THE *agile* NONPROFIT

— A QUICK-START GUIDE —

TO ITERATIVE >> WEB DEVELOPMENT

CivicActions
Empowered

Agility is defined as the power of moving and adapting easily, with the ability to quickly think and draw conclusions.

THE
AGILE NONPROFIT

Given the landscape in which most nonprofit organizations operate, what is more valuable than the ability to quickly and easily adapt to changing circumstances?

Increased service demands, less funds for programs, rising costs to retain staff, and fierce competition among organizations can be dizzying in the face of the already-challenging job you do to support your mission.

In this guide, CivicActions provides an overview of the Agile (with the Scrum framework) development process and its key benefits. We draw from real-life examples of nonprofit groups that have successfully utilized the Agile/Scrum process to achieve groundbreaking results and conclude with practical tips on how to make the process work for you.

SIX KEY BENEFITS

6

What you do is as important as how you do it. For any group, choosing a process that shares your values, supports the ways you want to work with your staff and constituents, and maximizes your efficiency is critical. The choice of the Agile process centers on the following key benefits as they help define the type of relationships and interactions a team wants to bring to its organization.

1 The Process

Is The Product.

A well-defined process that is in step with your existing activities and maximizes the expertise of each member of the team is an important foundation for the success of any project. Working with the Agile process by developing a website or technology project might be just the beginning of bringing Agile principles into your team or organization.

2 Deeply Respects

Stakeholder Input.

When stakeholders are fully included in the process of developing the tools designed to serve them, they become loyal and committed participants. The Agile process allows for and prioritizes direct feedback from end-users and stakeholders as part of a sprint-based development plan. Documentation about features and specifications is maintained in a way that is understandable to the non-technical end-user and allows for the meaningful and clear exchange of details.

Partnership and collaboration are cornerstones of community and of social change movements, but also of the Agile process. The Agile team works in partnership with one another, within their specific roles, toward shared success.

Builds Partnership and
3 Collaboration

Agile teams form around the concepts of self-management and trust. The Product Owner clearly communicates priorities and constraints, and the team possesses the skills and talents necessary to deliver the most value. With limited constraint, the team is able to use its creativity to solve problems and is responsible for the quality of its completed work.

Increases the Capacity for
4 Self-Management And Trust

Drives Organizational

5 Empowerment

Empowerment is the ability to effectively manage and continue to evolve the initial completed work. The Agile process puts you (the Product Owner) in the driver's seat from the start and supports you in formally defining the project's key features and business objectives within the process itself. As you learn the Agile/Scrum process, you are also learning to take full ownership of the strategy, website or web application, as well as harness its power to reach your strategic goals. This process, and the new ability to own the success of a project, translates throughout all aspects of the organization.

The Agile Process Delivers

6 Continuous Value

The Agile process is designed to deliver continuous value in the constantly changing land-scape of technology and user needs. Short cycles (called Sprints) enable adaptations to be made when new things are learned or decided, avoiding runaway costs and lengthy scope change processes. The most important tools and features are developed first.

The Agile process is a simple and empowering one that will involve stakeholders at critical points and allow for dynamic user feedback concerning completed work. As the team becomes more practiced at using the process, efficiency improves, work satisfaction improves, waste decreases and agility increases. We hope the use of the Agile process in our website and application development work with you —or wherever you use it— is the starting place for the adoption of the process within the organization as a whole.

THE AGILE MANIFESTO

The Agile Manifesto was written by a group of 17 software developers in the interest of making development better and more effective. It states:

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

Individuals and interactions *over processes and tools*
Working software *over comprehensive documentation*
Customer collaboration *over contract negotiation*
Responding to change *over following a plan*

That is, while there is value in the items on the right, we value the items on the left more.

Beck, Kent; et al. (2001)."Manifesto for Agile Software Development". Agile Alliance.
http://agilemanifesto.org Retrieved 2010-06-14.

WHAT IS SCRUM?

"Scrum" (or "Agile with Scrum") is one version of the Agile process.

