GETTING STARTED

PHASE 1

PHASE 3 · PHASE 2

ASSESSING AND EVOLVING · **GROWING**

It Takes a Village

Open Source Software Sustainability

Activity 1: Who is Your Community?

Goals

1. Identify community stakeholders

2. Consider goals for each stakeholder group

3. Prioritize community stakeholders

Prerequisites

None

Who Should Participate?

Program leadership (strategic thinkers)

Length

30-75 minutes

Definition: Open-Source Communities and Stakeholders

Sustainable software is that which remains viable and effective as long as it is needed. Who decides if software is viable, effective, and needed? The community!

> "...Contributors from all over the world who share an interest in meeting a common need, ranging from minor projects to huge developments..."
> Encyclopedia of Networked and Virtual Organizations

Communities consist of various stakeholder groups. A stakeholder is an individual, group or organization within or outside the program who is impacted by its outcome, and who has an interest in its success.

Every community is different and is defined by the shared need and joint endeavors. There can be communities within communities (e.g., Fedora developers may be a community within the larger Fedora community; or VuFind community members are part of the larger open-source community). Stakeholders can also belong to multiple communities.

Activity Instructions

This can be done as one group or multiple small groups. If you have more than five people participating, consider multiple small groups doing this activity separately and coming back as a larger group to discuss results.

Part 1

1. On a whiteboard, list as many stakeholders as you can (example).

2. Group the stakeholders into categories, using whatever methodology you find helpful to facilitate discussion.

   ▪ For example, if there are several individuals or organizations with similar goals and relationships to your program, group them, e.g., potential integration partners, funders, service providers, etc.

3. Consider your goals for each stakeholder group along a matrix of Influence and Interest/Availability. A sample matrix is on page 3. Those involved with the program likely have limited bandwidth, so what is the most productive way to focus how you engage with them? For example, for the following stakeholders, are you trying to keep them activity engaged or generally informed:

   ▪ End user
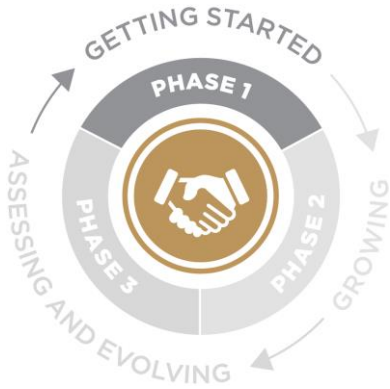
Activity 1: Who is Your Community?

- Library Dean

- Developer

- Governance member

4. Prioritize the groups that you want to increase engagement with during the next year. Consider what is a manageable number of prioritized groups (i.e., is it 1-3?). If you have more than 10, a sticker vote (details below) is a helpful prioritization method.

    o Sticker Vote: In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

Part 2

1. Once you have agreed upon and prioritized stakeholder groups, you can identify which groups to work with to achieve specific goals and objectives (e.g., technical stakeholders for a specific development project). This information can serve to help explain activities or direction.

2. Discuss potential areas of opportunities and areas of collaboration. How can your community work together to create and achieve community goals?

3. Consider what skills are required to make collaboration effective (e.g., language)
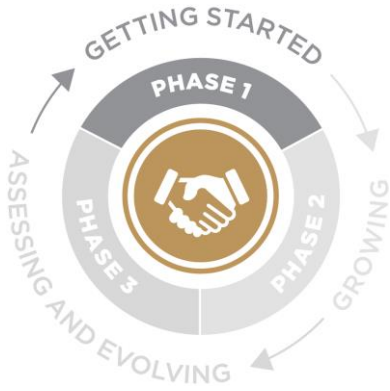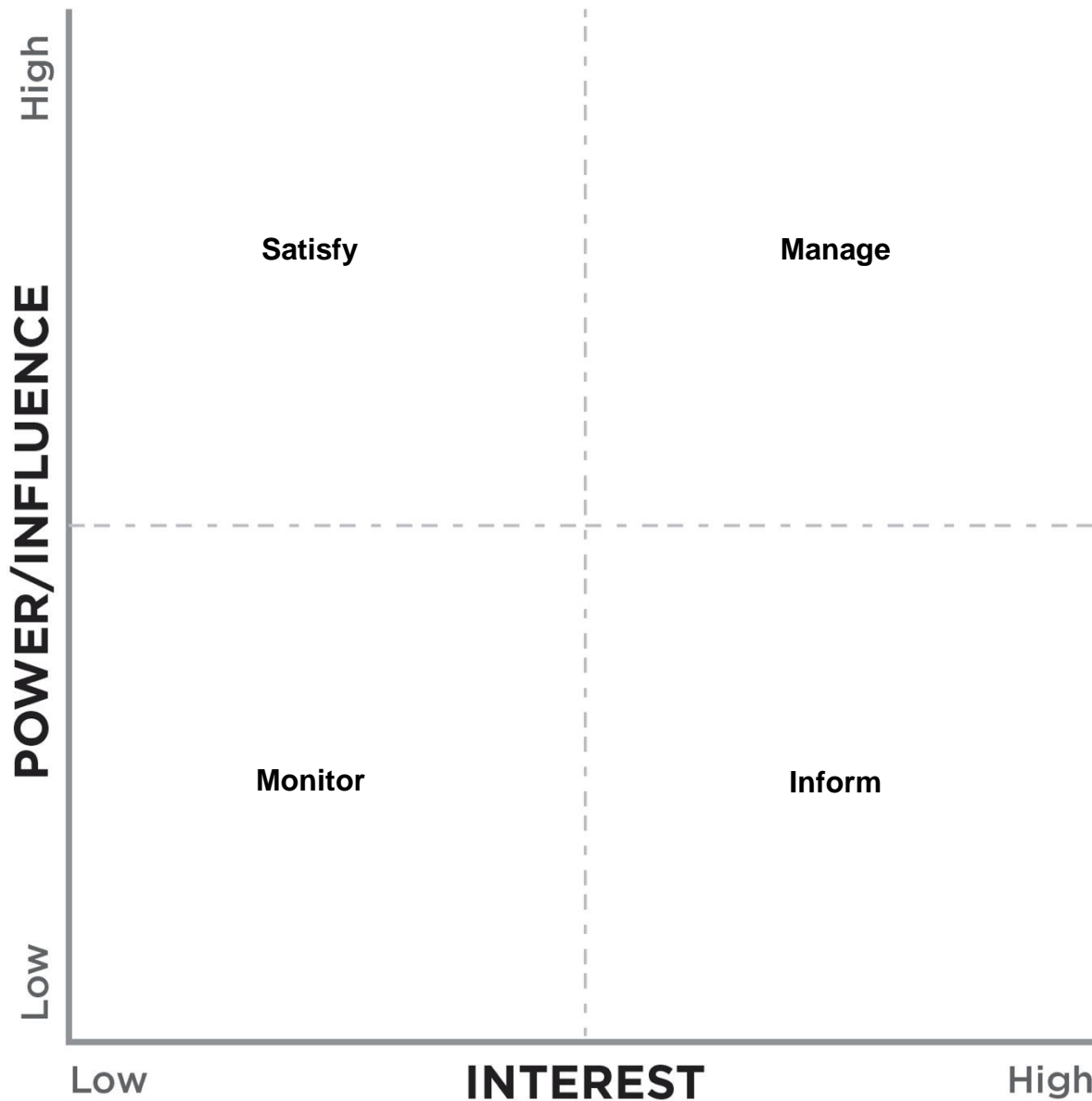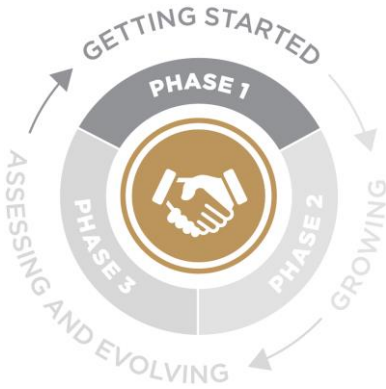
Activity 1: Who is Your Community?

COMMUNITY ENGAGEMENT

Phase I: Getting Beyond Initial Stakeholders

Activity 2: Create Personas

Goals

1. Create explicit personas for community stakeholders to help guide community efforts

2. Enable checking future plans against persona goals

Prerequisites

Activity: *Who is Your Community?*

Related Activity

Governance Activity: *Recognition and Contributions*

Who Should Participate?

Program management (tactical thinkers); Program staff (operational expertise); Community representatives

### Length

45-60 minutes

Definition

Personas are descriptions of imaginary users that are based on observations or understanding of actual potential or current stakeholders.

