



## Benchmarks for Building Extranets and Online Communities

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### What are benchmarks?

Generally, benchmarks provide the groundwork for creating a continuous improvement process that organizations may use to move towards “best practices” in accomplishing their missions and advancing organizational objectives.<sup>1</sup> They are not to be used as a test of success or failure, but as an ongoing process to help organizations measure progress towards their goals. Benchmarks can be and have been created for a variety of purposes. This set of benchmarks is designed to help organizations effectively implement online communities—whether a community of grantees or a community of volunteers or some other collection of constituents.

The benchmarks included here are a work in progress—in great part because the building and support of online communities<sup>2</sup> is also a work in progress. Each benchmark seeks to represent the *current* standard for appropriate, efficient and sustainable nonprofit online community building. Collectively, they provide an example of how foundations and nonprofits might incorporate the use of online communities or extranets into their operations. In addition, we place particular emphasis on the partnership between the parties that are requesting, designing and building the technology and “humanware” solutions that will drive the online community. As a result, many of these benchmarks are very focused on *process*.

While this set of benchmarks was created for a specific foundation’s extranet project, it is Benton’s hope that they can be translated to the broader nonprofit and foundation communities as a guide – not only for the building of extranets, but of major online community-building initiatives more generally. The Benton Foundation wants to acknowledge The Pew Charitable Trusts for opening up their process in a way that allows the broader nonprofit and funder communities to benefit from the real-world experience of a funder seeking to expand beyond traditional forms of grantee support.

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<sup>1</sup> This approach to the use of benchmarks is based on the work of NPower Seattle, co-publisher (with the Benton Foundation) of *Technology Literacy Benchmarks for Nonprofit Organizations*. We have followed that model to develop a set of benchmarks specifically around the creation of online communities—in this case a communications Extranet for a foundation’s grantees. In addition, we have drawn heavily from “Building Online Communities: Transforming Assumptions into Success,” by Victoria Bernal, © Benton Foundation 2001 ([www.benton.org/Practice/Community/assumptions.html](http://www.benton.org/Practice/Community/assumptions.html)).

<sup>2</sup> In this document, we frequently use the terms “extranet” and “online community” interchangeably. An extranet is a Web-based application that can be used to build online community.

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### How to use these benchmarks

A benchmarking process generally takes place in three phases:

1. A team of individuals, representing a cross-section of the organization or organizations building and supporting the online community, is created. This team reviews the benchmarks and their respective explanations and assesses the organization's current status against each one by checking which benchmark elements have been attained. The team uses these benchmark elements not as a test, but as guides to help the group plan the extranet and to help move implementation toward best practices in online community building.
2. Desired outcomes are identified for each section of benchmarks. Determining if these outcomes have been attained will require evaluation through such tools as interviews, online surveys, or possibly focus groups. Once the assessment is finished, the team should examine its results, highlight the group's strengths and challenges, then create a plan to serve as a roadmap for addressing the identified challenges.
3. Finally, the team develops mechanisms for ongoing reflection about its online community. Regularly revisiting and revising the benchmark answers will enable the team to modify and revise its plan, leading to a greater likelihood of success with the online community.

This benchmarks document is broken down into the following sections:

- A. Why an Extranet?
- B. The Partnership
- C. The Intended Audience
- D. "Care and Feeding" of the Extranet
- E. Sustainability

Each section includes suggested "Desired Outcomes." These were the desired outcomes of The Pew Charitable Trusts for its extranet. But each organization that seeks to develop an extranet needs to develop its own "Desired Outcomes" specific to its particular mission and programmatic goals and objectives.

In addition, periodic "Lessons Learned" boxes highlights additional issues to consider.

The benchmarks are then followed by a set of "Resources for Further Exploration."

<b>Benchmarks vs. Desired Outcomes</b>
<p>A <i>benchmark</i> identifies a general "best practice" or standard for the topic at hand (in this case, the creation of an extranet for a particular community), and is something against which an organization can measure its progress.</p>
<p>A <i>desired outcome</i> is that which an organization desires as a result of an expenditure of effort and resources; i.e., as a result of the extranet.</p>
<p>A <i>benchmark</i> refers to the planning, design, implementation and evaluation of a particular initiative.</p>
<p>A <i>desired outcome</i> refers to the results of that initiative.</p>

## A. Why an Extranet?

*The first phase of any significant technology initiative should be focused on clarifying and planning for how, in this case, the extranet, will (a) advance or support your organization's overall goals and objectives, and (b) intersect with the needs and interests of your intended audience. Only then can you build and test a technology solution to address those needs while at the same time supporting your organization's agenda.*

How will you know your goals have been reached?