Adopting the Scrum framework of Agile effectively means that there will be a roadmap to follow on your way through the Agile process. There are standard meetings that are concise and designed to keep the communication straightforward. There are artifacts, which are the tangible items that are necessary for communication and visibility. Lastly, there are the defined roles for the people involved in the project, which clearly describe each person's responsibilities.

Agile/Scrum 1-2-3!

THREE ROLES
THREE ARTIFACTS
THREE MEETINGS

Three 3's in the Scrum Cycle

Product Backlog   Scrum Production Sprints   Deliverable

Agile/Scrum 1-2-3!
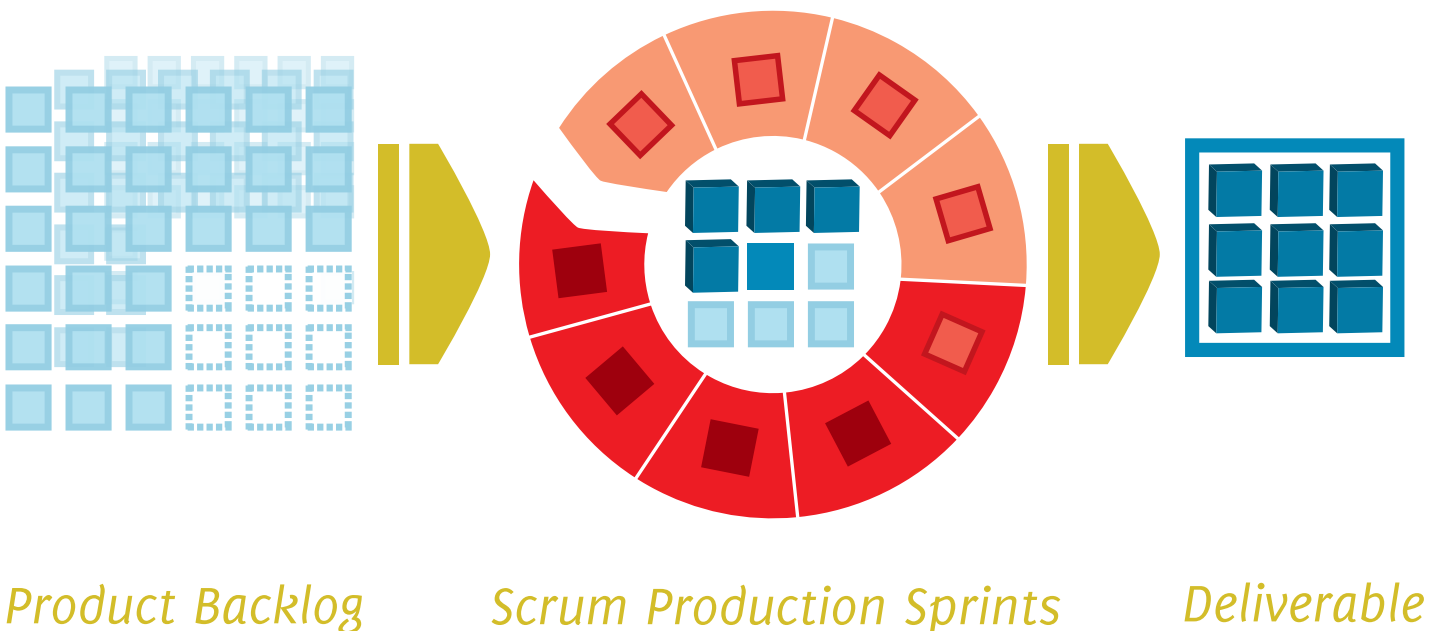
THREE ROLES

1 Product Owner (PO)

The Product Owner represents the voice of the stakeholder

and ensures that the Scrum Team works on the most important features and functions. The Product Owner manages the Product Backlog – a list of each of the specifications for the final product that are prioritized according to their business value. The Product Owner can be considered a subject-matter expert, with comprehensive knowledge about the impact and importance of each feature from the perspective of business value.

2 ScrumMaster

The ScrumMaster serves many roles at once: facilitator, roadblock remover and coach.

