

Transition Web project: recommendations report



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NOTE: Supported with full appendices online at: <http://tinyurl.com/twg-recommendations>.

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Executive summary

This document is the output from the "Research Evaluation and Recommendations" phase of the Web Project. It details all we've learned following a mass of communications and interactions with transitioners, technodweebs, social engineers and software architects around the world.

It aims to provide a clear statement of our options going forward for using technology, processes and partnerships to accelerate and deepen the spread of transition thinking and action around the world.

The board's job is to look at these options and help decide where we need to be heading.

It's worth thinking back to the beginnings of this project. Right from the first few conversations in the mists of transition time, it became clear that we needed to facilitate systems that enabled three things to happen:

- quick and easy internet presence for groups
- community networking platform
- knowledge sharing platform

Initially, we envisaged this as a single solution or platform, a kind of "build it and they will come" response to these requirements. Over time, we've shifted our focus to a much more distributed architecture, and we now think of that shift as being "from skyscraper to ecosystem".

During this process, the necessity of capturing and making available write-ups of all the wonderful projects that initiatives are undertaking became more and more of a priority.

These shifts didn't happen in a vacuum – they're the inescapable conclusion following multiple surveys, workshops, interviews, pilots, forum discussions, wiki documenting and international skydings held over the last 5 months, presided over by a core team of Ed Mitchell, Gary Alexander, and Ben Brangwyn with admirable assistance from Jon Walker, Graham Mitchell (no relative of Ed) and Daniel Harris.

There are a few differences, in web terms, between a skyscraper and an ecosystem. The former is expensive, difficult to maintain, goes out of date quickly, is centralised and doesn't guarantee take up. But it is very tidy in a web architecture diagram. An ecosystem, however, is messier, cheaper, tougher to manage, much more resilient and, by virtue of its inclusive design, guarantees take up by a significant number of initiatives.

On our travels, we've encountered a few skyscrapers, and we're continually struck by their out-of-datedness, their costs, their top-down orientation and their lack of resilience - particularly with regard to their dependence on a single developer (or very small team). That's the route to ulcers and a very bad use of our meagre resources.

So what does a web "ecosystem" look like? We have some great diagrams that will do the job of 10,000 words, but in essence, this web system ecosystem:

- encourages conversations to be face to face
- involves social processes as well as technology
- starts small and stays nimble
- captures and makes available write-ups of projects undertaken by initiatives around the world

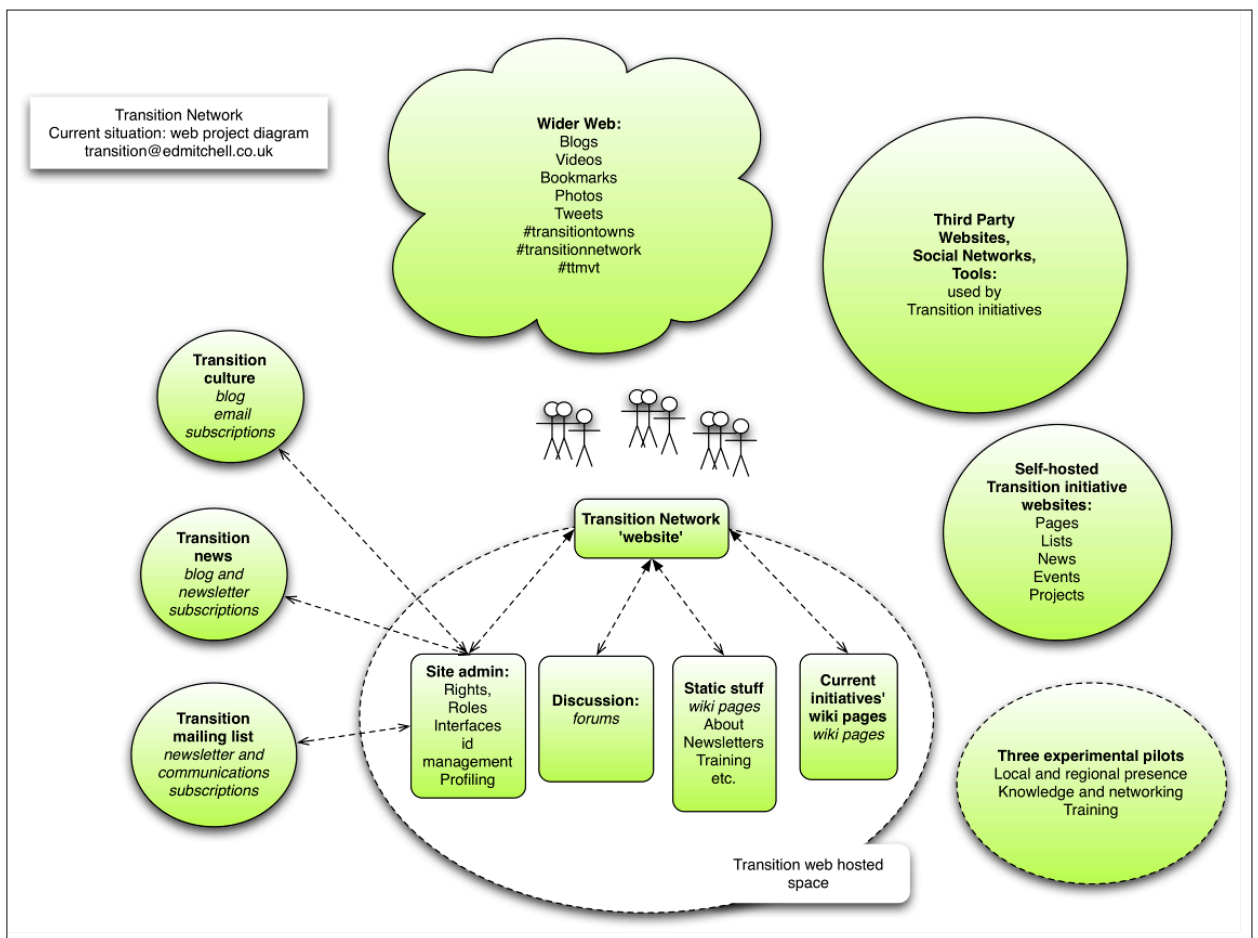
- affords space to elements and solutions that are already in use and address the functional requirements listed above
- links up these existing elements and allows them to share assets
- involves creating new elements
- creates conditions for the emergence of self-organising elements
- establishes key partnerships (eg with School Of Everything)

This project appears to be breaking new ground with considerable interest already generated among the open-source development crowd. It goes against the trend of a) building skyscrapers, b) focusing on individuals (a la Facebook) and c) ignoring social processes.

Instead, we're recommending a distributed ecosystem that's designed around nested networks of groups, that is underpinned by social processes and protocols that put humans face to face as much as possible and that pulls together the key shareable asset - project write-ups - so that each community can stand on the shoulders of others that have gone before.

Current "architecture"

Before revealing the findings from this phase, here's what the current world of web for transitioners looks like.



(diagram illustrating Transition Network's web 'stuff' to date)

Findings and observations, patterns and conclusions for the research stream

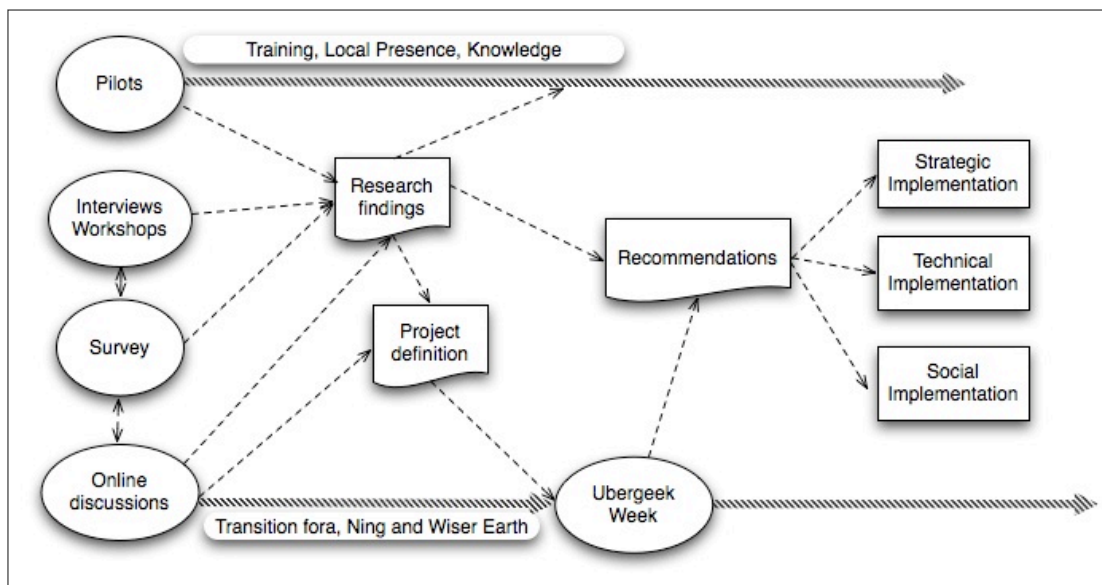
Introduction and background to research

This chapter covers the high level 'patterns' observed in common from all of the research streams outlined below, followed with a summary of direct findings from the survey. It is deliberately concise in order to give a digestible overview to the recommendations without the need to wade through long tracts of text. All source data is included in the appendices.

The web project is rooted in research in a variety of ways in order to gain the broadest sense of need and want from Transitioners. This includes a variety of 'traditional' research and engagement activities as follows:

1. Early broad discussions in Transition Network online fora
2. Focused discussions in 'Ning' online workspace
3. Face to face interviews and workshops (Bristol, Norfolk, Sydney)
4. Qualitative and quantitative online survey
5. Detailed discussions and recommendations in 'Wiser Earth' online workspace

The research fits into the wider project as described in the diagram below:



(diagram illustrating the project process and the research streams inclusion)

The sequence of these research activities reflects the gradual emergence of the recommendations over this project phase. Early discussions (#1) attracted a lot of enthusiasm, and a high level 'wishlist'; the interviews and more focused discussions (#2, #3) teased out higher level project patterns and pointed to the need for a collaborative working methodology; the survey (#4), informed by earlier work, broadened the research to its widest reach; and the final, most collaborative phase (#5) covered the first presentation of recommendations, and a detailed analysis of how to support them.