Activity Instructions

1. Follow Mozilla's Contributor Personas & Pathways activity using the list of prioritized community stakeholders from *Activity: Who Is Your Community.* Create specific descriptions of needs, value proposition, and interests.

   - For example, a few potential stakeholder groups might include: publishers, java developers, grant officers, and library deans. If library deans are one group you want to engage and keep informed, create a specific description of an individual "dean" so you can consider their needs, value proposition and interests.

2. After creating personas, consider how they map to your prioritized community stakeholders

3. Consider how these groups value recognition (see Governance Activity: Recognition and Contributions)

Next Steps

Incorporate these personas into your planning documentations and review them periodically as a part of your regular strategic planning efforts. You may need to update these personas as their needs change or modify your plans to re-align your efforts with their needs.
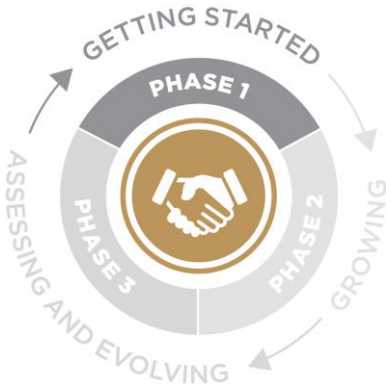
COMMUNITY ENGAGEMENT

Phase I: Getting Beyond Initial Stakeholders

Activity 3: Plan an Outreach Committee

Goals

1. Create goals, identify gaps, and determine timeline for the Outreach Committee
2. Create mission/vision for the committee

Prerequisites

None

Who Should Participate?

Current Governance participants, Community representatives who are interested in outreach. This tends to be an activity for larger programs or those that want to start engaging community members.

Length

60-90 minutes

Background

Communication strategies tend to focus on reaching out to share information with current and potential community members. Community engagement takes it a step further by interacting with our stakeholders and encouraging them to interact with each other. In phase one, your program may be focused simply on communication while building toward a stronger engagement strategy.

Pre-Work

You may want to document current outreach practices to help with goal creation and gap identification.

Activity Instructions

1. Brainstorm goals for the Outreach Committee. Examples include:

   - creation of overall communications and engagement strategy
   - outline mechanism to execute a strategy – e.g., create working groups, etc.
   - prioritization of stakeholder groups for specific time periods
   - creation of communication channels
   - need to engage more community members
   - how to consider the diverse needs of the community and how their needs and capacity may vary

2. Identify gaps in current communication and engagement, such as lack of:

   - mechanism for distribution of information
   - specific communication channels
   - mechanism for new community members to learn about the landscape (software itself, how to participate in governance and committees, etc.)
   - mechanism for community members to engage each other (without intervention/moderation from program staff or governance)
   - mechanism for existing community members to help new members
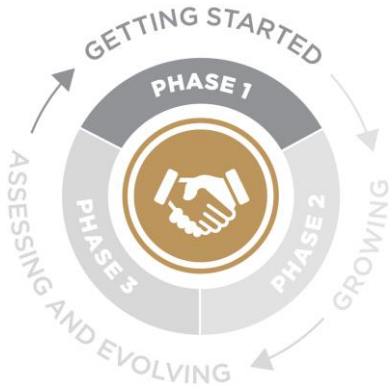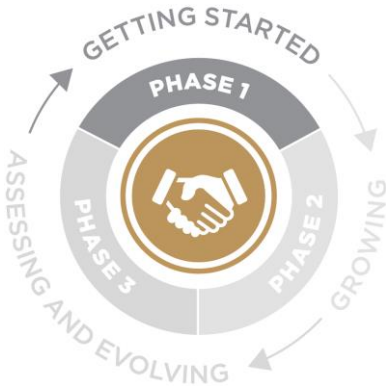
Activity 3: Plan an Outreach Committee

3. Prioritize gaps (via sticker vote if there are many)

   - In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

4. Determine the committee's mode of operation (consider goals and gaps from earlier step). For example, does the committee need to:

   - create an overall strategy for other teams to close gaps (short term)

   - choose top 3 gaps to close (short term) or

   - take actions to close all gaps (long term)

5. Based on operation, determine if the committee is time-bound. Is this a standing committee or a committee that is being formed for a specific purpose (e.g., to create a strategy) and then other committees will execute it?

6. Create a mission/vision/purpose for the Committee.

   You can use the mission/vision exercise in the Pre-Work section of the Community Engagement Toolkit:

   https://itav.lyrasis.org/toolkit-engagement/

Next Steps

You can use these results in Activity: Create Outreach Committee Charter.

COMMUNITY ENGAGEMENT

Phase I: Getting Beyond Initial Stakeholders

Activity 4: Create Outreach Committee Charter

Goals

1. Create an Outreach Committee Charter to clarity roles and purpose

Prerequisites

None

Related Activities

[Activity: Plan an Outreach Committee](#)

Who Should Participate?

A subset of current Governance participants

Length

60 minutes

Note

This activity is included in CE, but it could be used for creating a committee in connection with any ITAV facet

Benefits

A committee charter is a best practice when creating a new committee. Benefits include:

- Helps to orient new members of the committee
- Set shared expectations
- Serves as a reference for disputes
- Provides clarity on purpose
- Serves as a touchstone as work progresses and scope creep occurs

Activity Instructions

1. Review "[Structuring a Committee Charter](#)" (pertinent info below)

2. Consider your program's overall mission/vision

3. Consider what you are trying to accomplish with the Outreach Committee (using results of [Activity: Plan an Outreach Committee](#) if available)

4. Create charter

   o The charter should be voted upon by the group (and any higher board or officers if your program has them) and reviewed on a regular basis

5. Identify location to publicly post charter

6. Re-evaluate based on a predetermined schedule
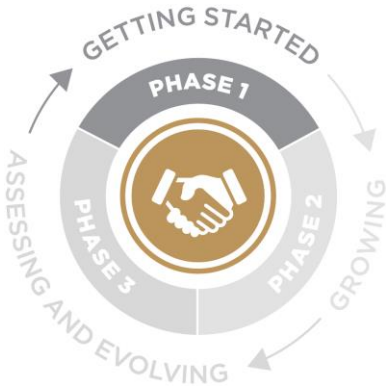
Activity 4: Creating Outreach Committee Charter

Structuring a Committee Charter

Text below taken from: https://landing.directorpoint.com/blog/writing-a-strong-charter-for-your-committee/

Purpose

Many charters begin with a brief overview of the committee's purpose. This may involve crafting a mission statement or statement of purpose. The goal is to describe the board's intentions for creating the committee as well as how those intentions translate to the committee's objectives.
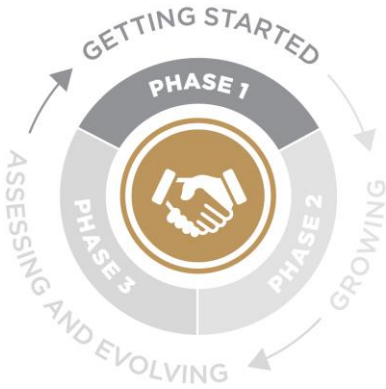
Committee Members

Once the board has crafted a mission statement (or similar outline of the committee's primary objective), the next section of many charters is a description of how committee memberships are determined. This description commonly includes:

1. The committee's term limits
2. How committee members are appointed
3. How the committee's chairperson is determined
4. The committee's size limitations and requirements
5. Which committee members are granted voting privileges
6. The number of board members required to serve on the committee

Roles and Responsibilities

Almost all committee charters include a detailed list of the group's roles and responsibilities. This can include information regarding the degree of autonomy with which the committee is allowed to operate; specifically, the decisions they are allowed to make without further approval from the board. Many charters also add supplemental information regarding the internal governance practices of the committee itself. This may include:

1. The committee's reporting practices
2. Requirements for taking attendance
3. Details about when the committee meets
4. The frequency of meetings in a given year
5. How meeting minutes are recorded (and by whom)
6. The designation of executive or administrative assistants
7. The level of access to sensitive information granted to others

Activity 4: Creating Outreach Committee Charter

8. The minimum number of committee members required to be in attendance in order to constitute a quorum

9. Re-evaluation period

Additional Helpful Resources

Template

https://www.boardeffect.com/blog/template-for-a-board-committee-charter/

Examples of nonprofit charters:

https://iiif.io/community/groups/outreach/#about
https://www.arl.org/wp-content/uploads/2019/07/Charge-MEOC-2019.07.24.pdf
https://www.nhnonprofits.org/resource-center/sample-documents-and-templates

Other

https://landing.directorpoint.com/blog/writing-a-strong-charter-for-your-committee/#more-5396
https://www.nhnonprofits.org/resource-center/sample-documents-and-templates
https://agb.org/blog-post/board-standing-committee-charters/
https://charitylawyerblog.com/2019/11/04/setting-up-nonprofit-board-committees-for-maximum-effect/

Activity 5: Stakeholder and Engagement Matching Tool

Goals

1. Understand the communication needs and preferences of different stakeholders

2. Match different stakeholders to potential engagement tools

Prerequisites

Activity: Who is Your Community?

