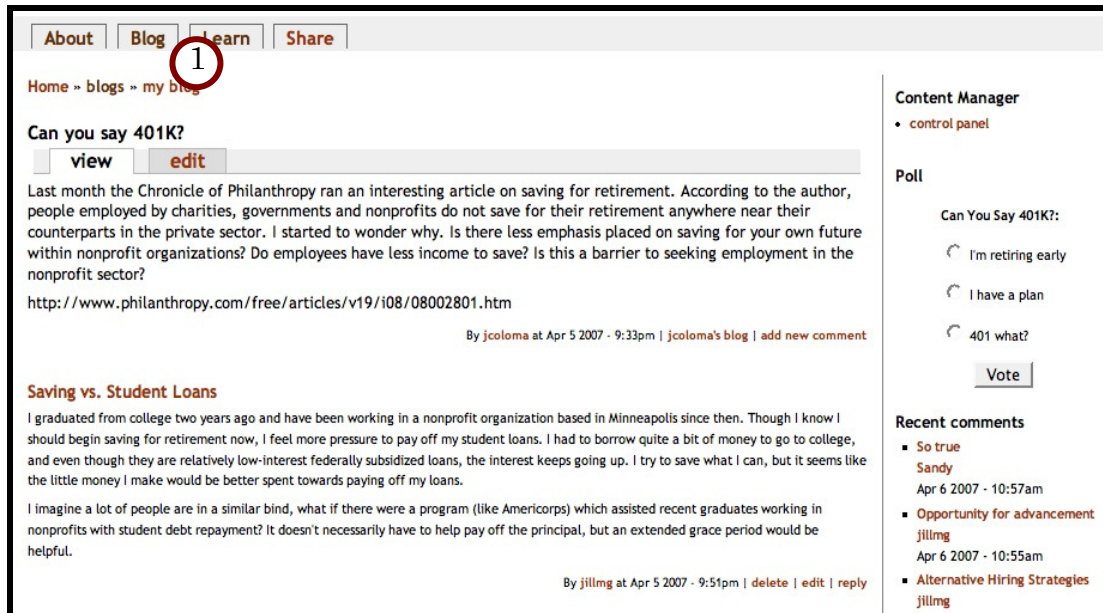


Figure 3. Blog

From the front page visitors can navigate to the **Blog (1)** to read recent posts, post a comment, or read comments posted by other visitors. The Content Manager will consistently update the blog and associated polls; both attributes are accessible from every page. Visitors can easily contribute their ideas either as a comment on the blog or by answering a poll.



Figure 4. “Learn” page

Visitors will have the opportunity to visit the **Learn** page to page to read recently submitted blog posts fed from other sites, follow links to interesting organizations or websites, and read news articles that discuss the leadership/diversity deficit. By collecting this information in one place, visitors will save time searching Google or looking for quality articles and resources—instead it is contained in one area and updated consistently.

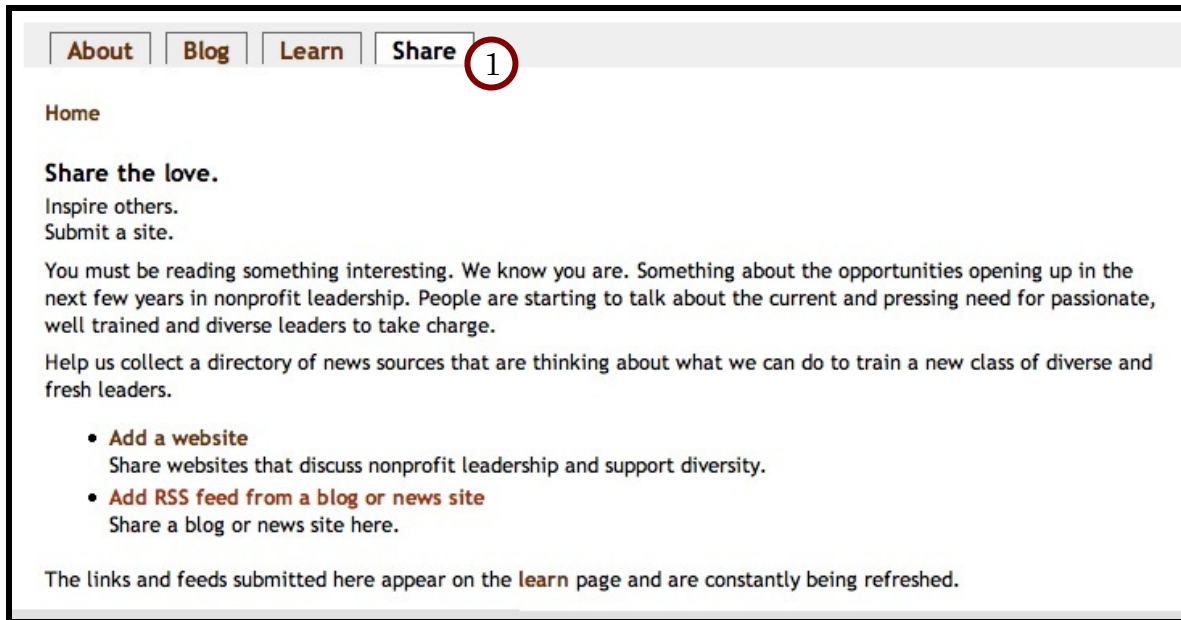


Figure 5. “Share” page

When a visitor feels that they have a great resource (webpage, news feed, or blog feed) to share with the Content Manager or other visitors, they will be able to navigate to the **Share** page (1) and submit their links.

If questions arise on either technical aspects of the site or the content, visitors can visit the **Contact** and **About** pages to learn more about the project or get in touch with the Content Manager directly.

Visitors can also access their **Profile** from any part of the site once they have logged in. The **Profile** page allows visitors to edit their personal profiles, and share their insights into the leadership/diversity deficit and share organizations doing work in this sector.

## Content Manager Experience

The first page Kellogg staff will see is the welcome front page. They will then be able to login or create an account. The Content Manager will write weekly blog posts and polls to appear on the site by following a “Create Content” link on the right menu bar. The Content Manager may schedule blog posts in advance and specify when the date and duration for publication. This is designed to make writing and scheduling multiple posts in one session convenient and time effective. Polls are created through the same “create content” link and follow the same menu options for publication as blogs.

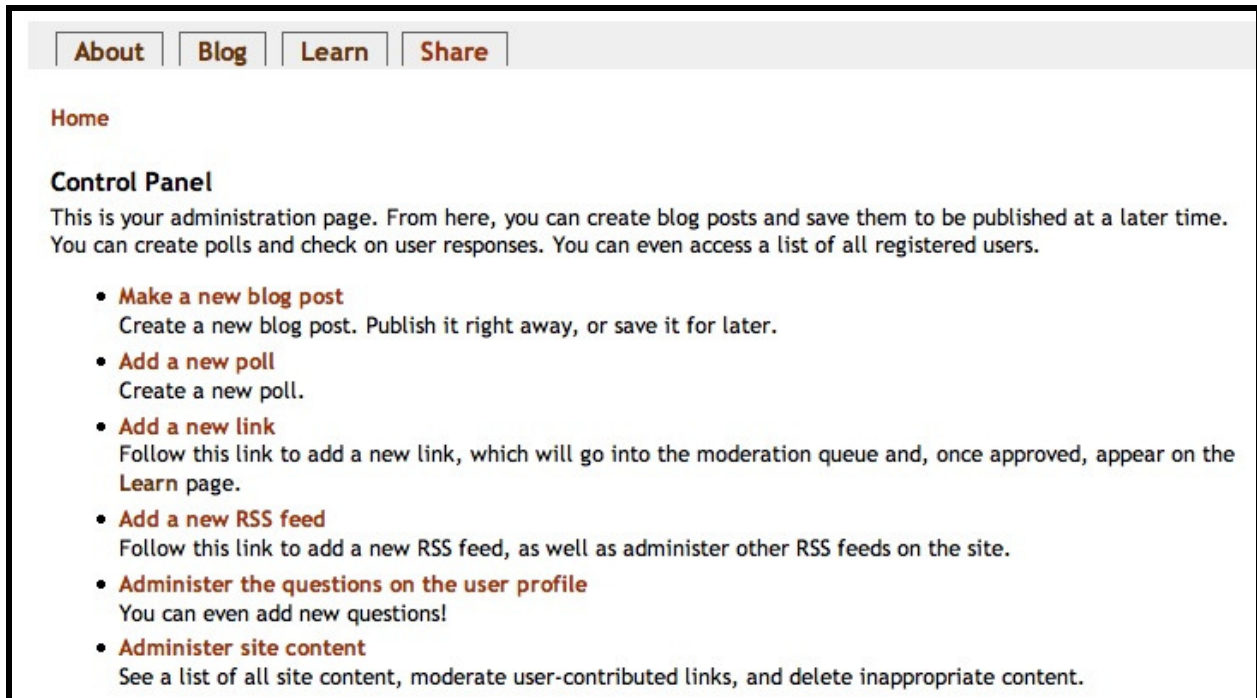


Figure 6. Control panel

The Content Manager may also navigate to the **Learn** page to read recently submitted blog posts on other sites, follow links to interesting organizations or websites, and also read up on news articles that discuss the leadership/diversity deficit. The Content Manager will be able to save time by accessing all the information in one place; they will avoid having to search Google or other sources for quality articles and resources.

The Content Manager will be responsible for monitoring the appropriateness of content on submitted from the **Share** page; they may flag or delete it as necessary. The Content Manager may also make use of the Help page, although specific documentation has been provided to assist her or him with tasks (see Appendix VII: Cheat Sheets).

The Content Manager can view aggregated data by navigating to the right menu, and selecting view all blogs or polls. Using this feature, the Content Manager will be able to compare data from the blogs and polls.

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## Using and Managing this Site:

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Minimal oversight is needed to maintain the functionality of this site. This section is an overview of how content is added and removed, how visitors are managed, as well as an overview of managing the technology to run the site.

This manual is split into two, one is an overview of the Content Manager's tasks and the other covers the System Administrator's task.

This section should be given to the Content Manager and the System Administrator for training and reference.

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## Content Manager Manual

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The site is intended as an aggregator, to pull information from visitors (who have been invited to participate) and collect it in a way that is useful to the Kellogg Foundation.

Visitors offer information by:

- Commenting on blog posts
- Answering polls
- Submitting links to web sites
- Submitting RSS feeds of news sources or blogs
- Creating a visitor profile

Content on the site is managed by the Content Manager, who is responsible for adding blogs, moderating comments, and harvesting and compiling information gathered on the site. The Content Manager is not responsible for technical maintenance of the site.

## Drupal

The site is implemented in Drupal 4.7.6, an open source web-based content management system (<http://www.drupal.org>).

The Content Manager's responsibilities are as follows:

- Content Posting:
  - Post a weekly blog
  - Lightly moderate blog comments
  - Post a poll weekly
- Visitor Administration
  - Handle visitor questions and complaints



- Approve visitor-suggested blogs, news feeds and web sites
- Harvest and Compile information from the site:
  - Poll results
  - Blog comments
  - Visitor profile information

Ultimately, the Content Manager will create a report from the information gathered from the site in a way that is useful to the Kellogg Foundation. The technical aspects of site administration will be performed by a Site Administrator.

## Introduction to the Site

There are four main pages that link from the main navigation bar under the header:

- **Learn:** Includes recent updates to blogs the site subscribes to, the most recent poll, links to web sites, updates from news feeds.
- **Share:** Visitors can submit links to web sites they like, or feeds to blogs or news sources.
- **Blog:** The Content Manager's weekly blog appears here, as well as any comments from visitors.
- **About:** Information about the web site, the project, and the lack of leadership and diversity in the nonprofit field.

In the upper right hand corner are links to:

- **Visitor profiles:** New visitors can create a profile, returning visitors can edit their profile.
- **Contact:** Visitors can submit questions and comments to the Content Manager via email.

The Content Manager will have access to the **Content Manager Menu**, which appears along the right side of the site:

- **Control Panel:** From here the Content Manager can add new blogs, polls, or view visitor profile information. Only the Content Manager and the Site Administrator will have access to this part of the site.

