It Takes a Village
Open Source Software Sustainability

Activity 20: Reassess Engagement Activities

Goals

1. Identify 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

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 evolution or 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 evolution or 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. The questions below are provided as example to help think through issues. Feel free to disregard ones that are not relevant or add others.

   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.
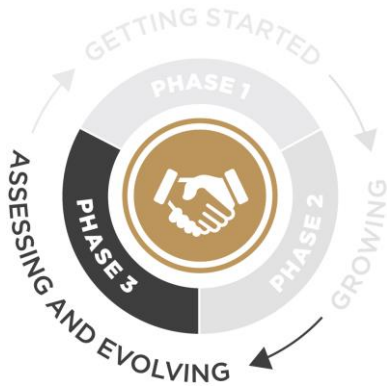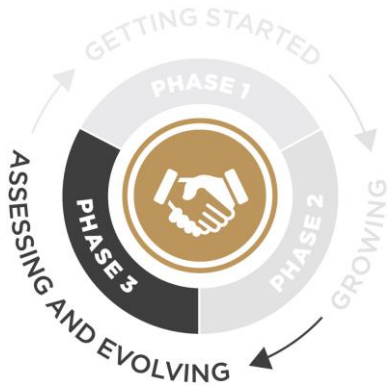
Activity 20: Reassess Engagement Activities

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.

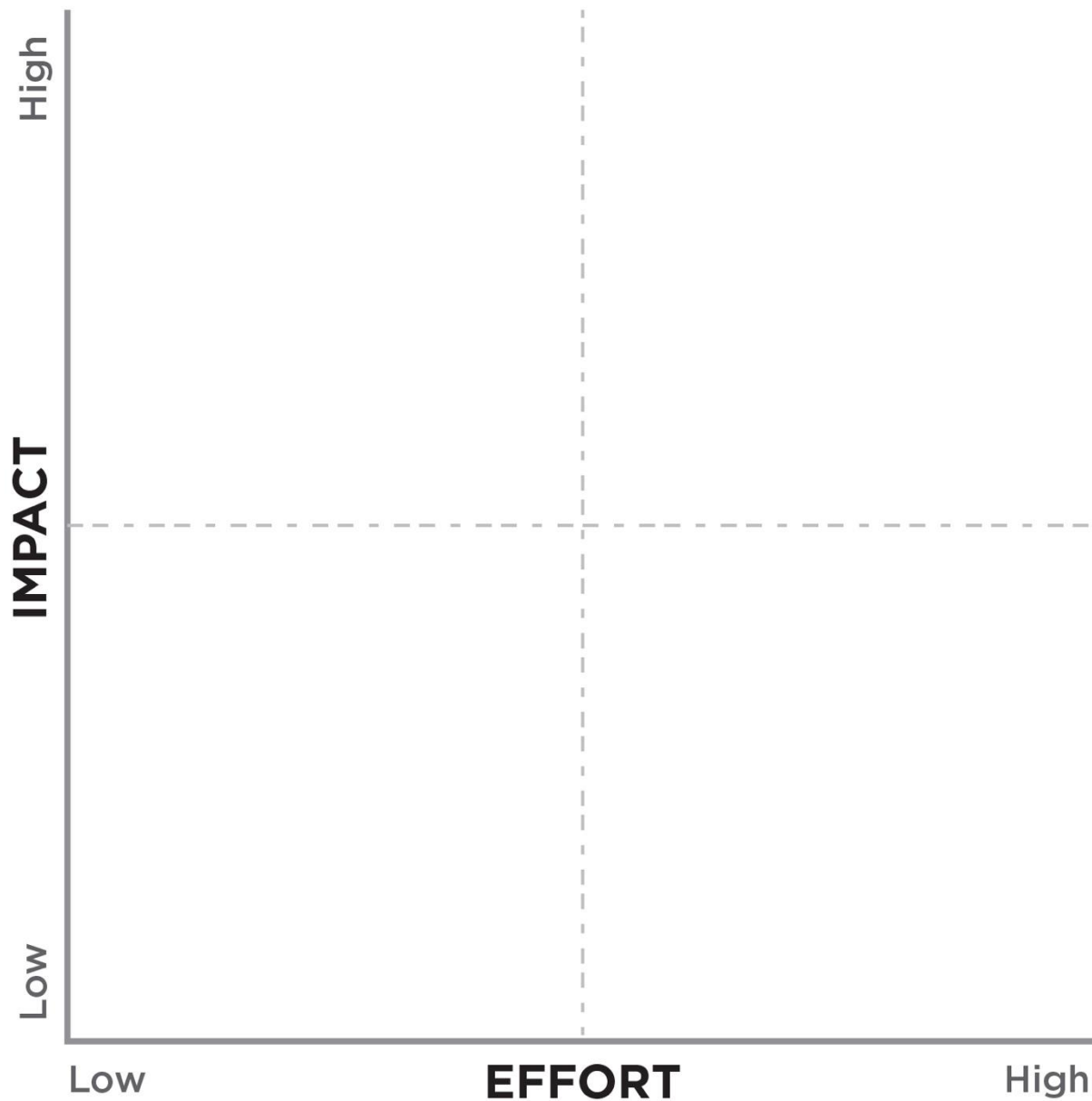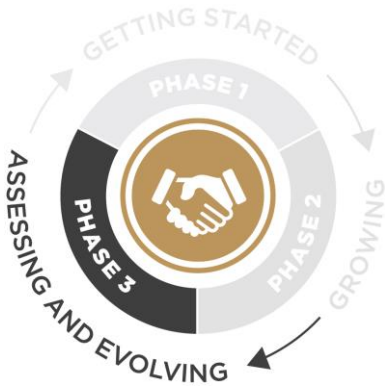   v. Monitor feedback in the days/weeks following the announcement.

High

IMPACT

Low

Low   **EFFORT**   High

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?
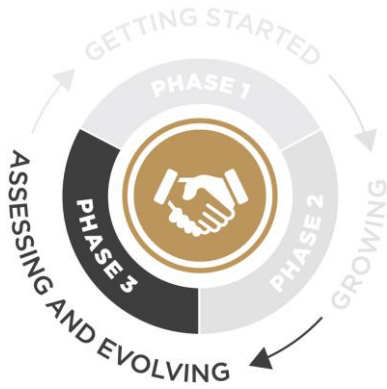
Activity 21: Context Mapping for Future Community Engagement

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 Activity: Review and Expand Infrastructure.
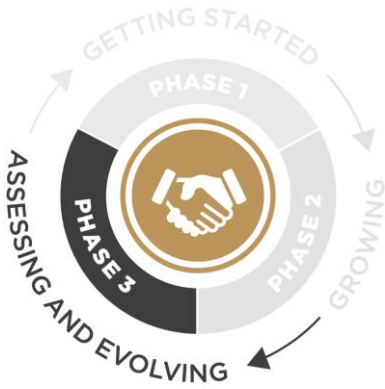
Activity 22: Review and Expand Infrastructure

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.).