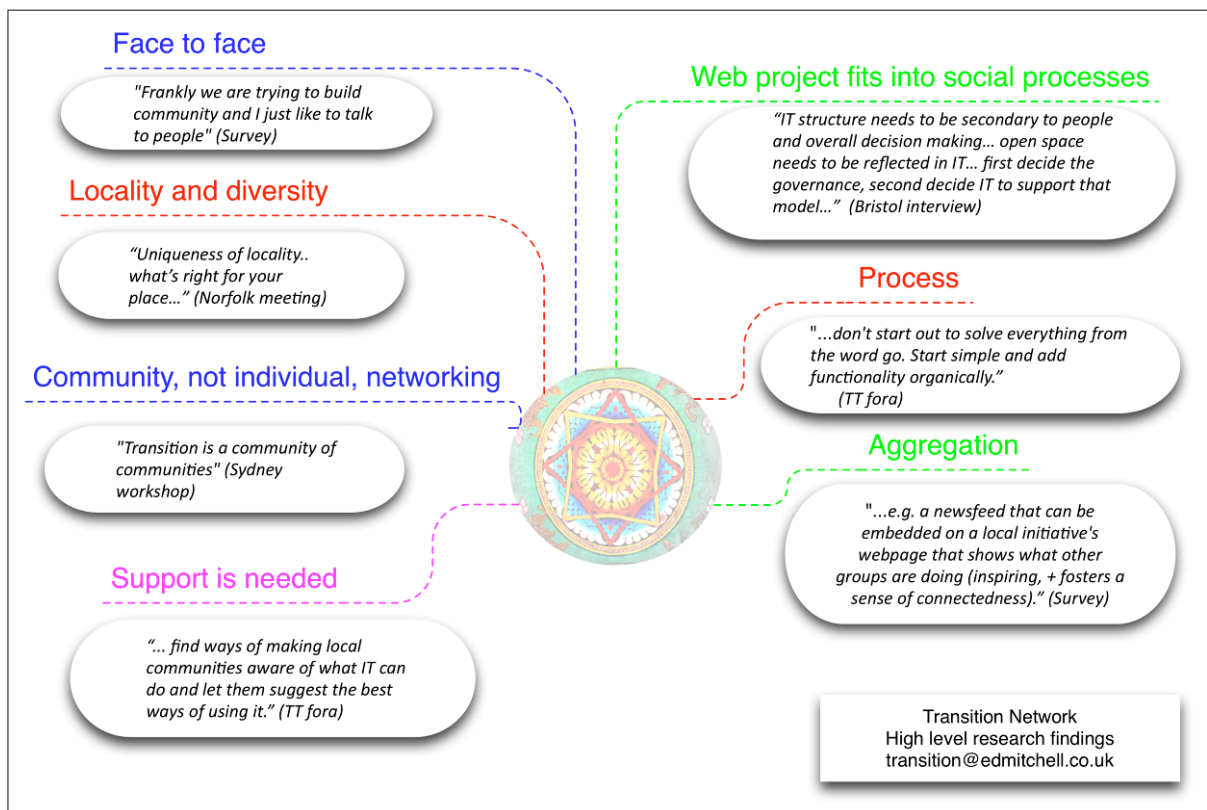
As well as these more 'traditional' theoretical research activities, the project includes three live online pilots to explore the key project streams (Knowledge and Networking, Local and Regional Web Presence, Training) in actual use. These are live web projects in themselves, supporting real activity embedded in

the Transition eco-system, and generating findings beyond this project phase. These will be discussed in more detail in following chapters.

The overwhelming theme reflects what we know about Transition itself; that we are in an experimental context, working as an emergent culture with no pre-canned solutions, clear guidelines nor processes, and we need to approach the web with open minds.

“Transition is bigger, wider, deeper more diverse and creative than Transition Network or TT or TM. It shouldn't be can't be "siloeed", organised, made efficient, channelled.” (Survey)

High level patterns from the research phase



(diagram illustrating the high level research findings from all research streams)

1. Face to face engagement is the most important activity for initiatives

- Not a surprise given Transition's focus on locality
- The web project should support this and not assume priority
- Regional support is key to effectively supporting this pattern
- There may be training implications

"IT structure needs to be secondary to people and overall decision making... open space needs to be reflected in IT... first decide the governance, second decide IT to support that model..." (Bristol interview)

"Frankly we are trying to build community and I just like to talk to people" (Survey)

"it's easier when you've met that person and they are already there." (Norfolk workshop)

"the use of I.T. can be divisive within a group." (Survey)

2. Locality and diversity is key: initiatives have different contexts and lifecycles

- Initiatives vary in context, resources, ambition, cohesion, maturity, and more
- There is no 'one size fits all' model for the web to support
- There are plenty of contradictions in preferences toward the web

"Local personal interaction is vital to local site design" (Sydney meeting)

"I don't think anyone should be dictating what system Transition Initiatives go for individually, but its does help if they all choose for a small selection of a very good bunch." (TT fora)

"Uniqueness of locality.. what's right for your place..." (Norfolk meeting)

3. The web project needs to fit into local social processes

- Initiatives' needs change with maturity; their want of the web will follow suit
- There are suitable tools for different activities in specific contexts when required; it is not possible to prescribe a formula in advance
- There is a role for a web person in initiatives to support these needs
- There is a role for a wider support network to support these needs

"... it is fine to have these tools if there are people to manage them, or it becomes the people such as me who end up managing the content when my job is to set the system up..." (survey)

"We have just started and are trying to focus on practical activities, letting the further organizational happen when a few more local people get involved." (Survey)

"... weekly working parties at our CSA site, which involve discussion as well as digging etc" (Survey)

"Transition works very well without electronic communication by word of mouth, meetings, posters, etc, but there is a need for 'simple' coordinated web based communication." (Survey)

4. Support is needed

- Needs to reflect a wide (and widening!) variety of social and technical needs
- Necessarily de-centralised and owned by the network, with facilitation
- More needed for early groups and mullers: is this a focus for facilitation?
- Regional in nature: connections, virtual conversations and physical meetings
- 'Routemap' as a metaphor: what to use, when and why

"Best place where you can help is the list of free or inexpensive resources. That will help us increase our sustainability forces." (Survey)

"The best ideas will come from the people on the ground but it's unlikely that local communities will have the knowledge of IT or the resources to take direct advantage of it so the platform would need to find ways of making local communities aware of what IT can do and let them suggest the best ways of using it." (TT fora)

"A kiddy style guide to the agreed useful tools and which of them should be considered at various stages of initiative building could be handy. It's be helpful to have readily available a list of contacts in the various transition (town) initiatives" (Survey)

5. Community based networking is the most important focus

- Transition has a focus on initiatives; not peer to peer social network style
- Personal profiling is popular for some but exclusive to others

"Transition is a community of communities" (Sydney workshop)

"A lot of our members said they do not want their names and contact details online, we will have one person's details for each working group hopefully," (Survey)

"Where do we put our names? Where do we say who we are?" (Norfolk meeting)

"We need group structures above personal blogs" (Bristol interview)

7. Process: and simplicity

- Web project can never be a finished product – needs evolutionary approach
- Modular rollouts of applications embedded in a support community
- Simplicity must be the watchword – start simple and work outwards
- Project needs roles and governance at all levels (board to working groups)
- Open Source technology very popular; maintenance must be easy

"Of course we start small. But unless we aim big we'll stay small. We must aim for the stars and have many steps along the way. At each step we need to produce working and usable systems. Lots of small steps. Lots of working systems. Not wait for some big bang product at the end." (TT fora)

"And finally, my advice from doing this before is don't start out to solve everything from the word go. Start simple and add functionality organically." (TT fora)

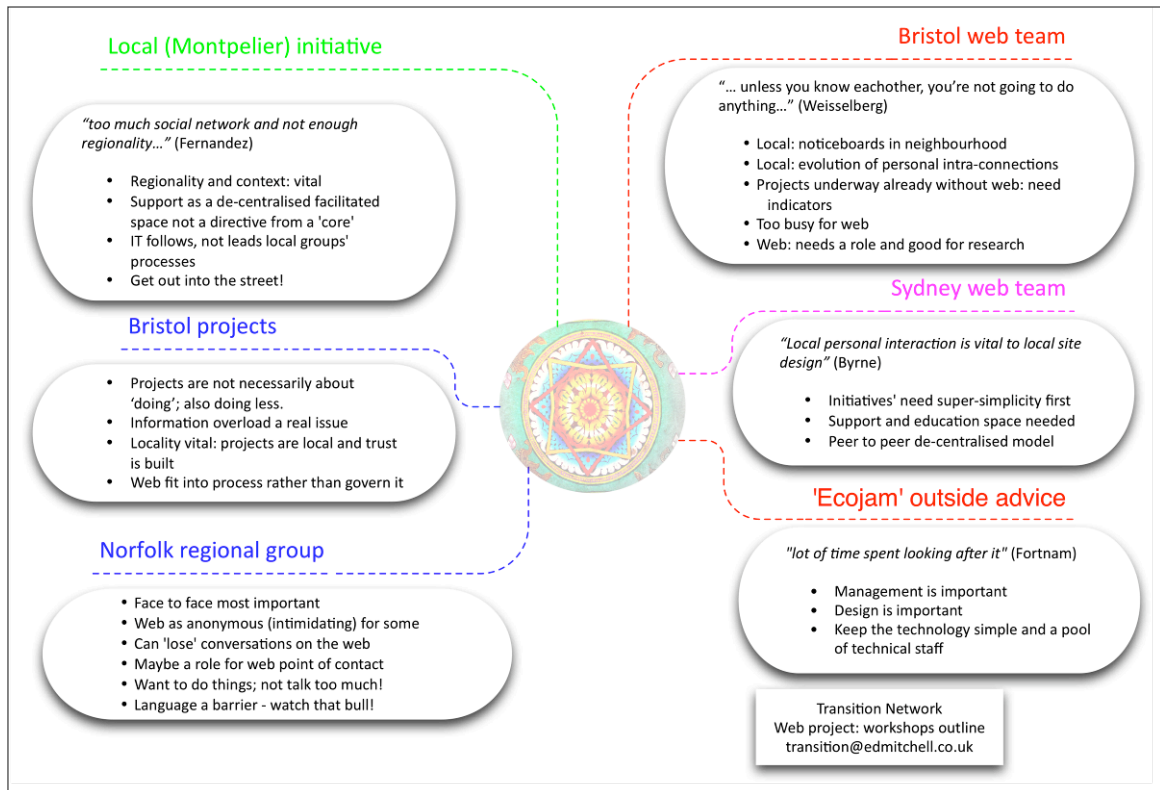
8. Aggregation

- To support independence and diversity rather than centralise them
- To bridge inside and 'outside' Transition Network
- Will require users' motivation but offer peer to peer de-centralisation
- Centralisation and aggregation both carry risks: possible to try both

"A system that encourages collaboration and cross-fertilisation of ideas between groups - e.g. a newsfeed that can be embedded on a local initiative's webpage that shows what other groups are doing (inspiring, + fosters a sense of connectedness)." (Survey)

"As there are already many TT web sites (and similar, eg LCCN), aggregation of content from a wide variety of sources will probably need to play a big part in any 'global' TT web site." (TT fora)

Findings from the workshops



(diagram illustrating the findings from the face to face interviews/workshops)

The workshops were invaluable in providing a qualitative input into the survey work as well as ongoing reflections into the project's evolution (the last one was at the Transition Towns Conference in May 2009).

Being that so much of them is reflected in the high level findings, no detail is gone into here.