- ❖ Grantees report that they used the extranet to communicate and collaborate with each other.
- ❖ Grantees report they shared information and experience with other grantees facing similar challenges.
- ❖ Grantees report that they saved time as a result of what they learned through the extranet.
- ❖ Staff of the organization that originated the extranet report that its design reflects their plans and intentions for it.
- ❖ The intended audience reports that the extranet was clearly designed with their needs in mind.
- ❖ Pilot participants are able to explain the value of the extranet.

The Pew Charitable Trusts Communications Extranet ("Grantee Central") was conceived in order to meet the following goals of the Pew Charitable Trusts:

- ❖ To extend the resources of the Trusts grantees, thereby increasing the social return on the Trusts' grantmaking investments.
- ❖ To enhance and encourage communications and collaboration among Trusts grantees and between the Trusts and their grantees.
- ❖ To foster information sharing among Trusts grantees that face similar challenges in achieving their program goals.

### **Benchmark:**

**The goals and objectives of the extranet are clearly identified and documented.**

#### **Explanation:**

*Many organizations jump into building an online community without identifying what they hope to accomplish with it. They are so eager to get something up and running (and often are being pressured by other forces within their organization) that they are hesitant to spend too much time on the planning required to ensure that the best, most appropriate and useful solution is designed and implemented. However, an unplanned online community or extranet often results in very little to show. It is crucial to identify early on: Who is the intended audience? What will be accomplished through the use of the extranet? What outcomes will the intended audience experience as a result of their use of the extranet? How will an extranet benefit the intended audience? Answers to these questions not only help you keep the project grounded in the overall programmatic goals and objectives of your organization, but **they can significantly influence the design, maintenance, usage guidelines and outreach activities** of the extranet itself.*

- An initial plan for the extranet is written and shared.

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- The plan clearly explains how the extranet supports the goals and objectives of the primary organization.
- The plan clearly reflects reasonable expectations for the users of the extranet.
- Other like-minded extranet projects have been explored for extracting lessons learned that can benefit this effort.
- The plan explains how the extranet will improve upon or support existing online or other resources and approaches to strengthening and building its constituency.
- The purpose of the extranet is clearly explained in the extranet usage guidelines.

*An outline of a possible extranet plan is included in Table 1 at the end of this document.*

### **Lessons Learned – the grantee-foundation dynamic or “the chicken-and-egg phenomenon”**

There are a couple of paradoxes concerning grantee extranets and online communities.

- Supporting the Extranet only if it proves to be useful. The problem with this approach is that the Extranet will only be useful if staff—at both the foundation and the grantee organizations – get involved and make the extranet useful. Foundations, like grantee organizations, are busy places. Overworked staff in both kinds of organizations are protective of their time. But if buy-in does not happen at both the foundation and the leadership of the intended audiences, the extranet cannot and will not be successful. Buy-in must include commitment by staff – including program officers – to support and engage in the extranet. One way to build such support and engagement is to start with committed, interested parties before expanding participation to a broader audience.
- Grantee terror of foundations. If grantees do not use the extranet that was built for them, they are afraid they will be punished. Such punishment might take the form of no future funding. On the flip side, grantees may not use the extranet unless they are required to do so by the foundation. Be careful about balancing non-punitive encouragement with procedures that encourage participation.

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## **B. The Partnership**

*The development of an extranet is not a process that can simply be handed over to a Web design firm. It is by nature an ongoing, collaborative process involving a partnership between the organization wanting to have the extranet built (the client) and the (usually) third party that is designing and building the architecture that will house the extranet (the vendor). If built internally, the client could be the program staff, and the vendor might be the organization’s information technology (IT) staff. Whether build internally or with a hired vendor, these partnership benchmarks still apply.*

*While the ultimate value of the extranet will be found in its use by the intended audiences, a successful extranet requires clear expectations and communications between the parties who are requesting, designing and building it. The process or strategy for achieving the extranet’s goals*

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should therefore be transparent, participatory and respectful. This set of benchmarks is designed with this process in mind.<sup>3</sup>

### Desired outcomes:

- ❖ Each partner reports that their objectives were reached.
- ❖ Each partner reports having achieved a benefit from the partnership.
- ❖ Each partner reports having the experience they brought to the table recognized, respected and appropriately used.