Who Should Participate?

Program management (tactical thinkers); Program staff (operational expertise); representatives of stakeholder groups you want to reach

Length

60-90 minutes

Activity Instructions

This can be done in one small group, or as a large group broken into multiple small groups focused on different stakeholder groups.

Step 1: Tool Brainstorm and Review

- Brainstorm various tools and mechanisms your program uses (or may want to use) to communicate with stakeholders. Note the pros and cons of each.

  o Some communication tools are better suited for specific audiences. For example, using Twitter to reach senior citizens may not be the best match; developers may be more likely to respond to Slack messages than listservs, etc.

  o It can be helpful to set objectives for the number of ideas to be listed and the time to be spent, e.g. "Let's spend 10 minutes coming up with a list of 15 tools we use or would like to use to communicate with our stakeholders."

(See sample brainstorm table on next page)

Tool Brainstorm and Review
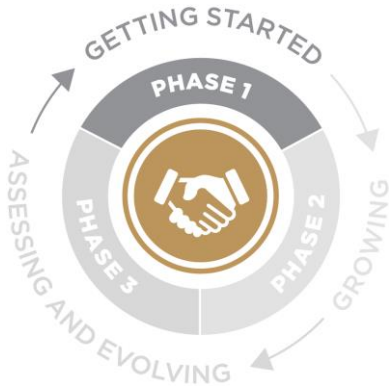
COMMUNITY ENGAGEMENT

Phase I: Getting Beyond Initial Stakeholders

Activity 5: Stakeholder and Engagement Matching Tool

Examples in *blue italics*.

Tools/Modes	Pros	Cons
Wiki	*Easy to update; detailed info*	*Can be passive; need to notify people to go there to see info*
Listservs (as a group or individual listservs)	*Delivered to addressee's inbox*	*Can be overwhelming or underused*
Slack		
Twitter		

Step 2: Map Stakeholder Group/Goal/Communication Preferences

- For each stakeholder group, bring in your goals (along a matrix of Influence and Interest/Availability from CE Activity: Who Is Your Community) and map communication preferences and tools.

Stakeholder Preferences

Examples in *blue italics*.

Stakeholder Group	Goal: Keep Satisfied Monitor Keep informed Actively engaged	Communication Preferences	Tools
Example: End Users	*Monitor*		*Listserv*
Example: Code Contributors	*Activity Engaged*	*Keep it succinct*	*Slack*

Output

Consider these preferences in the Communication and Engagement Planning activities.
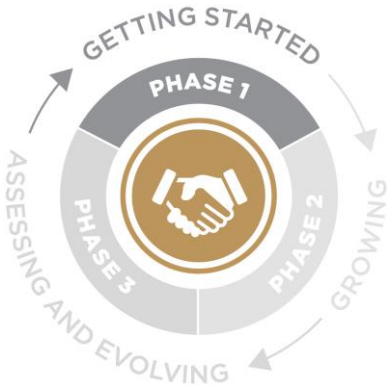
GETTING STARTED

PHASE 1

ASSESSING AND EVOLVING

PHASE 3

PHASE 2

GROWING

COMMUNITY ENGAGEMENT

Phase I: Getting Beyond Initial Stakeholders

It Takes a Village
Open Source Software Sustainability

Activity 6: Create Communication and Engagement Plan

Goals

1. Understand the components of a Communication and Engagement Plan

2. Fill out the template to create a plan

3. Share the plan

Prerequisites

Activity: Who is Your Community?

Activity: Creating User Personas

Related Activities

Activity: Create Outreach Committee Charter

Activity: Matching Stakeholder and Engagement Tools

Who Should Participate?

Program management (tactical thinkers)

Length

60 minutes

Activity Instructions

1. Work together to fill out the Communication and Engagement Plan template. There are two related documents:

   a. A blank Communication and Engagement Plan template to fill in

   b. A sample Communication and Engagement Plan with example content

2. Once completed, consider who it might be beneficial to share it with. Examples could include governance members or other community members.

This plan does not need to reflect everything you want to do in the future. It can focus on documenting current strategies and include new elements you want to introduce within a given time period (e.g., one year). Each year, you can survey the community to identify needs/gaps to address for the next year.

Next steps

- Share with appropriate stakeholders – note that the execution of the plan is an engagement opportunity.

- Consider how to calendarize, i.e., look at what needs to be done each month/quarter.

- There is a related evaluation activity (Activity: Evaluate Your Communication and Engagement Plan) to formalize your evaluation but you are welcome to review and update at any time.
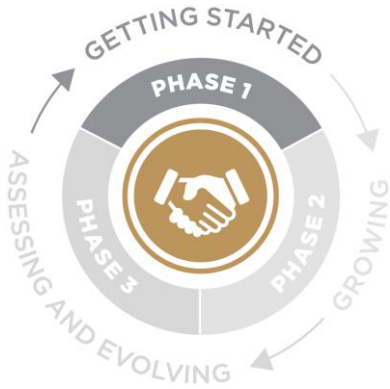
COMMUNITY ENGAGEMENT

Phase I: Getting Beyond Initial Stakeholders

Template for Activity 6: Create Communication and Engagement Plan

Purpose

Create a short (one-two sentences) description of the core goals/purposes of this plan.

Target Audiences

The plan's target audiences for the next year are:

Stakeholder Group (CE Activity 5)	Needs (CE Activity 2)	Goals (CE Activity 5)	Communication Preference (CE Activity 5)

Target Goals

You can base these on the goals outlined for each target audience in the previous section, goals of the Outreach Committee developed in Step 1 of CE Activity 3: Planning an Outreach Committee, or the Outreach Committee Mission/Vision developed in Step 6 of CE Activity 3.

Write goals in SMART format (Specific, measurable, actionable, realistic, timebound), so they can be used as a measure for success.

Stakeholder Group	Goals (specific, measurable, actionable, realistic, timebound)
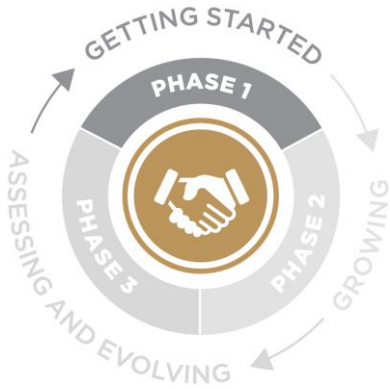
COMMUNITY ENGAGEMENT
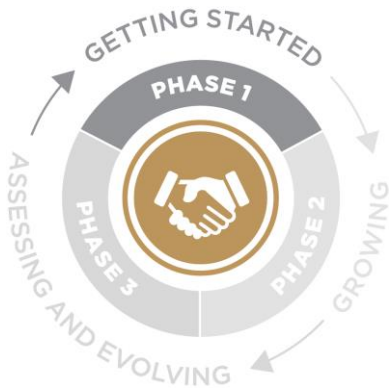
Phase I: Getting Beyond Initial Stakeholders

Template for Activity 6: Create Communication and Engagement Plan

Targeted Outreach Efforts

To reach target goals, determine specific kinds of engagement the program would like to do for the target audience (added these in the sentence to tie back to content in the previous sections) and map out responsibility, timing, and tools. To begin engaging with the community, consider giving responsibilities to those outside of the Outreach Committee and core staff.

