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.

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COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

Activity 8: Determine New Forms of Community Engagement

- 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.

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COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

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.

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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* *- Mechanism to submit proposed changes* *- Notifications for changes*
New code contributor onboarding: revise technical documentation	
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*

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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.

- Review/measure progress towards those initial goals. Determine gaps in work done.
- 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?
- Prioritize if needed. Establish updated timelines.

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COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

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/

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COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

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.

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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).

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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.

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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

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COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

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.

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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?

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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.

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COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

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:
    - Create toolkits to facilitate more effective communication with clear and consistent messaging.
    - Create toolkits to allow community to do conference presentations, start their own regional meet-ups or organize working groups.
    - Create an ambassador program.
3. Prioritize three non-directed activity ideas (via 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.).
4. Talk through the following for the top three ideas
    - Who does this idea benefit?
        - Does it correspond with larger goals or priorities?
    - 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)

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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

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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:
   - We can't get technical volunteers
   - We can't do in person events for a global audience
   - 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:
   - If we had $ 10 million...we could pay technical contributors
   - If we had a time machine...we could make events occur at the same time for a global audience
   - 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?

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COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

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.
    - 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)?
    - 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.

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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

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COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

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

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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?

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- 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

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COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

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.
   - 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?
   - 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.
   - 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.
   - 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.

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COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

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				

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COMMUNITY ENGAGEMENT

Phase II: Establishing Community Engagement Infrastructure

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”

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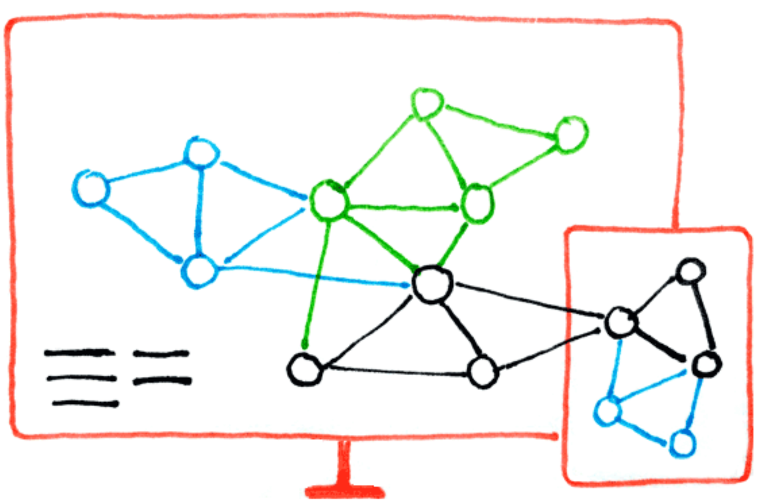
Activity 19: Engage with New Communities - Nodes

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/.

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