Finding from survey: tools analysis

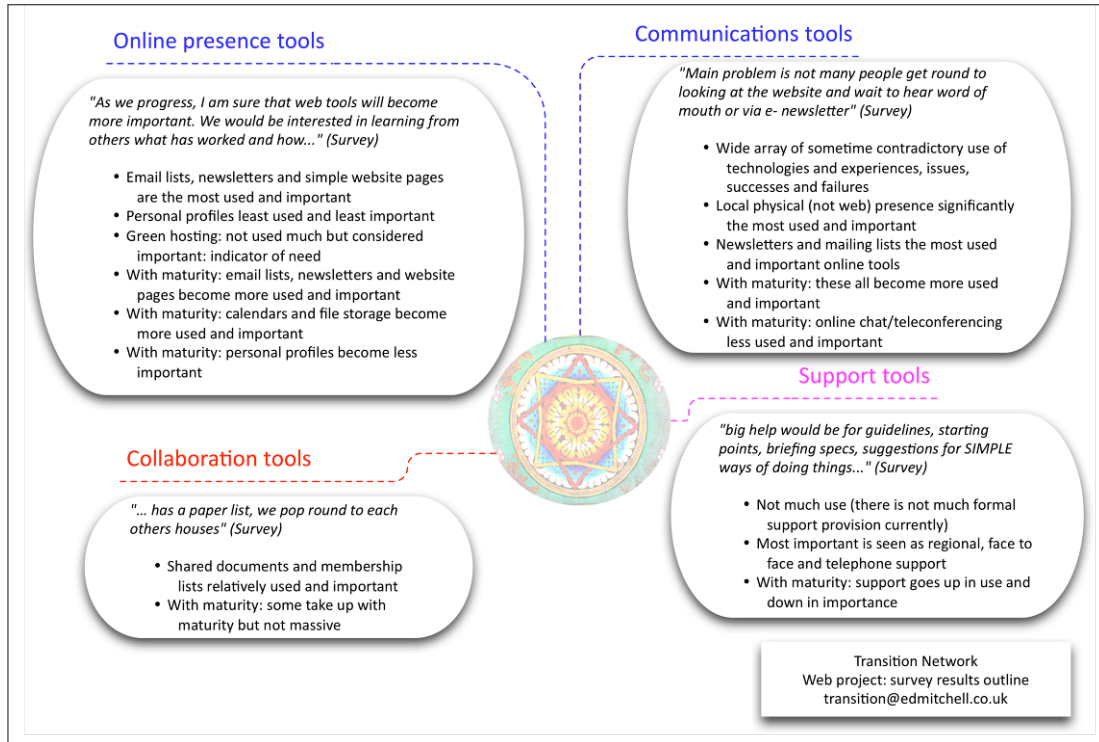
The following represents the analysis of the quantitative findings from the survey, run in April 2009. Full quantitative and qualitative data, as well as a full graphical analysis can be found in the appendix.

Respondents were asked to identify their current use of web tools and then rank them by importance. They were also invited to share qualitative feedback about these tools in free text fields. The web tools were classified as follows:

- Communications
- Online presence
- Collaboration
- Support

This was then cross-referenced with their 'maturity' (length of engagement with an initiative) to produce a sense of change over time. Thus we can see what people are using, what they think is important, and how that changes as their initiatives mature.

Included with these results are our 'indicators and lessons' from each section which contributed to the 'high level patterns' in an earlier section of this chapter.



(diagram illustrating tools by use and importance from the survey)

Users

- Average 415 replies - 10% response - excellent feedback
- Excellent base for future launches and support (experiment: Ubergeek week)
- Largely competent and more sophisticated (non-webbers didn't reply!)
- Mainly from The UK, USA, Australia
- Majority responses from relatively mature initiatives, but a good range of younger initiatives provide balance

Communications tools:

- Wide array of sometime contradictory use of technologies and experiences, issues, successes and failures
- Local physical (not web) presence significantly the most used and important
- Newsletters and mailing lists the most used and important online tools
- With maturity: these all become more used and important
- With maturity: online chat/teleconferencing less used and important

"Main problem is not many people get round to looking at the website and wait to hear word of mouth or via e- newsletter" (Survey)

Indicators and lessons from communications tools feedback:

- Locality is vital to initiatives, increasingly so with maturity
- At this time, most focus is about announcement not online engagement
- Any web tools are best integrated into the initiatives' social processes

Online presence tools:

- Email lists, newsletters and simple website pages are the most used and important
- Personal profiles least used and least important
- Green hosting: not used much but considered important: indicator of need
- With maturity: email lists, newsletters and website pages become more used and important
- With maturity: calendars and file storage become more used and important
- With maturity: personal profiles become less important

"As we progress, I am sure that web tools will become more important. We would be interested in learning from others what has worked and how." (Survey)

Indicators and lessons from online presence feedback:

- Gradual tech adoption: online presence tools become more sophisticated with maturity. This is natural as their complexity, needs and identity and confidence grows
- Tools provision needs to be managed and gradual in line with stage of initiative
- Pattern of 'community of communities' and in parallel with regional/national support - need processes in regional and project focused way NOT social networking at this point.

Collaboration tools:

- Shared documents and membership lists relatively used and important
- With maturity: some take up with maturity but not massive

"... has a paper list, we pop round to each others houses" (Survey)

Indicators and lessons from collaboration tools feedback:

- Local projects work face to face primarily
- Working with new social models - need trust not wysiwyg editors
- Sensitive issues around control and behaviour - handled best face to face
- Document sharing doesn't necessarily need the web in this context

Support tools:

- Not much use (there is not much formal support provision currently)
- Most important is seen as regional, face to face and telephone support
- With maturity: support goes up in use and down in importance

"... big help would be for guidelines, starting points, briefing specs, suggestions for SIMPLE ways of doing things so that the sense of powerlessness when an IT superstar says 'this is the best way' and you have a gut feeling that this will leave you forever running round in hi-tec circles not being able to do the simplest thing" (Survey)

Indicators and lessons from support tools feedback:

- Personal and group networks develop over time to provide support. Mullers and early groups need more facilitation
- Confidence appears to grow with maturity and growing resilience - is this an indicator that the model works?
- People build their own networks locally and spiral outwards regionally
- Significant number of related responses in qualitative input indicates that these are early days and there is need

Conclusions

Rolling out any web project in a network so keen on physical locality, independence, diversity and related context is very challenging. Millions of pounds have been spent on vast ambitious 'community' platforms trying to achieve everything with varying success; we need to monitor our ambition without dampening it.

The 'human-ness' of Transition needs to be honoured; the biggest emergent themes from our research are 'face to face' and 'support'. It is therefore vital to retain a project focus on the social support and blended (ie online and offline) facilitation elements to help the network help itself. The 'web' is not only a technical phenomenon and 'technology' is not the only cost; the project needs to consider how to launch this new social space as well as how to support it going forward.

A centralised 'one size fits all' design mentality is the traditional approach for web projects, which are rooted in engineering and scientific disciplines (although change is afoot). This approach feels 'tidy' and 'manageable' (to the providers and users of the project); and is therefore tempting. We can see from our research that this would be an anathema to Transitioners, so we have a double challenge of supporting a new way of working and introducing it to a group who are largely skeptical of technology.

Given the dynamic nature of Transition and the findings from the research, the most suitable strategy will be simple, modular, diverse, shared and extendable. We will need to support pilots and experimentation alongside keen social support. The most important project element will be the people.

Pilot report 1: Local and Regional Pilot project in East Anglia

Background

This pilot was run by Gary Alexander.

The purpose of the Local and Regional Pilot is to make a practical start to the overall purpose of the Transition Network Web Project: to provide an infrastructure to bring together the various local initiatives to enable them to work together effectively. It is meant to find out how best neighbouring towns in a region can keep in touch with each others' activities and support each other. One key issue we face is that all the local initiatives are autonomous and based on volunteers. There are no means of requiring them to do anything, even if we wanted to do so. We needed to create co-ordination without hierarchy or compulsion.

More specifically, the purposes of the pilot are:

- For existing initiatives, a way for them to meet each other, to learn about what has worked well and what hasn't, so they can build on each others' experiences and best ideas.
- For newly forming initiatives, to link them to others with a little more experience, so they don't feel isolated and can build on what has worked.
- To enable local initiatives without a web presence to create one easily, with no technical knowledge required.
- For local initiatives with an existing web presence, to offer them extra features they might not have, and to enable them to share events, news and discussions.

East Anglia is very suitable for a pilot as they have a few towns that are quite well advanced (Norwich, Cambridge, Ely, Bungay) and quite a few that are in their early stages. Some have their own web presence and discussion groups while others do not. Thus we would be able to see if new initiatives wanted to take advantage of the facilities, and explore ways of connecting those who already have their own systems. Also, at the time this pilot was conceived, there were already completely independent plans for a regional co-ordination meeting, held on 7th March 2009.

The move to hold a regional meeting came out of various informal meetings in which people from several local initiatives were present, often by accident. We learned, for example, that in some of the more established groups, people in one sub-group often had little idea as to what was happening in others. As people described the activities of their group, others would immediately realise that here were ideas that they too could try. The benefits of working together were obvious.

An East Anglian pilot for a web portal could also build on pre-existing work by Dr. Gary Alexander in Diss, who had been building a community portal, DissConnected, that appeared to have much of the required functionality, with funding from the EU and local authorities.

Design

There was no time for a long and careful design phase, nor was that needed, as the point of this pilot was to make a quick start and see what we could learn from that. There were two main strands to the design, social and technical. We felt that the point was not just to develop some software, but to actually begin some social interaction.

Social: Since the goal was co-ordination without hierarchy, the most relevant method appeared to be the Viable Systems Model¹ of social organisation, which is abstracted from the functioning of an organism with a nervous system.

We proposed a 'Regional Support Group' be drawn from people within the local initiatives who are willing to take an overview of the region and its activities, to take on the following functions:

- *Stability and conflict resolution:* Help local groups to systematically monitor their activities. Are they going well? If not, what can be done? Support for handling conflicts between people is a crucial part of this.
- *Synergy:* Look at the activities within a local initiative and across initiatives (ex. nearby food groups) and see where they affect each other or could benefit by working together. For example, by working together it may be possible to set up a regional transport infra-structure which would provide an effective means of moving goods around the region, saving both carbon and money.
- *External relations and planning:* Keep an eye on what is happening in the wider transition movement, other relevant organisations, and the broader environment, and use this to help local initiatives plan in general, and to their develop their Energy Descent Action Plans in particular.
- *Policy and identity:* Support the membership in formulating overall policy. Most policies will come directly from the Transition ethos but some may be needed for the region in particular.

These functions are sufficient to enable the separate groups to function as a co-ordinated whole, providing the advantages of scale of a large organisation, but while retaining the autonomy of the separate groups.

Technical: We built upon the design of DissConnected, and used a specification by Dr. Alexander that extended that.² Its principal features are:

- For individuals, a personal profile page which can be expanded to a personal website if desired.
- 'Recursive groups': Each group and sub-group has their own area that feels individual and has a clear identity, with content created easily by its members (using simple templates), yet is clearly connected with information to and from other groups at the same, larger and smaller scales.
- Standard facilities are included such as events listings with calendars, news/blogs, resource centre for sharing files, pictures, and media with good indexing and search, map pages.
- Organisational support such as group editable pages (wiki), member lists with roles, agreement lists, task trackers.
- Enhanced communication facilities including a discussion system optimised to promote groups coming to agreement, with email notification and online archives.
- Exchange/trading system designed to promote exchange on a basis of personal relationship, integrity, quality, need, and environmental soundness rather than simply for money.