Activity	Responsibility	Timing	Tools

COMMUNITY ENGAGEMENT

Phase I: Getting Beyond Initial Stakeholders

Sample for Activity 6: Create Communication and Engagement Plan

Purpose

This Communication and Engagement Plan is intended to outline opportunities for new engagement with three existing stakeholder groups.
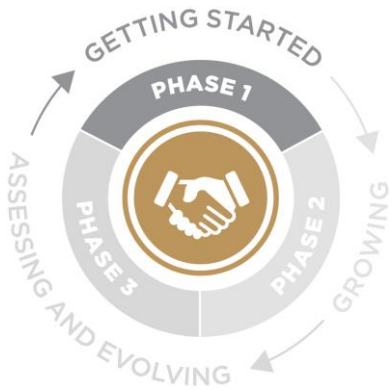
Target Audiences

The plan's target audiences for the next year are:

Stakeholder Group (CE Activity 5)	Needs (CE Activity 2)	Goals (CE Activity 5)	Communication Preference (CE Activity 5)
Rural libraries	Understanding benefits of membership	Activity engaged - Feeling engaged with program	Individual email; in person meetings
Learning library subscribers	Regular updates about new content	Keep informed	Group updates via listserv
Local history organizations	Creating ways for participants to engage and support each other	Keep satisfied	Group meetings; consider scheduling in conjunction with existing group events

Target Goals

The plan's target goals for the next year are:

Stakeholder Group	Goal (specific, measurable, actionable, realistic, timebound)
Rural libraries	Successfully onboard two new members this fiscal year.
Learning library subscribers	Create three communications templates for events within three months.
Local history organizations	Schedule in-person group meeting to occur within the fiscal year.

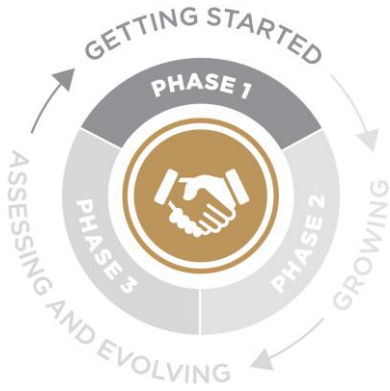## *Sample* for Activity 6: Create Communication and Engagement Plan

Targeted Outreach Efforts

Specific engagement plans for the next year are:

Successfully onboard two new members	Responsibility	Timing	Tools
Arrange orientation with new member organization	Volunteer Lead	Schedule for 2 weeks after member joins	Zoom
Announce the new member to the wider community	Committee Member	At time of membership enrollment	Tweet (link to previous tweet announcement), listserv

Create three communications templates for events	Responsibility	Timing	Tools
Create new event announcement template	Committee Member	1st quarter	Maintain on wiki
Create reminder/update event templates per delivery mechanism (i.e., 2 weeks before, 1 week left to register)	Volunteer	1st quarter	Tweet, listserv
Create template intro/closing slides for events (welcome, agenda, program info, Q&A)	Volunteer	1st quarter	Maintain on wiki

Create "birds of a feather" event for local history organizations	Responsibility	Timing	Tools
Determine specific timing for event	Committee Member	2nd quarter	Note on community calendar
Create agenda for the meeting, emphasizing time for participants to share and talk together (vs featured speaker)	Committee Member	3rd quarter	Listserv; wiki
Publicize event	Volunteer	Publicize 4 weeks before event (and reminders)	Tweet, listserv

Sample for Activity 6: Create Communication and Engagement Plan

COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

Activity 8: Determine New Forms of Community Engagement

Goals

1. Determine what kind of engagement is right for your community

2. Map stakeholder groups with nascent activities you want to support

Prerequisites

Activity: Who is Your Community?

Related Activity

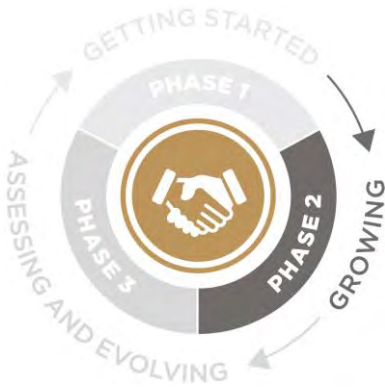Activity: Create Communication and Engagement Plan

Who Should Participate?

Outreach Committee members; program management (tactical thinkers) and/or community members

Length

60-90 minutes

Activity Instructions

1. Review stakeholder groups prioritized in Activity: Who is Your Community?

2. Review Activity: Create Communication and Engagement Plan (or equivalent) for goals, priority stakeholders and engagement level so far

3. Determine the desired next level of engagement

4. Consider what new types of engagement activities you might like to pilot with your community. Examples could include:

    i. Onboarding

    ii. Hackathons

    iii. Training

        1. in person

        2. online

        3. specialized topics

    iv. Documentation

        1. translating documentation in different languages

    v. Mentoring/shadowing

    vi. Regional groups

        1. create regional/national coordinators, give frameworks, tools, presentation templates, agenda templates

        2. program ambassadors

    vii. Credentialing system (way to validate or approve skills, track time)

    viii. Knowledge sharing/Question answering

        1. office hours

        2. lessons learned

5. Map stakeholder groups with nascent activities you want to support (template below). You can take the time to go through this with all stakeholder groups, but you may want to focus on prioritized stakeholder groups.

6. Use sticker vote to choose 2-3 activities to pilot over the coming year.

## Activity 8: Determine New Forms of Community Engagement

- o In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

7. Document decisions so everyone is clear on why you chose as you did.

Template (examples in *blue italics*)

Stakeholder group	Pilot engagement activity
Code contributors	*Hackathon*
End users in Spanish speaking countries	*Translating user documentation into Spanish*

Output

Prioritized activities to pilot.
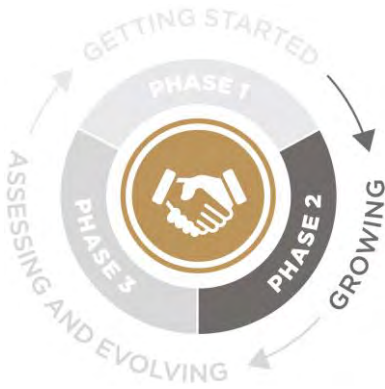
It Takes a Village
Open Source Software Sustainability

Activity 9: Identify Infrastructure for Community Engagement

Goals

1. Identify the processes and infrastructure you need for engagement

Related Activities

Activity: Determine New Forms of Community Engagement

Who Should Participate?

Outreach Committee members; others interested in engagement. Consider if you should ask reps from specific stakeholder groups (e.g., a developer if developers are a targeted stakeholder group)

Length

30-60 minutes

Pre-Work

Define Infrastructure: Define engagement infrastructure for your program and community. Infrastructure could include:

- Systems such as Slack, a wiki, a blog, or ticketing

- Human resources such as committees

- Processes such as codified workflows

Map Current Infrastructure: For this activity, you will want to make sure everyone is clear on what you currently have now so you can consider how to review, grow, support and sustain it.

Activity Instructions

Now that you know what kind of activities you want to support (Activity: Determine New Forms of Community Engagement), determine the infrastructure you need to create and support. Consider if you need to create new ones or if you can enhance existing ones.

This can be done in one small group, or you can assign each small group a different stakeholder to consider and come back together with the larger group for Step 3.

Activity 9: Identify Infrastructure for Community Engagement

1. Identify specific infrastructure for the kinds of engagement you want to support. Examples are listed below in *blue italics.*

Engagement + Activities	Infrastructure Need
New member onboarding: Review user documentation	*- Standardized style for all documentation* *- Centralized location for all documentation*
New code contributor onboarding: revise technical documentation	*- Mechanism to submit proposed changes* *- Notifications for changes*
Social media engagement	*Code of Conduct*

2. Prioritize specific processes and infrastructure for the kinds of engagement you want to support using "Sticker Vote"

   o Consider prioritized stakeholders (Activity: Who is Your Community) and strategic program goals

   ▪ In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

3. Map prioritized infrastructure components needed and who will be responsible.

   a. Create a plan to map engagement to those responsible for piloting. Examples are listed below in *blue italics*.

| Kind of infrastructure	Stakeholders involved	Components needed	Who will pilot? When?
Improved documentation processes	*Current users; consider if someone new to community would be good beta tester/reviewer*	*- Standardized style for all documentation* *- Centralized location for all documentation.* *- Mechanism to submit proposed changes* *- Notifications for changes*	*Person name, Q1 Year*
Code of Conduct	*Consider reaching out to those new in community who could use a small*	*- Create small team* *- Review sample codes* *- Create draft*	*Person name, Q3 Year*

Activity 9: Identify Infrastructure for Community Engagement

	engagement opportunity to get more involved	*- Share for feedback* *- Pilot and seek feedback* *- Revise as necessary* *- Set up review schedule*	

Next Steps

Set up an annual review cycle.

- o Review/measure progress towards those initial goals. Determine gaps in work done.

- o Review the original priorities and consider whether new groups or activities need to be incorporated and determine new tools.

  - Do you need to support different languages, customs, time zones, or skill sets?

  - Do you need to participate with different conferences in adjacent communities?

  - Consider the time and resource commitment for sustaining any new tools created: Is this a tool that would replace something else? Do you or others have time to add the maintenance of this?