The ScrumMaster meets briefly with the team every day during the Daily Scrum. If there is a change or important issue generated from outside the Scrum team, the ScrumMaster ensures it has as little impact as possible. The ScrumMaster's overall role is to protect the productivity of the team, with a focus on ensuring success of the current Sprint in completing already-committed work.

3 Scrum Team

The Scrum Team performs the actual work of designing, problem solving and building.

A Scrum team normally consists of 5-9 people - a group size demonstrated effective for this type of work. Team members review prioritized tasks from the Product Backlog and estimate the work together. Within the Scrum team, there are no specific roles. These teams work best when their members are generalists and able to work competently on a variety of different tasks.
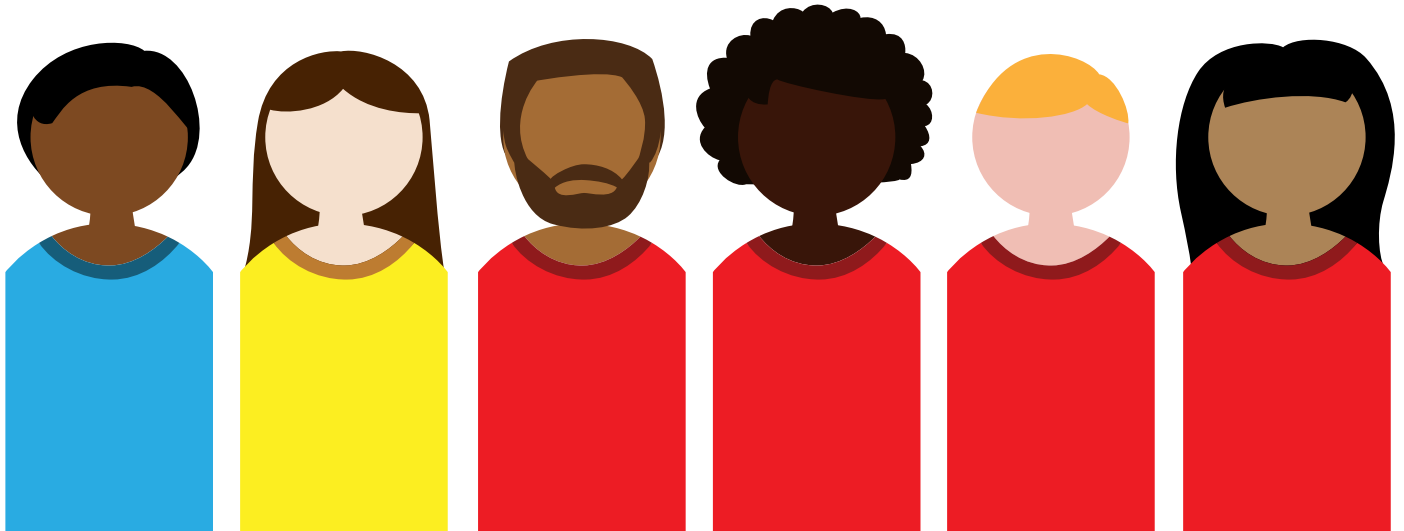
1 1 (PO)

2 S-Master

3 S-Team

THREE ARTIFACTS

1 Product Backlog

The Product Owner compiles all the features and specifications planned for the product or project and prioritizes them.

The result of the Product Owner's work is the initial Product Backlog. This backlog is constantly re-prioritized based on what is happening at the moment and can be constantly added to as new requirements come to light.

Before the start of each Sprint, the highest priority goals are estimated; those that can be completed during the Sprint are transferred to a Sprint Backlog.