### Benchmark:

**Clear expectations are delineated and communicated between all project partners.<sup>4</sup>**

#### **Explanation:**

*In any vendor-client relationship, each party enters with a certain set of expectations. If these are not clarified from the outset, the likelihood of misunderstandings and disappointments later in the process increases significantly. For example, the client may assume that if the vendor builds a good enough tool, it will be used, but the vendor may be assuming that the client will adequately staff the project. Get all assumptions out on the table and discussed.*

- Roles and deliverables of all key personnel are clearly understood, delineated and documented. These include (but are not limited to): project governance, management and marketing.
- All project-related costs are clearly defined.
- Each organization is clear about how each will be represented in online and print materials.
- The group together identifies, discusses and agrees upon needs that *cannot* be met by this particular technology solution.
- A written contract—that includes documentation of these expectations as well as the deliverables—is sufficient, signed and exchanged.

### Benchmark:

**Systems are in place for easily communicating between project partners.**

#### **Explanation:**

*What communications devices (phone, email, fax, Intranet) will each organization use to communicate internally? Assess the technological strengths and limitations of each partnering organization. Maintain a balance between personal interactions and electronic communications. Choose the most appropriate methods of communications suited to the resources and habits of each organization. Remember that the goal is successful communications.*

- One primary liaison from each partner organization is identified. Contact information for each is shared with all relevant parties.
- All partner meetings have clear agendas and goals, preferably conveyed in advance of each meeting.

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<sup>3</sup> This section is informed by the work of Whitney Wilcox of the Benton Foundation, and includes adapted sections from "Finding Common Ground: A Partnership Worksheet," a chapter within *Partners in Public Service: Models for Collaboration* © 2002 Penn State University.

<sup>4</sup> *Flawless Consulting*, by Peter Bock, can be particularly helpful here; specifically the chapter on creating a scope of work.

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- Working meetings – especially agreements reached and identified action items – are documented and shared in a timely manner.

### **Benchmark:**

**The value of each partners' time and unique expertise is acknowledged, respected and leveraged.**

### **Explanation:**

*Partnerships are often entered into out of necessity. Identifying, acknowledging and remembering the assets that each partner brings will go a long way in contributing to a productive project design and implementation that also respects people for their time.*

- Vendor / designer experience from previous technology initiatives is leveraged in current initiative.
- Content-related staff (e.g., foundation program areas) actively participate in relevant phases of the design and implementation of the site.
- Unique roles of each partner are delineated, documented and implemented.
- Requests for information are handled in a timely manner.
- Partners meet deadlines guided by an initial workplan and timeline.
- If timelines cannot be met, reasons are adequate and communicated and resolved.
- The organizational “chain of command” is clearly explained so that each party understands the required process (and time needed) for decisions to be made; these realities are reflected in the work plan and timeline.
- Existing timelines and demands of the partnering organizations are identified and shared early and as they come up, especially if they present external demands that may impact the timeline (such as major board meetings, conferences, other activities that demand sufficient investment of time by any of the partners.)

### **Benchmark:**

**Partners identify and agree on appropriate policies that govern the site's design and usage.**

### **Explanation:**

*Partnerships can be too easily harmed and the entire project threatened if policies and legal issues concerning the extranet are insufficiently addressed. Technology initiatives frequently raise legal concerns about ownership of content, use of the extranet for purposes outside of the mission of the sponsoring organization (or that might even threaten the existence of the organization – i.e., lobbying or electioneering), and the privacy of shared information. These and related legal issues must be identified, and legal advice about them sought. Any ramifications should then be incorporated into both the project work plan, the contract and extranet usage guidelines and policies.*

- All parties clearly state legal concerns as early as possible.
- Ownership of content is determined.
- Ownership and licensing of software code is determined.
- Copyright issues around site content developed by third parties are addressed.
- Editorial control is addressed
- A usage policy is in place.

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- Legal advice is sought to approve all legal policies.
- All legal notifications are appropriately addressed in the online environment, easy to find, in understandable language.<sup>5</sup>

### Lessons Learned – Roles & Expectations

*Assume Nothing.* Even if roles and expectations are defined early on, they continue to need reflection and refinement over the course of the initiative. In particular pay close attention to:

- Who is the ultimate client? To whom must all parties be accountable? Who has the final “buck-stops-here” decision-making authority?
- How might roles shift through each phase of the project? Have one sheet that serves as a check list and reminder of who is doing what and by when.
- Identify an overall “project manager” who is the liaison among all parties and who tracks the progress of the *entire* initiative.
- Vendor and client need to be very explicit about what is and is not covered by the budget. For example, are the costs of using third-party services (such as news feeds) included in the budget? From which line item?
- How will communications between parties be handled? When is email appropriate and when is it better to pick up the phone? It is often easy to over-rely on email when it may not be the preferred mode, or most comfortable medium for all people involved in the planning and implementation of the extranet. And no matter which mode you use, be explicit about what you need from each other and by when.