## Content Posting

### Post a Weekly Blog

The Content Manager will be responsible for a weekly blog post intended to elicit visitor comments. The blog entry can be short, approximately 100-200 words, and should include a question or provocative statement to encourage comments from visitors. The Content Manager should also be aware of comments left by visitors



and moderate as necessary by removing inappropriate responses.

The blog may be posted weekly or as regularly as the Content Manager deems appropriate, or blogs may be written in advance and released on a predetermined schedule.

**To post an individual blog for immediate publishing:**

- Select “Control Panel”
- Select “Make a new blog post”
- Create a title for the blog entry: this will become the title for the entire discussion thread that may follow the blog
- Type the body of the blog in “body:” you can copy and paste from a word processing application into this section
- Select “Preview” and then “Submit,” or just
- Select “Submit.” It will be posted immediately.

**To schedule blog posts for later release:**

Follow the directions above for entering the blog; but instead of previewing and submitting:

- Select “Scheduling Options”
- Enter the date and time you would like the blog published, in the format: “ “
- Leave “unpublish” blank, unless the blog should be removed from the site after a certain period of time or a specific date

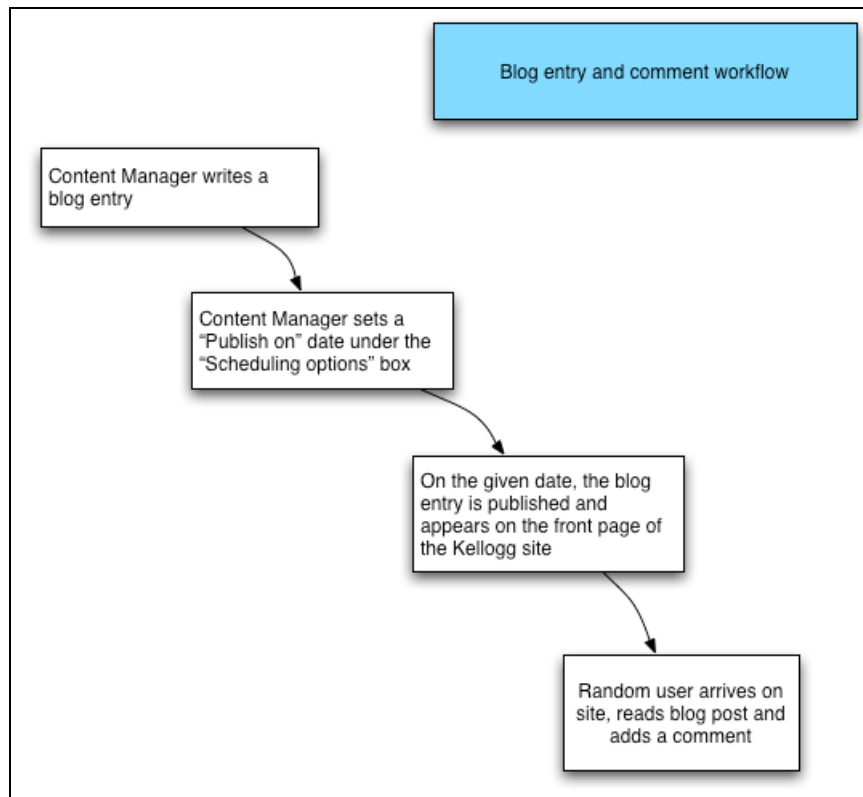


Figure 7. Blog entry and commenting workflow

### Moderate Blog Comments

Click on the title of the blog post, or on “read more” beneath the entry, to see all the comments posted on a particular blog entry. There is an option for “delete” and “edit” beneath each individual post. You may also reply directly to a comment. The reply will appear on the site as a reply to the comment, and as part of the general discussion thread belonging to the initial blog entry.

### Post a Weekly Poll

Polls should be released weekly, and are intended to get succinct data from visitors about their nonprofit experience, educational background, or demographics. They are a way to ask visitors specific questions that may not have been included in the visitor profile. Polls may, or may not, relate to the topic of the weekly blog.

#### To post a poll for immediate publishing:

- Select “Control Panel”
- Select “Add a new poll”
- Enter the question
- Add answer options into the “choice” fields: you can add as few or as many as necessary
- Select the duration of the poll, probably unlimited
- Finally, “Preview” to view the poll before publishing then “Submit,” or
- Select “Submit.”

#### To schedule a poll for later release:

Create the poll the same as above, but before submitting:

- Select “Scheduling Options”
- Enter a day and time in the format “ “ on which the poll will be published

### Moderate Visitor Contributions

From the Share page, visitors can submit links to websites, and links to RSS feeds. Both of these submissions go into a moderation queue, which the Content Manager can access from the Control Panel.

The following flowchart outlines the moderation process. A larger version can be found in Appendix IV.

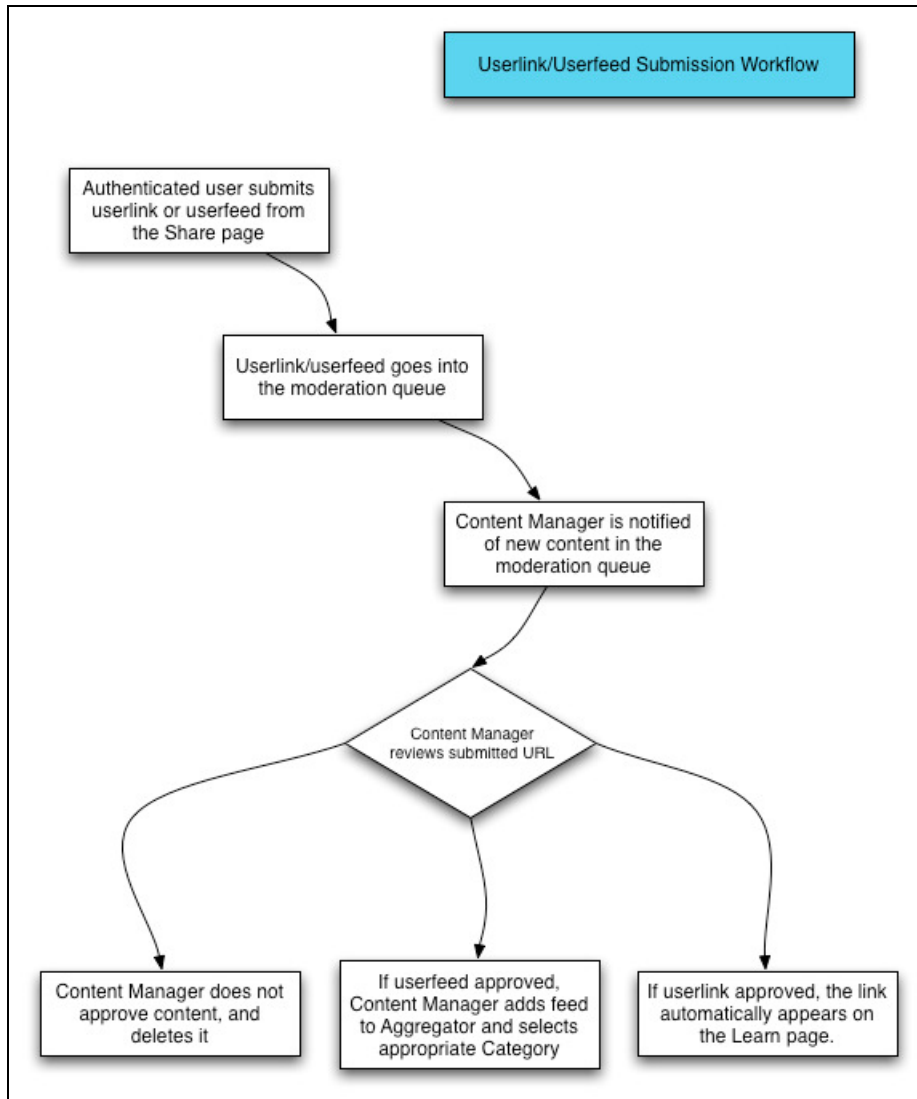


Figure 8. Userlink and Userfeed submission workflow

**To moderate submitted content:**

- Click on “Control Panel” in the Content Manager menu on the right hand side of the page
- Click on “Administer site content”
- From the “Administer site content” page, click on the first drop-down menu and change status to “in moderation:”

**content**

Below is a list of all of the posts on your site. Other forms of content are listed elsewhere (e.g. [comments](#)).  
Clicking a title views the post, while clicking an author's name views their user information. [\[more help...\]](#)

---

Show only items where

☒ status is published

☐ type blog entry

---

Update options

Approve the selected posts

---

Title	Type	Author	Status	Operations
<input type="checkbox"/> <a href="#">Share the love.</a>	page	<a href="#">jalz</a>	published	<a href="#">edit</a>

Figure 9. Moderating content

- Click the “Filter” button and you will see a new list of content – only those pieces of content that are in moderation will be displayed.

**content**

Below is a list of all of the posts on your site. Other forms of content are listed elsewhere (e.g. [comments](#)).  
Clicking a title views the post, while clicking an author's name views their user information. [\[more help...\]](#)

---

Show only items where

**status is in moderation**

and where ☒ status is in moderation

☐ type blog entry

---

Update options

Approve the selected posts

---

Title	Type	Author	Status	Operations
<input type="checkbox"/> <a href="#">Latino Media Studies Update</a>	userlink	<a href="#">jcoloma</a>	not published	<a href="#">edit</a>

Figure 10. Moderating content

- Click on the “Title” link to check out the submitted site. If it seems like an appropriate, relevant link, you can “Approve the selected post.” Here’s how:
- Click the checkbox next to the post titles you wish to approve (in this example, the title is “Latino Media Studies Update.”) Then, under “Update options,” select “Approve the selected posts” in the drop-down menu and click the “Update” button.

Show only items where

☒ status is

☐ type

Update options

	Title	Type	Author	Status	Operations
<input checked="" type="checkbox"/>	Latino Media Studies Update	userlink	jcoloma	not published	edit

Figure 11. Moderating content

- Drupal will tell you that “The update has been performed,” and the content in question should now report status as “published.”

The update has been performed.

Show only items where

☒ status is

☐ type

Update options

	Title	Type	Author	Status	Operations
<input type="checkbox"/>	Latino Media Studies Update	userlink	jcoloma	published	edit

Figure 12. Moderating content

## Changing the Site Title

If the site needs to be repurposed away from diversity to some other topic, the title can easily be changed.

- Click on “Control Panel” in the Content Manager menu on the right hand side of the page
- Click on “Administer site settings”
- Click on “General Settings”
- Type the new title into the “Name” textbox
- Click the “Save configuration” button at the bottom of the page

## Visitor Administration

### Visitor Profiles

To participate in the site, visitors must create a profile so that they can log in. From any page in the site, the visitor can access the visitor profile by clicking on “my profile” in the upper right corner.

#### First-time visitors:

A first-time visitor will be presented with a prompt to choose a username and enter their email address. Passwords are generated automatically and sent to this email address, at which point they may change the password. Following the “Account Information” are sets of questions relating to “Education,” “Nonprofit Experience,” and “Personal Information.” Several of the fields in this form are required.

#### Return Visitors:

Visitors who already have a log-in can do so without going to the visitor profile page. However, they are able to return to their profile page (again, by clicking on “my profile” in the upper right corner) to edit their profile.

### Visitor Questions and Concerns

The Content Manager should add their email address to the “Contact” page so that visitors with questions or problems can reach them.

## Harvesting and Compiling Information

Compiled information from the site is available from the control panel. In the menu on the right hand side of the page, click on “Control panel.” From the control panel, the Content Manager can access all poll results, all blog entries and comments, and a list of all registered visitors.

### Poll Results

As visitors respond to polls, their responses are aggregated into a horizontal bar graph. By clicking the “View All Polls” link from the control panel, the Content Manager can see a single list of each poll’s response graph.

### Blog Comments

One of the primary means for “getting inside the minds” of the target demographic is engaging them in conversation through the comment option on the blog. By clicking the “View All Blog Entries and Comments” link from the control panel, the Content Manager can view a single list of all blog entries along with the comments for each entry.