¹ See, for example *The VSM Guide: An introduction to the Viable System Model as a diagnostic & design tool for co-operatives & federations*, by Jon Walker at <http://tinyurl.com/vsmintro>.

² See "A software platform for a global network of connected communities" by Dr Gary Alexander, at <http://tinyurl.com/swspec>.



(screengrab of the Transition East pilot website)

Pilot

Technical: For the software development, we chose the open source content management system Plone as our starting point because a) it offered very rapid, and very flexible development, b) we had a starting point in the DissConnected community portal, and c) we had the services of an extremely capable web developer, Souheil Chelfouh, who is part of the Plone core development team and so knows it inside out and can work very quickly with it. (We are nonetheless very aware of the difficulties with Plone: need for specialised developers, expensive to host.)

Over the period January to March 2009, we built the transitioneast.net web portal, starting with a basic Plone 3 installation, which comes with a lot of the required functionality. We added an existing module for the forum, and then were able to quickly build on that to incorporate most of the functionality in the specification. We were aiming to have a version to show at the 7th March regional meeting and succeeded at that. Work is still continuing, with more needed especially on the exchange/trading system. The cost to date of this development work has been 5,000 €.

Social: For the social development, we held two meetings and attended the regional meeting.

- A preliminary meeting on 29th January, 2009, attended by Ed Mitchell and 11 local people, at which we presented our plans and agreed to proceed.
- A presentation of the idea of a Regional Support Group to the first East Anglian regional meeting at Downham Market on 7th March 2009 in an open space discussion and in the plenary, at which it was approved. We presented the new web portal at a second open space discussion and then to everyone over lunchtime. It too was approved in the final plenary.
- A first meeting of the Regional Support Group³, held after a shared meal, on 17th April, 2009. We talked about the roles described above. Then each person described the state of their towns' initiative and the group gave them each advice.

Findings

³ See the report of the meeting on TransitionEast at <http://transitioneast.net/groups/transition-east-support-group/transition-east-regional-support-group-meeting> .

The Regional Support Group and the transitioneast.net web portal are still only beginning, so it is too early to draw any strong conclusions, but initial signs are promising:

Web portal:

- although just in its first few weeks, transitioneast.net already has initial pages or sections for 12 of the regional towns and 30 people have created accounts on it.
- people are beginning to put up notices of coming events for other towns to see, and news of interest.
- there are a few active discussions, so far mostly about the website itself, its usability and minor early problems with using it. The developer has begun to correct these problems.
- Comments from the Regional Support Group meeting:
 - All agreed that any organisational system for transition had to preserve group autonomy, could not be hierarchical and had to connect groups (within and between initiatives).
 - Food and the Heart and Soul / Well-being theme groups appear to be particularly dynamic.
 - Some of the Initiatives were concerned about maintaining momentum and interest in certain theme areas. Some of the theme groups and initiatives lacked focus and purpose. We discussed the development of work plans and how responsibility is divided / assigned.
 - We talked about 'burn-out' as a threat to individual and group / initiative well-being and how this might be identified and managed.
 - We were all impressed by how well things seem to be going in Cambridge and thought there were many lessons to be learned from them!

Pilot report 2: Knowledge and Networking - Food Pilot

This pilot was run by Jon Walker.

This report provides a brief overview of the Food Pilot started in February 2009, one element of the Transition Web Project, whose overall objective is to provide Internet based services to encourage the various Transition initiatives to exchange information, network, collaborate, and gradually to develop a culture of mutual support. Food was chosen to initiate the Knowledge and Networking stream as this is the area that the vast majority of Transition Towns focus upon.

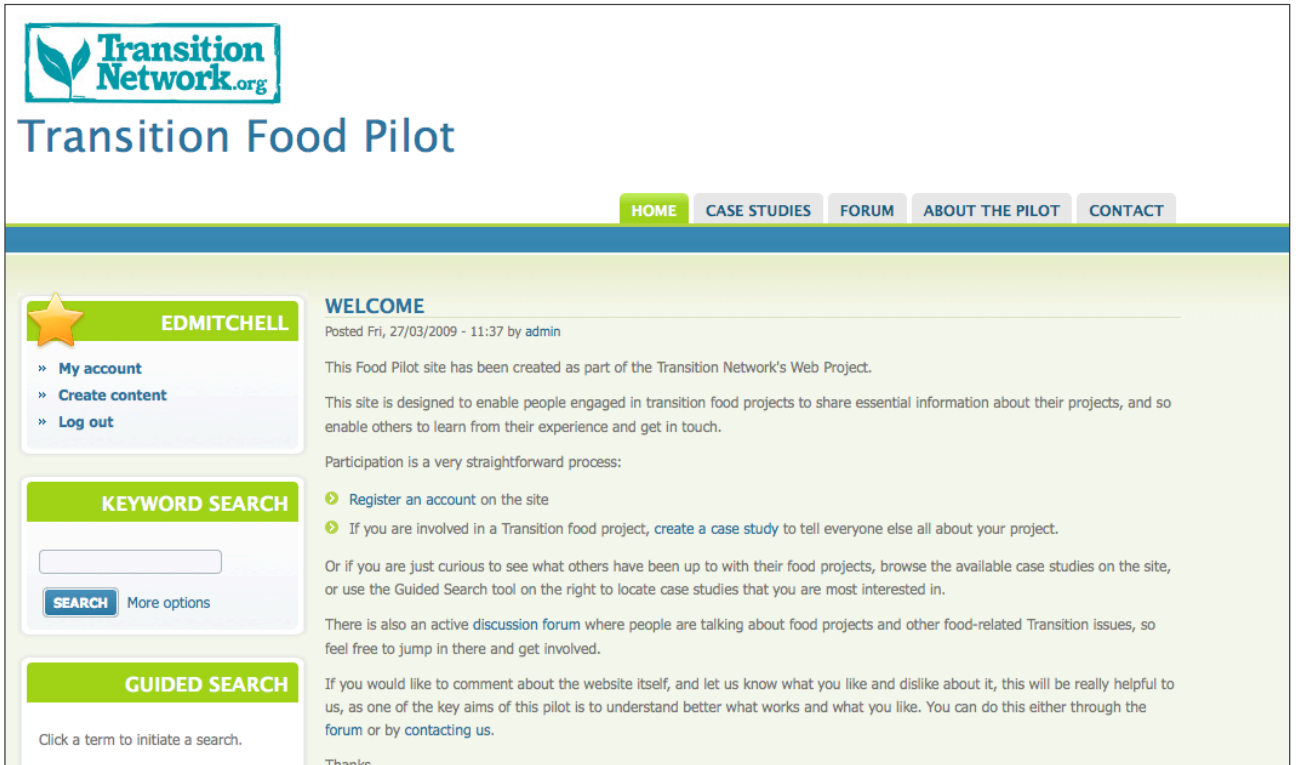
Key Design Elements for the Food Pilot

Preliminary research revealed that people were most interested in learning about other projects. This became the focus for the Food Pilot. Other possibilities such as Personal Profiles were put on one side given the limited time and resources available. This focus dovetailed nicely with the overall objective - to make links between the various communities rather than individuals. Projects are (almost) always community activities and thus provide a good platform.

The mechanics of the site had to fulfil four criteria:

- The uploading process must be quick and easy (or no-one will bother) and we must find a way to tag the information. So (for example) if you're making an entry on a project it may contain stuff on a) gardening b) organising volunteers c) sources of seeds and so on. All of these must be tagged for ease of information retrieval.
- The search process must be equally easy. There needs to be a search by project, region, and whatever else emerges from the study. Clearly this will be of importance to the design process in both the architecture of the data tagging and the way it is uploaded and retrieved.
- Some suggestions like "other people who referenced this project also looked at community fish ponds" or "if you want to grow your own vegetables you may also be interested in Permaculture or the Organic Gardening Catalogue" may be helpful.
- The objective is to encourage people to make contact with each other - not to spend several hours a day in front of their computers.

(Thanks to Cathy King for the fundamentals of the design strategy)



(screengrab of the Transition Food pilot website)

Development

Given the focus on food projects and the criteria listed above, an architecture was developed to create a site capable of storing a large number of projects, carefully segmented into a number of categories which would enable people to search for and find the information they require. To make this possible it was essential that a) the categories were comprehensive enough to cover the wide range of activities which the site would contain and b) that all important aspects of the project were teased out of the person uploading the information and c) various media could be included. (Thanks to Tamzin Pinkerton for providing the template for the information)

The Site

The site was written by Graham Mitchell of MC3 using DRUPAL. The initial process was completed in two weeks and early problems - mainly in presentation - were dealt with quickly and effectively. It has proved to be robust, despite the best efforts of testers to reveal weaknesses. A discussion forum is included. For this study, it was decided to limit access to the site: anyone wanting to log-on had to be approved by Graham, and this created some problems. However, once this stage is concluded, we can allow anyone to access the site, and this problem will disappear.

Site Characteristics

Uploading: I initially uploaded 8 projects from case studies sent to me by Tamzin (more thanks to Tamzin and the original authors who agreed to let me use their information). The process was quick and easy and flexible: if there was a lot of information to upload, new boxes could be quickly created to accommodate it. The 8 case studies came in many different styles and levels of completeness: the site

managed to accept all the information without having to exclude anything. Some of the briefer accounts look a bit sparse on the site: it's likely that the uploading process would encourage the author to provide more information. Pull-down menus for category and region proved helpful, and speed up the process.

Three other people uploaded case studies (including photos and other graphics) and reported no problems.. One of the original authors went back in to correct some of the data.

Searching: Tags are provided in three different ways: from the pull-down menus (categories and regions) from the author (who can define anything he/she thinks is relevant) and from a system called Calais (which checks all entries against its database and adds tags accordingly). So far the category and region tags look most useful: you look for projects on Community Gardens and get a list; you then look for projects from that list in your area. The site is designed to enable browsers to "drill down" to get a short list of projects which are of interest. Graham showed me a test site which enabled him to do this with several thousand entries in a few seconds. So far, the Calais system has only generated a tag called "food" (!) and has now been suspended.

Assessment: Following a few changes to the design of the site, everything seems to work well. Uploading is straightforward, searching (given the limited number of case studies) is fine, and the whole thing can be extended to contain large numbers of case studies. The nuts and bolts work ! Users report they like the look and feel of the site, and the only major problem seems to be the registration process (which only refers to this stage of the pilot.)

Limitations of the Pilot

Given the time and available resources, this was always going to be a limited pilot study, depending on persuading busy people to experiment with it. We now have a prototype which works and needs to be made available to the Network. The following questions remain to be answered.