- o Prioritize if needed. Establish updated timelines.
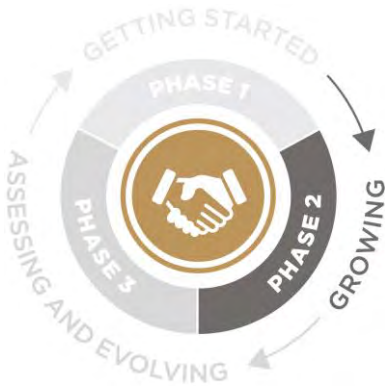
Activity 10: Assess Non-Technical Documentation

Goals

1. Assess non-technical documentation for clarity and usefulness

Related Activities

Tech Activity: Documentation Friction Logging

Tech Activity: Shadow Observations

Tech Activity: Building Welcoming Communities

Who Should Participate?

Documentation users who were not involved in documentation creation

New contributors

Length

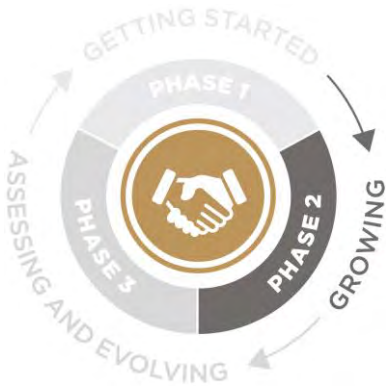Depends on activities chosen.

Background

An important component for engagement is clear communication practices and policies that community members can find and understand. Documentation usability addresses the critical role of an open-source program's documentation by making sure that various users can understand it. Documentation usability contains issues of structure, content, jargon, and readability with the goal to foster understanding for the widest audience of contributors to the program.

Activity Instructions

1. Assemble a small group to plan assessment of non-technical documentation. Several items are listed below as example assessment activities.

2. Decide which (if any) of the example activities should be executed.

3. Depending on the size of your program team, you might want to create a RACI matrix to assign responsibility.

   a. A RACI matrix is a responsibility chart that maps out each task and milestone or key decision involved in completing a project, and assigns which roles are Responsible for each action item, which are Accountable, and which needs to be Consulted or Informed.

4. Create a timeline for carrying out each activity.

5. Schedule a time to review results and prioritize next steps.

Many of these ideas are based on info from: https://chaoss.community/metric-documentation-usability/

Activity 10: Assess Non-Technical Documentation

Example Assessment Activities

1. Interview new contributors (2-5) to determine how documentation helped them understand the contribution process, and/or complete a specific task such as contributing a blog post, participating in QA testing, or submitting user documentation.

   a. Sample interview questions include:

      i. Describe your experience with using the documentation to understand the contribution process.

      ii. Describe your experience with using the documentation when you have a question about doing work in the community.

      iii. Describe your experience with using the documentation to understand how to help outreach efforts.

      iv. How comfortable were you with the number of technical terms present here? (scale 1-5)

      v. Were there any terms or language you didn't understand?

      vi. What suggestions do you have for improving the program's policies, processes, or guidelines available to new contributors?

      vii. Does the documentation use organizing constructs (for readability and scan-ability) such as:

         - Headings
         - Text and Code Blocks
         - Bullets versus Paragraphs
         - Anchors

   b. After interviewing, the community can track responses to each prompt as Positive experience, Negative experience, or Neutral experience and report these month-over-month to see improvement over time.

2. Walkthrough intended users of the documentation and observe how they interact and use the documentation and where they get stuck. Tech Activity: Shadow Observations may be helpful here.

3. Ask documentation users to write a friction log and describe issues with documentation. Tech Activity: Friction Logging has instructions.

4. Complete the WCAG 2.0 Checklist for accessibility.

5. Consider if different versions of documentation are available for different audiences. Review results and prioritize changes to improve documentation.

COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

Activity 11: Consider Branding and Consistency Issues

Goals

1. Ensure your community is finding accurate and consistent information across all platforms over which the program has direct control

Prerequisites

None

Who Should Participate?

Program staff (operational expertise), Community representatives

Length

60-90 minutes

Definition

A brand "is the sum total of how someone perceives a particular organization. Branding is about shaping that perception." Ashley Friedlein – Econsultancy

Instructions

Your program has a name and mission with an associated overall brand, logo and/or tagline. You need it to be properly used and maintained in multiple places.

1. Consider yourself as someone with a professional brand/logo. You have a presence in multiple places. Take 5 minutes and write down all the places you need to revisit and update if you were to change professional positions (i.e., your professional brand). Examples could include LinkedIn, GitHub, ORCID, Facebook, etc. At the end of 5 minutes, you should have a greater sense of the range of places and platforms a "brand" can live. Next shift your focus to the program's brand.

2. Create a list of platforms on which the program has control of the content (e.g., website, wiki, GitHub Readme's, etc.)

3. Review consistency of branding on those listed platforms. Do they have the most recent logo? Is there outdated or inconsistent info?

   - If consistency is lacking, consider creating a page on the program website/wiki with the official logo, tagline and how it should be used.

4. Develop a regular schedule and who is responsible to review and confirm that all internal documentation and external-facing communication channels such as landing pages, FAQs, etc. are internally consistent and reflect the most recent messaging.

   - This is an opportunity to refer to/review/update/tweak the Communication and Engagement Plan (Activity: Create Communication and Engagement Plan).

COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

Activity 12: Increase Transparency Checklist and Work Plan

Goals

1. Understand current level of transparency

2. Determine goals for transparency

3. Prioritize areas of work for the coming year

Prerequisites

None

Who Should Participate?

Program staff (operational expertise)

Length

60 minutes

Definition

Transparency is "operating in such a way that it is easy for others to see what actions are performed. Transparency implies openness, communication, and accountability."

- https://en.wikipedia.org/wiki/Transparency_(behavior)

This activity consists of pre-work, a group activity, and a work plan. See pages 2-3 for the pre-work survey, group activity instructions, and sample work plan.

Activity 12: Increase Program Transparency

Pre-Work

Take straw polls to gain a sense of where participants think the program is in terms of transparency. This can be done with a survey tool or informally at events. Make sure to target different stakeholder groups. Share results with activity participants in advance. Example questions are included below; in all cases, a **zero indicates that only targeted individuals can access information, and a ten that information is open to anyone.**

Overall, do you see a general consensus, or is there a range of opinions?

How would you rank current <u>program</u> transparency?

0 1 2 3 4 5 6 7 8 9 10

How would you rank current <u>governance process</u> transparency?

0 1 2 3 4 5 6 7 8 9 10

How would you rank current <u>technical documentation</u> transparency?

0 1 2 3 4 5 6 7 8 9 10

How would you rank current <u>financial information</u> transparency?

0 1 2 3 4 5 6 7 8 9 10

## Activity 12: Increase Program Transparency

Activity Instructions

1. As a small group, review the prework results.

2. Brainstorm a list of ways to increase transparency for your program, with a focus on those elements in the pre-work that were deemed less transparent.

   a. Set objectives for the number of ideas to be listed and the time to be spent, e.g. "Let's spend 10 minutes coming up with a list of 30 new ideas."

3. As a group prioritize areas of work for the coming year using a sticker vote.

   a. In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

4. Document prioritization decisions for future reference.

   a. For example, some financial information may not be made public, and that could be noted so that newer participants will understand it was a deliberate decision vs. not a high priority to work towards.

5. Create a work plan for the prioritized areas (sample below).

Work Plan Template (examples in *blue italics*)

Task	Area of Improvement	Responsible	Timeline
Create an annual report	*Governance and financial transparency*	*Program manager*	*Complete in the quarter after close of fiscal year*
Regularly distribute/share technical roadmap	*Technical documentation transparency*	*Technical lead*	*Quarterly*
Publish bylaws	*Governance transparency*	*Chair, Program manager*	*Annually in line with governance elections*

Next Steps

- Consider redoing the survey annually to see progress.

- Determine if there is value in a way to tabulate feedback to see how different stakeholder groups are responding.
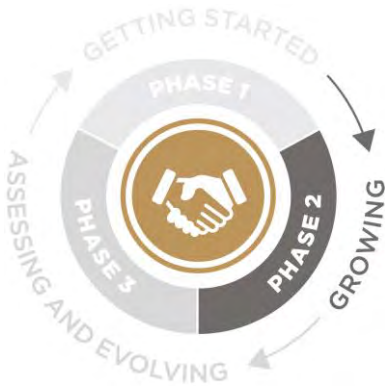
COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

Activity 13: Value Propositions for Position Descriptions

Goals

1. Create a value proposition for a new program position to help articulate significance of allocating resources to program leadership

2. Optional: Create a job description for a new program position

Prerequisites

Position description (optional). If you don't have a description yet, having samples of other similar roles can be a helpful starting point

Who Should Participate?

