

PLACECUBE / HISTORIC ENGLAND

Online Communities of Practice (CoP) Review Final Report

HERFORUM

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EXECUTIVE SUMMARY

This report, funded by Historic England in 2023, is part of a pilot demonstrator to analyse and evaluate the effectiveness of the Online Communities of Practice Review Toolkit. This innovative toolkit represents a significant step forward in the assessment of established online communities of practice (CoP), while providing practical recommendations for community managers to take forward.

By harnessing the capabilities of this toolkit, we can pave the way for more informed decisions regarding the creation, delivery and management of online communities of practice.

OVERVIEW OF THE HERFORUM CoP

The HERFORUM is a community of practice on Historic Environment Records (HER) which are the primary source of information for planning, development-control work, and land management.

Its purpose is to promote best practice amongst HERs and to encourage discussion and the spread of new ideas amongst those using, managing and maintaining records of this type. Participation in the group is also seen as having a role in the training of HER staff and supporting Continuing Professional Development (CPD).

PURPOSE OF REVIEW

The purpose of the review is to draw lessons from the HERFORUM's 28 years of operation (1995-2023), to evaluate its appropriateness and usefulness for its members and to identify areas where improvements could be made to move the community forward.

FINDINGS ON RELEVANCE

***Is the CoP's mission consistent with the needs of its members and of the initiator?
What is the value/motivation of participation to the members?***

- Feedback from the Community Members Survey clearly indicated that the members understood the purpose and objectives of the community, and felt that the community was meeting those objectives with 94% of respondents feeling that the purpose and objectives were 'extremely relevant' or 'relevant'.
- The community's members have clear reasons as to why they are part of the community, and these match their reasons to keep participating. For example, the community fulfils their needs of keeping up to date in the subject area, allows them to seek advice from like minded colleagues and discuss professional issues related to their role and industry.

FINDINGS ON SIGNIFICANCE

Does the CoP generate results and outcomes? And what are they?

- The community is clearly significant to the members by providing them access to knowledge that is difficult to access elsewhere, in addition to providing them with the ability to learn from others in the subject area.
- The community has helped members to find solutions to problems, improve their skills and know-how and is a place where they can gather responses to address their information needs.
- The community is geographically dispersed, therefore an online community brings them together, when there are only a few HER staff per area.

FINDINGS ON EFFECTIVENESS

To what extent has the CoP achieved its objectives?

- The community members clearly understand the purpose and objectives of the community and feel part of a community with a common concern.
- The community has reduced the duplication of work, helped members find and share good practice and has identified significant savings in time spent through the sharing of knowledge and experience.
- It has also been key to keeping members up to date on current thinking in an ever-evolving subject area.

FINDINGS ON ORGANISATION

How is the CoP structured? How does communication and collaboration among the members work?

- The community has a lead Community Manager and support from one other Community Manager and a Chair that brings a wealth of knowledge and experience to the community.
- Communication with the members is through JISCMail and is underpinned with regular meetings and two workshops throughout the year to support the relationship building between the community management team and member-to-member relationships.

FINDINGS ON EVOLUTION

How should the CoP continue? What changes are needed to make it more relevant, significant, effective and functional?

- The community is working well and any changes regarding technology will have to be well thought out and tested first, if any changes are to be made. If it's not broken, there is no need to fix it.
- Some small changes could make a big difference to the community going forward, and these will be based on whether these can be implemented with JISCMail, e.g. themes, debates and discussions.
- A wider understanding of the skill set and what is needed will assist in how the community evolves, and how effective the recruitment of potential new members to the community is.

CONCLUSIONS

- The HERFORUM is well regarded as a place to go for those working and involved with Historic Environment Records.
- The community members feel part of a committed community and wish for it to continue.
- The community is strong on delivering events and has adapted well to hybrid events after the Covid-19 pandemic.

- The Community Management Team are passionate about the community and its membership, and are well regarded by the members.
- The Community Management Team could benefit from looking into succession planning for the future as the community evolves.
- Recruiting new members would help to keep the community active as more established members come to retirement age.