- Is the site useful enough to become a widely used reference tool ?
- Will it encourage people looking for help to get in touch with others who have had to deal with similar issues ?
- Will the current architecture still work when there are hundreds of projects listed ?
- How does it fit into the big picture ?

Rolling Out the Pilot

I'm of the opinion that the site as it is is good enough to form the basis for further experiments in the context of other developments happening within the Transition Network. Initial discussions with Claire Milne, (currently developing the Network's Food and Farming Strategy) suggested that there is a danger of replication. With limited resources it's clear that we all need to be working in full knowledge of what else is going on, rather than to find that two of us have spent several weeks doing exactly the same thing. The Food Projects site is a resource which needs to be accessible from many parts of the Transition Network, and needs a home. Perhaps it would be best located within Claire's Food and Farming one-stop-shop site. Whatever happens, some sort of over-view of all developments is needed to ensure a coherent strategy. The discussions forum on the food pilot site were never encouraged, and, again, we need to decide on the best place to hold these discussions. There is no point in having dozens of sites all hosting discussions on growing vegetables.

Once these issues have been resolved, two major strands need to be developed:

- **Developing the Food Site:** Rather than an unleashing, it seems sensible to begin by using a much longer lead: i.e. to encourage a large group of people to use the site without providing

universal access. We need to see how the site copes with hundreds of case studies, if the search facilities work well, and what else is needed. Specifically, the idea of suggestions (see key design elements) has not been developed, and the Home page may need to be more enticing (100th Community Garden opened ! A thousand nut-trees in Devon !) Whatever happens after the site is made more accessible, it's inevitable there are many issues which will need to be dealt with.

- **Setting up Parallel Sites:** Once the modifications to the food site are in place, we can begin to roll out similar sites to cover topics like Energy, Housing, & Transport. Clearly the categories will be different, but much of the site architecture can be copied exactly.

Pilot report 3: Transition Learning Connections

This pilot was run by Nick Osborne and Sophy Banks.

1. Background (e.g. where it came from, why it is needed etc.)

Transition Training seeks to support transition by providing training in the many skills required. Two distinct types of training have been identified:

- Training specifically related to the transition model and processes
- Other training in more generic areas which can be applied to transition initiatives, e.g. project management, fundraising, avoiding burn-out etc.

Transition Training develops and delivers the first type of training and recognises that there is no need for us to also deliver the second type as many people do this already. We therefore seek to facilitate people involved with transition being able to access the second type of training without delivering it ourselves. This is the purpose of Transition Learning Connections (TLC). In addition to training, we recognise there is also a need for support around certain issues- for example people may require some support with fundraising without wanting to be trained in how to be fundraisers. This project also looks at connecting people to provide such support as well as training.

The need for this second type of generic training is enormous. There are a huge variety of skills and competencies required to successfully run transition initiatives; and of the people involved in transition initiatives

One of the most frequent messages that we get on the 2-day Training for Transition is that many people want more support in the skills required to work effectively with people, groups and organisations. We know there are countless very skilled and experienced people in the Transition Network who offer training in the many areas where support is needed. That is why this area of training specifically was chosen to pilot this project in a limited way before attempting to roll it out to all potential areas of training and support.

The project was initially named as the Transition Training Marketplace to convey a sense of community-type trade and exchange. Just before launching, the School of Everything, our chosen host for the site launched an online payment facility which they called Marketplace and had links to on the site. To avoid potential confusion we decided to change the name to Transition Learning Connections to convey that the project is about wider learning rather than just through training and about making connections to provide opportunities for mutual learning.

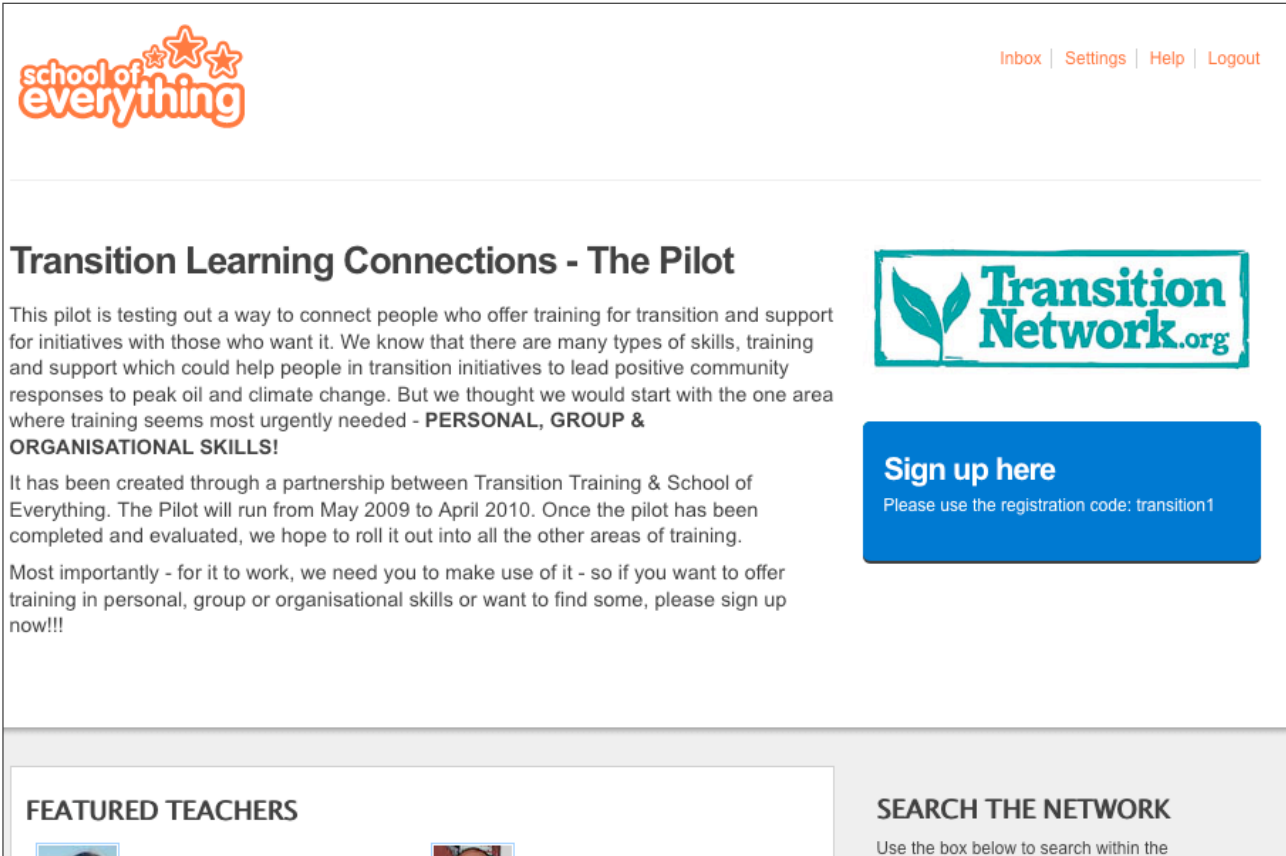
Another aspect of the brief for the system was that it is to be designed on principles of self-organisation & self-regulation as far as possible, keeping central planning & monitoring to a minimum (see design mindmap in the appendix *)

2. Design

Having identified the needs of users as about getting connected with each other in order to access training opportunities, we started by identifying how different users would travel through the system, what the different stages would be, what trainers and learners would need to do at each stage and what materials would be needed. This is detailed in the appendix *.

This was then used to identify a specification for system requirements, Appendix *. To help with assessing potential system options, we identified what would be a minimum, average or ideal set of requirements.

Some of the key questions at this stage were about the nature of the system. Questions of principle were around issues such as: to what extent should it be centrally planned, moderated and supported; or should we just set it up and allow individuals to get on with it; or is there a third way of creating a community of users who support and moderate themselves. Some of the specific questions were about quality assurance, providing advice on training needs, peer support and dispute resolution. See Appendix * for more details of thinking through these issues.



(screenshot from the Learning Connections pilot website)

3. Pilot (e.g. how we chose the pilot's platform, quick description)

As the specification for the system was defined, it became clear that the requirements were ambitious, demanding and beyond what could be produced as a bespoke facility from scratch by developers; given that there was no budget specifically allocated for technical development. It became clear that the only real option was to use an existing platform that had been developed with a similar purpose that would be likely to have the required functionality.

Research into the available options and a fortuitous connection that Ed Mitchell had with the School of Everything (SoE) revealed that SoE is a site that was designed for almost exactly the purpose we had

defined. It also had most of the functionality identified as being 'Ideal' in the system spec, plus more. It works on a global scale, has now developed an online payment system and has lots of plans to develop in the future. So we agreed to team up with them.

SoE also share a similar grass-roots self-help ethos about people getting on and doing things for themselves. When we entered initial discussions with them they said they were very keen to partner with the transition movement as they said they felt they shared similar values and purpose. While the initial arrangement with the SoE doesn't include all of the issues around creating a self-moderating community of trainers, there is potential to develop this.

4. Findings (e.g. from interviews, web stats, users adding their thoughts etc.)

The pilot was launched on May 2nd by announcement in the Transition Network newsletter and a targeted publicity campaign is planned to encourage people to start using the system. By mid-May, the following activity had occurred:

- Visits to landing page: 180
- **Unique** visits to the landing page: 123
- Users registered with the Transition code: 34

We believe that for the system to be successful it requires a critical mass of people to start using it to provide momentum. So it was decided that to give the system enough of a chance to generate useful information for meaningful evaluation, that the pilot would run for a year from May 2009-April 2010 with a review after 6 months.

Recommendations: the what, how, who and how much of it all

Introduction and background

The recommendations of this phase of the web project are split into three sections:

1. 'What?'
2. 'How?'
3. 'Who?'
4. 'How much?'