Program management (tactical experience), Program staff (operational experience)
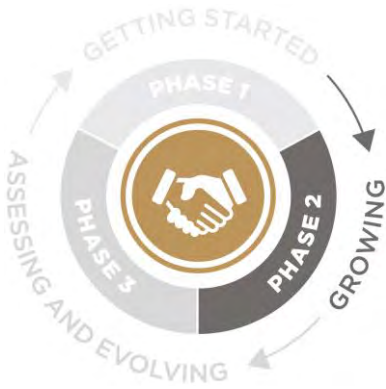
Length

60-90 minutes

Pre-Work

Determine which potential new position you'd like to develop a value proposition for – e.g., a community manager, a technical lead, an outreach specialist, etc.

Activity Instructions

1. Brainstorm a list of potential responsibilities for the position.

    a. If you already have a position description, you can take the responsibilities list from that. If you do not already have a position description, this is the place to go broad - not all these elements will make it into a final position description or value proposition.

    b. It can be helpful to set objectives for the number of ideas to be listed and the time to be spent, e.g. "Let's spend 5 minutes coming up with a list of 20 responsibilities / tasks / duties we think this job would cover."

2. Take a quick sticker vote to select the responsibilities that are the most critical / highest priority.

    a. In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

3. For each of your top vote-getters, discuss and capture how the responsibility / task / duty would solve problems faced by your application, program, and/or community or add new benefits. For example, could the person in this role:

    a. Save time and/or resources? Help the project increase resources?

    b. Improve community buy-in and engagement?

    c. Improve the application's quality or functionality?

    d. Eliminate risks the application, program, or community might face?

    e. Help end users use the application more effectively?

    f. Eliminate barriers to adoption?

    g. Create positive social consequences?

Activity 13: Value Propositions for Position Descriptions

4. Rank each of the elements articulated in Item 3 as "essential" or "nice to have."

5. Finally, collate the "essential" value proposition elements into a value proposition document.

6. If you don't already have a position description, you can use the top priority elements from Item 2 as the basis for creating one.

7. Share both documents with program leadership.

Activity 14: Empower Community Activities

Goals

1. Increase active community-based representatives
2. Encourage spontaneous, informal, non-directed community activities

Prerequisites

None

Who Should Participate?

Program management (tactical thinkers); Program staff (operational expertise)

Length

45-60 minutes

Activity Instructions

1. As a group, reflect on non-directed activities that worked before. Are there elements that could be repeated? What was successful about those efforts?

2. Brainstorm ideas around non-directed activities that could be supported. Examples could be:

   o Create toolkits to facilitate more effective communication with clear and consistent messaging.

   o Create toolkits to allow community to do conference presentations, start their own regional meet-ups or organize working groups.

   o Create an ambassador program.

3. Prioritize three non-directed activity ideas (via sticker vote)

   o In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

4. Talk through the following for the top three ideas

   o Who does this idea benefit?

      ▪ Does it correspond with larger goals or priorities?

   o Does the community have the capacity to respond?

      ▪ Do there need to be earlier steps (e.g., if you need trainers, do you need to develop a "train the trainer" program)

      ▪ Who will pick up responsibilities (i.e., who will train the trainer, manage documentation, etc.)

      ▪ Are there elements that won't work as non-directed (i.e., would need too many permissions or guard rails, such as you probably don't want anyone to add any code without review, but you might empower certain community members to review code, i.e., core committers)

Activity 14: Empower Community Activities

- Are there incentives that would help motivate or provide recognition (consider Gov Activity: Recognition and Contributions)

- What infrastructure does the non-directed activity require? Are there existing resources that can be leveraged such as: https://thatcamp.org/help/organize/index.html

COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

Activity 15: We Can, IF…

Goals

1. Help identify barriers and spark creative solutions

Prerequisites

None

Who Should Participate?

Program management (tactical thinkers); Program staff (operational expertise)

Length

30-45 minutes

Activity Instructions

Have someone outside of current community engagement efforts facilitate the following activity.

1. Brainstorm your greatest community engagement challenges. Spend 10 minutes coming up with a list of 5 challenges. Examples could be:

   o We can't get technical volunteers

   o We can't do in person events for a global audience

   o It is hard to recruit smaller institutions for governance roles

2. Brainstorm about what would make each challenge possible. Spend 10 minutes coming up with 10 solutions (however improbable). For example:

   o If we had $ 10 million...we could pay technical contributors

   o If we had a time machine...we could make events occur at the same time for a global audience

   o If we could compensate board members for their time...we could have wider representation

These solutions may be unlikely but identifying the "hinge" that is the main challenge can help spark creativity around ways to address the issue or find ways to improve these situations. Perhaps you do not have $10 million, but could you do a fundraising campaign and raise $10,000?

3. Discuss how you could make those hinges more possible. Are there interim steps or smaller scale pilot projects that would provide longer pathways?

Activity 16: Identify Skills Gaps - Speedboat

Goals

1. Identify gaps in skills represented in community
2. Better understand barriers for participation

Prerequisites

None

Who Should Participate?

Program staff (operational expertise)

Length

60-90 minutes

Activity Instructions

1. Identify the experiences and skills the program doesn't currently have to meet its current strategic goals or technical roadmap elements. Examples could include:

   a. specific programming languages or frameworks

   b. teaching experience

   c. content curation for social media

   d. experience writing documentation

   e. succession planning

   f. leading committees or teams

2. Take a sticker vote to prioritize a skill to focus attention on over the next year.

   o In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

3. Use a whiteboard and a speed boat analogy for the prioritized skill. Imagine the skill as a speedboat. What are the "anchors" (blockers, barriers) and what are the "engines" (accelerators)?

   o For example, if the skill is Java expertise

     ▪ Anchors could be: decreased interest in Java among CS students

     ▪ Engines could be: readily available training

4. Discuss how to reduce the anchors and build on engines. Are there ways to motivate and incentivize those with these skills to participate?

5. Brainstorm where/how to find people with the specific skills (either within the community or outside). This is an opportunity to step outside the "usual" channels for finding people.

6. Prioritize specific actions to take and assign responsibilities. You can use a RACI Matrix to do this. Example given below.

Activity 16: Identify Skills Gaps - Speedboat

RACI Matrix Example

Key:
R: Responsible
A: Accountable
C: Consulted
I: Informed

Task List	Role or Person 1	Role or Person 2	Role or Person 3	Role or Person 4
Task 1	A	R	C	
Task 2	A		R	I
Task 3	AR			I
Task 4	A	R	I	C

Activity 17: Increase Cultural Sensitivity

Goals

1. Consider the context and cultural norms in different parts of the world

2. Consider how to adjust CE techniques to better fit global needs

Prerequisites

None

Who Should Participate?

Program leadership (strategic thinkers), Program management (tactical thinkers), Program staff (operational expertise)

Length

30-45 minutes

Definition

Cultural Sensitivity: awareness and appreciation of the values, norms, and beliefs characteristic of a cultural, ethnic, racial, or other group that is not one's own, accompanied by a willingness to adapt one's behavior accordingly. American Psychological Association

Activity Instructions

Part 1 – Time Travel

1. Select one from each category:

   A. Place

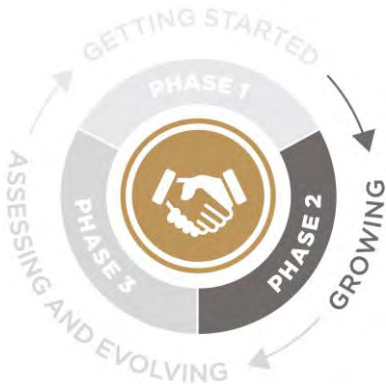   - New York City
   - Tokyo
   - Moscow
   - Nairobi
   - Bozeman, Montana
   - Rio de Janeiro

   B. Year

   - 1754
   - 1914
   - 2050

   C. Goal

   - Get across town
   - Get a meal
   - Make a friend
   - Steal the microfilm and get back to spaceship by midnight

Activity 17: Increase Cultural Sensitivity

2. One day, you fall asleep and wake up in a new environment. You are now in Place A in the year B with a goal of C. How do you proceed? What are your first three steps? How do you orient yourself? What information do you need?

3. Consider how to establish trust with the locals and accomplish your goals. Consider language, customs, and time zones.

