GETTING STARTED

PHASE 1

PHASE 3

PHASE 2

ASSESSING AND EVOLVING

GROWING

COMMUNITY ENGAGEMENT

Phase I: Getting Beyond Initial Stakeholders

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)
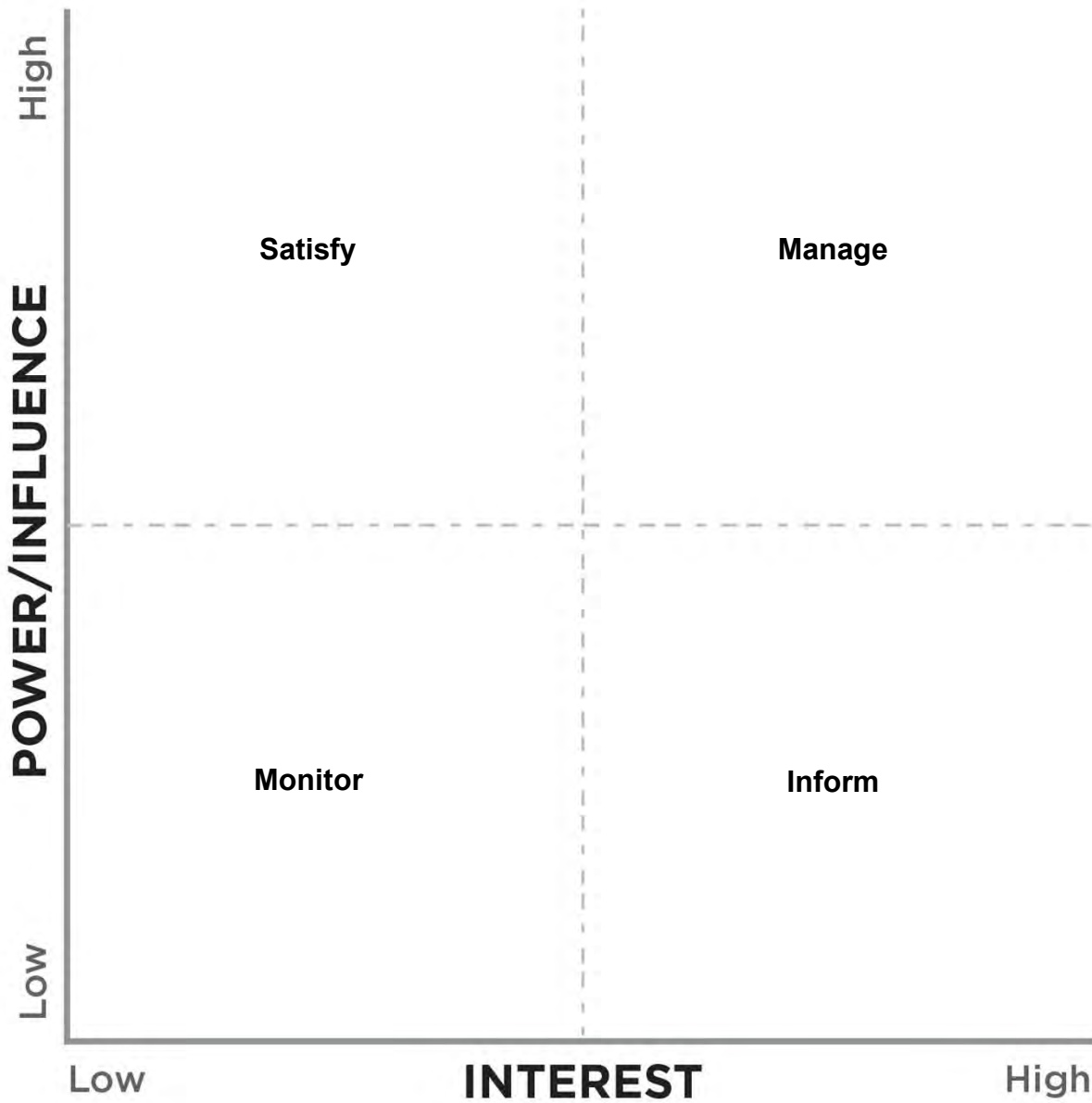
COMMUNITY ENGAGEMENT

Phase I: Getting Beyond Initial Stakeholders

Activity 1: Who is Your Community?

POWER/INFLUENCE (vertical axis, Low to High)

INTEREST (horizontal axis, Low to High)

- Satisfy (High Power/Influence, Low Interest)
- Manage (High Power/Influence, High Interest)
- Monitor (Low Power/Influence, Low Interest)
- Inform (Low Power/Influence, High Interest)

COMMUNITY ENGAGEMENT

Phase I: Getting Beyond Initial Stakeholders

Activity: 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

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.

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

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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.

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)

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

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.

COMMUNITY ENGAGEMENT

Phase I: Getting Beyond Initial Stakeholders

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

Activity 7: Evaluate Communication & Engagement Plan

Goals

1. Evaluate how well you were able to implement your communication and engagement plan

2. Determine gaps and identify how to improve

Prerequisites

Activity: Create a Communication & Engagement Plan (or equivalent)

Who Should Participate?

Program staff (operational expertise)

Length

60 Minutes

Helpful Resources

- https://ctb.ku.edu/en/table-of-contents/evaluate/evaluate-community-initiatives/measure-success/main

- https://ctb.ku.edu/en/table-of-contents/evaluate/evaluate-community-initiatives/monitor-progress/main

Activity Instructions

Program staff can conduct evaluation and share results with pertinent stakeholders.

1. Answer the questions below to assess whether your communication and engagement execution went according to plan. You can also evaluate each facet of the plan separately.

2. Evaluate the effectiveness of the plan

3. Document lessons learned and areas of improvement

4. Incorporate improvements into the Communication and Engagement Plan

How Effective Was the Implementation?

Give a score between 1 – 5 for each element below. 5 is the highest score.

1. Were you able to involve new people (outside the Outreach Committee) in the execution of the plan?

2. Do you have metrics for where communications were sent such as direct contact, blogs, listservs?

3. Do you have good open rates for email communications?

    a. Open rates can vary widely by community and campaign, but an average open rate is between 15-25% and the higher the rate, the wider the reach

4. Did you include a feedback mechanism?

5. Consider a quick poll/survey. Did recipients change their behavior, i.e., participate in something?

6. How well did the specific stakeholder groups act on the message?

7. Are there measurable outputs, e.g., how many signed up for an informational webinar or clicked on a blog link?

8. Did you consider other methods of feedback - individual contacts?

Activity 7: Evaluate Communication & Engagement Plan

Add up your score and see what you may need to rework or improve.

Score

6-12:   You may need to reconsider your plan or how you can improve effectiveness

13-23:   You have some areas you can continue to improve upon

24-30:   Keep up the good work!

Also consider

- What went well and is worth repeating again?

- What would you do differently?

- Do you want to schedule an annual review of the plan?

    o   As you grow, review the original priorities, and consider whether new groups or activities need to be incorporated and determine new tools.

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

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

    o   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?

Output

- A sense of how well you were able to implement your communication and engagement strategy

- Identified gaps and ways to improve

Next Steps: Modify your Communication and Engagement Plan according to gaps identified and lessons learned.