### **Visitor Profile Information**

It is also important that the site maintain a record of the people who are participating in the conversation. By clicking on the “View All Visitors” link from the control panel, the Content Manager can view a list of all visitors, and then gain added demographic information about each visitor.



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## Training Documents: Site Administrator

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The site is intended as an aggregator, to pull information from visitors (who have been invited to participate) and collect it in a way that is useful to the Kellogg Foundation.

Visitors offer information by:

- Commenting on blog posts
- Answering polls
- Submitting links to web sites
- Submitting RSS feeds of news sources or blogs
- Creating a visitor profile

Content on the site is managed by a Content Manager, who will be responsible for adding blogs, moderating comments, and harvesting and compiling information gathered on the site. The Content Manager will not be responsible for technical maintenance of the site.

The Site Administrator should:

- Be proficient in HTML/CSS
- Possess a basic knowledge of PHP
- Spend 7-10 hours a week working with the site

### Drupal

The site is implemented in Drupal 4.7.6, an open source web-based content management system (<http://www.drupal.org>). Using a PHP engine and a MySQL database, Drupal manages and displays content. To expand functionality, Drupal relies on a set of pre-made pieces, called modules, which can be chosen and installed to create a custom web site. A set of core modules are automatically included in a Drupal package, and from there the developer can select various additional modules for other functionalities. Modules, and support for them, are available at:

<http://www.drupal.org/project/modules>.

Drupal has a fairly straightforward directory structure. The index.php file for the site is located in the top level of the drupal directory, and serves all page requests for the site. It relies heavily on the include files located in the “includes” directory. The MySQL database, where all of the content is stored, can be found in the “databases” directory. All of the modules for adding functionality to the site are located in the “modules” directory. The “sites” directory is for serving multiple websites with one Drupal installation. This should not be necessary for Kellogg at this point in time. The “themes” directory contains cascading style sheets and php

files for displaying the site. The theme files for displaying the current site are located in the “kellogg” subdirectory.

## Administer Menu

The Site Administrator has access to an navigation and administrative menu that appears on the right side of the page. Visitors will not see this menu. From here, the Site Administrator can manage the site. The Site Administrator can edit, delete, modify the web site, add or remove visitor permissions and change access restrictions on the site.

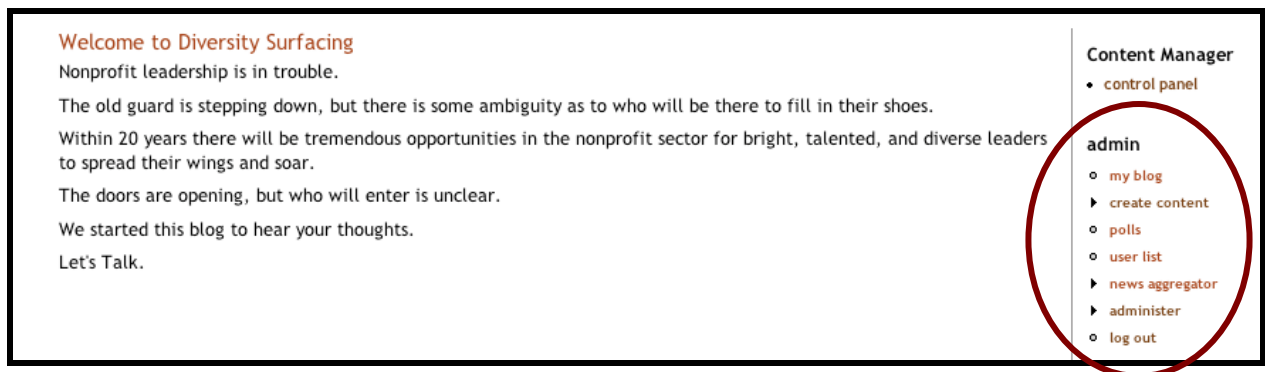


Figure 13. Site Administrator’s Navigation Menu

In Drupal, menus are called “blocks” and they are managed through the administer menu. In the navigation menu, go to “administer >> blocks” to see a list of all blocks available on the site. You can turn blocks on and off by clicking the “Enabled” checkbox, and change their height in the sidebar by changing their “weight.” You can also manage block visibility from this page. Block visibility determines which users get to see which blocks. For example, block visibility for the administer menu is set to only allow “Site Administrator” users to see the menu. You can change block visibility by clicking on the “configure” link next to the particular block. If you click on the “configure” link next to the “Navigation” block, under “Page specific visibility settings” you will see some PHP code:

```
<?php
    global $user;
    if (in_array('site administrator',$user->roles)) {
        return TRUE;
    } else {
        return FALSE;
    }
?>
```

This code evaluates to true when the current user is a Site Administrator. If the

code evaluates to true, then the Navigation menu will be shown in the sidebar.

## Modules

Modules allow site administrators to extend the core functionality of a Drupal site. Module files end in “.module” and are written in PHP. The Drupal engine uses a set of hooks that allow new modules to access core Drupal functions. Examples are “hook\_help()” and “hook\_menu()”. Each new module is a PHP file that calls those hooks by defining new functions that replace the word “hook” with the name of the module, such as “blog.” Examples would be “blog\_help()” or “blog\_menu()”. If for some reason you need to dig into the interior of a module, you may find the Drupal API site helpful (<http://api.drupal.org/api/4.7/group/hooks>).

Setting visitor permissions for modules is accessible from the menu on the right hand side of the page, under “administer >> access control.”

Given Kellogg’s use of Sharepoint software, the site may be ported away from Drupal. In light of this fact, a list of modules and their functions has been included for the convenience of future Site Administrators. If a Site Administrator wishes to port the site to Sharepoint, she or he simply needs to find a way to replicate similar functionality within Sharepoint’s toolset.

<b>Module</b>	<b>Function</b>
Aggregator	Pulls RSS feeds to blogs and news sources and displays them on the Learn page
Profile	Creates a customizable visitor profile form that elicits specific information from visitors about themselves to be accessed by the Content Manager and Site Administrator
Polls	Allows the Content Manager to create custom polls which visitors can respond to
Content Construction Kit (CCK)	Allows the site developers to create new types of content, it is used on this site to create the userlink content type
Userlink	A defined type of content that specifies how visitors contribute links and feeds to the site and in what format they are displayed on the site
Scheduler	Allows the Content Manager to create blog entries or polls to be published to the site at a later date
Panel	Displays the different content types on the Learn page as 4 separate panels

Table 1. Modules and functions

### **Aggregated feeds from blog and news searches**

Modules: Aggregator

The Aggregator module is implemented so that RSS feeds of blogs and news articles are aggregated and displayed as different categories. To modify the Aggregator module, or to delete or edit content being aggregated: select “Administer” from the menu on the right, and select “Aggregator”. The following information will be displayed:

### **Visitor Profiles/Visitor Lists**

Modules: Profile (Administer >> Settings >> Profile)

The Profile module allows customization of questions and formats (text fields, radio

buttons, drop-down menus, etc.)

## Polls

Modules: Polls

The polls module comes bundled with the default Drupal installation. Polls will be available in a block on the right sidebar. Poll results will be available in one of the panels on the **Learn** page.

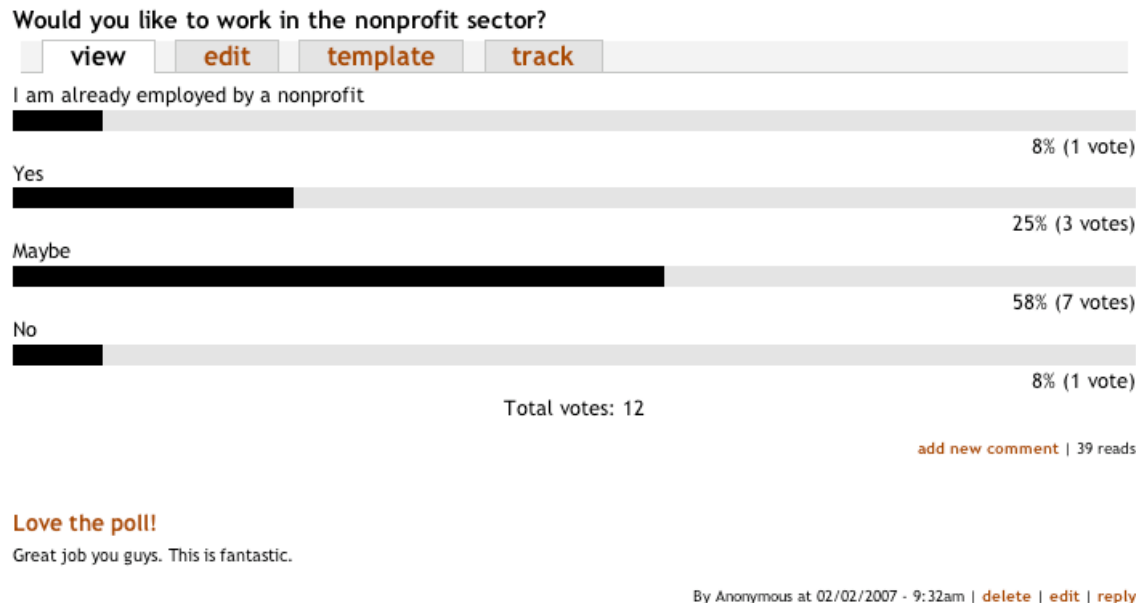


Figure 14. Poll results

## Visitor-contributed RSS feeds and links to resources

Modules: Content Construction Kit (CCK)  
Userlinks

The “Share” portion of the site is designed to enable visitors to contribute the addresses for RSS feeds and websites. The Content Construction Kit (CCK) module was used to create a new content type where visitors contribute feed URL, feed title and a brief description. For visitor contributed links, the ready-made module called Userlinks was employed. In both cases, visitor submitted content goes into a moderation queue, processed automatically or by the Content Manager (see Workflow document).

## Scheduling node publication

Modules: Scheduler

As previously mentioned, one of the main design constraints was the need to make

it time efficient for the Content Manager. To streamline the blog writing process, the Content Manager will be able to write multiple, short blog posts, input them all at one time, and then schedule a time and date for each to be published. (Recommended: twice a week.) To accomplish this work process, the Scheduler module was installed and enabled only for blog posts. It adds a “Scheduling options” box to the “Submit blog entry” screen.

▼ **Scheduling options**

**Publish on:**  
  
 Format: 2007-03-12 11:39:34. Leave blank to publish on the time of form submission.

**Unpublish on:**  
  
 Format: 2007-03-12 11:39:34. Leave blank to not unpublish this node.

**Time zone:**  
 ▼  
 Select the time zone to (un)publish in.

Figure 15. Scheduling publication. This box allows a “Publish on” date to be specified.

### Layout options

Modules:    Views  
               Panels

The quantity of information on the Learn page was organized through the Panels module. Using panels, two columns were laid out on the Learn page, and displayed with two blocks in each panel: Recent aggregator feeds categorized as “blog,” recent aggregator feeds categorized as “news,” most recent poll and most recent submitted userlinks all appear here.

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## **Appendix I: Organizational Background**

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The W. K. Kellogg Foundation seeks “to help people help themselves through the practical application of knowledge and resources to improve their quality of life and that of future generations” (WKKF, “Mission Vision Values”). W.K. Kellogg established the Foundation in 1930, with the intent that those involved could “use the money as [they] please so long as it promotes the health, happiness, and well-being of children” (WKKF, “Frequently Asked Questions - Who We Are”). Though the work supported by the Foundation has changed over time to reflect changes in perceived need, the Foundation’s mission and work continue to reflect Kellogg’s vision. The Foundation seeks to empower individuals and communities by focusing on existing strengths and providing tools enabling people to help themselves.

The Foundation’s income stems primarily from the trust set up by Kellogg in 1930 (WKKF, “Overview – Who We Are”). Throughout his lifetime, Kellogg gave 66 million dollars in Kellogg Company stock to the Foundation, among other stocks (WKKF). The Foundation still owns stock in the Kellogg cereal company, as well as holding investments in other companies and organizations. Though established by Kellogg, and receiving a large part of its income through Kellogg Company stock, the W.K. Kellogg Foundation and the Kellogg Company are not related. The Foundation is run by an independent board of trustees.