Part 2: Community Engagement Considerations

This activity can help underscore how we sometimes take our local ideas and techniques and blindly apply them to different cultures. Before traveling to a new environment, we typically try to understand the context – we look at climate, customs (are there expectations around dress or how formal the culture is), local transportation and currency.

If you want to work with people in other parts of the world, try to understand the potential new community members and how they might like to engage.

1. Work with others in your group to create a list of elements to research and consider as you approach potential community members in other parts of the world. Some examples are given below.

2. Think through some of these issues and adjust community engagement techniques and activities.

3. Consider Activity: Engage with New Communities – Nodes. Are there connections with some in the potential audience to help think through some of these issues?
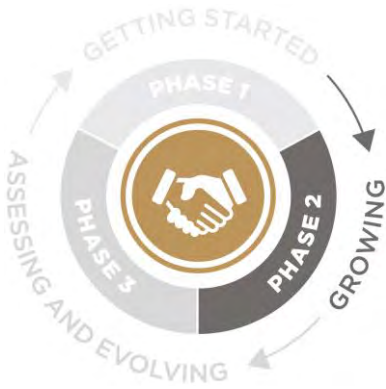
Elements to Consider

Language

- Are you able to speak their primary language?

- Is English a common second language?

- Do you need to think about translators or provide transcripts?

Customs

- Are people formal or informal when meeting new people?

- Is there a hierarchy for introductions?

- Is there an expectation for friendly introductory chat before a presentation?

Activity 17: Increase Cultural Sensitivity

- Will online meetings work, or do you need to meet people in person first?

Time zones

- Are you expecting them to attend meetings in US-based time zones?

- What are the best times of day for remote meetings that span several time zones?

- Consider meetings specifically for that time zone

Internet access

- Is there sufficient internet access and bandwidth to support video conferencing?

- Are there times of day that are best for connectivity?

Next Steps: Based on the results, consider if you need to update your Communication and Engagement Plan

Activity 18: Identify Gaps in Stakeholders

Goals

1. Clarify why diverse participation is important

2. Identify gaps in community stakeholders

3. Improve understanding of barriers for participation
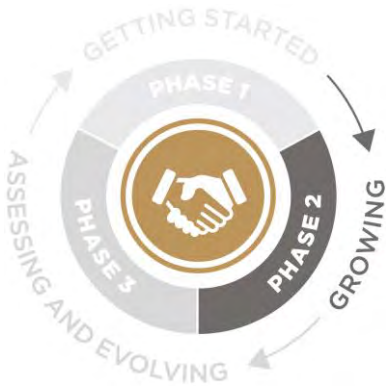
Prerequisites

None

Who Should Participate?

Program management (tactical thinkers): Program staff (operational expertise)

Length

60-75 minutes

Activity Instructions

1. As a group, take 15-20 minutes to discuss why more diverse participation is important to the program and community. Designate a facilitator to help guide the conversation.

   o Why do we want to engage more stakeholders in our program? Will it:

      ▪ Help further our program's mission/vision?

      ▪ Help our stakeholders achieve their goals?

      ▪ Improve our sustainability along one or more facets?

   o What are our goals? Examples could include:

      ▪ Deeper engagement with stakeholder institutions (more than 1 person?)

      ▪ Having a broader range of perspectives in governance

2. Identify gaps within current stakeholder groups. Use the template on page 2.

   o Are there hidden stakeholders? Are there perspectives that aren't being included? Examples could include:

      ▪ Few representatives from smaller institutions on governance

      ▪ Lack of code contributions from larger institutions

      ▪ Less engagement/attendance at events from those newer to the field

      ▪ People at participating institutions who are unheard

3. Prioritize top 1-2 gaps using sticker voting.

   o In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

4. Determine the best format to gather information on existing barriers for prioritized gaps (survey, town hall, focus groups, one on one interviews, a combination). There may be challenges with time zones, cultural norms about participation in meetings, membership models, time commitments for committees, etc. This is an opportunity to reach out and ask questions to better understand the challenges and engage the community in working to try to address them.

Activity 18: Identify Gaps in Stakeholders

5.   Factor the results of this exercise into your Communication and Engagement Plan.

Stakeholder Gaps Template

The **example** below is for an open-source library management system.

Consider:

- Is contribution vs. users proportional?
- Missing representation at the governance level?
- Large number of users but no contributions?

Types of institutions/participants and engagement are included in *blue italics* below as examples, but you should update this to reflect your program's gaps (i.e., different perspectives, parts of the globe, organizational types, etc.).

Types of Libraries / Types of Engagement	Governance Participation	Technology Contribution	Donors/Paid Members	Users
Very large institutions				
Large institutions				
Medium institutions				
Small institutions				

Types of Participants / Types of Engagement	Governance Participation	Technology Contribution	Donors/Paid Members	Users
Entry level staff				
Managers				
Directors				

Activity 19: Engage with New Communities - Nodes

Goals

1. Identify key influencers in new communities

Prerequisites

None

Related Activities

Activity: Identify Stakeholder Gaps

Who Should Participate?

A diverse group of community representatives.

Length

60 minutes

Pre-Work

Reflect how highly effective stakeholders came into the community (e.g., via personal recommendations, hearing an effective speaker at a related conference, etc.)

Activity Instructions

This activity presumes you have decided you want to engage with new communities.

1. Consider if there are potential stakeholders in adjacent communities you want to engage.

   a. Consider roles that may be helpful for the program (consider Activity: Identify Stakeholder Gaps results). Examples include:

      i. Ambassador (someone participating in industry events, speaking engagements)

      ii. "Behind the scenes" networker who can make introductions, etc.

      iii. Highly regarded author

   b. Use "Crazy 8s" – one minute, each person writes 8 ideas – to brainstorm desired skills, such as:

      i. Ambassadors to those in early career

      ii. Those who work in multilingual environment

      iii. Strong writers

      iv. Those with video editing skills

   c. Identify potential gateway nodes for skills/roles using a mindmap or an online node-mapping tool such as graphcommons.com.

      i. Nodes can help identify the next key set of influencers to start to work with in terms of integrations, joint events, etc. For example, if museums were a target community, would the Getty be an influencer?

   d. Use sticker voting to prioritize 2-3 key gateway "nodes"

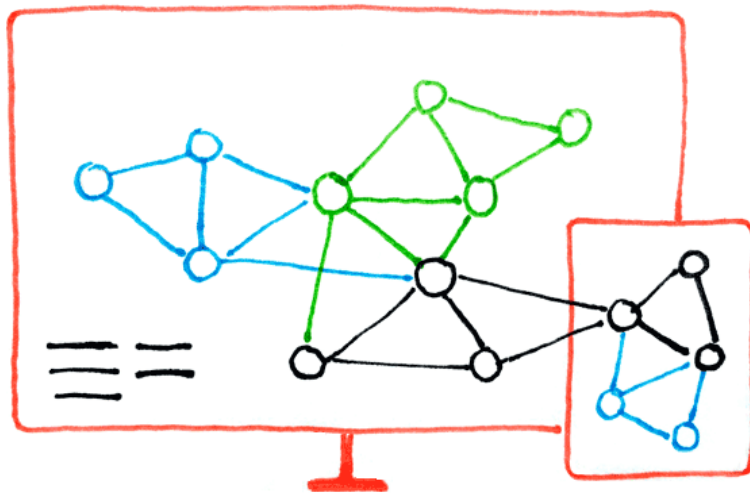**Phase II: Establishing Community Engagement Infrastructure**

## Activity 19: Engage with New Communities - Nodes

Potential Next Steps

Establish timelines and responsibilities for initial contacts, meetings and then set timelines for reconvening to share feedback and determine next steps for working through the nodes and those suggested.

- Thinking about roles can help you formulate your outreach to them and your "ask."

- Consider what they will "get" - reputation, shared grants, support?

Consider a graphic to help convey the node concept with your colleagues, example above from:
https://graphcommons.com/.
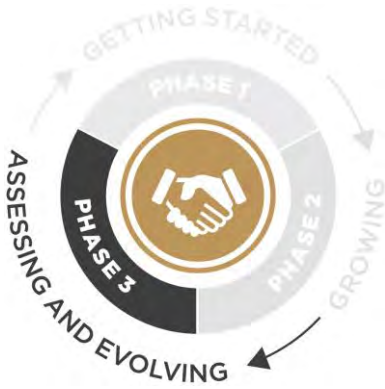
COMMUNITY ENGAGEMENT

Phase III: Assessing and Evolving Community Engagement

Activity 20: Reassess Engagement Activities

Background

How do you know when to sunset an initiative or evolve the initiative into a community directed initiative? You can't base engagement success on numbers alone. The emotional labor and interpersonal connections of community engagement can make it especially challenging to assess. It is important to step back and reassess, otherwise you can overtax your human and technical infrastructure.
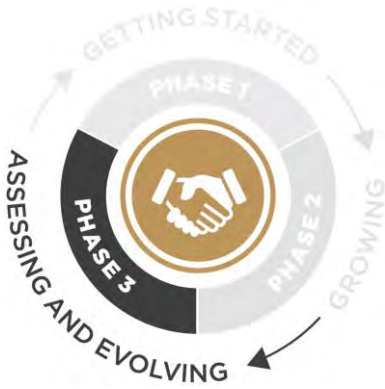
Activity Instructions

Part 1: As a small group…

1. Discuss/brainstorm a list of activities or events that may be suitable for sunsetting. Plotting activities on an effort/impact matrix (sample below) may help identify elements that are difficult to maintain but do not provide a huge value to users.