They are intended to provide the Transition Network board with:

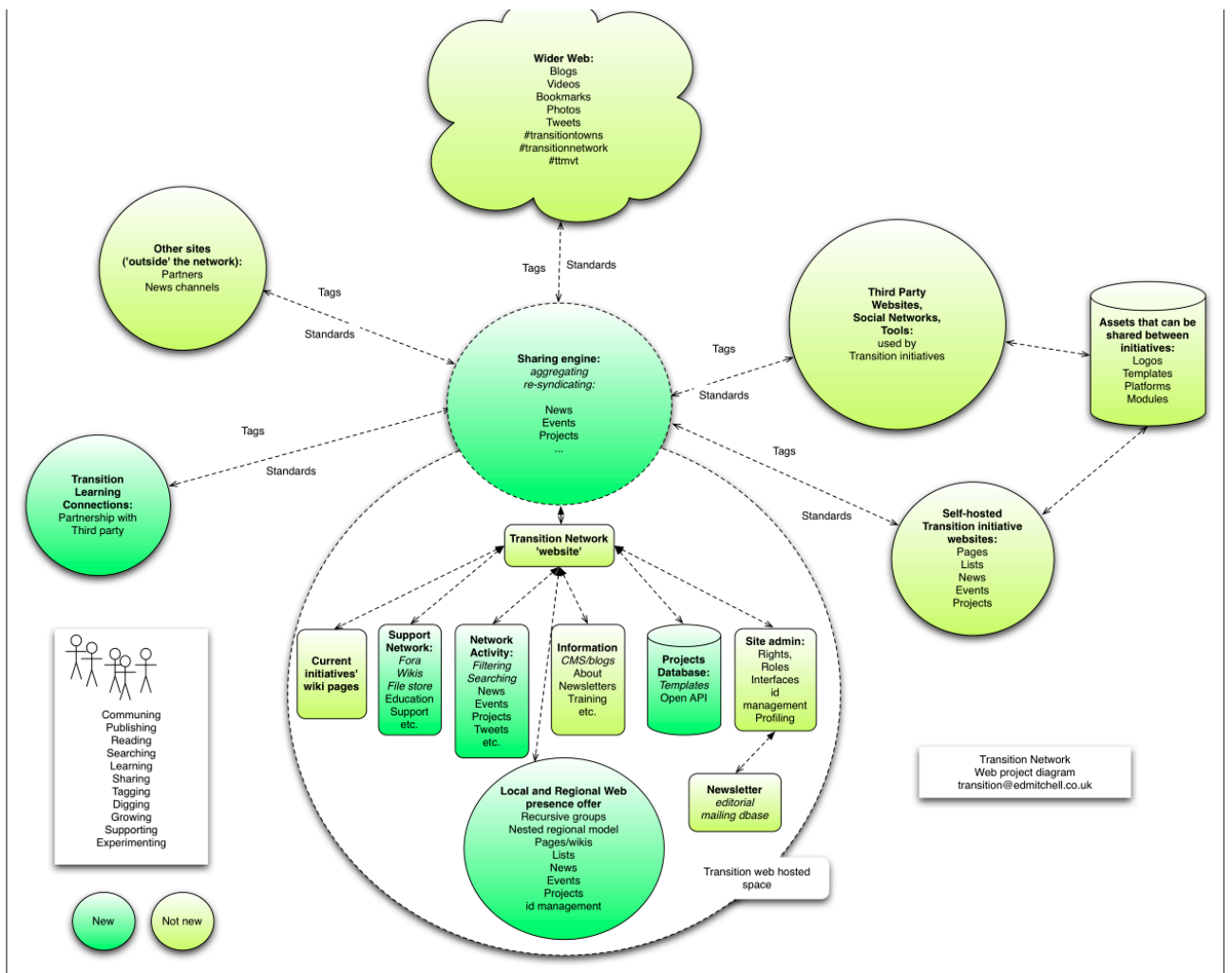
1. A shared understanding and common language around the web project
2. A strategic and tactical decision making tool with which to agree a way forward
3. Enough clarity of purpose and information to initiate a 'call for tenders' from suppliers (technical and management) to move the project into its implementation phase
4. 'Ballpark' expense and time estimates for the different project elements; these can only be confirmed by the actual suppliers once the implementation begins in earnest

They are relatively high level recommendations because:

- The project scope has evolved since this phase began, introducing new unknown elements and stimulating new approaches
- The web project is not going to be a discrete and closed-system software product. It is a service. It will be an emergent entity reflecting the dynamic needs of the movement and adjusting accordingly. Therefore it needs to adopt a modular, prototyping, engaging approach to delivering the software. This requires different tactics from traditional software processes
- There is a big risk when developing software of over-engineering a 'Solution'. This is particularly acute when developing 'social software', which needs to reflect the complex patterns and needs displayed by users, which can't be understood until the software is actually in use.
- This 'Solution' worldview is tempting as it appears nice and tidy, and keeps control with the 'decision makers' (in a traditional management structure). Asides to such an approach not fitting with Transition's context or ethos, it can be expensive and alienating, avoiding simplicity for the sake of grandiose views.
- At 2009's NonProfit Technology Conference, new technology lecturer, author and all round admirably knowledge-able person Clay Shirky hit this particular nail right on the spot to great applause:

"The loss of control you fear is already in the past"
(<http://twitter.com/webb/status/1630295663>)

The What



(diagram illustrating the web project)

The above diagram is a high level representation of the web project. It takes into account:

- Sharing Engine: to link and share information around the network in a de-centralised way (defined by protocols agreed between users)
- Core functions in a Transition-hosted web space
 - Information about Transition Network, news etc.
 - Support Network
 - Initiatives' web presences (current wikis and possible new tools)
 - Activity from around the network (from the Sharing Engine)
 - Projects database
 - Rights and roles, logins, admin etc.
- Partnerships with other providers to useful services (e.g. School of Everything)
- Transition initiatives on the web
 - Present in Third Party Social Networks or other hosts
 - Self-hosted (using a range of CMS offers)
 - .. and the assets they can share between them (e.g. themes for blogs)
- The wider web, other networks, posts, tags, photos, videos, podcasts etc.

The Sharing Engine: overview and recommendations

Overview

Currently we have a real problem with information overload. There is too much 'stuff' to sort through to find the information that we really want. But the problem of too much information will not go away. In fact the problem is going to get worse. From another angle, the problem is that we don't yet have the most effective tools to manage, filter and search all this information.

Fortunately, recent technologies in the field of Information Management will help us out of the quagmire and allow us to specify more accurately what information we want to receive. Sometimes referred to as the 'Semantic Web' and increasingly adopted by organisations, the Sharing Engine is a way to support knowledge sharing without centralisation.

Within the web project, the Sharing Engine seeks to promote the effectiveness of the whole Transition movement, and to support knowledge sharing across a distributed network using different technical platforms. It will enable users to share and find useful information that they can apply to their own neighbourhood and/or project. The types of information that would be shared in its early phases are:

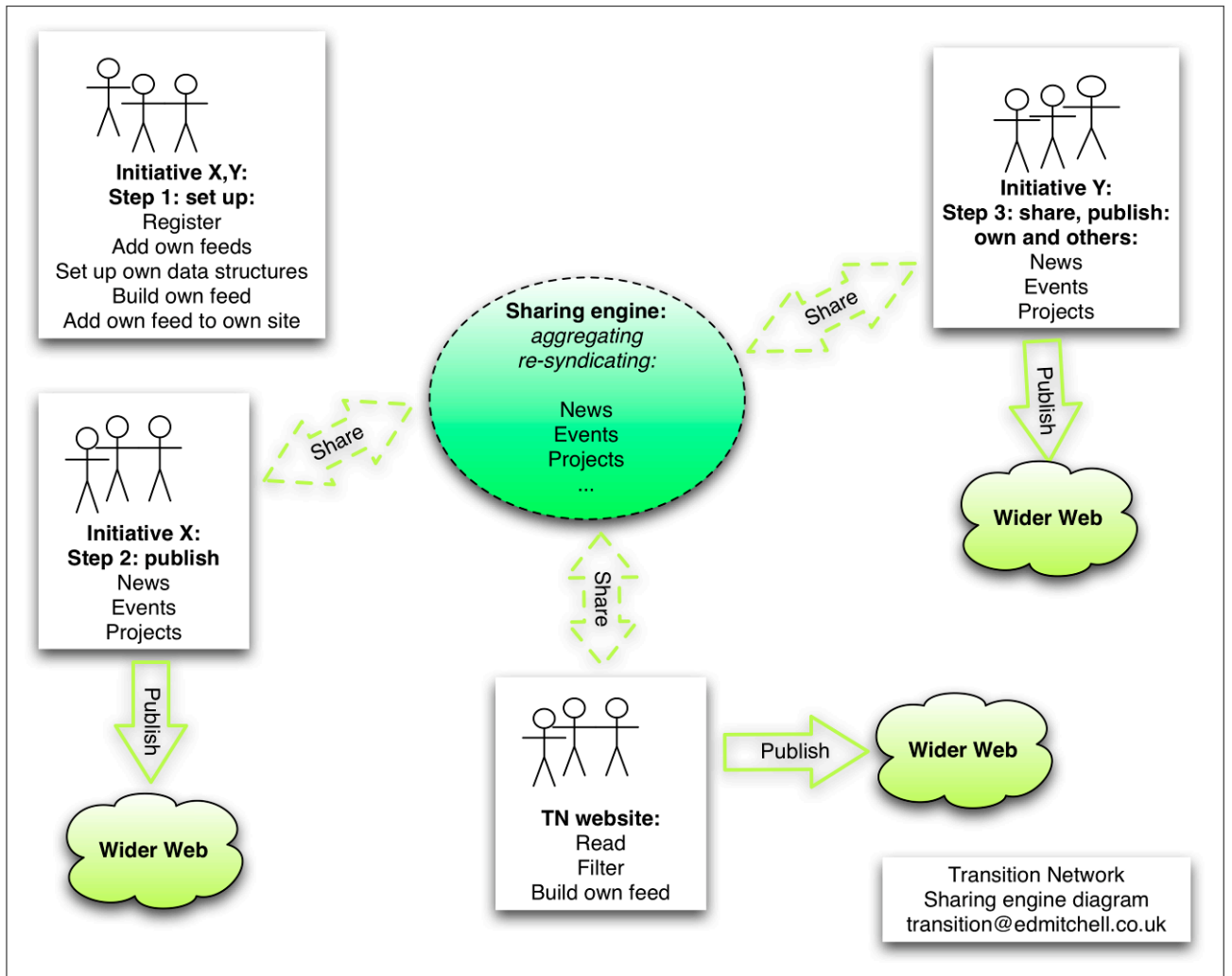
- News
- Events
- Projects

Given the adoption of the Sharing Engine, there is a wide range of information that can be explored in this way later (issues, skills, journeys etc.)

Defining the Sharing Engine

- Is a set of processes, protocols (schemas and standards) and web tools that will assist Transition initiatives to publish, share, and find information in a de-centralised manner.
- Starts with news and events and then evolves into projects, issues, skills and other relevant items of interest dependent on the agreement of the user group.
- Will harvest information from Transition initiatives' websites, aggregate this into information feeds, then make the information feeds available for re-publishing by other initiatives.
- Will encourage Transition initiatives to describe their content in 'machine readable' ways to enable their content to be included in 'deep' searches - where multiple and specific criteria can be used to build detailed searches.
- Will provide a search interface (on the TN Ltd website) that will enable multiple and specific criteria to be used. This is very different from the one line text field you find in Google. Criteria could be based on date, location, language and much more specific details depending on the object being searched for.

Using the Sharing Engine



(diagram illustrating how an initiative could use the Sharing Engine)

Different parties will have different ways to interact with the Sharing Engine:

- ‘Publishers’ (initiatives’ websites) will register their original content (news, events etc.) to the Sharing Engine. This will be done in a number of ways: registering individual pieces of content; referring to a ‘feed’ of their content. These feeds could be complex queries that could filter information captured by the Sharing Engine or shared by the publisher.
- Publishers will also be able to ‘build’ a feed of Transition-related information around the network from the Sharing Engine for re-publishing on their own websites.
- Community websites will be able to take feeds from the Sharing Engine and have these filtered too. For example the Sharing Engine will hold all shared events in the movement. However, only those events in 50 miles of the community are of interest. Hence, this is a filter that will be able to be implemented. And this filter can only be implemented if the original event was published with the exact location coordinates in the first place.
- It has also been proposed that the Sharing Engine could be used to aggregate topic specific information for the movement. This would be later.