While the Foundation initially focused on the local Battle Creek, Michigan area, it began to do international work at the beginning of World War II (WKKF, “Overview – Who We Are”). The Foundation further expanded into southern Africa in the 1980’s, hoping to address some of the problems associated with apartheid (WKKF). Today, the W.K. Kellogg Foundation funds grants in the United States, Latin America and the Caribbean, and southern Africa in the following program areas:

- Health
- Philanthropy and Volunteerism
- Youth and Education
- Food Systems and Rural Development

### **Philanthropy and Volunteerism**

For this project, lasting from January through April 2007, a team of four University of Michigan School of Information (SI) students worked with Jessica Coloma, the program associate for the Philanthropy and Volunteerism program area.

The Philanthropy and Volunteerism program area focuses on “increasing the ranks of new givers and nurturing new emerging forms of philanthropy” (WKKF, “Overview – Philanthropy and Volunteerism”). Philanthropy is broadly defined at

Kellogg as action in support of the common good (WKKF). In particular, this area of Kellogg grant making “[seeks] to unleash resources by supporting the emergence of new leaders and donors, creating and sharing knowledge, and building tools that advance the effectiveness of the philanthropic sector” (WKKF).

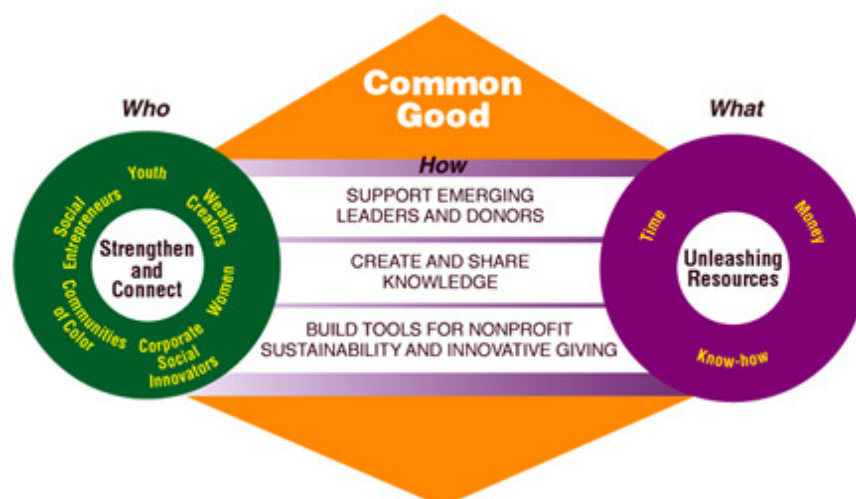


Figure 16. Anatomy of the Philanthropy and Volunteerism Program Area (from <http://www.wkkf.org>)

Part of Kellogg’s goal is to “[foster]...interconnections” between these six demographic groups, and in so doing “create a marketplace of ideas, techniques, and actions supported by collaborative leadership efforts.” In greater detail:

The challenge is to broker ideas, relationships, and opportunities. We hope that strengthening and connecting groups of individuals and organizations will result in improved knowledge and new philanthropic resources that will greatly increase giving and volunteerism in the coming years. The objective is to multiply resources both financial and human that are dedicated to improving the collective lives of citizens and advancing the common good. (WKKF, Overview – Philanthropy and Volunteerism)

## Primary Stakeholders

For this project, the SI team has defined key stakeholders as inclusive of internal Kellogg Program Associates, external consultants, organizations, and individuals interested in the nonprofit sector. Following are roles and responsibilities for these individuals.

### Kellogg Program Associates

The Kellogg Foundation currently employs several Program Associates across the four areas. All Program Associates manage environmental scans that fall under their respective programming area. Jessica Coloma, the Program Associate in the



Philanthropy and Volunteering area,<sup>5</sup> oversees the current environmental scanning area that this project will focus on.

Jessica is interested in Drupal as a platform for a web-based scan because of its low barriers for use. Kellogg would like the site to have as little need for moderation/maintenance as possible, while still soliciting a high number of visitor contributions.

Kellogg/Jessica's primary interests in this project are:

- Gather scan information as quickly and efficiently as possible
- Facilitate a manner by which they can directly and effectively work with organizations and interested individuals
- Potentially creating programming grants, as applicable
- Bring together top-notch individuals to brainstorm strategies for increasing youth interest in the nonprofit sector
- Filling the deficit of leaders in the nonprofit sector
- Attempting to create a smooth transition between retiring leaders and new ones

Kellogg/Jessica imagines that visitors of the site will be able to:

- Make themselves and their organizations visible to Kellogg (get on their radar)
- Share their constraints or concerns about becoming more active in nonprofits
- Explain their motivations to work in nonprofit organizations
- Explain why potential leaders in field leave for for-profit organizations

### **External Consultants**

External consultants frequently are hired by Kellogg to assist in environmental scans. Their level of participation varies, depending on the length of time available for the scan and the type of scan. Though Kellogg doesn't anticipate hiring external consultants to work on this particular scan during the initial phase, they may contribute work at a later stage and would at that time need to use information gathered from the website. Furthermore, if the website proves useful, Kellogg may adapt it to be used as a tool for other environmental scans by external consultants, as well as internally by staff. Consultants who carry out traditional environmental scans could see the site as a complementary mechanism for gathering scan information.

External Consultants' interests in this project include:

- Desire to stay involved the process but gather information more efficiently

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<sup>5</sup> Jessica Coloma is the Philanthropy and Volunteering Program Associate at the time of writing for this document.

- Ability to contribute their research expertise
- Efficient means by which to extract relevant data from the environment.

Consultants might imagine that visitors of the site would be able to:

- Make themselves and their organizations visible to Kellogg (get on their radar)
- Share their constraints or concerns about becoming more active in nonprofits
- Explain their motivations to work in nonprofit organizations
- Explain why potential leaders in field leave for for-profit organizations

## **Organizations**

Among their target groups, Kellogg is especially interested in student and activist groups. They also hope to include organizations that specialize in pulling young people into the nonprofit sector.

Kellogg has already identified key organizations that they would like to solicit more information from during the process of this scan. A preliminary list of these organization includes: NetImpact, American Humanics, Charles Mott Foundation, and Dynamics. These organizations are already working to connect individuals with positions of leadership within nonprofits or train them for future posts as leaders.

Organizations' interests in this project may include:

- Finding new leaders as people being to retire/move out of the nonprofit sector
- Locating people to bring fresh perspectives into their organizations
- Establish a working relationship with Kellogg
- Potentially receiving program funding to support their initiatives

Organizations might imagine that visitors of the site would be able to:

- Explain their organization (its mission, activities, partnerships) in their own voice
- Help Kellogg understand key players working in towards the goal of cultivating future leaders for nonprofit organizations
- Acquire funding for their organization or specific project
- Become recognized by Kellogg as an active organization
- Share visions and hopes for nonprofit organizations in the future
- Share constraints of entering into nonprofit organizations
- See who else is working the same areas as their organization
- Hear the voices of other organizations that are working towards similar goals

## **Interested Individuals/Site Visitors**

Interested individuals/Site Visitors primarily include communities of color, 18-35 years old, who are interested in working in the nonprofit sector and/or working towards social change.

These stakeholders represent the future leaders of the nonprofit sector. They are aware the site will be maintained and used by Kellogg to create a dialog amongst those interested in nonprofit leadership and currently active in nonprofit work.

Interested Individuals/Site Visitors' interest in this project centers around:

- Learn about organizations that support their personal and career interests
- Contribute to understanding the issue of diversity in the nonprofit sector
- Learn more about leadership in the nonprofit sector

These future leaders will be able to use the site to:

- Get their voices heard directly by Kellogg
- Learn about organizations working in this sphere
- Share visions and hopes for nonprofit organizations in the future

## **Trajectory**

The intention of the site is to solicit high quality content about a focused topic from a medium to large number of visitors representing a particular demographic over a short period of time. However, because of the experimental nature of the website as an information sharing tool, its trajectory is uncertain. If found to be useful, it may be maintained or adapted for continuing use as part of this project or adapted for use in other environmental scanning projects.

Environmental scans can take anywhere from several months to a year to complete. After the scan has concluded, it is probable the site will go offline, however, it should be re-launched within several months. Given the on-and-off again nature of the site one of the challenges will be in garnering enough visitors to make the site valuable to Kellogg as an information gathering tool.

Kellogg intends to use contacts at other organizations to find visitors for the site. In particular, American Humanics has a large alumni and membership base which Kellogg could draw upon in inviting visitors to the site. Also, the Yong Nonprofit Professionals Network has conveyed an interest in providing visitors for the site (see Appendix V for further information).

Four incentives have been identified that lead visitors to contribute to online communities: social, altruistic, visibility, and informational (Butler, Sproull, Kiesler, & Kraut, 2002). The website aims to appeal to these four incentives with a design that intends to provide visitors with the opportunity to fulfill a variety of motivational aims on the site, including: networking with individuals with similar interests; contributing their knowledge and perspective; gaining visibility with the Kellogg Foundation; and finding out more about the topic area of focus.

Moderation of the site also presents a challenge. According to McLaughlin, Osborne, and Smith (1995), moderators devote up to 15% of their time to addressing norm violations. Much of the remainder of their time is devoted to eliminating repetitive and off-topic messages (Wise, Hamman, & Thorson, 2006). Butler et al.'s (2002) research indicates that the need for moderation of online content increases as the size of an online community grows, and as the frequency of online interactions and message posting increases. A recent study published by Wise et al. (2006) indicates that visitors have more positive views of moderated than unmoderated sites. The trend Wise et al. (2006) observed may be even more pronounced under the conditions we hope to support the development of, namely a large community of visitors frequently interacting and posting messages.

Because of its experimental nature, the time available for working on the site, from Kellogg's end, is limited. Furthermore, contributed content may be sporadic and visitors may not provide enough useful, on-target information to warrant investment in moderating the site or keeping it online for more than a short trial period of a few months. Attentive moderation will increase the likelihood that this site will both reflect positively on the Kellogg Foundation and will be viewed as an worthwhile complement to traditional environmental scans. Our web development team needs to discuss the importance of moderation further with our client, and we may need to design around the possible contingency of the site lacking attentive moderation.

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## Appendix II: Personas and Scenarios

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Six personas represent the potential classes of visitors for W.K. Kellogg's CMS site. While they may intentionally contain a composite of characteristics and projections drawn from real people, they are in actuality fictitious and any such characteristics or projections are the creation of the authors. One or more usage scenarios are included for each persona, following the persona's description. The personas are:

<b>Kelly Lawson</b>	<b>Kellogg Program Associate</b>
<b>Peter Ivaszuk</b>	<b>19 year old first generation Eastern European youth with no nonprofit experience</b>
<b>Reena Shah</b>	<b>22 year old East Indian-American old full time college student and member of American Humanics</b>
<b>Nicole Davis</b>	<b>26 year old Ojibwe with some experience in nonprofits</b>
<b>Joe Ortega</b>	<b>33 year old Latino with several years experience in the nonprofit sector</b>
<b>Michelle Williamson</b>	<b>35 year old African American with leadership experience in the private sector and interest in becoming involved with nonprofits</b>

Table 2. List of Personas

### **Kelly Lawson, Kellogg Program Associate**

#### **Scenario: Developing a New Grant Making Area**

Kelly has worked at Kellogg since she graduated from Western Michigan University in 1995. Now 32, she lives in Portage, Michigan with her Labrador, Sam.

Kelly is very committed to her work at Kellogg and really enjoys it. In the 10 years she has been there, she has held several different positions and worked in two different departments. She now works as the Program Associate (PA) for Philanthropy and Volunteerism. Kelly knows many people throughout the Foundation and has many contacts in other organizations involved in philanthropy and grant-making.



Kelly, along with several other individuals at Kellogg, sees the imminent shortage of leadership in the nonprofit sector as an opportunity for increasing the

representation of communities of color and women in leadership roles. Kelly and her colleagues at the Kellogg Foundation would like to conduct an environmental scan to get a sense of the current situation in nonprofit leadership. Most importantly, they would like to understand why young people (primarily ages 18-35) from communities of color and other under-represented groups are or are not seeking leadership roles in nonprofit organizations.

