## 2008–2018: retrospective & lessons learned by Groupe URD

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Introduction

By the end of 2018, the Sigmah project will have merged with TolaData. As Sigmah is an open source software project, all its technical contents will remain available free of charge on its software forge\(^1\) and the archive page of its documentation\(^2\). But Sigmah is not simply an IT project. First and foremost, it is a collective attempt to put a vision into practice: a centralised project management application created by and for international aid organisations.

This article summarises the different phases of the Sigmah project and the lessons learned, so that these can benefit the sector as much as possible.

Retrospective

This section provides an overview of the different phases of the Sigmah project. A detailed timeline of the key events of the project can be found in the annexes.

Phase 0: needs analysis (2008-2009)

The Sigmah story began when three NGOs (Solidarités, Aide Médecine Internationale and Première Urgence) contacted Groupe URD with regard to their shared needs in terms of project management. At the same time, Groupe URD was considering the possibility of creating an open source software to follow up its Dynamic COMPAS software project.

A needs analysis was carried out with 6 NGOs which confirmed that shared needs did exist. The group began to meet regularly and grew. A project proposal was then written to find initial funding.

Phase 1: pilot project (2010-2011), principally funded by ECHO

ECHO, as well as Agência Catalana de Cooperació al Desenvolupament, Fondation pour le Progrès de l'Homme, and Île-de-France and Rhône-Alpes Regional Councils, provided funding for a 16-month project to develop the first version of the software and help organisations to adopt it. Led by the group of NGOs who were now referred to as the “Sigmah Steering Cooperative”, the project began operationally, managed by Groupe URD. The foundations of the software were developed by the technical partners, Ideia, on the basis of the open source software ActivityInfo\(^3\), an indicator management platform. A complete merger of the two projects did not take place in the end.

Intermediary phase without funding (2012-2013)

From July 2011 to October 2013, the development of Sigmah was slowed down due to a lack of external funding. The financial contributions of the members, though modest, and the financial backing of Rhône-Alpes Regional Council, made it possible to continue to facilitate the process at a minimal level. Thanks to this minimal financial backing, the partnerships with Ideia for the development, and with Adergo for the ergonomic design, and being selected for the Google Summer of Code programme, development was able to continue at a slow pace. Training courses continued to be given, thanks notably to the partnership with Coordination SUD.

This phase showed how difficult it was to find funding to develop open source software for the humanitarian sector. It also showed that the innovation was able to survive economically without external

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\(^1\) Sigmah software forge: https://github.com/sigmah-dev/sigmah

\(^2\) Sigmah technical documentation archive: https://sigmah-dev.github.io/

\(^3\) ActivityInfo is a monitoring and evaluation support application which continues to be maintained and supported by bedatadriven: http://www.bedatadriven.com/products/activityinfo.html
backing, but the product had a number of essential functional gaps that could only be filled with significant investment. This funding was provided by the French Development Agency (AFD) in 2013.

**Phase 2: further adoptions (2013-2017), funded principally by the French Development Agency**

In November 2013, the development of an offline mode was established as the number one priority for the member NGOs, in order to make Sigmah usable in regions where there was little or no internet connection.

The project, which was managed by Groupe URD, who decided to externalise all the software development, came up against a number of difficulties which sometimes exist in relations with service providers: the service provider went bankrupt, was bought over, almost all the staff left as a result, etc. After this episode, the decision was made to establish a network of technical partners. These difficulties complicated and delayed the development of version 2 with the offline mode, which was finally released in 2015.

2015 was a pivotal year for the project. Following a strategic meeting of the Steering Cooperative, greater importance was given to the development of features that immediately benefit users. A major adoption project began with the Organisation Internationale de la Francophonie, including the development of a contact management feature. Work on the business model began with Participative.

In 2016, Sigmah was pre-selected by the Humanitarian Innovation Fund for its programme, “Acceleration of the journey to scale”. The related “Innovation Workshop” helped to finalise the design of the new business model.

In early 2017, this business model was put in place and presented via a new project website. Version 2.2 of the software, including contact management, was released the same year. In parallel, the evaluation process was launched, both in response to persistent structural difficulties perceived by Groupe URD and the Steering Cooperative, and to meet one of the last requirements related to the funding from the French Development Agency, which was due to end at the end of 2017.

The results of the evaluation, co-funded by the AFD, Fondation pour le Progrès de l'Homme and Handicap International, were presented in July 2017. Subsequently, a study to find a buyer for Sigmah was launched in the second semester of the year, with funding from the Organisation Internationale de la Francophonie.
Evaluation (summer 2017)

Context of the evaluation
Following a call for proposals, the Sigmah evaluation was entrusted to Simlab, and was carried out by its Director, Laura Walker McDonald.