RECOMMENDATIONS

1. Identify ways to make new members feel more welcomed into the community through introductions and hints and tips on how to get the best out of the JISCMail approach.
2. Target local authorities and promote the HER Forum to those organisations that are not part of the community.
3. Review the history of discussions and identify recurring themes to help link back to past discussions and prepare for future themes.
4. Investigate the option to theme the discussions through editing subject lines.
5. Identify key content from the community that would be relevant to different members based on the stage of their career development.
6. Develop a benchmark of skills and experience of members to assist in creating content, events and training to help build the capability of members.
7. Create a succession plan for the community managers and key members to enable the long term continuation of the community.

Section 1: INTRODUCTION

BACKGROUND

The **HERFORUM** Community of Practice (CoP) was created in **1995**, originally as the Sites and Monuments (SMR) Software User Group.

Members of the CoP are **predominately in Local Government** whose roles involve working with Historic Environment Records (HER).

The community's purpose is **to promote best practice amongst HERs and to encourage discussion and the spread of new ideas amongst those using, managing and maintaining records of this type. Participation in the group is also seen as having a role in the training of HER staff and supporting Continuing Professional Development (CPD).**

The structure of the Community is based on a typical **Community of Practice**, under the leadership of Community Manager **Nick Davis**, with an additional Community Manager, **Marion Page**, and additional support from **Chris Webster**.

The Community's Focus is on: **Identifying and sharing practice - developing and disseminating practices, guidelines and procedures issued to provide instant access to validated and up to date knowledge and information.**

The stage of the community's life cycle could be classed as being at the **Maturity Stage - the community is long established and provides a valuable space for members to ask, share and create resources on the subject area.**

SUPPORTING TECHNOLOGY

The main supporting technology used is a **JISCmail email site and file store**. Other systems used include **Office 365 Surveys and MS teams**.

Related activities such as **events, meetings and polls** are held to support the community's participation.

Section 2: REVIEW SCOPE

After more than 28 years of existence, a need was seen to evaluate the community. The following main questions were agreed to guide this exercise:

- **Relevance:** Is the community's mission consistent with the needs of its members and of the hosting organisation/key team, as the initiator? What is the value/motivation of participation to the members?
- **Significance:** Does the community generate results and outcomes, and what are they?
- **Effectiveness:** To what extent has the community achieved its objectives?
- **Organisation:** How is the community organised/structured? How does communication and collaboration among the members work?
- **Evolution:** How should the community continue? What changes are needed to make it more relevant, significant, effective and functional?

REVIEW METHOD

The review method adopted here follows the Online Communities of Practice Toolkit.

It was agreed that the following tools will be used to support the review:

- **Community Background Questionnaire** - completed by the Community Managers.
- **Community Members Survey** - distributed via the community's facilitators, filled out by all those willing using Microsoft Forms, with an expected return rate of 1-10% of active members.
- **Three Self Assessment Tools** - allowing the community managers to assess the community's performance, explore their current skills/needs compared to any future targets, and review the time/effort spent facilitating the community.
- **In-depth action planning workshop** - involving the Community Managers, the workshop concentrates on a SWOT analysis and shaping and planning the future of the community.

TIMING

- In 2023, a concept for the review was agreed between Historic England and Placecube.

CoP Review

- Initial information about the forthcoming review was sent to the community managers by Michael Norton on 10/3/23, including the Community Background Questionnaire.
- The kick off meeting was arranged and took place on 18/4/23.
- On 19/4/23, the Members Survey and the three Self-Evaluation tools were sent to the community managers.
- On 5/4/23, the three Self-Evaluation tools were returned by the community managers.
- On 15/5/23, the Members Survey was sent out to the members by Nick Davis using Microsoft Forms.
- On 26/6/23, the Enhancing Communities Workshop took place.

Section 3: RESULTS AND FINDINGS

A. SURVEY RESULTS

The response rate of **9%** to the online quantitative survey can be considered as satisfactory and reflects a strong commitment to the community.

HIGHLIGHTS

- 36 respondents
- 91% of respondents have been a member for over a year and 75% over 9 years
- 94% of respondents are based in England, mostly in the South West and South East
- 86% of respondents indicated they worked in Local Government
- 77% of respondents are in the Middle or at a Senior level in their career paths
- 41% of respondents said the majority of their work contributes to researching (making discoveries and finding new knowledge) and 25% to conserving (adapting, repairing and renovating).