The ideas are still very much in the preliminary stages. Kelly and a few other colleagues hope to make this an issue of priority for Kellogg in the future, but first need to gather information and decide how to proceed in proposing projects and solutions to the Foundation. A contact at the University of Michigan suggested the Drupal platform as a way of creating a content management system to collect and aggregate the information Kellogg was looking for. Kelly is willing to try this in hopes it might provide a more convenient method for conducting environmental scans.

Kelly will use the site regularly to gather information to prepare a preliminary environmental scan report. She will be looking for information from several types of sources and in several ways; the value of the site will be its simple interface and its aggregation of multiple channels of information. One of her biggest goals is to “get inside the minds” of potential nonprofit leaders to find out why they are, or are not, seeking positions of leadership. Reading aggregated blogs, visitor polls, and visitor profile data will help give her a sense of what kinds of people are interested in nonprofits and why.

Kelly often meets with colleagues in other nonprofit and grant-making organizations (American Humanics, Public Allies, etc.) and would like to both solicit their expertise and share her own resource with them. The site offers her an easy way of communicating with them: she can email the websites URL to various colleagues as a way of contributing and sharing information amongst themselves.

Though she doesn't anticipate hiring external consultants for the initial phases of the project, she may eventually bring them on board to compile a more formal report or to gather additional information. Kelly would want to share the information from this site with the consultants at that time, so they could use it and build from it. The site will respond to both Kelly's current needs and hopefully anticipate additional needs that may arise in the immediate future.

## **Peter Ivaszuk, New to Nonprofits**

### **Scenario: Trying to go straight into nonprofit sector**



Peter is a 19 year old from the west side of Chicago. His parents emigrated from Kosovo when he was still an infant. He has graduated high school, and taken a few classes at Roosevelt College in downtown Chicago.

However, he is not a full time college student. He works full time at a coffee shop, and is committed to arts education/youth work in his community. Peter is the first person in his family to speak English as a primary language, and the first person in his family to attend college. He has been working with an after school arts program and is getting more and more excited about the possibility of doing this type of work as a career. However, he doesn't know anything about nonprofit leadership. He has some natural leadership skills, but is still figuring out how he wants to translate his interest in arts education into a career.

Peter does not own a computer, but is very familiar with web-based email, instant messengers, and social sites like Facebook and MySpace. He has been using computers to communicate with friends since elementary school. Computers have always been available in labs at school, or at the public library. He has used both Apple and Windows machine, and is comfortable in both operating systems since he only uses the web browser and IM client.

Peter wants to learn how to break into nonprofits and be successful in that sphere. He is interested in making contacts with others in the nonprofit sector and has begun talking to the head of the arts education program with which he volunteers. The head of the program, which is funded in part by Kellogg, tells Peter about the Kellogg drupal site. Peter goes to his local public library, signs up for a one hour time slot on a computer, and logs into the site. On the “Learn” page, Peter notices some recent blog postings on people’s experience in the nonprofit sector, and clicks on them. He finds one that he really likes – an RSS feed by the head of an arts organization for high school students in Michigan – and adds it to his Google RSS Reader account. While on the Kellogg site, he also notices a set of recent links submitted by other visitors and clicks on the first link, which turns out to be a very helpful FAQ on starting your own nonprofit.

Because Peter wants to make contact with other people in the field, he clicks on the “Visitor Directory” page to view a list of all visitor profiles, with links to their organizations. Many visitor profiles are tagged with descriptors of the type of work



they do (arts, environment, etc).

The above photo was taken by Chocobo (<http://flickr.com/photos/chocobo/>) and is licensed under an Attribution-NonCommercial-ShareAlike Creative Commons license (<http://creativecommons.org/licenses/by-nc-sa/2.0/>).

**Reena Shah, full time college student and member of NetImpact**

**Scenario: Graduating & Moving**

Reena, 22, is a college senior and member of NetImpact. Reena is majoring in business and would ideally like to work in a nonprofit but isn't sure she will be able find one that works with her interests.



Reena is primarily using the web to conduct research on organizations she might like to work for, places she might like to live, and even for jobs. Reena has had a computer since she was 12 and communicates with her friends over email and IM. She manages the website of the student chapter of Net Impact and is always interested in what new technologies are out there.

Reena learns of the site through NetImpact, and after expressing interest, is invited to share her opinions as a representative of NetImpact. Reena is curious about the site, and after visiting for a few minutes, decides to create an account. Reena is interested in learning about opportunities in the nonprofit sector, reading Kellogg's blog, and taking polls.

Reena spends about an hour on the site reading responses to Kellogg's blog and adding her own response. She also contributes a description of NetImpact and includes the information that Kellogg suggests to cover and reads about similar organizations. When she receives an email a few weeks later asking her to respond to Kellogg's most recent blog and new polls, Reena returns to the site.

**Nicole Davis, Some Nonprofit Experience**

**Scenario: Finding a New Direction**



Nicole, 26, currently lives in Boston with two friends. She works as an Administrative Assistant at a Realty Firm and would like to find a new professional direction. She has her bachelors in communications from Boston University, and subsequently spent two years substitute teaching in an under-privileged neighborhood before joining the

realty firm. Based on this experience, Nicole is interested in a nonprofit specializing in inner city youth; however, she does not currently devote a lot of time to her job search. Since she started at the firm three years ago, she has steadily taken on more responsibility and learned to Quickbooks, build simple websites advertising properties, and work with both private and corporate clients.

After attending a benefit supporting the creation of community green spaces, co-sponsored by her firm and a local nonprofit, Nicole decides to be more proactive about her job search. Nicole starts looking on craigslist and idealist to see what is available. She also talked to a friend who suggests Kellogg's Drupal site as another resource. When she gets to Kellogg's Drupal site, she does not find job postings, but instead becomes very interested in Kellogg's blog, which seems to be their current source of information gathering. Nicole also browses the "Learn" page, which contains helpful articles and information on the nonprofit sector.

Feeling more realistically informed about nonprofits, Nicole decides to make an account in order to respond to Kellogg's blog. At the end of her response, she includes a job-search related question and, having opted to make her email visible on her visitor profile, requests other visitors to email her with advice. Over the next few days, she is pleasantly surprised to find several emails about her question. This interaction convinces Nicole to be an active participant on the Drupal site.

## **Joe Ortega, Several Years Experience**

### **Scenario: Mentoring Youth**

The son of migrant farm workers from southern Mexico, 33 year old Joe Ortega was born and raised in the United States and has overcome numerous obstacles to attain his current professional position.



Joe has worked at several nonprofits over the last ten years and previous to his current position, Joe spent five years working with the People's Community Services in Mission Viejo, California, where he was eventually appointed Director of Education. During that time, Joe completed his master's in nonprofit management through the adult education program at Midwestern college, where he, upon completion of his degree, he accepted a position as Undergraduate Internship Coordinator.

Joe is comfortable using and teaching others to use Excel, Word, and various online accounting and record-keeping software; during his master's program, he also gained more experience with email, conducting online searches and chatting on instant messenger.

Joe is an active member of American Humanics, and contributes regularly to a

listserve for administrators in higher education working to prepare undergraduates for employment in the nonprofit sector. Through his listserve, he hears about the Kellogg Foundation's interest in collecting feedback and ideas from people like himself about how to mentor and prepare youth of color for positions of nonprofit leadership. Excited to visit and contribute to the Kellogg Drupal site, Joe is also looking forward to sharing information with Kellogg about Midwestern's internship program.

Initially, Joe browses through the site and fills out a few online polls. When he decides to join, Joe describes Midwestern's internship program in his profile and signs up to receive notification when Kellogg posts a new blog or poll. Browsing other visitor profiles, Joe is excited to see how many young people are interested in working in the nonprofit sector, judging from the profiles posted.

Additionally, syndicated blog posts on the Learn page lead Joe to other blogs and forums on sites similar to Kellogg's. When Joe finds a new resource he thinks might be of interest to the Kellogg staff, he copies the link into the appropriate field on the Share page. Joe is delighted to find that his contribution was approved, which makes him feel as though he is part of a community of visitors.

### **Michelle Williamson, Corporate Veteran/Interested in Nonprofits**

#### **Scenario: Uncertain about making the switch**



Michelle, a 35 year old marketing analyst, has worked for the local corporation, Axion, for the past 10 years. She has successfully risen through the company during her time there, and three years ago she was appointed Chief Marketing Officer. She and her family (a husband and two children) enjoy a comfortable life, of which Michelle is very proud. Despite the benefits it provides, Michelle finds herself enjoying her job less than she used to, largely because of the cut throat corporate culture. During her undergraduate years, Michelle worked for the one of the town's small nonprofit art galleries and boutiques. Although she only worked there a few years, Michelle remembers this time fondly, and has begun to wonder if she might like to work for a larger nonprofit organization.

Michelle is comfortable with Windows computers through her work, and her family owns several computers, including her daughter's Macbook, which Michelle is still discovering. Michelle commands an expert use of imaging software and communicates and searches easily and effectively online.

Concerned about making the switch to nonprofits, Michelle has started to do some research on the matter. A colleague who volunteers with NetImpact forwards an email to Michelle about helping with a local fund raising event, and Michelle decides to participate. While there, she meets many interesting people involved with various states of nonprofit work, and while it isn't really the place to voice her concerns, she is able to ask about resources for those interested in nonprofits. One NetImpact member points her to the Kellogg Drupal Site, and later that week Michelle visits. She's not very comfortable responding to Kellogg's blog posts because of her limited nonprofit experience; additionally, she is afraid that if she reveals her work in the corporate sector, Kellogg and other visitors might not value her input.

Instead of making an account, Michelle decides to read other visitor's responses to Kellogg's current and archived posts, view the polls and organization profiles, which she is able to do as a guest. While she would like to see visitor profiles as well, she is unable to do so unless she creates an account, which she is still reluctant to do. Michelle gleans an idea of some companies she might be interested in, although she is still concerned about things like the stability of working in a nonprofit (as her job with Axion is currently very stable), her ability to make a comparable income to contribute to her family's earnings, and her ability to take a leadership role, instead of stepping backwards into a smaller position with less responsibility.

Michelle visits the site several times over the next few weeks, eventually opting to create an account and share her limited experiences.

---

## Appendix III: Information Architecture

---

### Site Navigation Scheme

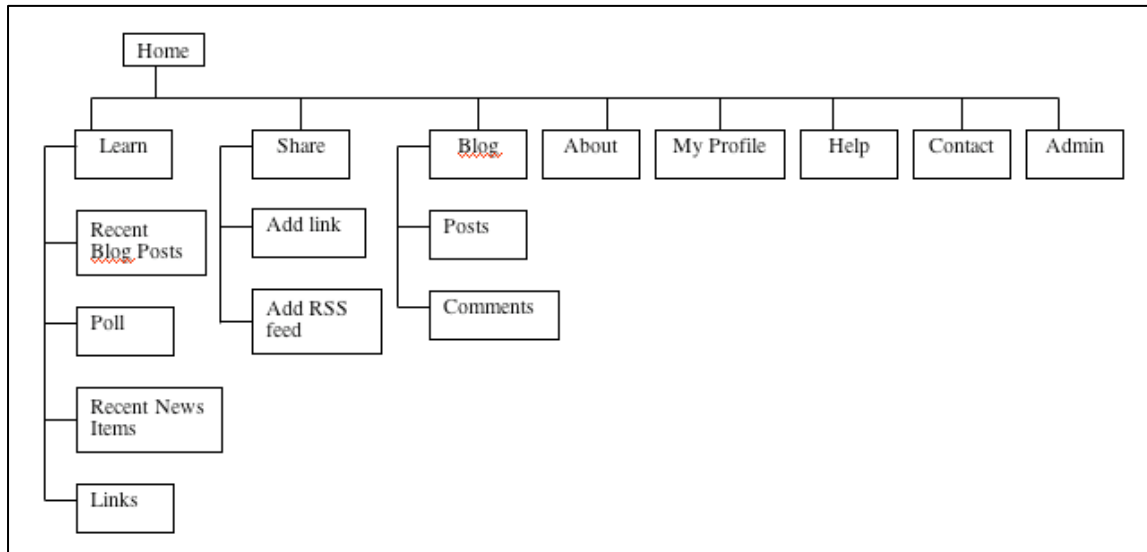


Figure 17. Map of site navigation scheme

In essence, the site is a blog – the personal voice of someone working at Kellogg, hoping to interact with the voices of potential leaders in the nonprofit sector. However, to make it a bit more dynamic, the site brings in some extra content for Kellogg to consider. The **Learn** and **Share** aspects of the site are our attempt at allowing these multiple streams of information. Visitors can add content on the **Share** page and, once approved by the moderator, see the content appear on the **Learn** page.