2 Sprint Backlog

Based on the Sprint Backlog, the Product Owner and Scrum Team determine goals of the Sprint.
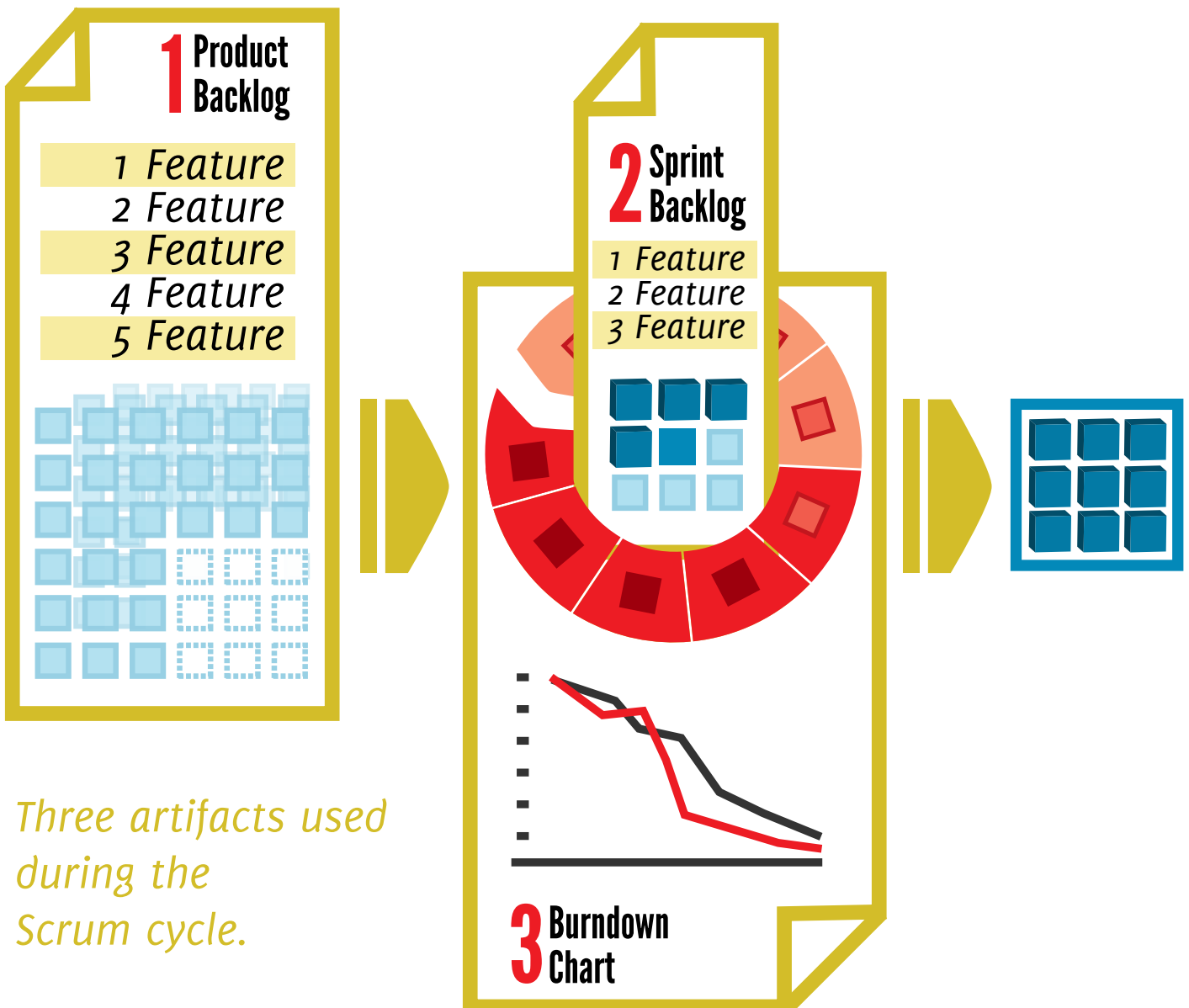
Prioritized functionality is broken down into detailed tasks, and each member of the Scrum Team commits to complete some number of tasks. The team is self-organized, and team members share responsibility for the results of the Sprint.

3 Burndown Chart

A Burndown Chart is used to communicate day-by-day how much work and time remains in the Sprint.

The chart should clearly show the velocity with which work is completed and should be visible to every member of the team at all times. With a quick glance the team and Management can see if the Sprint is on schedule.

1 Product Backlog

1 Feature
2 Feature
3 Feature
4 Feature
5 Feature

2 Sprint Backlog

1 Feature
2 Feature
3 Feature

3 Burndown Chart

Three artifacts used during the Scrum cycle.

Agile/Scrum 1-2-3!