PARTICIPATION

- 58% of respondents visit the community a few times a week
- 44% of respondents say they are regular or frequent contributors, with 47% saying they are infrequent contributors
- Top three reasons for not contributing were:
 - a. Reading/browsing for information only meets my needs.
 - b. Lack of confidence to post/contribute.
 - c. Time pressure - not enough time to post.

MEMBERSHIP

- Top three reasons for membership:
 - To keep up to date with what's happening in my work area.
 - To seek advice from like-minded colleagues and ask questions.
 - To discuss professional issues relating to my role and industry.
- Top three motivations to remain active in the community:

- It can help me keep up to date with what's happening in my work area.
- I can seek advice from like-minded colleagues and ask questions.
- I can discuss professional issues relating to my role and industry.

PURPOSE

- The community's purpose and objectives:
 - To promote best practice amongst HERs and to encourage discussion and the spread of new ideas amongst those using, managing and maintaining records of this type. By Supporting Continuing Professional Development (CPD) and Supporting Training of HER Staff.
- When Community Members were asked to describe the Communities Purpose before seeing the full describe the top 5 keywords from members where:
 - Good practice
 - Share knowledge
 - Professional and practice
 - Historic environment
 - Good communication
- 94% of respondents felt the purpose and objectives were extremely relevant or relevant.

COMMUNITY CONTENT

- 94% of respondents said the relevance of the discussions, content and activities was relevant or extremely relevant.
- 94% of respondents said that the quality of the discussions, content and activities was high or good quality.

SIGNIFICANCE

- 95% of respondents said that the community enabled them to access knowledge that is otherwise difficult to access to a great or some extent.

- 97% of respondents said the community enabled them to learn from the experience of others to a great or some extent.
- 91% of respondents said that their needs, when expressed, were responded to by the community to a great or some extent.
- 94% of respondents said that the community helped them to find solutions to their problems and answers their questions to a great or some extent.
- 91% of respondents said that the community helped them to improve their skills and know-how to a great or some extent.

EFFECTIVENESS

- 100% of respondents feel part of a community that shares a common concern to a great or some extent.
- 91% of respondents said the community helped them in finding good practice and avoiding duplication of work to a great or some extent.
- 97% of respondents said the community helped them keep up to date with current thinking to a great or some extent.
- 80% of respondents said the community helped them save time to a great or some extent.

COMMUNITY MANAGEMENT

- 97% of respondents are satisfied with the facilitation of the community to some or great extent.
- 83% of respondents said community events and activities were important to some or great extent.
- 94% of respondents are satisfied with the communication from the community to some or great extent.
- When asked if new members receive enough information and support to help them integrate in the community, the following responses were received:
 - Yes - 16%
 - No - 16%
 - Don't know - 66%

FUTURE IMPROVEMENTS

Top five keywords used when respondents were asked the following statements/questions.

- List three things that you find useful about the community:
 - Questions
 - Information
 - Similar issues
 - Projects
 - Discussions
- List three things you would like to improve about the community:
 - Discussions
 - Debates
 - Training
 - Forums
 - Relevant
- What would help you to play a more active future role in the community?
 - Time
 - Confidence
 - Experience
 - Discussions
 - How to's

B. SELF-EVALUATION HEADLINES

COMMUNITY MANAGER TIME SPENT

The results of the self-evaluation tool showed that the Community Managers Team spend approximately 13 hours a week supporting the community, with the lead community manager spending approximately 11 hours per week.

With Content and Events being the primary focus of attention for the community managers supporting the community, a smaller amount of effort is spent on the Moderation aspects. With the community being highly focused on Events, the time spent aligns with the focus of the community.