The home page is a landing page, with some information about the issue of diversity and leadership in the nonprofit sector and an explanation of the site.

Visitors can contact the Content Manager and learn about why the site exists by visiting the **Contact** and **About** pages.

**My Profile** is the space for visitors to edit their personal profiles, and includes checkboxes for demographic information of interest to Kellogg.

Content type	Where is it found in Site Navigation?
Blog entry	Home, Blog
Comments	Home, Blog
Page	About
Poll	Sidebar on all pages, main content area on Learn page
Userfeed	Share
Userlink	Share
Aggregator feed	Admin
Visitor profile	My Profile

Table 3. Content types

## Site Content

Seed content for the site is produced by the Content Manager, who submits blog entries and polls. Visitors submit userlinks and comments, as well as answering polls. As a result, much of the dynamic nature of the site requires visitors to be present and involved.

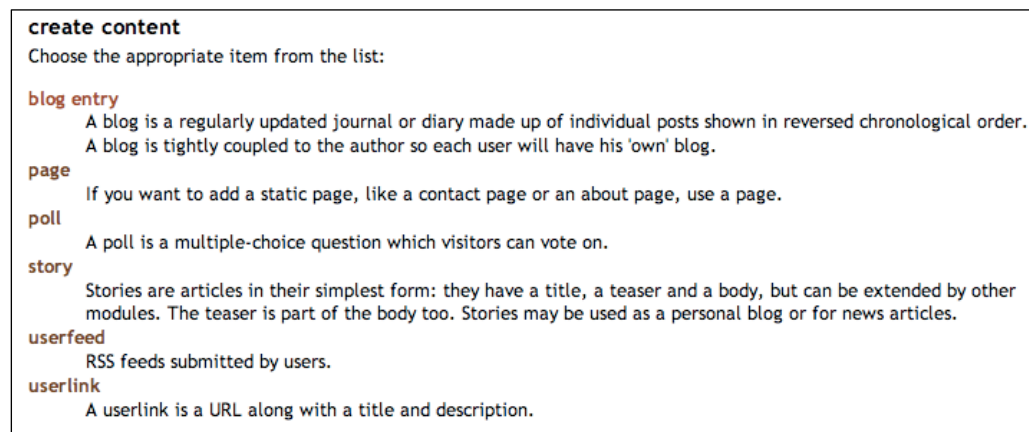


Figure 18. Screenshot of the “Create content” page. Note that the story and page content types are not used.

<b>Content type</b>	<b>Fields</b>	<b>Notes/relationships to other content</b>
Blog Post	Title	Comments are associated with blog posts
	Body	
Comment	Subject	Comments are associated with blog posts
	Comment	
Page	Title	Only used for About page
	Body	
Poll	Question	Polls produces a “Most recent poll” block that is used in sidebars and on the Learn page
	Choice 1	
	Votes for Choice 1	
	Choice 2	
	Votes for Choice 2	
	Choice 3	
	Votes for Choice 3	
	Choice 4	
	Votes for Choice 4	
	Choice 5	
	Votes for Choice 5	
	Poll Status	
	Poll Duration	
Userfeed	Feed Title	
	Feed URL	Goes into moderation, Content Manager adds feed to the Aggregator feed below and categorizes accordingly
	Description	
Userlink	URL	Userlinks produces a “Most recent links” block that is used on the Learn page
	Title	
	Description	
Aggregator feed	Title	
	Feed URL	
	Update interval	Default once per hour
	Category	Affects the panel in which feed items appear on the Learn page
Visitor profile	Organization	
	Self-identified racial or ethnic information	

	Age	
--	-----	--

Table 4: Content type and accompanying fields



## Taxonomy

Although in-depth taxonomies seemed unnecessary for the type of use the Content Manager requires, one place that a taxonomy is implemented is the RSS feeds. Visitors can submit RSS feeds via the Userlink content type. Once the Content Manager approves the feed, they will add it to the Aggregator module's feeds. However, News feeds and Blog feeds are separated. Both are displayed on the **Learn** page, and Aggregator keeps track of two separate categories of RSS feeds. When the Content Manager adds approved RSS feeds, she or he will need to categorize the feed as either blog or news. The blog category will be set as default, since most RSS feeds will not be sources from news outlets.

**aggregator**  

list

add category

add feed

Thousands of sites (particularly news sites and weblogs) publish their latest headlines and/or stories in a machine-readable format so that other sites can easily link to them. This content is usually in the form of an **RSS feed** (which is an XML-based syndication standard). To display the feed or category in a block you must decide how many items to show by editing the feed or block and turning on the **feed's block**.

[more help...]

---

**Feed overview**

Title	Items	Last update	Next update	Operations
Howard University Chapter of American Humanics	12 items	9 min 4 sec ago	50 min 56 sec left	edit remove items update items
http://news.google.com/	11 items	1 hour 9 min ago	22 hours 50 min left	edit remove items update items
Nonprofit Congress	9 items	9 min 5 sec ago	50 min 55 sec left	edit remove items update items

**Category overview**

Title	Items	Operations
Blogs	21 items	edit
News	11 items	edit

Figure 19. Screenshot of Aggregator feeds, and an overview of items in each category

**aggregator**

list

add category

add feed

Add a site that has an RSS/RDF/Atom feed. The URL is the full path to the feed file. For the feed to update automatically you must run "cron.php" on a regular basis. If you already have a feed with the URL you are planning to use, the system will not accept another feed with the same URL.

---

**Title: \***

The name of the feed; typically the name of the web site you syndicate content from.

**URL: \***

The fully-qualified URL of the feed.

**Update interval:**

1 hour ▾

The refresh interval indicating how often you want to update this feed. Requires crontab.

**Categorize news items:**

☐ Blogs

☐ News

New items in this feed will be automatically filed in the checked categories as they are received.

Submit

Figure 20 Screenshot of Adding a feed to Aggregator. Note that the Content Manager will categorize the feed as either Blogs or News.

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## Appendix IV: Workflow

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### Visitor Roles

#### Site Administrator

A visitor who has complete control over the site. While we strongly recommend that someone on site be trained as the administrator, we also recognize that day-to-day content work will not be done by a visitor with this much site access.

#### Content Manager

This role should generally be occupied by a Kellogg staff person, however the Content Manager could be given to consultants or to other primary content contributors. This visitor is responsible for regular submission of blog entries and regularly checking the moderation queue for submitted userlinks and userfeeds.

#### Authenticated Visitor

These visitors have an account on the site, along with a visitor profile. They can submit links and feeds on the Share page, view site content and post comments, as well as vote in polls.

#### Anonymous Visitor

These visitors do not have an account on the site or a visitor profile. They can still submit links and feeds on the Share page, since these will be moderated.. They can view site content but cannot post comments, vote in polls, or access visitor profiles. It is advisable for this information to remain somewhat restricted (although clearly still public, since anyone can create an account).

### Access Controls (privileges):

Privileges unique to a visitor have been colored **blue** and italicized.

	Site Administrator	Content Manager	Anonymous Visitor	Authenticated Visitor
Access news feeds				
Administer news feeds				
Administer blocks				
Use PHP for block visibility				
Edit own blog				
Access comments				
Administer comments				
Post comments				
Post comments without				

approval				
Administer content types				
Create content_userfeed content				
Edit content_userfeed content				
Edit own content_userfeed content				
Administer filters				
Administer menu				
Access content				
Administer nodes				
Revert revisions				
View revisions				
Creates pages				
Edit own pages				
Access all panels				
Create panels				
Administer url aliases				
Create url aliases				
Create polls				
Vote on polls				
Schedule (un)publishing of nodes				
Access statistics				
View post access counter				
Access administration pages				
Administer site configuration				
Select different theme				
Administer taxonomy				
Upload files				
View uploaded files				
Access user profiles				
Administer access control				
Administer users				

Change own username				
Create userlinks				
View all userlinks				
View own userlinks				
Administer views				

