Case Study: National Democratic Institute (NDI)

NDI DemTools: Civi

Principle(s) Addressed
Design with the User, Open Standards

Overview

Around the globe, technology plays a crucial role in the political landscape. As developing countries' access to online and mobile information grows, dissemination of local, regional and national political information is not always widespread. Developed by the National Democratic Institute (NDI), DemTools is a suite of six open source tools (see Resources) that connect citizens to political information, collect constituent data and promote outreach efforts through mass communication. Civi is one of the six tools within DemTools. It uses CiviCRM [https://civicrm.org], a Constituent Relationship Management (CRM) system, to organize, store and safeguard constituent and membership information. Civic organizations, advocacy groups and political parties use this data to organize events, send communications, and track interactions with individual constituents and groups for more effective, targeted and strategic outreach. CiviCRM has been used by more than 10,000 organizations worldwide and has been translated into many languages, including Russian and Arabic.

Background

DemTools is a suite of six open source digital platforms that connect citizens in developing countries to real-time political information. Through online and mobile access, citizens are engaging with their broader communities and local governments, creating a dialogue around government decision making, ensuring timely service delivery and promoting petitions to encourage change. DemTools is an initiative of NDI, a not-for-profit nongovernmental and nonpartisan organization. Founded in 1983, NDI has more than 30 years of experience in the political sector and works in 132 countries and with more than 27,000 partners worldwide.

Objectives

- Provide free open source platforms [http://digitalprinciples.org/use-open-standards-open-data-open-source-and-open-innovation/] to community-supported organizations, civic groups and political parties, who can then customize the platforms based on data collection and privacy needs.
- Improve the ability for organizations and groups to collect, store, organize and use the information that they need to meet their goals.
- Connect organizations and groups to their constituents easily and efficiently through mass text-messaging and email communications.
- Save implementers time and energy by allowing them to focus on their campaign efforts rather than on maintenance, security and privacy infrastructure, which NDI manages using its DemCloud software-as-a-service platform.

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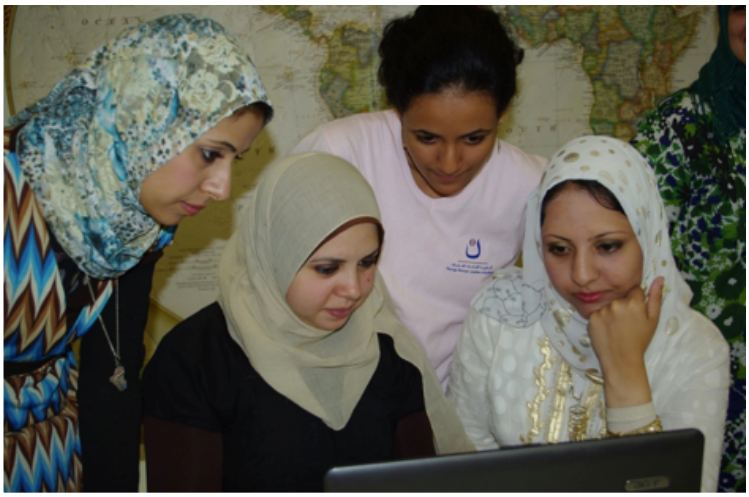
Civi is one of the six platforms within DemTools. It uses CiviCRM, an open source CRM database, to track individual and group information for political outreach efforts. With Civi, elected officials, advocacy groups, political parties and organizations can track contacts and events, communicate with large groups of individuals through text-message and email blasts, and use advanced search features to find specific demographics for targeting resources and outreach efforts. Constituent privacy and data security are vital to the success of Civi, so clients sign a memorandum of understanding before using the software. Although the NDI Technology Innovation team, NDItech, is able to access the systems built for security updates and auditing, each client is responsible for safeguarding access within their own organizations. NDItech has worked with hundreds of organizations around the world to create a platform to collect and analyze data for political efforts regardless of location, demographics and bandwidth capabilities. Civi is used by NDI partners in dozens of countries, including Nicaragua, Ukraine, Morocco, Nigeria and Serbia.



Nonpartisan organizations in the Middle East use Civi to store and track constituent engagement and data for political outreach efforts.