Comparison of time spent by different community managers and type of community

	Full-time global community brand (Feverbee)	Part-time knowledge sharing community (Knowledge Hub)	Facebook community example	Nick - HERFORUM	Marion - HERFORUM
Time spent	40 hours	4 hours	30 Hours	11 hours	2 hours
Strategy (purpose, objectives,collecting/analysing data)	7%	7%	5%	0%	5%
Growth (direct invites, promotion, referral tactics etc.)	12%	13%	5%	0%	5%
Moderation (initiating discussions, soliciting responses, steering the community)	25%	19%	30%	6%	10%
Content (writing content and encouraging others to contribute)	12%	28%	20%	43%	50%
Relationship Building (personal participation, cultivating volunteers, befriending key members)	17%	12%	30%	0%	0%
Events & Activities (planning online/offline events, regular/irregular events)	12%	12%	0%	51%	30%
Technology (optimising areas of the site, checking out future technology, training of members)	15%	15%	10%	0%	0%

COMMUNITY MOT

When looking at the community from a community manager's point of view, the community manager identified activity as 'frequent', with over 140 individuals taking part over the last year.

Interactivity was seen as the 'frequent' when it came to getting advice from others, and there were some examples of working together through online workshops and via email to help members find solutions, share ideas and share practice.

Strategy

The community managers suggest they are making good progress towards its objectives through its ongoing process of exchanging information, ideas and experience.

Growth

In terms of growth, there are examples of new members joining the community via the HE website and personal recommendations.

Moderation

The community managers suggested that participation had increased due to the key meetings held throughout the year. In addition, participation via email continues and key moderation actions took place during hybrid events, polls and when the list malfunctioned.

Content

Most of the community's new content is generated from the events hosted, as well as the sessions delivered as part of these events. Older content can be accessed via the community's file store.

Relationship building

With virtual and hybrid events being run twice a year as part of the community, it is very strong at building relationships directly with members and encouraging members to connect with each other.

Technology

The technology and functionality available is still relevant for the community's needs, and users have access to a blend of old approaches through JISCMail, and

with newer solutions using Microsoft Teams which works well with the community members.

COMMUNITY MANAGER BENCHMARK

The community manager benchmarking tool was used to assess the skills of the community managers based on the seven categories. This tool was designed to compare community managers' skills to industry standards and identify areas for improvement. The results of the benchmarking tool showed that community managers performed well in the areas of Events, Content and Relationship Building. However, there was room for improvement in Moderation and Technology.

Table of benchmark available on the next page.

The Blue outline indicates where they currently feel they are, and the Yellow outline indicates where they would like to be in 12 months' time.