THREE MEETINGS

1 Sprint Planning

A small part of the fixed timeline for a Sprint is dedicated to planning

and committing the work. Working with the Product Owner, the Scrum Team moves prioritized and estimated stories from the Product Backlog to the Sprint Backlog, breaking them down into specific tasks. Once the items in the Sprint Backlog have been set, the Product Owner lets go and hands the work to the Scrum Team. The ScrumMaster moves from facilitating the Sprint Planning process to keeping the Scrum Team as focused and free of distraction as possible for the remaining duration of the Sprint.

2 Daily Scrum

The Daily Scrum is a brief (15-minute) meeting

convened by the ScrumMaster that is specifically to report on progress, identify any blocks to productivity, and adjust work assignments based on what is happening. Anyone may attend the Daily Scrum meeting, but only the ScrumMaster and the Scrum Team members may speak. Each member of the team should provide the following information:

What have I done since the last meeting?

What will I be doing between now and the next meeting?

Is there anything that will stop me from working my plan?

This fixed agenda is intended to preserve this critical time for keeping the team moving forward, rather than being distracted by side discussions or information that is not critical to the work of the current Sprint.

3 Sprint Demo & Retrospective

Each Sprint finishes with a demonstration of completed work.

Work is usually demonstrated by the person who completed it, which builds accountability and thoroughness. Attending the Sprint Demo are the members of the Scrum Team and the Product Owner. It can also be beneficial to include members of end-user groups, organization managers, or stakeholders of specific completed components. The evaluation of the state of the work or product upon completion of the demo becomes the basis for re-prioritizing the Product Backlog for the next Sprint.

At the completion of each Sprint, the Scrum-Master convenes a Sprint Retrospective meeting with the Scrum team. The purpose of the meeting is to share experiences and results from the latest work effort in order to improve communication, productivity and workability during the next sprint.