Table 5. Access roles and permissions

## Workflow Diagrams

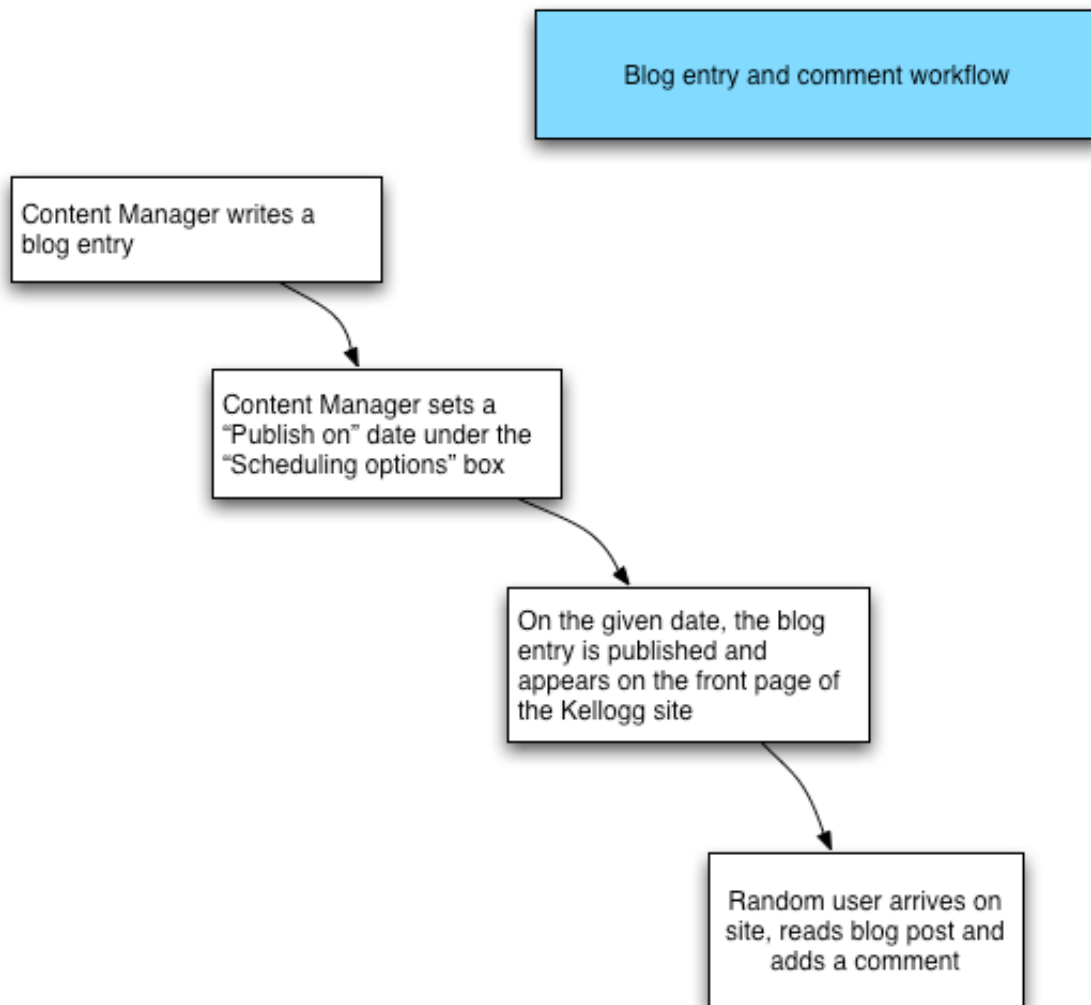


Figure 21. Blog entry and comment submission workflow

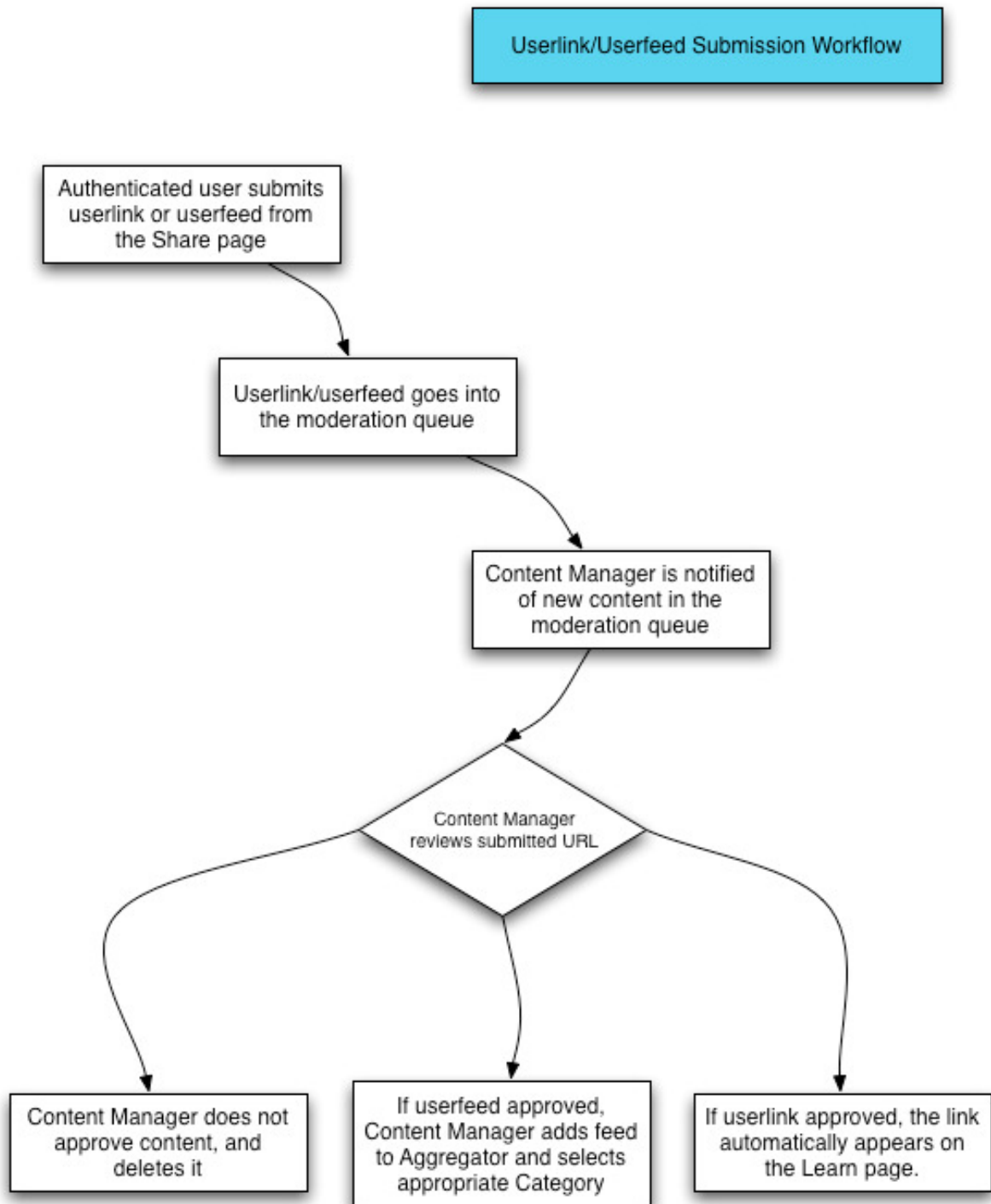


Figure 22. Userlink/visitorfeed submission and moderation workflow

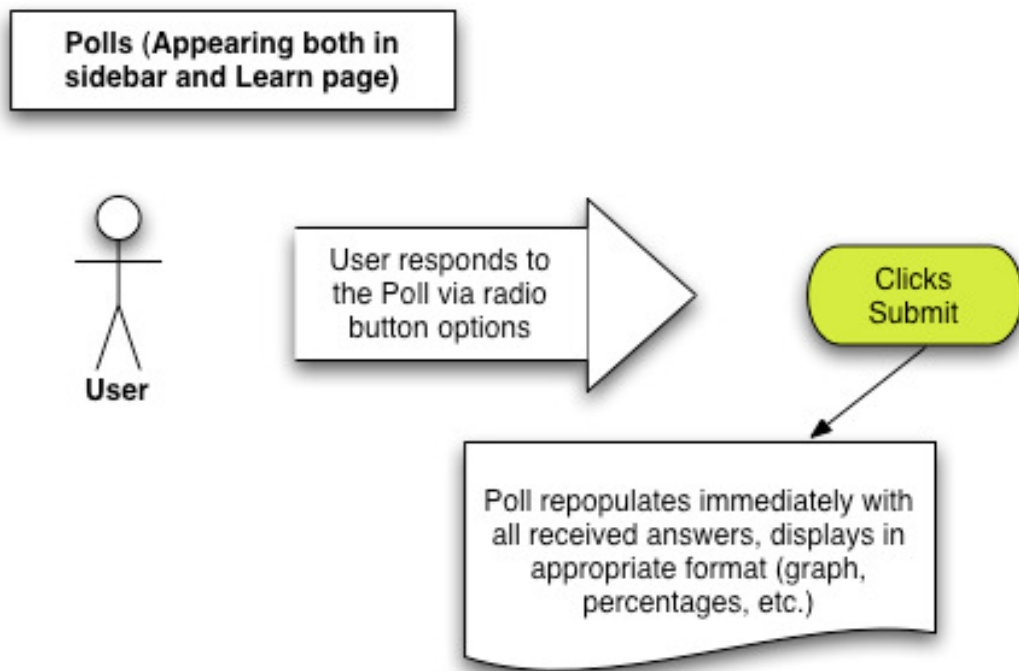


Figure 23. Polls workflow



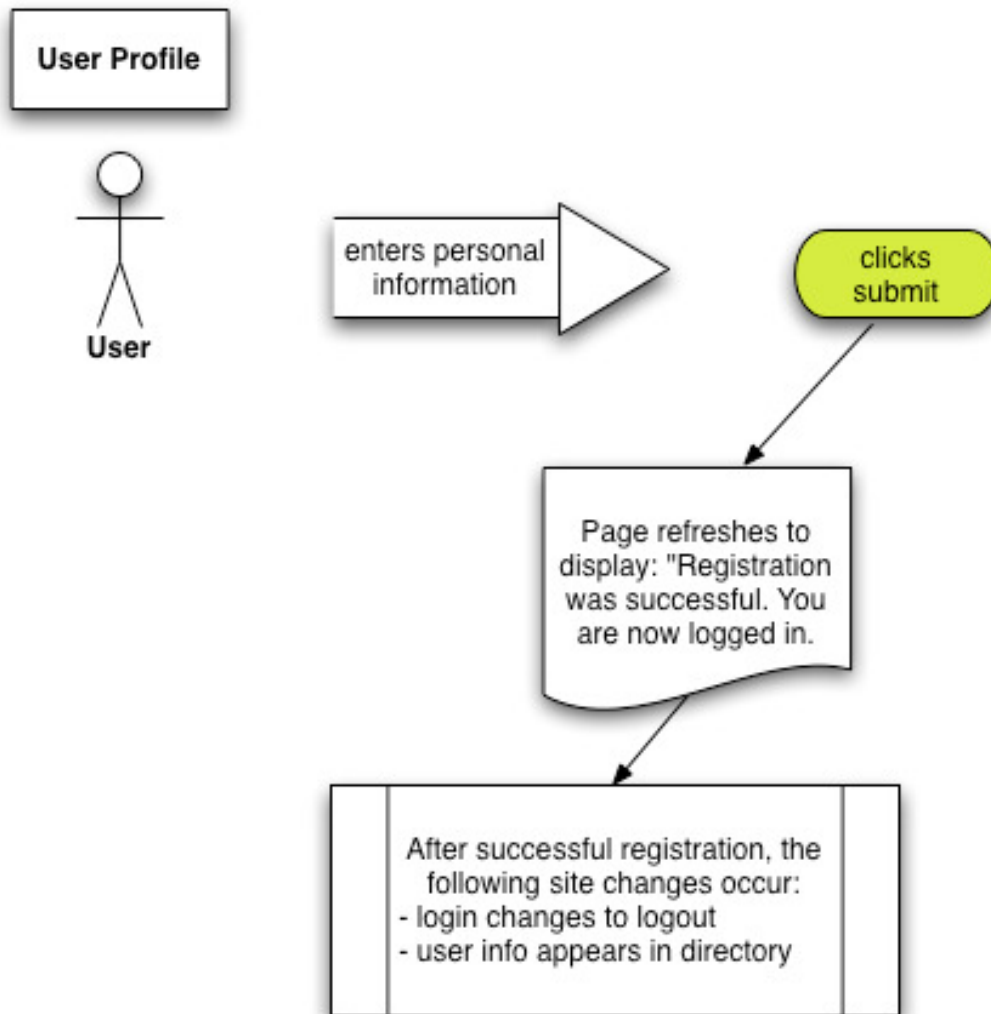


Figure 24. Visitor profile workflow

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## **Appendix V: Learning Community Site**

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### **Overview**

After extensive discussion with the Kellogg staff members responsible for the construction of the environmental scanning site, it was decided that an additional site could aid in the mission to discover diverse individuals to assume leadership roles within the nonprofit sector in the coming years. While the scanning site is intended to function as a digital environmental scan, the learning community is intended to become an online community. It will not be hosted by Kellogg; instead Kellogg will support it with other nonprofits hosting and maintaining the site and providing a visitor base. It will carry its own branding (or that of the hosting organization) and consist largely of those already in the nonprofit sector. The main purpose of this site is to create an online community via an active and consistent dialog between visitors with the intent to assist those currently in nonprofits with understanding the impending diversity and leadership deficits. While the scanning site may create a learning community as a byproduct, this is not its primary intent. The learning community differs from this in that its goal is to create a persistent and strong community; extra work to develop and maintain the community will be necessary for this site while not as necessary for the scanning site.

### **Hosts and Visitors**

Ideally, the learning community will be hosted by a current nonprofit organization, while receiving support from the Kellogg foundation. The hosts may potentially consist of members from more than one organization; the site may also become an extension of a current organization, as long as it remains open to contribution from other individuals in the nonprofit sector. The hosts will moderate the site and the conversations therein. Such responsibilities may involve jump-starting discussions with new topics, removing inappropriate content, interceding in extensive or distracting conflict between visitors, and other similar duties as they arise. Further, the hosts will be responsible for all technical elements of the site, updating it, and keeping it current.

The visitor body will ideally consist of current members of the nonprofit sector from various demographics and stages of their career. Additionally, those who are not current members of the nonprofit sector but are interested should feel welcome to post questions and concerns for sector veterans. They will be encouraged to participate in the site frequently and aid the moderators/hosts with creating new topics of discussion. As an online community, the site will be largely visitor-driven, with some visitors eventually able to obtain moderator status in order to assist the hosts.

## Recommendations

Based on recent meetings with the organizations Echoing Green and Young Nonprofit Professionals Network (YNPN), the University of Michigan team would like to recommend that the Kellogg Foundation confer with Echoing Green regarding site hosting and set up a membership exchange with YNPN (ie, in exchange for posting its logo and having the ability to promote YNPN on the site, they are willing to send their members to the site in order to help establish a visitor base for the online community). YNPN has more than 10,000 members nation wide, and Echoing Green already has the prominence and stability, and based on our conversations with their Vice President of Strategy & Communications,<sup>6</sup> Echoing Green may be interested in hosting the site.

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<sup>6</sup> The Vice President of Strategy and Communications is Lara Galinsky ([lara@echoinggreen.org](mailto:lara@echoinggreen.org)) as of the writing of this document.