## C. The Intended Audience

*We could have called this section “Designing the Extranet,” but we want to underscore that ultimately, any extranet or online initiative is created for the purpose of serving your intended audience while at the same time advancing your own goals and objectives. The bulk of the extranet must serve the needs of its intended audience or it will not fly. It simply won’t. So while this next set of benchmarks addresses the guts of what goes **into** the extranet, we frame it all in the context that you are building this **for your audience** and that they should stay at the forefront of your mind as you proceed through all phases of your extranet.*

*Many organizations assume that their intended audience will automatically want to participate in their extranet, that “if you build it, they will come.” However, if the definition of your intended audience is too broad, you may find that you are unable to meet that audience’s broad range of needs, especially in the first year of an extranet project. For example, the shared characteristic that all of your audience members are grantees of your foundation may not be enough to encourage them to communicate and share information with each other. Your plan needs to identify a target audience that will most benefit from the use of an extranet.*

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<sup>5</sup> For an example of how one organization handled the “easy-to-understand” of “legalese,” see NPower Seattle’s (or TechSoup’s) usage agreement...

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### Desired outcomes:

- ❖ Focus group participants and survey contributors report feeling heard, being engaged in the design, and seeing their input reflected in the resulting design.
- ❖ Pilot participants report a greater sense of community with their fellow grantees, especially within a program area.
- ❖ Pilot participants report that the extranet adds value to their efforts.
- ❖ Foundation program officers for the pilot participants report that they perceive that their grantees are benefiting from the extranet.

### Benchmark:

**The goals for the extranet are compatible with the needs and resources of the intended audience.**

#### **Explanation:**

*“In any successful community, the goals of the site owner and the needs of members must intersect,” writes online community expert Amy Jo Kim. “Your members need a reason to come back to your community time and time again. Why should they bother? What need are you filling in their lives? They have precious little time to devote to their entire [online] experience. Why should any of it, let alone the substantial amount of time it takes to be an active participant in an online community, be spent at your site? **If you get this right—if you can identify and fill a need in the lives of your community members – you can go a long way on very little technology. If you miss this, no amount of technology is going to make you successful in an online community.**”<sup>6</sup>*

- An appropriate, targeted audience is identified and selected for the online community.
- The intended audience, as a group, already considers itself a community, or its members are at least already communicating with each other through other means.
- The extranet is technically accessible by the intended audience. (For example, if the majority of intended users are using dial-up modems to access the Internet, the extranet will not have as a primary feature streaming video training sessions.)
- The benefits that participants will gain from participating in the extranet have been defined and communicated.

### Benchmark:

**The design process addresses the needs of all stakeholders; end-user input is adequately sought and incorporated into site development.**

#### **Explanation:**

*Members of the intended audience should be tapped for their input about using an online community, including what topics might be of interest to them. An extranet takes time to be used. How much time will be asked of the intended audience? Is such an amount reasonable to them? Does this audience have access to the necessary equipment and software to participate? For example, even if all members of the intended audience have Internet access and use email regularly, that does not mean that they are automatically going to incorporate coming to a Web-based extranet into their daily activities.*

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<sup>6</sup> “Amy Jo Kim: Common Purpose, Uncommon Woman,” interview published in *The Online Community Report*.

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- Input – through online surveys, focus groups or interviews – has been sought from the intended audience about their interests in and concerns about an extranet.
- Design of the extranet reflects and accommodates current modes of behavior and activities of intended audiences.
- An implementation plan is created that reflects design solutions to meet needs and interests identified during the focus groups and from surveys.

### D. “Care and Feeding” of the Extranet

*Many organizations fail to budget sufficient staff time and resources to **promote and maintain** their online community. Or they assume that the vendor who designed and built and perhaps even technically hosts the extranet will also provide sufficient online “care and feeding” of the extranet once it is built. The latter is not usually the case, and in almost all situations, should **not** be the case. Expecting a Web design firm to provide the lifeblood of the extranet is like expecting the architect or technical help of a convention center to design the conference program and arrange for speakers. Conference organizers call upon such technicians to hook up the appropriate technology so invited speakers will be physically heard, but they are not asked to design or moderate a panel of experts.*

#### **Desired Outcomes:**

The intended audience reports that:

- ❖ They heard about the extranet on a regular basis throughout the course of the pilot.
- ❖ They were well prepared to use the extranet, that training and technical assistance were adequate.
- ❖ The extranet contains information, tools and resources relevant to their work.
- ❖ They are satisfied with the level of involvement by foundation staff.
- ❖ They benefited from the sharing of their own and others’ content, lessons, etc.