In order to contribute to learning within the sector, and in keeping with its values, Groupe URD decided to publish the questions and perspectives that emerged from the evaluation.

Summary of findings

<table>
<thead>
<tr>
<th>Points to maintain</th>
<th>Points to review</th>
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</thead>
<tbody>
<tr>
<td><strong>1/ TECH</strong> : The code</td>
<td><strong>2/ TECH</strong> : User interface</td>
</tr>
<tr>
<td>Sigmah appears to be a mature and professionnally developed platform. Rewriting it would be time-consuming and pointless.</td>
<td>Many interviewees said that the user interface is unclear, non-intuitive and off-putting for field staff.</td>
</tr>
<tr>
<td><strong>3/ TECH</strong> : Functional scope</td>
<td><strong>4/ ADOPTION</strong> : Groupe URD</td>
</tr>
<tr>
<td>The functional scope is complex, and the existing tool still has gaps and bugs. Several key features that had been promised are missing. Overall, it is perhaps too ambitious.</td>
<td>The people interviewed were very positive about the working relations with Groupe URD. The head of the Sigmah project performed miracles to keep the project moving forward and provide support alone or with one other person.</td>
</tr>
<tr>
<td><strong>5/ ADOPTION</strong> : Field staff do not agree with headquarters that Sigmah is worth the time invested</td>
<td><strong>6/ SUSTAINABILITY</strong> : The current business model is not viable for Groupe URD and does not allow either long-term development or maintenance of the central application. Funding solely via grants, even if renewed, is perhaps not the solution.</td>
</tr>
<tr>
<td><strong>7/ GOVERNANCE</strong> : The Steering Cooperative is perhaps not suited to the objective</td>
<td><strong>8/ GOVERNANCE</strong> : Can Groupe URD continue to run the project?</td>
</tr>
<tr>
<td>The project might benefit if the lead partner was given formal responsibilities, and there was real steering instead of &quot;micro-management&quot;.</td>
<td>Would a new business model need a new project leader? Is Groupe URD a software publisher, given the measures that need to be taken to become more professional?</td>
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<td><strong>9/ Sigmah does not currently meet its objectives</strong></td>
<td><strong>Post-evaluation action plan</strong></td>
</tr>
<tr>
<td>For the time being, Sigmah has not met its objective: &quot;improve ... the quality and effectiveness... of the project management mechanisms of organisations who have been using Sigmah for more than a year.&quot;</td>
<td></td>
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After the evaluation, Groupe URD drew up an action plan based on 4 structural changes.

A new business model where the member NGOs became investors
The evaluation findings helped Groupe URD to understand the extent to which the business model and governance were linked. Healthy governance means that the investors should also lead the project. As it
would be difficult for the donors to be involved in governance other than during periods of funding, this meant that the new business model had to be structured with the new member NGOs as investors.

A new form of governance led by the investors
Governance roles and responsibilities should be clarified, and final responsibility for the project should be limited to a small group of investors.

Revision of the software to reduce its functional scope and make it more user-friendly
To give Sigmah a new lease of life, priority should be given to the needs it meets most effectively and these should be completed. The user-friendliness of the software should be revised on the basis of these priorities.

Groupe URD replaced as the software publisher
The evaluation showed that a non-profit research institute specialised in humanitarian action like Groupe URD could not sustainably support a technological project like Sigmah. The question of finding a replacement for Groupe URD was rapidly seen as central by Groupe URD as the other points depended on it: the new business model and governance could not be decided without taking into account the specific characteristics of the buyer, in the same way that a programme to revise the software could only be launched once funding and a buyer had been found.

The strategic reflection carried out during the summer of 2017 led to the conclusion that the next essential step was to work on the Sigmah takeover.
Takeover (late 2017 to late 2018)

Operational context
Once the results of the evaluation had been shared in a transparent manner with all the users and the members of the Steering Cooperative, a positive opportunity emerged. The Organisation Internationale de la Francophonie was able to fund methodological support for the transition.

A consultant from the RBMG group was contacted to help, first, to draw up a partnership strategy to make Sigmah sustainable, during the second semester of 2017, and then to implement it in 2018.

Phase 1: drawing up a partnership strategy to make Sigmah sustainable (late 2017)
An agile process was set up with the RBMG consultant. This began with a structured analysis of the current state of the project and the context of the organisations concerned, in order to clarify the assets that would be transferred. A takeover dossier was then drawn up with the objective of having a complete document that could be presented to potential buyers. Interviews were then carried out with potential buyers interested in the call for proposals and scenarios were then drawn up.