Interfacing to the Sharing Engine

All participating websites will need to register on the Sharing Engine. But there will be a number of varying ways for the Sharing Engine to obtain the metadata from the TN websites. More detail about how systems will interface to the Sharing Engine:

- HTML: In the case of a website being crafted purely from HTML and with no database capabilities, it should still be possible to register the content on the Sharing Engine. In the worst case this will be done by filling out a form on the Sharing Engine to act as a signpost to "point back" to the content from the Sharing Engine. Next best will be a standard XML piece of code inserted into the HTML content that when harvested by the Sharing Engine will act as the signpost information.
- Other platforms (e.g. Ning, WiserEarth, Joomla, Drupal, Plone, Wordpress) may need specific add-ons created that will enable schemas to be shared and received in a more automated way if they are not already available. A few key platforms will be identified to focus on during implementation.
- Share a link: a popular tool amongst social networking sites is to enable their members to share a link to their personal feed or blog or profile. In the same way we could produce (or adopt) web tools that would enable anyone to "share a link" to an event, news item, project or any other defined TN object. There would also be the option to include a rating or attending tag.

Governance for schemas and standards

For the Sharing Engine to work, participating TN websites will need to adopt standard practices and ways on publishing certain metadata information. This is not as scary or as authoritarian as it sounds. For example all websites currently adhere to HTML web standards otherwise they will not be viewable by web browsers. So, in order for their data to be fed into the Sharing Engine the metadata must be in a specific agreed format.

In order to kick off the Sharing Engine trial a set of initial schemas and standards will be created by the core group (with help from the wider community if possible) for participating websites to adopt. However, as with other elements of the web project, it is clear that a formal process will need to be introduced that will enable collaborative modifying of these schemas and standards on a frequent basis. This will enable more information terms to be introduced or for current information terms to be modified. Keeping the schemas and standards dynamic will enable the movement to be kept up to date.

Note that constantly updating the schemas and standards will not cause expected confusion between the Sharing Engine and websites that are not using the most current schemas and standards because all modifications of the schemas and standards will be tagged with a version number. All versions of the schemas and standards will be compatible with each other with use of version conversion tables.

Effort must be put into marketing the Sharing Engine concept to existing TN participant websites. Adopting standards and specific publishing practices never happens by itself in the early stages of a service.

Implementing the Sharing Engine

It is important to get a working system up and running very quickly. Hence, the recommendation is not to spend months specifying the Sharing Engine in theoretical detail but to rollout a series of working milestones starting very simple. There are many projects and tools available for us to build this system. But we also need to have Transition participants working with us as we create the Sharing Engine.

- Build a working implementation using Drupal. As well as being the choice for the core functionality, it is advanced in the area of RSS aggregation and syndication. RSS will form the basis for this project but we will then move on to Atom and RDF - both of which are being built into Drupal.

- Support a 'Sharing Engine' group within the Support Network group that will market, promote, educate and support initiatives' websites implementing the tools that will enable them to interface with the Sharing Engine. This will cover the standards and schemas used. It will also include beta-testers and cover feedback (see the 'management' role later in this document), as well as inviting partner organisations (e.g. Soil Association, C.A.T.) to participate where suitable (e.g. to agree shared standards for project information sharing).
- Starting with simple 'RSS' feeds, roll the engine out, seek comments, assess use. Expand the engine's development to events and projects in line with the group's agreements and other related groups (e.g. the projects group would need to have agreed project information design to share with the sharing engine).

Schedule and Estimated Costs

Community-dependent, it is estimated to take between two to six months for having a fully up and running working system, with an immediate focus on swift early delivery of simple options. It is not clear how this project element would work out as so much is dependent on what emerges, but the estimated cost for this work is 8,000.00 GBP (in gradual expenditure).

The How

Hosting

Use of one or more suitably specified managed virtual private servers⁴ to offer the best mix of robustness, price/performance and flexibility. The operating systems used should be suitable Linux (open source) distributions. The servers should be powered with renewable energy and/or offer energy efficiencies. The hosting provider will ideally be supportive of/in tune with Transition values.

Website Frameworks

Given what we currently know about the nature of the perceived user requirements, custom software development seems very unlikely to be needed. We believe that all of the essential functionality required can be delivered by using commonly available open source content management systems. There are many of these available.

Our preferred selection for the new Transition Network site, based on a number of criteria⁵, is a popular

⁴ A managed virtual private server is essentially a virtual slice of a physical server computer. It offers guaranteed minimum hardware resources in terms of processor time and memory and high degree of configurability (which makes it more robust and flexible than standard shared hosting), while offering lower running costs than a dedicated physical server.

⁵ The questions asked about various content management systems (CMS):

- were they open source?
- how widely used were they?
- how widely supported were they by common hosting offerings?
- were they built on standard technologies?
- were they suitably flexible and capable of supporting the requirements now and into the future?
- how large and how active was the developer community around the product?
- how scalable was the product (i.e. could it be used to run a massively popular website with millions of page views per day)?
- what expertise was there already within the web project group that could be useful?

framework called Drupal (<http://drupal.org>). The Transition Network website needs to use some sort of framework if it is to be developed and managed efficiently and effectively, and Drupal offers the best fit for that specific task, in our view, which is certainly not to say that it is the framework that Transition Network should be recommending that all transition initiatives adopt.

A key aim in taking this project forward is to be platform agnostic, and to recognise and support the wide diversity of online approaches that have been taken by transition initiatives. Hence the central importance of the Sharing Engine concept.

Another excellent reason for choosing Drupal is that the national hubs of Transition US, NZ and AUS are using it already. Working with the same software (and community of developers) offers Transition Network a wider spectrum of opportunity to share software, skills and so forth. As well as this, sharing 'profiling' (of individuals' preferences, not personal) data will be simpler, enabling the international effort to exchange news and newsletters around the world with ease.

It is therefore recommended to set up a group of national hub web people to share work done to date, plans for the future etc.

Technical support for other platforms and frameworks

The vast majority of modern content management systems (e.g. Drupal, Joomla, Wordpress, etc.), hosted web presence services (e.g. Ning, WiserEarth, etc.) and collaboration solutions (Google/Yahoo Groups, Google Apps, Facebook, etc.) will provide one form or another of syndication/aggregation technology, commonly in the form of RSS or Atom feeds. Utilising these services is at the heart of the Sharing Engine concept, enabling us to draw content together from many diverse sources. There is more information on this in the Sharing Engine chapter.

The core functions and website

This may be run as a single site, or possibly as several sites (Drupal offers a multi-site capability from one single installation), and the decision on this may be driven by various technical and developmental requirements. With simplicity and replicability in mind a single site offers the most straightforward approach. All of the following facilities and functionality, as described more fully elsewhere in this report, can be delivered through a single Drupal installation:

- The migration of all content and login information held on the existing Transition Network site (<http://www.transitiontowns.org>) including 'wiki' pages (fora likely to require archiving and re-launching).
- Identity management: assimilation and management of individuals' profile information (e.g. newsletters, fora and wiki logins, profile updating etc.), keeping them open for future developments. 'Openid' is recommended for wider sharing of logins; this needs more investigation.
- The planned new content for the Transition Network site as outlined in the appendix (Transition Network website outline 280509)
- The projects database (being developed initially via the Food Pilot site (<http://www.transitionfood.org.uk>))
- The Transition Network Support network
- The Sharing Engine
- Presentation of aggregated news, events, projects, etc.

Local and Regional Platforms

In answering these questions Drupal came out as clear leader. A different group could easily have reached a different conclusion. The key point here is that we believe that Drupal will offer a robust and effective platform.

Continue the current pilot based on the Transition East website (<http://www.transitioneast.net>) and extend it to one or two additional regions if the demand exists. Ensure that the standards used by the pilot are the same as those defined for the sharing engine. At the same time, and subject to resources, develop a parallel solution built on the Drupal framework, and offer this to regional groupings with appropriate support. Run both systems in parallel for 6-12 months and monitor user experience throughout.

The Transition East site has been built using a content management system called Plone, which is written in a less commonly used, but high quality programming language called Python. A key concern for that project has been and continues to be the availability of skilled developers able to maintain and further develop the Transition East site (and any other sites that will use the same software). This concern has also been flagged up by independent commentators as part of the project to develop these recommendations. The extended parallel pilot study outlined above will help us to better understand whether the benefits of working with an existing product (i.e. Transition East) outweigh the potential downsides stemming from this perceived issue about developer scarcity, and also the possible challenges of working with two software platforms, and therefore potentially two technical groups (one for each platform). It is worth noting that even if it is decided to drop the Plone option at the end of the study, the time and investment made into it will not be lost.

As well as the technical recommendations above, the Local and Regional presence stream needs clear strategic direction and support from Transition Network as it de-centralises and supports the emergence of regional networks. There are many opinions as to how to handle what is an important strategic issue for Transition Network, so the web project can only raise this and support as suitable. Following the conference in London (May 2009), a number of interested parties have approached the web project with interest in this area. It is recommended to work with this group to build an interest group around this with strategic support from Transition Network and trialling relevant events and software roll-outs.

With this in mind, it is recommended that regional networks are offered simple web presences as part of the technical pilots, initially supported with face to face web tools training at events similar to the successful 'social media surgeries' (<http://www.paradisecircus.com/social-media-surgeries/>) running in Birmingham.

This training is best launched and trialled with support from the Transition Network org but with a view to proposing it as entirely self-supporting. In the longer term, these 'surgeries' could be open to any similar movement. As well as this being a 'web project' task, there are also opportunities to work with the training team.

Transition Learning Connections

A pilot to support the training dimension has been set up in collaboration with The School of Everything, essentially as a subset of their existing site. This pilot should continue to operate and be monitored with the aim of better understanding the needs of individuals both training providers and those seeking training, and the processes involved. At the same time, funding permitting, we should be ensuring that our own web development programme is taken forward in such a way that the functionality required by the Learning Connections users could be implemented either as an integral part of the re-developed transitiontowns.org site, or as a stand-alone site operating as part of the portfolio of Transition Network sponsored sites, should the findings from the pilot study show that the collaborative approach with the School of Everything is not delivering the desired objectives.

Knowledge and Networking: currently the 'Food' projects database

The food pilot has uncovered a few minor issues around the presentation of information but nothing else to suggest it is not a good idea. In parallel to this, Rob Hopkins' request for project information around the conference (May 2009) produced a clear indicator of passion in this area.

As with the other pilots, this pilot should continue to operate and be monitored with the aim of better understanding the needs of individuals and the projects it is there to support, with a view to altering it as required (design, usability). Rights around content clarified, we recommend launching the pilot as an open public 'beta', inviting people to read, upload, edit their own projects, and comment on how to improve the system. Following this work, the model (of shared project information in a template-ed document format) could be extended into other areas (Energy, Transport etc.).