In addition, foundation staff report that:

- ❖ They witnessed active participation by individuals, especially around the contribution of content.
- ❖ They perceive grantees are valuing the extranet.
- ❖ They say that it is worth their time to contribute to the extranet.
- ❖ The extranet adds value to their own efforts.
- ❖ Training and technical assistance were adequate.

In addition, extranet usage statistics show that:

- ❖ Foundation staff spent time contributing to the extranet.
- ❖ Select “power” users spent time contributing to the extranet.

### Of Special Concern to Foundations

Building community among grantees, across programs, can challenge the very infrastructures upon which grantmaking programs have been built. Foundations considering or building an extranet for grantees will likely encounter and need to address the following issues:

- Many foundations practice a hands-off relationship to grantees. But no matter how you handle the paperwork within your foundation, an extranet must involve both the interests of the intended audience (grantees) and the goals of the foundation (grantmakers). A foundation cannot help but have a vested interest in various decisions to be made that it might not otherwise in a typical grant or contract arrangement. Similarly, a foundation must be involved in the launch, outreach and ongoing support of the online community it hopes to foster among its grantees. If a foundation wants their grantees to institutionalize the use of the extranet into their work, then the foundation must be willing to institutionalize support of the extranet into their own operations.
- The vendor or internal staff building the extranet needs to have access to both grantees and the people most closely aligned with them (usually program officers). A single meeting or survey may not be enough to collect the feedback necessary for designing a solution that works for the intended audience. Foundations tend to be protective of the time of both. Some foundations set up a committee of grantees and program officers that can act as a sounding board at different phases of the project.
- Many foundations prefer to play down their visibility on projects that involve grantees in order to give grantees the primary platform. In the case of an extranet where grantees communicate with each other, a foundation may be particularly concerned about distancing itself from any online discussions that take place, especially those concerning political advocacy. One possibility is to establish usage rules that forbid such activity, especially if the foundation is the owning entity of the extranet and therefore responsible for its content. However, such restrictions might (a) be in sharp contrast to the need of grantees who might find sharing advocacy methods with each other one of the more beneficial uses of an extranet, and (b) require a level of monitoring that the foundation may not be willing to practice. In addition, foundations should not ignore the value that their staff's participation in an extranet can have for grantees, and might consider such participation as a form of expanded technical support.
- While foundations might see their grantees as a form of community by the nature of the fact that they *are* grantees, grantee organizations may not see themselves as such a community at all. Getting financial and technical assistance from a foundation is not enough to make a *community* out of grantee organizations. Our findings indicated that it is important that (a) the members of the intended audience already be communicating with each other, and (b) they have shared interests and concerns. Shared interests tend to include: access to best practices, lessons learned, expertise (especially that housed at the foundation), and vendor recommendations.
- Foundations need to think very carefully about where they will “house” the responsibility for the extranet. Be careful not to make this decision based on the fact that an extranet is computer technology, or even about communications, leading to the extranet being placed in your IT or Communications department. Neither of these departments is directly involved with the activities and goals *of the target audience*—grantees. It is imperative to the success of a grantee extranet to involve those people at the foundation most connected with the intended audience, most familiar with their needs, most likely to have the greatest insights, and most grounded in what the foundation hopes to achieve by this effort—i.e., program officers. Because foundation programs tend to work in isolation from each other, it's not always so easy to find one particular department to build the community of grantees.

**Benchmark:**

**The organization initiating the creation of the extranet takes on the activities required to make the extranet a success, addressing promotion, content, administration and technical assistance.**

**Explanation:**

*This benchmark is in part connected to one of the earliest benchmarks about clear delineation of expectations. But it bears reframing under extranet “care and feeding” because without the commitment—either in staff time or dollars—to providing the “humanware” components of an extranet, the extranet is likely to fail. This is not to say that all of these activities must be done by foundation staff, but these are crucial roles that must be assigned, and assigned carefully.*

- Existing organizational practices are examined and modified as needed to support the goals of the extranet.
- New organizational practices are created to support the extranet.
- Staff time is built in to promote the extranet to its intended audience.
- External support is recruited as needed to supplement staff resources.

**Benchmark:**

**A plan is in place for marketing and recruiting the participation of your intended audience.**

**Explanation:**

*Many organizations often expect their online community to flourish on its own once the system is launched. The good news is that once an organization has defined the goals and audience for its extranet, most of the remaining work involves developing proactive strategies to promote and engage the community.*

- Staff time is built in to promote the extranet to its intended audience.
- Outreach is coordinated with and integrated into existing outreach or communications efforts.
- Specific outreach and follow-up expectations are developed, including responding to needs of participants in a timely manner.
- Printed and online outreach materials have been created, tested and disseminated.