1 Sprint Planning

2 Daily Scrum

3 Sprint Demo
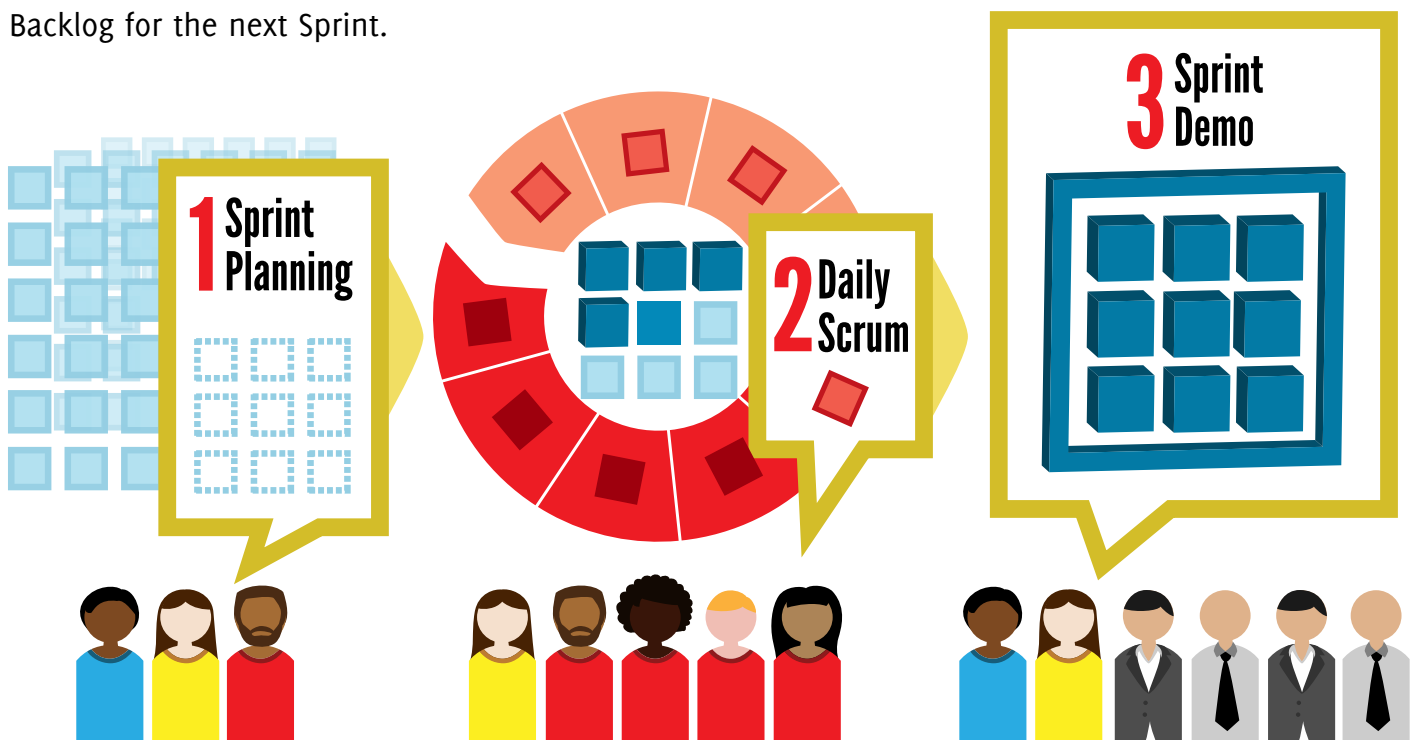
Three types of meetings during the Scrum cycle.

10 TIPS FOR MAKING AGILE WORK X

The following tips are drawn from our experience in using the Agile/Scrum process with our clients on many different sizes and types of projects. If you plan to use an Agile/Scrum process, either internally or on a specific project with a vendor, these tips will help you get the most out of the process and avoid roadblocks.

1 Learn about *and understand the process you will use.*

If you are working with vendors, they should provide the information and support you need to play along. If not, there are plenty of resources and training options available to help you learn about the Agile process in whatever flavor you will use it.

2 Have a Product Owner

who has the time and interest to play the role effectively.

Being a Product Owner is a consuming task and requires a substantial time commitment. The person in the role of Product Owner needs to have her schedule clear enough to make the success of the project her top priority.

3 Make sure

that your Product Owner really owns the product.

Holding the role of Product Owner in name only does not work and is not any fun. The Product Owner needs to be empowered to make binding decisions and have the trust of internal stakeholders to make the right decisions on their behalf, even without them present.

4 Use

External Product Owners with caution.

Product Owners are subject-matter experts. While it is possible for a person external to your organization to become familiar with your needs and the organization itself, trusting that he will always make the best decision for you is a risk. If you must use an external Product Owner due to lack of capacity to fill the role internally, be clear about what constitutes subject-matter expertise for this project, and make sure your Product Owner is an expert before he starts making decisions.

5 Commit

to the process.

Rome was not built in a day, nor will your website or application be. Commit to the process you are using and see it through. It will take at least one Sprint for your team to adjust to one another and really start to move efficiently.

6 Commit

even more.

If things break down, the answer is not to break the Agile/Scrum process, but to adhere to it even more fully. The process is simple, and breakdowns usually occur when things have become more complex than they were intended. Go back to the process and bring everyone back to basics.

7 Share

honestly during retrospectives.

Retrospectives are not the time to be nice. They are a time to share the real impact of breakdowns and create better ways of doing things together. If we cannot commit to being honest and sharing where things do not work, the process will not improve and frustration will build.

8 Claim Only

what you can complete.

There is no room (and no love) in the Agile process for over-committing. It is critical to only commit to what you can realistically complete without heroics, and to avoid committing to something because you think you should be able to get it done. Look at your time. Look at what else you have to do. Look at the work at hand. Then, commit to what you really can do.

9 Help the ScrumMaster

keep the Scrum Team focused.

The more efficient your Scrum Team, the more value you get for your money. Help the ScrumMaster keep the team focused by being an effective channel for communication between stakeholders and the Scrum Team. Be familiar with the goals of the Sprint and help stakeholders understand the real cost of interruption.

10 Make room for IT

at the Strategic Planning table.