As well as requiring keen facilitation to launch this beta and engage Transitioners with it, this work needs to proceed hand in hand with the emergence of the Sharing Engine as the standards defined by the Sharing Engine group will need to be shared with the projects groups.

The Support Network

The survey and face to face meetings clearly indicated a desire for need (and user) - driven support rather than top down centralised dictat about how to behave. This fits with Transition's culture of bottom up and de-centralised activity. However, it does not offer us a definite object to plan for; we can only provide a trusted space and nurture it to support initiatives as they seek and share knowledge around the variety of issues they face.

The project could support the development of some guidelines, advice and possibly practical support to new initiatives just starting out (who need the most support). Rather than propose to do it all centrally, it would focus on encouraging users of similar technologies (possibly also at similar points on their initiatives' lifecycles) to support eachother.

A 'routemap' has been discussed. This could range from useful factsheets on how to use online services to support communications and networking within an initiative, through recommendations regarding content management systems and hosting providers, to provision of pre-configured solutions, hands-on support and training. The extent to which this support is developed will depend both on the demand and the capacity and resources available to meet that demand.

Other topics mooted for a support function during the research included:

- hosting recommendations
- sustainability considerations
- free software advice and support
- ethical advice
- open standards advice and support (for the Sharing Engine)
- accessibility advice and support
- facilitation advice and support
- legal advice
- technical information and related contacts for similar tech people

We recommend providing a Support Network, linked into the profiling system, that enables people to share their issues, govern themselves around decisions (e.g. Sharing Engine, accessibility), and commune over suitable topics. Technically, this would be a configuration of online fora, identity management, adjustable alert mechanisms, and wikis. As with the Local and regional presence proposal, it is recommended to facilitate the space suitably, and encourage offline as well as online interactions to support the evolution of local networks.

Development Resources

Whilst the technical recommendations to do not explicitly include coverage of the skills and human resources needed to take this work forward, it is nonetheless worthwhile addressing this issue in some regards. We believe that these proposed developments, in conjunction with the scale and rapid growth

globally of the Transition movement, represent a significant project for the Drupal community. Consequently we recommend that we approach that developer community, and the Drupal Association that is at its heart in order to seek their support for the project. A similar approach should also be made to the Plone community. In this way we may be able to open up new channels for collaboration to the mutual benefit of all those involved.

Governance, Ownership and Control

Whilst ownership of the content on <http://www.transitiontowns.org> will rest with the author, and ultimate control may well be retained at least in part by Transition Network, if the site is successful it will become the de facto property of the community that it seeks to serve, and so consideration should be given to governance arrangements. Does Transition Network really want to be concerning itself with the ins and outs of running a large and complex website several years from now, or would that task be better managed by a skilled group serving the best interests of the movement? Who is responsible for Transition-related activities on other sites (e.g. Ning and Facebook)?

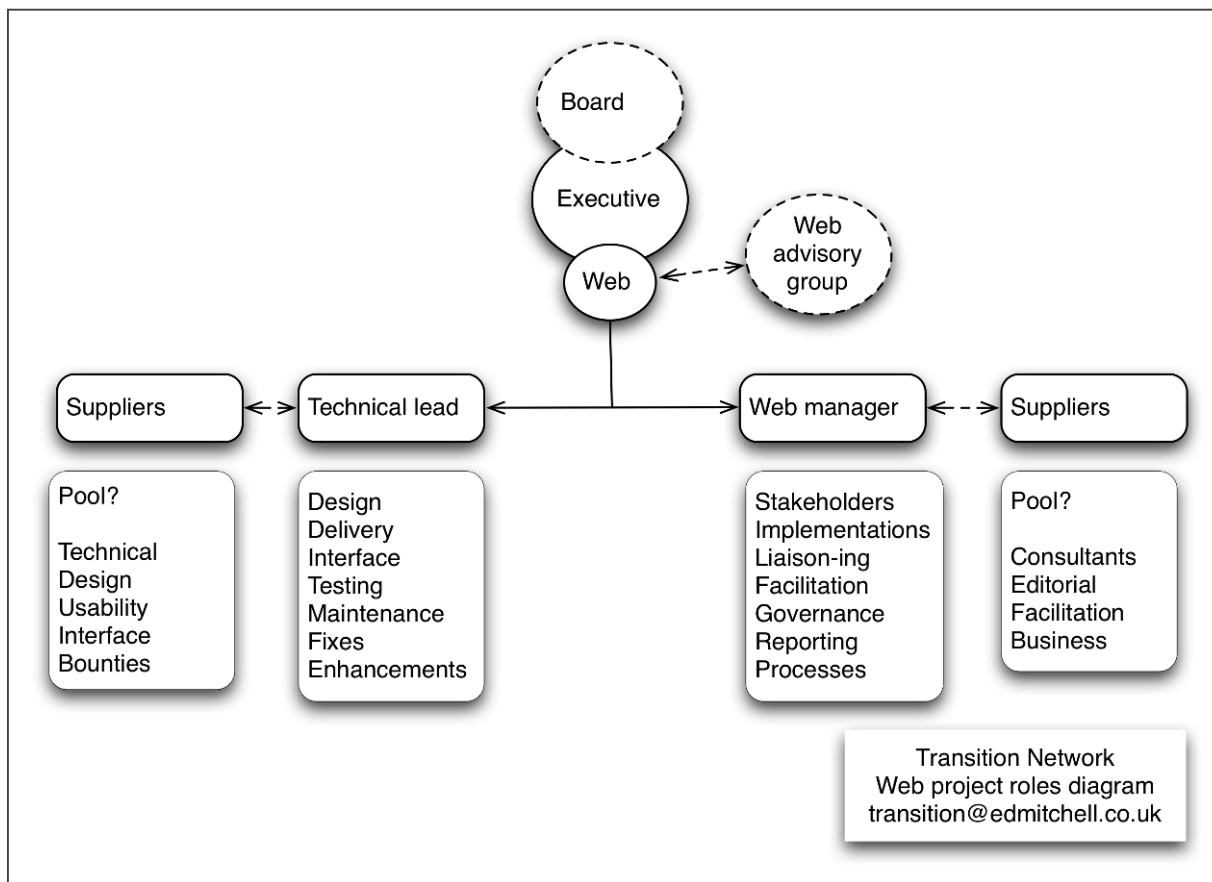
We recommend that serious strategic consideration is given to this question, a governance structure discussed openly and launched and supported while it finds its legs. Both the technical and managerial roles as outlined below would take this into account; with the gradual dispersal of ownership being one of the key goals.

Management, Engagement, Facilitation

There are human elements to almost all of the recommendations points above. Technology does not lead a separate life to the humans who build it or use it. In order to offer the most chance of success, the web project needs to be owned by everyone suitable instead of seen as the domain of one responsible (and quickly over-whelmed!) person. This will require organisational support from a variety of stakeholders within and outside Transition Network. It is recommended that Transition Network understand the web project as an 'organisationally embedded socio-technical' project as opposed to a solely 'technical' one. At this time, a few key streams are recognised:

- Governance and management: establishing, supporting and championing the emergence of 'user-driven' networks to support the model and distribute ownership and responsibility (e.g. standards, usability, criteria etc.). Including the 'national hub technical group' as discussed above.
- Training and adoption: supporting the relevant adoption and use of the web tools in the Transition context. This would be a 'blended' approach: online in the 'support and education network' and physically at meetings. Helping Transitioners as they own their own website elements (e.g. News and newsletters, Training information, etc.). Extending the regional support groups with technical support if desirable and encouraging a peer to peer support model (ref: the 'social media café' model from Birmingham has been a great success).
- Technical assessment: longitudinally assessing the pilots/betas and website, managing ongoing discussions with users and recommending enhancements. Measuring and understanding activity around the network and responding suitably. Given the modular and evolutionary approach to the technical development, this would fit within any development schedule and provide valuable feedback loops into it.
- Engagement and facilitation: launching and encouraging participation with the project including the new website, projects database, knowledge and presence pilots, support and education network, sharing engine design, governance works etc. Always with a view to de-centralising power around the network and catalyzing local action in a bottom-up, open access and resilient strategy. Support voluntary facilitators with this in mind.

The Who



(diagram outlining proposed management and delivery functions)

As discussed earlier in this recommendations report, it is not recommended to view the web project as a discrete technical product, which, once delivered, requires no more work. In fact, during and beyond implementation it will require support and maintenance as a service to Transition Network, Transition initiatives, volunteers, external partners and more. This will include technical, managerial and facilitation roles.

In light of this, it is recommended to see the technical and management aspects of the web project as inter-connected yet separate with the following high level roles and responsibilities. There is bound to be significant overlap and/or doubling up of roles (e.g. the technical lead can do support, the manager is bound to be involved with project management); likewise, different individuals will bring different strengths and weaknesses to the roles which will only be known once the implementation conversations begin. Hence this is seen as a guide:

Web manager:

(contractual post, 4 days per week)

- involving stakeholders
- managing rollout (in collaboration with technical lead)
- liaising with initiatives
- liaising with and supporting national hubs
- documenting processes
- facilitating/arranging workshops, forums

- assessing needs on ongoing basis
- handling governance/management issues
- managing volunteers
- reporting
- managing techies, bounties, webhosting etc

Technical lead

(contractual post, starting very busy, moving to less)

- Technical design and project management (in collaboration with web manager)
- Technical delivery
- Interface design and usability
- Testing
- Maintenance
- Enhancements

Timescales

Again, subject to the details, the size of the team brought to bear on the project, etc. these sites could be developed within one to three months from the point of commissioning. While trying not to answer about the length of a piece of string, here follows a broad estimate:

- Day 0: Board approve the recommendations.
- Day 30: Agree specifications and tender documentation agreed and out. Issue the invitation.
- Day 50: Commission the contractors and get started.
- Day 80: First build of TRANSITION NETWORK site, Sharing engine and Drupal version of regional groups site, up and running, in terms of core functionality.
- Day 95: Tested, reviewed, refined, styled and polished.
- Day 100: Launch public betas.

Proposed actions

	June	July	August	September
Facilitation	<ul style="list-style-type: none"> • Update on work via newsletter etc. • Mapping exercise: stakeholder groups 	<ul style="list-style-type: none"> • Other networks outreach: • Drupal • National hubs • Social networks • Transition: • ‘Governance’ groups – networking and set up • Champions set up 	<ul style="list-style-type: none"> • Call for testers • Survey (sharing engine population) 	<ul style="list-style-type: none"> • Training on beta site • Events support • Local/regional • Training • Other communities
Organisation	<ul style="list-style-type: none"> • Move on from recommendations • Specs and criteria for tenders • Public call for applications • National hubs group kick off 	<ul style="list-style-type: none"> • Tenders out • Applications in • Commission • Objectives • Goals • Governance sorted 		
Technology	<ul style="list-style-type: none"> • Following approval, assessment: • Current technology • Usage stats • Participation stats 	<ul style="list-style-type: none"> • Tender applications • Specification workshops 	<ul style="list-style-type: none"> • Build • Survey 	<ul style="list-style-type: none"> • TN site first build

Thanks!

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Thanks all... Good work!

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