Phase 2: implementation of the takeover plan (2018)
In early 2018, it was clear that none of the potential buyers identified at the end of 2017 was interested in taking over the whole of the Sigmah project: the existing product, its current users, the brand, etc. The decision was therefore made to contact Sigmah’s direct competitors with the objective of a fusion of Sigmah and their product.

Among the different options that were identified, TolaData was selected due to the similarity of its vision of the sector and the fact that it is also an open source project. A detailed plan was then drawn up to ensure that the transition would be as smooth as possible for Sigmah’s users: plan for migrating from one IT solution to another, transferring customer relations, and communication activities.

The process led to the joint elaboration of a takeover agreement. This document, which, it was decided, did not have any legal value, was a moral contract with all Sigmah users and the Steering Cooperative. It established the reciprocal short- and long-term commitments of Groupe URD and TolaData so that the transition would take place in the best possible conditions.

Signed on 21 June 2018, the takeover agreement led to the transferral of the keys to Sigmah (the access code to email accounts, the transferral of administrator rights, etc.) in late July 2018. Groupe URD’s funding of Sigmah’s hosting service is due to end on 31 December 2018, and the transition towards TolaData is underway for the users.
Lessons

Ideals and results
As a product of the humanitarian sector, which is founded on ideals and strong values, Sigmah had always been based on an ambitious vision to develop a collectively-owned asset that was created by and for international aid organisations. This vision contributed to maintaining the cohesion within the Steering Cooperative, and interviewees during the evaluation praised the sincerity with which Groupe URD carried it.

It was obvious to everyone that the road to reach this vision would be long. But a pragmatic approach would have helped to maximize the benefits and added value of each concrete stage that was necessary along the way. The strategic objective of Phase 1 in 2010-2011 was to produce a basic tool that member NGOs could subsequently refine based on needs and feedback. Nothing was ever done to maximize the added value of this version of the software.

We feel that ideals and a strong vision are very effective in terms of mobilizing, but they need to be accompanied by a pragmatic approach in order to produce results in the short term. The agile principle of maximizing added value at each iteration should be applied.

The job of developing an innovation
Sigmah therefore did not manage to change scale and achieve its vision. It is not the only software innovation to have found itself in this situation. Groupe URD's perception is that our sector lacks maturity in terms of the expertise needed to develop innovations (though this is gradually changing). Donors and NGOs often under-estimate the complexity and the amount of resources needed to design and validate an appropriate business model, establish effective governance or partnerships, devise and adjust a product strategy that anticipates the future, while producing useful results in the short term.

As part of the aid sector, Groupe URD also underestimated the efforts required. For example, in 2013, we budgeted 3 days of support to help establish the new business model. In contrast, in 2017, an external advisor estimated the number of days needed to adjust this model and carry out the necessary market analysis beforehand to be 15.

We would therefore recommend that any lead organisation of an innovation that aims to be disseminated broadly should work with bodies like the Humanitarian Innovation Fund and the Global Alliance on Humanitarian Innovation to develop an appropriate approach for such an ambition.

Risks and anticipation
The central place given to the long-term vision meant that both short-term added value and risks were not sufficiently taken into consideration.

Thus, even though the underlying intention when the Steering "Cooperative" was created was explicitly to share the running costs of the project, none involved in the Cooperative – including Groupe URD – felt that it was necessary to validate this intention and its financial feasibility. Only one short and non-binding document was written regarding how the Steering Cooperative would function. A collective discussion about a binding partnership agreement which included the sharing of running costs would have made it possible to establish greater coherence between the ambition of the project and its financial feasibility.

Based on our experience in this area, we do not feel that formal documents are an immediate protection against risks, but that collectively drawing up binding documents can provide an opportunity for discussions to take place about the risks related to objectives.
Experimentation, learning, and a call for open innovation

Sigmah did not manage to revolutionise project management throughout the international aid sector as it secretly had hoped to do. Having checked that they have avoided the traps that we have identified, we have now passed the strength and demands of Sigmah's vision to TolaData.

However, many organisations who took part in or used Sigmah recognized that the project and the product allowed them to achieve a more precise understanding of their own needs, and the challenges of developing such a solution. The flexibility and affordability of the software allowed certain organisations to carry out the pilot phase of the adoption process for a centralized project management tool. For others, the transparent way in which the project was conducted made it possible to increase understanding of the challenges of IT solutions in our sector.

We feel that experimentation is an essential source of learning. But if an innovation of this kind is launched, it should adopt the principles of open innovation to guarantee that it at least serves as an opportunity for collective learning.

The next step for Groupe URD

Groupe URD's involvement in Sigmah is now finished. Based on the lessons we have learned, we will not be developing IT innovations of this size again. Instead, we plan to refocus our IT-related activities on two of our areas of expertise: research into the digital transition in the sector, and accompanying organisations in this area.
Annexe: Timeline