**Benchmark:**

**A plan is in place for the “care and feeding” of the extranet.**

**Explanation:**

*Overlooking the key role of the human facilitator is perhaps the greatest reason that online communities fail to meet the expectations of their creators. An extranet facilitator or moderator is responsible for such activities as welcoming newcomers, encouraging silent participants (“lurkers”) to speak up, seeding the conversation when necessary and connecting participants with the resources that will keep them coming back for more. The moderator/facilitator should have both technology skills to help participants navigate the software, but more importantly, the **people** skills required to coach participants into active and appropriate engagement. Ideally this person is housed at the organization that originated the extranet, and who is most familiar with both the needs of the intended audience and the resources of the sponsoring organization.*

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- Roles of extranet manager / facilitator are identified and put into place.
- Staff time is built in to help participants make best use of the system and to answer any questions they may have about the use of the extranet.
- A proactive extranet manager compiles and disseminates news and other resources relevant to the topics or interests of the online community.

### Lessons Learned – Timelines & Keeping to Schedule

The following areas often take more time than you might think:

- Grant agreements and contracts involving extranets may require more back-and-forth and review and approval processes than other typical contracts or grant agreements. Concerns about copyright, ownership of content and licensing of software code will usually require legal attention from all parties.
- Share travel and vacation schedules early on. Will an upcoming weeklong staff retreat occur at a crucial time in the approval process of the plan? If your timeline cuts through August, what impact will vacation schedules have? If your launch is near a holiday, consider moving it back.
- Organizational restructures or changes in programmatic priorities and staff turnover are all realities facing any organization. As such changes occur, re-align timelines and expectations – or even the contract – as necessary.
- Any time you need to coordinate the schedules of multiple parties, ensure adequate lead time for communicating with participants.
- The requirements gathering phase is perhaps the phase most critical for success. This period involves translating all that has been learned during strategic planning into specifications and requirements – the blueprint for construction – that the vendor will use to actually build the extranet.

### **Benchmark:**

**The extranet contains information relevant enough to attract and ensure involvement of intended audience.**

### ***Explanation:***

*An extranet will only be used if such use brings value to the intended audience. Experienced online community builders reiterate the importance of drawing intended audiences to the extranet with content or tools needed to make their days more effective.*

- Valuable and timely content is “pushed” to grantees to keep them engaged.
- The extranet provides access to relevant resources from the field to improve grantee performance.
- Grantees are provided resources that they couldn’t easily find elsewhere.
- Content serves to enhance grantee effectiveness through how-tos, center start-up manuals, Q&A, vendor recommendations.
- “Intermediaries” contribute useful information.

**Benchmark:**

**The extranet fosters information sharing among participants that face similar challenges in achieving program goals.**

**Explanation:**

*One of the greatest values of an online community is its ability to support informal networking between people with shared concerns.*

- Participants share lessons learned with each other.
- Participants ask for support from each other.
- The extranet has a diverse (if small) set of “power users” who contribute to the value of the site with content or pro-active discussions.

**Benchmark:**

**Communications *technologies* are appropriately leveraged to increase success of extranet.**

**Explanation:**

*The following components are common **current** extranet elements and may need to be modified depending on the circumstances of your particular extranet, and the evolution of technology.*

The extranet...

- Supports the ability to log in to a secure (SSL-enabled) Web site.
- Provides interactive (and archived) areas for peer exchange and discussion.
- Allows participant to create their own discussion topics.
- Offers the ability to upload/download documents within specifically defined areas.
- Includes self-reported demographic information about other extranet participants and their organizations.
- Offers the ability to view and post calendar events.
- Supports the ability to receive notification of newly posted articles/documents and other information based on participant preferences.
- Allows participants to post job openings and other classified ads.
- Collects and reports usage stats to site manager(s) that demonstrate how different areas of the extranet are being used.

**Benchmark:**

**Sufficient mechanisms are put in place to provide adequate training and technical assistance to extranet participants.**

**Explanation:**

*The project examines the relationship of training and usage. Users who are trained are more likely to be active participants in the extranet.*

- Training sessions are of sufficient length to introduce use of the extranet and provide hands-on learning aimed at teaching target audiences how to incorporate use of the extranet into their operations.

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- Technology is appropriately leveraged (and sufficiently promoted) as a training delivery mechanism.
- Participant requests for technical assistance are handled in a timely, friendly manner.