If there is one pattern we see that needs to be disrupted in most of the groups with which we work, it is the lack of inclusion of the technical team in strategic planning from the start. In general, this means including the IT Director, CTO, Web Manager, or the one person on staff who is technical. Make room at the table for early discussions about what is possible with the existing infrastructure, roadblocks to getting things done on the technical end, and specifics about how current websites and other properties are being used (and not used) based on real data. This can help you to make the most of what you already have, but it also help you develop the most important and feasible things that will support the objectives of your project.
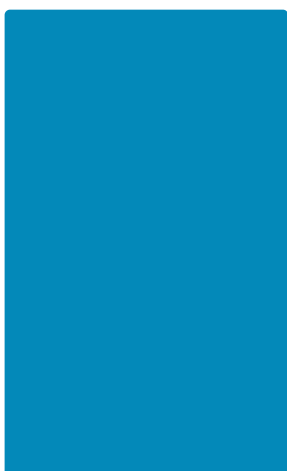
CASE STUDIES

AMERICAN PUBLIC MEDIA

The Problem

The national budget crisis created an all-out assault on public broadcasting and jeopardized all federal funding from Congress.

Agile Help

Agile enabled almost

immediate implementation of basic functions for the 170MillionAmericans.org website, so a demo could be made to stakeholders who could then focus on what else was needed. In iterations after launch, stakeholders have been able to see real-time site analytics, measure success, and make rapid adjustments to the toolset to improve sign-ups.

The Results

54% of all site visitors

took measurable action, and within a few weeks APM has 127,921 fans on Facebook. Activists persuaded Congress to preserve the entirety of the $445 million in government funding that supports public broadcasting across the country.
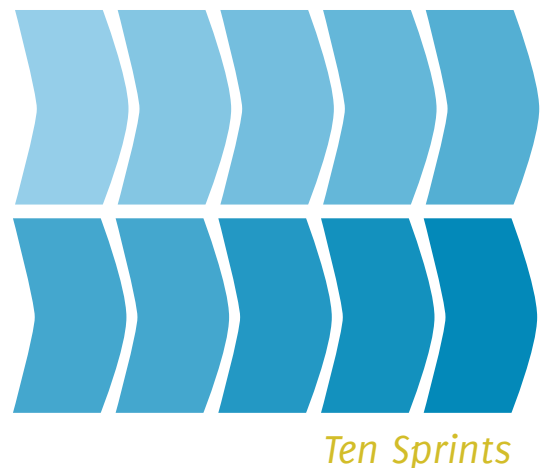
Timeline

Two Week-long Sprints

SACNAS

The Problem

Society for Advancement of Chicanos and Native

Americans in Science (SACNAS) needed a well-supported and scalable content management system (CMS) to help improve online member engagement to track constituents' activities, progress and stages along their educational career trajectory.

Timeline

Ten Sprints

Agile Help

The Agile process

helped SACNAS to break a highly complex project into several smaller initiatives that were more manageable, with a schedule that created meaningful opportunities for input from internal and external stakeholders. The process also allowed for scheduled breaks in development to allow the organization's staff to focus on its annual conference and other mission critical activities.

The Results

SACNAS launched a

SACNAS launched a simplified replacement to its old website and continues to adjust and develop it using the Agile process. Integration of the Drupal-based CMS with CiviCRM now provides detailed member histories, activities and interactions for the database of 25,000 members and 50,000 user records. Increased capacity in using the Agile development process internally means that work is completed more efficiently.

BAY AREA VIDEO COALITION

The Problem

The BAVC team was challenged to keep

its development focused on imperatives. The organization's large project included integrating the online class registration process with Salesforce CRM as well as extending Open Media technologies to enable a community of video producers to share diverse stories, thereby inspiring social change.

Timeline

Seven Month-Long Sprints

Agile Help

BAVC used a Product

Backlog with specific needs to help meet stakeholder expectations and manage a shared picture of priorities. They are now more effective Product Owners, ensuring whatever is developed next meets the strategic goals of the organization.

The Results

The Agile process

has helped the organization reach its goal of on-schedule launch and provided greater clarity among stakeholders. BAVC has created more advanced Salesforce CRM integration for class management, considerably reducing manual business processes and automating scheduling of equipment that was previously employed by staff.