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## Appendix VI: Site Transfer Guide

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This guide will walk you through transferring the Kellogg Drupal site to a new server. We will use Drupal 4.7.6, which has been provided on the site transfer CD, along with custom PHP files and MySQL tables created specifically for the Kellogg site. Drupal uses a MySQL database to store content and a PHP engine to format and display content.

### System Requirements

PHP4 (4.3.3 or greater) or PHP5 (<http://www.php.net/>)

MySQL (<http://www.mysql.com/>)

Apache web server

### Directions

- 1) From a UNIX shell or remote ssh session, browse to the directory where you want to install Drupal. Make sure you install to a public html directory, unless you are storing the site for internal use. When the site is ready for public use, it should be transferred (using these same steps) to a public html directory.

- 2) Download `drupal-4.7.6.tar.gz` from the site transfer CD.

- 3) Unpack Drupal directory structure with:

```
tar -zxvf drupal-4.7.6.tar.gz
```

- 4) We have provided the MySQL database in our site transfer CD. Once you have unpacked `drupal-4.7.6.tar.gz`, you will find the database tables in the database directory:

```
YourDrupalDirectory/database/database.4.1.mysql
```

- 5) Import the database into MySQL, using your own database and username:

```
mysql -u username -p databasename < database.4.1.mysql
```

- 6) The last step is to make sure that Drupal knows where to find your database tables. You have to edit the `settings.php` file, which can be found in:

```
MyDrupalDirectory/sites/default/settings.php
```

- 7) Open the file in any text editor, and look for the `$db_url` line:

```
$db_url                                     =  
"mysql://username:password@localhost/database.4.1.mysql";
```

Replace “username” and “password” with your mysql username and password. If your database is stored on a different host than your Drupal installation, change “localhost” to match the database host. Finally, you should not need to change the last part of this line unless you changed the name of the database when you imported it into MySQL.

**IMPORTANT:** Remember to check your double quotes, and make sure the line ends with a semicolon.

Once you have completed these steps, you should be able to point your web browser to your Drupal directory. Login information can be found in the Site Administrator and Content Manager training.

## Appendix VII: Cheat Sheets

### Cheat Sheets

For the convenience of the System Administrators (SA) and Content Managers (CM), the following are a series of quick reference documents for the site's most common processes.

**Note:** The CM may set up numerous blog posts to be published on future dates, but each post must be set up individually. Leaving the Publish On field blank will publish immediately, leaving the Unpublish On field blank will leave post up indefinitely. Leaving one field blank does not affect the other.

### Cheat Sheets

### Writing a Blog

1. Login with Content Manager **User Name** and **Password**.
2. On the right hand side, select **Control Panel**.
3. From the center Admin list, select **Make a New Blog Post**.
4. A new window will open; enter the blog title and text into the **Title** and **Body** fields
5. Select **Preview** to see the post, or **Submit** to publish immediately.

### Optional Tasks

*To have a blog published on a future date:*

6. Click the black arrow to expand **Scheduling Options**.
7. In the **Publish On** field, enter the date formatted as: 2007-04-05 17:24:25.\*
8. In the **Unpublish On** field, enter the date formatted as: 2007-04-05 17:24:25.\*
9. Select the time zone.

**Note:** *To attach a file:*

10. Click the black arrow to expand **File Attachments**.
11. **Browse** to the file on your hard drive, click okay.
12. Select **Attach**.

The screenshot shows the Content Manager interface with the following elements and numbered steps:

- User login** (Step 1): Username and Password fields with a "Log in" button. Links for "Create new account" and "Request new password" are below.
- Content Manager** (Step 2): A list with "control panel" selected.
- Poll**: A section titled "Can You Say 401K?" with a radio button for "I'm retiring early".
- Control Panel** (Step 3): A section titled "This is your administration page. From You can create polls and check on". It contains a list of links: "Make a new blog post", "Add a new poll", "Add a new link", and "Add a new RSS feed".
- Title** (Step 4): A text input field.
- Body** (Step 4): A large text area.
- Scheduling options** (Step 5): A section with "Publish on:" and "Unpublish on:" fields, a "Time zone:" dropdown, and "Preview" and "Submit" buttons.
- File attachments** (Step 10): A section with "Attach new file:" and "Attach" buttons.

## Submitting a Poll

1. Login with Content Manager **User Name** and **Password**.
2. On the right hand side, select **Control Panel**.
3. From the center Admin list, select **Add a new poll**.
4. A new window will open; enter the poll question and answers into the **Question** and **Choice** fields
5. Select the **Poll Duration** drop down menu and select how long the poll will be open (not selecting an option leaves the poll up indefinitely.)
6. Select **Preview** to see the poll, or **Submit** to publish immediately.

*To add more choices follow the on-site directions.*

## Optional Tasks

*To have a poll published on a future date:*

- 7 Click the black arrow to expand **Scheduling Options**.
8. In the **Publish On** field, enter the date formatted as: 2007-04-05 17:24:25.
9. In the **Unpublish On** field, enter the date formatted as: 2007-04-05 17:24:25.
10. Select the time zone.

*To enable comments:*

11. Click the black arrow to expand comment settings.
12. Select the appropriate radio button.

*To attach a file:*

13. Click the black arrow to expand **File Attachments**.
14. **Browse** to the file on your hard drive, click okay.
15. Select **Attach**.

User login

Username: \*

1

Password: \*

Log in

Create new account

Request new password

Content Manager

control panel

2

Poll

Can You Say 40 IK?

I'm retiring early

Submit poll

Polls should be released background, or demogr

Question: \*

4

Choices

Choice 1:

Choice 2:

If the amount of boxes above isn't enough, check t

Poll duration:

Unlimited

5

After this period, the poll will be closed automatically

File attachments

Scheduling options

Preview

Submit

6

7 Scheduling options

Publish on:

8

Format: 2007-04-14 23:07:42

Unpublish on:

9

Format: 2007-04-14 23:07:42

Time zone:

10

Saturday, April 14, 2007

Select the time zone to (un)c

Preview

Submit

11 Comment settings

Disabled

12

Read only

Read/ Write

13 File attachments

Changes made to the attachments are not permanent until in RSS feeds.

Attach new file:

14

Browse...

Attach

15

## Add A New Link

1. Login with Content Manager **User Name** and **Password**.
2. On the right hand side, select **Control Panel**.
3. From the center Admin list, select **Add a new link**.
4. A new window will open; enter the URL as `http://www.url.com`, enter the link **Title** and **Description** into their respective fields
5. Select **Preview** to see the post, or **Submit** to publish immediately.

### Optional Tasks

*To enable comments:*

6. Click the black arrow to expand comment settings.
7. Select the appropriate radio button

User login

Username: \* **1**

Password: \*

Login

☐ Create new account  
☐ Request new password

Content Manager **2**

• control panel

Poll

Can You Say 40 IK?:

☐ I'm retiring early

Control Panel

This is your administration page. From here you can create polls and check on **3**

- Make a new blog post  
Create a new blog post. Pu
- Add a new poll  
Create a new poll.
- Add a new link  
Follow this link to add a new link  
Learn page.
- Add a new RSS feed

Copy and paste that URL

URL: \* **4**

`http://`

The URL for this link (usually

Title: \* **4**

The title of this link.

Description: \*

**5**

Preview Submit

**6** ▾ Comment settings

☒ Disabled **7**

☐ Read only

☐ Read/Write



## Add A New RSS Feed

1. Login with Content Manager **User Name** and **Password**.
2. On the right hand side, select **Control Panel**.
3. From the center Admin list, select **Add a new RSS feed**.
4. A new window will open; enter the **Title** and **URL** formatted as `http://www.url.com` into their respective fields.
5. Select **Submit** to publish.

### Optional Tasks

*Choose update interval (how often you would like the feed to check the website for new entries):*

6. Select the drop down menu for **Update interval** and make a selection (suggestion: one day for a constant news source and some bloggers, one week for most constant bloggers, two weeks for less constant sources).

*To Categorize items:*

7. Click the check box for **Blogs** or **News** (both may be selected if the source qualifies. This selection organizes sources on the Learn page.)

User login

Username: \*

1

Password: \*

Log in

Create new account

Request new password

Content Manager

control panel

2

Poll

Can You Say 401K?

I'm retiring early

Control Panel

This is your administration page. From

You can create polls and check on

3

Make a new blog post

Create a new blog post. Pu

Add a new poll

Create a new poll.

Add a new link

Follow this link to add a new link

Learn page.

Add a new RSS feed

----

use, the system will not accept and

Title: \*

4

The name of the feed; typically the name

URL: \*

The fully-qualified URL of the feed.

Submit

5

Update interval: 6

1 hour

The refresh interval indicating how o

Categorize news items:

Blogs

7

News

New items in this feed will be automati

## Glossary of Terms

---

**Access Permissions** – A method of administering permissions or access rights to specific users (the Content Manager and System Administrator).

**Admin** – See System Administrator.

**Add a new poll** – The option under Control Panel and Create Content that allows the Content Manager to create a new poll.

**About** – On the About page, users may learn more about the purpose and goals of the project, as well as the University of Michigan team, The W.K. Kellogg Foundation, and Drupal.

**Blog (Blog Entry)** – Posted by the Content Manager, the blog contains the current question or discussion point, to which users are expected to post comments. In general, blog is a truncation of web log, and usually takes the form of an online journal.

**Comments** – Refers to user responses to blog posts.

**Content Manager** – Abbreviated CM, this is individual is responsible for generating the site's content, i.e., blogs and polls. The CM may also have some admin responsibilities.

**Control Panel** – A short cut menu that allows the CM to make blog posts, add polls, view the user directory, view all polls, view all blogs and view all users (See definitions for these actions in glossary).

**Create Content** – The option that allows the CM to create blog posts and polls, add RSS feeds and upload links.

**CSS** – Cascading Style Sheets. The CSS defines the overall appearance of each web page, including color, font, etc. For more information, see: <http://www.w3.org/Style/CSS/>

**Drupal** – The modular content management system on which the site is run. For more information, see <http://www.drupal.org>

**Feed** – See RSS Feed.

**HTML** – Hyper Text Markup Language. HTML is the primary markup language used for creating web pages. It describes the structure of the document by denoting headings, paragraphs, lists, embedded images, etc. It works with CSS to create a

complete web page. See <http://www.w3.org/html/> and <http://www.yourhtmlsource.com/> for more information.

**Learn** – On the Learn page, users may view blog posts, news items (submitted via RSS feed), links (submitted via the URL submission option on the share page), and polls.

**Links** – Websites submitted via the Share page, which appear on the Learn page.

**Login** – The fields in which a user, System Administrator or Content Manager enters their user name and password in order to access their respective profile and administrative functions.

**Log Out** – When a user, System Administrator or Content Manager is finished using the site, they may select this option to close out of their respective profiles and administrative functions

**Moderation Queue** – Refers to the list of user submitted items (blogs, news, links etc) awaiting approval. Once approved, they are posted on the Learn page.

**Make a New Blog Post**– The option under Control Panel/Create Content that allows the CM to create a new blog post. The CM may opt to post the blog immediately or schedule it for publication at a later date. Additionally, the CM may set up numerous blog posts, although each post must be created and scheduled separately.

**MySQL** – The software managing the database which contains the site's content. For more information, see <http://www.mysql.com/> for more information.

**News Items** – Frequently updates RSS Feeds, submitted by the users.

**News Sites** – Sites containing frequently updated content relevant to the mission of the project.

**Open Source** – A method and philosophy for software licensing and distribution designed to encourage use and improvement of software written by volunteers by ensuring that anyone can copy the source code and modify it freely.

**RSS Feed** – an abbreviation for Really Simple Syndication, RSS is a family of web feed (data format used for serving users frequently updated content) formats used to publish frequently updated digital content, such as blogs, news feeds, etc. The RSS feed uses an aggregate to collect all of the information into one place.

**Share** – On the Share page, users may submit websites and RSS feeds of interest;

these items will appear on the Learn page.

**Spam** – Unsolicited, undesirable and often inappropriate forum posts or email message (often sent in bulk).

**System Administrator – Abbreviated SA or Admin**, this individual is responsible for administrating the site; includes modifying, updating and maintaining the site as necessary.