### D. SUSTAINABILITY

*In order to sustain an extranet beyond its initial pilot period, it is also essential to assess how the initiative is meeting the needs of its intended audience as well as the initial objectives of the sponsor of the initiative. This next set of benchmarks are intended as a self-guided evaluation tool to help the partners in an extranet initiative determine how well the project achieved its objectives and what may need adjusting in order to sustain the effort into the future.*

#### Desired outcomes:

- ❖ Systems are in place to adequately capture data that will measure the effectiveness of the effort.
- ❖ A subsequent redesign (if necessary) or implementation plan reflects the lessons learned from the initial assessment.
- ❖ The “benchmarks team” reports that this set of benchmarks supports the documentation and assessment purposes of the project, or is modified as necessary.

#### Benchmark:

**A pilot phase of the extranet is designed in such a way to increase chances for ongoing success.**

#### *Explanation:*

*Those grantees that see the clear potential, and are most likely to use such a tool should be those selected for participating in the pilot. A methodology is developed for evaluating the pilot phase that engages all stakeholders, including project partners and end-users.*

- Pilot participation is based on identifying those grantees most likely to experience directly and timely benefits from participation
- Pilot process is evaluated by all stakeholders through online surveys, email solicitations and interviews.

#### Benchmark:

**The extranet is easy to use, to navigate.**

#### *Explanation:*

*In addition to great content and powerful facilitation, an extranet's design must be user-friendly.*

- Usability studies are conducted during beta (pre-pilot) stage to test and ensure ease of use.
- Through email feedback and online surveys, users during the pilot phase report that the site is easy to understand and that content is easy to find.

## Benchmarks for Building Extranets and Online Communities

- Site usage statistics indicate that all areas of site have been seen by users.

### **Benchmark:**

#### **The extranet is perceived as valuable by the intended audience.**

##### ***Explanation:***

*Value in this case is defined not only by the target audiences but by the staff members of the organization seeking to serve and support that target audience. It is extremely likely that users of the extranet will fall into various categories or types. This is natural. An organization should not expect all individuals to use the extranet in exactly the same way because each person has different kinds of needs.*

- Measures for each of high-end, active users; casual users; inactive users are tracked and targets are set (e.g., 51% of pilot participants actually participate at least once a week during the pilot; 80% participate at least once a month).
- Online tools and resources are downloaded and read.
- Foundation program officers report seeing value in the extranet for grantees.
- Foundation program officers report seeing value in the extranet as a means of improving communications between the foundation and the grantees.

### **Benchmark:**

#### **Feedback from target audiences informs fine-tuning and ongoing development/growth of the extranet.**

##### ***Explanation:***

*An online community, just like a real one, is dynamic. It consists of human beings whose needs change. A well-designed extranet plan will reflect these dynamics and be flexible enough to grow and expand as the needs of its target audience shift.*

- Sufficient feedback mechanisms are put into place, promoted and used, including online surveys, email solicitations and interviews or focus groups.
- Feedback is analyzed, and recommendations compiled.

### **Benchmark:**

#### **Extranet survives beyond the initial pilot period**

##### ***Explanation:***

*Ultimately, all organizations that enter the waters of online community building want their effort to be a success. In order to keep tabs on that progress, it is important to keep measuring the effectiveness and usefulness of the site far past the initial pilot period.*

- Measures for pilot participants' ongoing use of the extranet one year out are set (e.g., 51% of pilot users continue to use extranet at the end of the first (post-pilot) year).
- Measures for each of high-end, active users; casual users; inactive users are tracked and targets are set. (e.g., 51% of ongoing participants actually participate at least once a week; 80% participate at least once a month).
- Measures for participation satisfaction (users report value of extranet for their work) are set.

### Lessons Learned – Sustainability

- Much attention is given to the *technological* design and creation of the Extranet. Certainly, a strong, easy-to-use, and powerful technological infrastructure is key to a successful Extranet. However, even the most technologically sophisticated Extranet will not make an online community. Developing and supporting the *humanware* component of an Extranet—facilitators, information providers, community enthusiasts—is as critical an element as the technology on which the Extranet sits.
- Content is King. While usually stated from the beginning, the importance of content really comes into play immediately prior to launch when it is time to feed content into the Extranet so that there is some “there” there when participants first log on.
- Measuring Success. Both the vendor and the organization requesting the Extranet need to be very clear with each other about what is needed and possible in terms of measuring the activity of the Extranet once it is in place. Most vendors of web-based tools include standard usage statistics, but such statistics may not capture information required to understand the success of the Extranet. What information does your organization need to capture in order to assess the value of the initiative? This will likely require some customized programming on the part of the Extranet vendor. Expect to pay at least an extra \$20,000 for such customization. (Although a general recommendation to Extranet vendors is that they make themselves more marketable by building such assessment tools into their standard Extranet tool.)