YOUTHBUILD USA

The Problem

YouthBuild needed to move its existing

website from Kintera Sphere to Drupal, translating the existing web design into the new CMS, while seamlessly moving nearly 50,000 contacts and other critical program data.

Timeline

*Seven Month-Long Sprints*

Agile Help

The Agile process has

allowed YBUSA to gain proficiency in Product Ownership through the creation of User Stories that were detailed and accurate enough to generate the completed work. Employing the process on the web project provided YBUSA with training the staff can now use internally.

The Results

By migrating the

website to a Free and Open Source CMS, YBUSA has reduced license costs; additionally, consolidating various IT systems onto a common platform further reduced maintenance costs. Implementing a more flexible system has increased organizational efficiency, and the Agile/Scrum training now enables YBUSA engineering staff to further adapt the system based on organizational priorities.

the Author
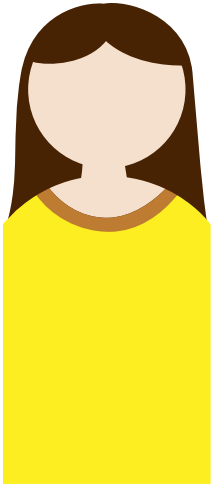
Jenn Sramek is the Director of Operations at CivicActions, a leading Free and Open Source web development firm committed to taking action in the world for positive, sustainable change. As a Certified ScrumMaster, Jenn serves as a mentor, adviser and facilitator to CivicActions's Agile Project Management group. Her technical proclivity and fascination with the way the web changes and enriches everyday interactions drew her to the intersection of nonprofits and technology.

Before coming to CivicActions, Jenn worked with the Boys and Girls Club, Boy Scouts of America and as a volunteer for the U.S. Peace Corps in Chad, Central Africa. As Program Manager for the Eco-Center at Heron's Head Park, she worked with Literacy for Environmental Justice, the Port of San Francisco and local youth and community members to design an off-grid environmental education center that won the 2010 EPA National Environmental Justice Achievement Award for Community Collaboration. Jenn currently serves as the President of the Board of Directors of the Haight Ashbury Food Program, a non-profit emergency food pantry in San Francisco.

Out of the office, Jenn is a master of agility in the form of Ultimate Frisbee, a sport she played for 12 years in national and international competition.

CivicActions
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CivicActions empowers social-change organizations with emerging technologies. We support the global movement of people and organizations building a sustainable future by providing Drupal, CiviCRM and mobile application development though our unrivaled Agile/Scrum project management methodology.

Our team has deployed more than 100 Drupal and CiviCRM-powered websites since 2005 for organizations such as the ACLU, Amnesty International, American Public Media, Center for Reproductive Rights, Free Software Foundation, Tesla Motors, and Women's Funding Network.

To download a free copy of this and other CivicActions guides, visit http://civicactions.com.

SPECIAL THANKS

Special thanks to the Scrum Alliance,

a not-for-profit professional membership organization that trained and certified our team on the Scrum framework. To learn more about Scrum Alliance, visit http://www.scrumalliance.org.

CONTACT US

Questions? Comments?
We welcome your thoughts and ideas.

Call: 510-408-7510
Web: civicactions.com/contact
Twitter: @civicactions

Lessons learned from Agile Applied Drupal Session notes and slides:

http://civicactions.com/blog/2011/mar/10/lessons_learned_from_agile_scrum_applied_slides_and_notes_from_drupalcon_chicago_panel

Top 5 Resources for Agile/Scrum Development

http://civicactions.com/blog/2011/feb/28/top_5_resources_for_agilescrum_development

How CivicActons Adopted Agile

Part One: The Way We Were

http://civicactions.com/blog/2011/mar/23/how_civicactions_adopted_agilescrum_part_one_the_way_we_were

Part Two: More Pods

http://civicactions.com/blog/2011/mar/15/how_civicactions_adopted_agile_scrum_part_two_more_pods

Part Three: Applying the Methodology

http://civicactions.com/blog/2011/apr/14/how_civicactions_adopted_agile_scrum_part_three_applying_the_methodology

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