2. If there are several, select 1-2 activities for further assessment.

3. Determine a timeline for the remainder of this activity, who will be responsible, and who will be accountable.

4. If a specific engagement activity is already under consideration for retirement, you may move directly to Part 2 of the activity.

Part 2: Asynchronously review data on each of the selected activities

1. Gather user data

   a. How many users will be affected by discontinuing the activity/event/what percentage of overall users participate?

   b. What are the numbers over time? Are the trends going up, did it start out strong, or peak several years ago?

   c. Did participants try it once or did they participate consistently?

   d. What percentage of users *do not* participate?

      i. Do you have qualitative or quantitative data on why they didn't participate? This may help you consider if the event/activity needs to evolve vs being stopped.

Goals

1. ID engagement activities that need to evolve or be retired

2. Develop a plan for communicating evolution or retirement

3. Communicate decisions

Prerequisites

None

Who Should Participate?

Those focused on community engagement work. Best kicked off with a small group together (in person or virtually), and then moved to asynchronous work.

Length

30-60 minutes for Part 1

Activity 20: Reassess Engagement Activities

2. Gather data on alternative engagement opportunities

    a. What engagement goals was the activity or event supporting? What alternatives are there to support the engagement goal?

3. Gather data on organizational effort

    a. What human, financial, or technical resources does the activity or event require?

    b. Could the activity or event be managed by a community member or group?

    c. Is the activity or event adding to or distracting from our program mission?

4. Discuss and make a recommendation to retire/not retire/evolve activities or events based on the data and information gathered. If no clear consensus, conduct a sticker vote.

    ▪ In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

If, after the above elements are complete, the decision is made to retire an activity or event, move on to:

5. Gain approvals from the appropriate governance/leadership representatives.

6. If necessary, develop a retirement communication plan

    a. See Tech Activity: Developing an End-of-Life Communications Plan

7. Communicate changes to stakeholders

    a. Internal

        i. Ensure all program team members are aware of the change and the key details - why, when, alternatives

        ii. Update documentation (website, calendars, etc.) to ensure that the activity or event is no longer being advertised or promoted.

    b. External

        iii. If necessary, reach out to affected users with a simple, concise message - enough detail so that nothing is unclear, dates and times the activity or event will be discontinued, and recommendations for alternatives.

        iv. Reach out via different channels: emails, in-application messaging if available, phone calls, social media.

        v. Monitor feedback in the days/weeks following the announcement.
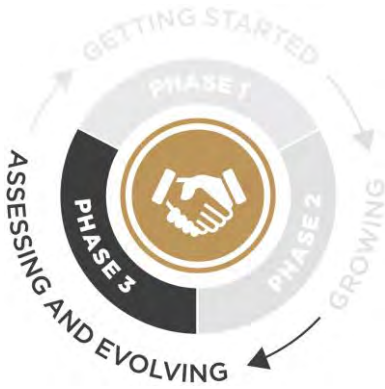
COMMUNITY ENGAGEMENT

Phase III: Assessing and Evolving Community Engagement

Activity 21: Context Mapping for Future Community Engagement

Goals

1. Consider larger landscape for community engagement
2. Anticipate future community engagement needs

Prerequisites

None

## Who Should Participate?

Program leadership (strategic thinkers), Program management (tactical thinkers), Program staff (operational expertise)

Length

90 minutes

Activity Instructions

1. Start with a virtual or physical whiteboard with four quadrants labeled *Social*, *Technological*, *Economics*, and *What Else?* If your group has more than 6-8 participants, you may break into smaller groups through Step 3.

   a. Social factors: these are values and cultural ideals and how they affect the value and necessity of a product or service.

   b. Technological factors: these include changes in technology, technology advancements, technology lifecycles, and how those factors can positively or negatively impact a product or service in the marketplace.

   c. Economics: elements such as budgets, priorities, opportunities, and how they can positively or negatively impact a program's resource sustainability.

   d. What Else: trends that don't fit the above categories.

2. For each element in the map, brainstorm a list of key trends or events within the elements and note what evidence supports these trends.

   a. Social examples: focus on open access

   b. Technology examples: increased efforts in system integrations

   c. Economic examples: reduced travel budgets

3. If you broke into smaller groups, come back together and report back to the group on those trends that were the most interesting, the most meaningful, those that sparked the most discussion, etc.

4. As a group, discuss the following questions. The table below can be filled in to help organize the map. Sample trends and action items are provided in the table.

   a. What are the core trends in each quadrant?

   b. Will the trend have a positive or negative effect on our program?

   c. What are action steps we could take to mitigate or take advantage of the trend?

   d. What is the priority of each action step?
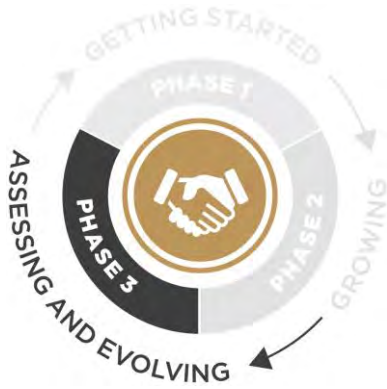
Activity 21: Context Mapping for Future Community Engagement

Sample Context Map Action Plan (examples in *blue italics*)

Quadrant	Trend	Positive | Negative | N/A	Action Steps	Priority (1-10) 1 is highest
Social	*Funder focus on open access*	*Positive*	*Highlight this aspect of our work in funding requests*	*5*
Economic	*Reduced travel budgets*	*Negative*	*Increase online or asynchronous activities*	*3*
...				

Next Steps

Consider how you want to use this information in future efforts and in <u>Activity: Review and Expand Infrastructure</u>.
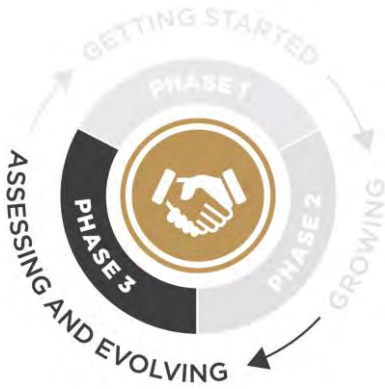
COMMUNITY ENGAGEMENT

Phase III: Assessing & Evolving Community Engagement

Activity 22: Review and Expand Infrastructure

Goals

1. Revisit infrastructure to evaluate and expand how it can support non-directed community activities

Prerequisites

Activity: Identify Infrastructure for Community Engagement Activities

Related Activities

Activity: Determine New Forms of Community Engagement

Activity: Value Propositions for Position Descriptions

Who Should Participate?

Program management (tactical thinkers)

Length

60-90 minutes

Activity Instructions

1. Review original plan from Activity: Identify Infrastructure for Community Engagement

2. Compare current state to plan (you can use survey feedback or review metrics). Identify gaps to increase non-directed activities.

3. Identify pieces and roles community members could play (governance, active community members and less engaged community members)

   ▪ Providing small ways to engage is an easy way to get wider engagement and lead to greater roles in the future.

4. Target and prioritize infrastructure that supports non-directed community activities. If program staff can create a framework, the impact can go much further. For example,

   ▪ Encourage stakeholders to propose conference presentations by sharing calls for proposals on community lists and sharing slides that include basic platform details (that they can then expand on).

   ▪ Provide template agendas and planning documents for local user group meetups.

5. Consider other infrastructure needed such as staffing or systems (see Activity: Value Propositions for Position Descriptions)

6. Consider a review of current system infrastructure (wiki, Facebook, website, Jira etc.)

   ▪ Is there too much for current staff/community to support?

   ▪ Are there too many ways to engage so that it is confusing for newcomers?

7. Prioritize the top 2-3 next steps (use sticker voting)

   a. In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).