## Resources for Further Exploration

### [Building Online Communities, Transforming Assumptions into Success](http://www.benton.org/Practice/Community/assumptions.html)

([www.benton.org/Practice/Community/assumptions.html](http://www.benton.org/Practice/Community/assumptions.html))

Before you start planning your own virtual community, read this article by community builder Victoria Bernal to learn about what an online community can *and can't* do for your organization.

See also Victoria's list of [additional community building resources](#)

([www.benton.org/Practice/Community/communitytips.html](http://www.benton.org/Practice/Community/communitytips.html))

### [Resources for Facilitators and Moderators of Online Discussion](http://www.emoderators.com/moderators.shtml)

([www.emoderators.com/moderators.shtml](http://www.emoderators.com/moderators.shtml))

An annotated list of articles and other materials to help you set up, maintain, and have a successful experience with online dialogue.

### [Online Community Report](http://www.onlinecommunityreport.com) ([www.onlinecommunityreport.com](http://www.onlinecommunityreport.com))

A twice-monthly email report on current events and trends in online community building. The report includes information on jobs, events, software, and legal issues related to online communities.

### [Partners in Public Service: A Working Guide for Public Broadcasters and Community Organizations](http://www.benton.org/Practice/Features/PIPS) ([www.benton.org/Practice/Features/PIPS](http://www.benton.org/Practice/Features/PIPS))

The staff involved in eight partnerships between public television stations and museums, libraries and historical societies share their experiences with collaboration in an effort to help pave the path for organizations breaking similar ground.

### [Twelve Steps for Effective Partnerships](http://www.benton.org/Practice/Features/truepartners.html) ([www.benton.org/Practice/Features/truepartners.html](http://www.benton.org/Practice/Features/truepartners.html))

The Institute of Museum and Library Sciences' (IMLS) *True Needs, True Partners* represents the culmination and analysis of fifteen partnerships between schools and museums. In this overview of the publication, elements defined by IMLS as essential for successful partnerships are identified.

### [Sound Partners for Community Health Toolkit](http://www.soundpartners.org/topics1983/topics.htm) ([www.soundpartners.org/topics1983/topics.htm](http://www.soundpartners.org/topics1983/topics.htm))

Benton's *Sound Partners* Program supports partnerships between public radio stations and local organizations that are working together to educate and stimulate discussion about health issues in their communities. The Web site's toolkit includes checklists, worksheets and partnership assessments.

### [Full Circle Associates](http://www.fullcirc.com/community/communitymanual.htm) ([www.fullcirc.com/community/communitymanual.htm](http://www.fullcirc.com/community/communitymanual.htm))

maintains a rich collection of resources aimed at helping online community builders stay informed on current trends, and obtain technical assistance and advice.

### *Flawless Consulting*, by Peter Block, Josse-Bass/Pfeiffer, second edition, 2000.

While this book, initially published in 1981, is aimed at helping consultants be more effective with their clients, the strong advice provided throughout can help any client/vendor partnership set clear expectations and handle "relationship" obstacles that may be encountered during especially the early phases of a technology initiative.

### *Community Building on the Web: Secret Strategies for Successful Online Communities*, by Amy Jo Kim, Peachpit Press, 2000.

Introduces nine essential strategies for creating true community online.

Table 1: **Elements of a Possible Extranet Plan**

Any extranet plan should be specific to the needs of the community for which the extranet will be built. However, the following elements should be addressed:

1.     **Background**  
Describes the research and analysis that has gone into the planning for the extranet. Includes key findings from focus groups or surveys of the intended participants as well as a review of lessons learned from other extranets built for similar purposes.
2.     **Goals & Objectives**  
Describes the objectives and desired outcomes of the extranet, and how success will be measured.
3.     **Target Audience**  
Details the target audience, their needs and how the extranet will meet those needs.
4.     **Content & Functionality**  
Describes the content and functionality, outlining a proposed site architecture.
5.     **Extranet Management**  
Addresses the resources (staffing as well as content) required to maintain the extranet. Describes where the extranet will be hosted; how users will be added; how content will be managed; how the community will be facilitated). Describes the outreach and marketing required to promote the extranet both at the beginning of its life *as well as throughout its life*. Suggests training and ongoing support.
6.     **Timeline**  
Includes a proposed timeline of activities with “by when” dates and clearly specifies responsibilities and expectations of extranet planners.