PHOTO CREDIT: NDITECH

Project Lifecycle Application

- **Analyze & Plan.** Civi's capabilities for collecting, filtering and synthesizing data can be robust or basic, depending on the needs of the group or community. During this phase of the project lifecycle, we believe it is vital to the success of any customized platform to engage with stakeholders, staff and implementers to understand how and where the software will be used. We do this by conducting initial surveys with users to understand the context in which they work, their information needs, their environment and what existing applications, software and processes they currently use. Our team then uses this information to customize the platform to the ideal specifications of each group through a collaborative mapping process. We believe engaging users

RESOURCES

Civi, DemTools by NDItech.
https://www.dem.tools/civi

DemTools, NDI.
https://www.ndi.org/demtools

National Democratic Institute (NDI).
https://www.ndi.org/

[http://digitalprinciples.org/design-with-user] also creates a sense of ownership in the process and in the tool itself.

- **Design & Develop.** Before designing a new platform, it is important to take into consideration existing software to assess if it can be reused, built upon or redesigned [http://digitalprinciples.org/reuse-and-improve/]. Most of our clients have yet to develop robust data collection and management processes, let alone adopt a CRM system. Therefore, they look to us to provide guidance in designing their data collection, storage, and management process, which often includes customizing the workflows and fields required in Civi. For those clients that already have established, preferred method(s) of collecting and organizing data, we'll work with them integrate their existing processes into the CRM tool. Civi is an open source software platform our developers can customize to the information and data privacy [http://digitalprinciples.org/address-privacy-security/] needs of each community. Particularly in places where membership information is very sensitive or where political parties must adhere to strict rules, we focus on safeguarding this information within our system.
- **Deploy & Implement.** Deploying, securing and keeping up-to-date software is resource intensive, particularly for customized tools used to collect and organize constituent data. Since Civi can be hosted on our DemCloud cloud-based infrastructure, we maintain and update the systems on behalf of the groups and organizations with which we work, so implementers can focus their time and efforts working toward their political goals. Users of the Civi platform can easily select what types of information they want to see (e.g., education level, geographic location, event attendance, etc.), and they can cater communications and event-specific information to those targeted groups.
- **Cross-cutting: Monitor & Evaluate.** Collecting relevant data to show a program's impact is crucial for allocating resources and addressing issues that could inhibit sustainability. We have completed a few generic customer surveys to understand the number of constituents tracked in Civi and how current users are capturing events, contact points and messages over SMS, as well

DemTools by NDItech

DEMTOOLS SUITE

- **Civi** [https://www.dem.tools/civi]: Managing constituent data.
- **Elections** [https://www.dem.tools/elections]: Documenting political processes through data collection and analysis.
- **Issues** [https://www.dem.tools/issues]: Connecting voters to topics that matter.
- **DKAN** [https://www.dem.tools/dkan]: Managing and organizing data for decision making.
- **Fix My Community** [https://www.dem.tools/fix-my-community]: Reporting civic issues in your community on an online platform.
- **Petitions** [https://www.dem.tools/petitions]: Creating and promoting petitions to drive change.

as how organizations are using the Civi capabilities in their day-to-day operations. Monitoring and evaluation, as it relates to the client, is based on the features the client has chosen to use in the application. We can measure aggregate numbers across clients. In the future, we plan to formally request feedback on software features and the user interface to better understand and address lack of uptake.

Lessons Learned and Recommendations

- Ensure that software developers, staff and implementers represented within the defined ecosystem [http://digitalprinciples.org/understand-the-existing-ecosystem/ are involved throughout the project lifecycle. This includes being a part of the initial surveying and information gathering, as well as participating in the mapping sessions and product-design activities.
- Create in-person and virtual opportunities for individuals to discuss their needs and expectations around system processes and functionality. These opportunities to provide consistent and regular feedback through multiple channels encourage users to be engaged throughout the project lifecycle.
- Gain full buy-in from the client organization or group on expectations and overall use of the platform prior to design and development. Successful clients commit leadership and human resources early in the project lifecycle and build their internal processes around the use of the tool.
- Before building a new platform, consider the ecosystem you are working in, the software that is already available, and the resources and staff needed for sustainability [http://digitalprinciples.org/build-for-sustainability/]; you might find that you can reuse or build upon something that already exists [http://digitalprinciples.org/reuse-and-improve/]. Civi can be easily modified to interoperate with established systems and processes.
- Take time to fully understand the security and maintenance processes provided by the open source software, and educate your staff members around the policies in place that safeguard constituent information.