CoP Review

Community Manager Name		Nick Davies		Community name		HERFORUM	
	Strategy Purpose, objectives and collecting/analysing data	Growth Direct invites, promotion, referral tactics etc.	Moderation Initiating discussions, resolving disputes, soliciting responses, steering the community	Content Writing Content and encouraging others to contribute	Relationship Buildings personal participation, cultivating volunteers, befriending key members	Events & Activities Planning online/offline events regular/irregular events	Technology Identifying and using other technology to support the community
Level 5	I continually work towards explicit community goals and expectations. I look to evolve the community purpose in order to meet the changing needs of its members by analysing data and feedback from the group.	I invite new members to join and keep them active/engaged. I continually promote the community in various formats ranging from marketing and blogs to success stories and case studies to encourage the right members to join.	I regularly review community content, including summarising and refreshing areas or deleting redundant content. I promote and signpost the knowledge created as a result of community activity into a useable format to show the benefits of being part of the community.	I introduce relevant content to the group that creates conversation or awareness on topic areas that fit the needs of the community. I encourage others to produce content that stimulates conversation.	I continue to build relationships with a wide range of members to develop a sense of community. I have recruited and trained volunteers to undertake activities within the community.	I plan a range of online and offline events throughout the year based on the requirements of the community members, including take-over days, roundtables, webinars, conferences and face-to-face meet ups.	I regularly look to ensure that I use new and innovative techniques and technology to get the most out of the community environment and its members.
Level 4	I make sure the goals and expectations of the community are clear and reinforced. I communicate with community members to ensure their goals and expectations are being met.	I regularly refresh the membership of the community and contact inactive members and devise ways to help them participate. I advertise the community to other colleagues and encourage other members to invite new members to the community.	I phrase discussions and content in ways that encourage further responses from participants. I try to draw connections between participants and content.	I craft content and make members aware of content that is relevant and important to the community, including newsletters and round-ups. I comment and like content from other members to encourage them to share.	I have regular meetings to help divide up tasks between the facilitators to assist in meeting the communities' goals and expectations. All community facilitators work together to facilitate and monitor the community.	I regularly arrange online and offline meetings for community members using a range of different activities based on the needs of the members.	I adjust the technology depending on the needs of the community members, and look to introduce technology based on the requirements of their needs and not just the technology.
Level 3	I helped identify the need for the community after discussions with possible community stakeholders. Clear goals and expectations are present in the community and I ensure community discussion stays on track to meet these aims.	I accept members and welcome them to the community. I direct new members to interesting content and encourage them to take the first step in participating.	As a facilitator I phrase discussions and content in ways that encourage further responses from participants. I am aware that all contributions should not come from me.	I create content on a regular basis that is relevant to the community members. I add new or relevant content on a regular basis that is of interest to the community members.	I regularly contact my network and look to increase it as new members join and participate in the community. I discuss the community and its direction with other facilitators.	I occasionally arrange online or offline events to help develop the community and mutual trust between members.	I adapt the technology based on feedback from the members and the use of the functions.
Level 2	I have added the goals and expectations of the group to the community description. I have got some level of buy-in from a core group before creating the community.	I accept members and welcome them to the community.	As a facilitator I respond to contributions and seed questions and content to encourage two-way communication.	I upload content that I have seen or that has been passed onto me when I get a chance to.	I have a small network of people that I go to for assistance with the community.	I'm aware that a community is not limited to an online platform and look to create events and activities for members when I can.	I have created a collaborative environment that suits the needs and the way the community members communicate.
Level 1	I am unclear or ambiguous of the communities' purpose, goals or expectations.	Members are accepted but I do not welcome them or connect them to content or people.	As a facilitator I dip in and out of the community. As a facilitator I feel that the communication with the community is one-way.	I batch upload content to the community that colleagues ask me to upload.	I do not have any go-to people when a question arises that I do not know the answer to.	The activities for the group are limited to the online platform	I have created the basic collaborative environment but I'm not sure how to use it and if it is right for the audience.

CoP Review

Community Manager Name		Marion Page		Community name		HERFORUM	
	Strategy Purpose, objectives and collecting/analysing data	Growth Direct invites, promotion, referral tactics etc.	Moderation Initiating discussions, resolving disputes, soliciting responses, steering the community	Content Writing Content and encouraging others to contribute	Relationship Buildings personal participation, cultivating volunteers, befriending key members	Events & Activities Planning online/offline events regular/irregular events	Technology Identifying and using other technology to support the community
Level 5	I continually work towards explicit community goals and expectations. I look to evolve the community purpose in order to meet the changing needs of its members by analysing data and feedback from the group.	I invite new members to join and keep them active/engaged. I continually promote the community in various formats ranging from marketing and blogs to success stories and case studies to encourage the right members to join.	I regularly review community content, including summarising and refreshing areas or deleting redundant content. I promote and signpost the knowledge created as a result of community activity into a useable format to show the benefits of being part of the community.	I introduce relevant content to the group that creates conversation or awareness on topic areas that fit the needs of the community. I encourage others to produce content that stimulates conversation.	I continue to build relationships with a wide range of members to develop a sense of community. I have recruited and trained volunteers to undertake activities within the community.	I plan a range of online and offline events throughout the year based on the requirements of the community members, including take-over days, roundtables, webinars, conferences and face-to-face meet ups.	I regularly look to ensure that I use new and innovative techniques and technology to get the most out of the community environment and its members.
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C. SWOT HEADLINES

STRENGTHS

- Long term committed members
- Popular and established community events (face-to-face / hybrid / online)
- Strong core community management team
- Members understand what the community is about
- Lots of relevant content available in the archive
- The community is in a mature stage of its lifecycle
- The community has a fun element to it
- The community has a searchable archive
- You can discuss technical issues with the community
- High levels of expertise across the membership
- The members are the right members for the community
- High levels of engagement and quick responses
- Awareness of national developments

WEAKNESSES

- No formal introductions for new members
- Lots of long term members
- Can lose track of discussions due to the email chain generated
- Lack of ease for new members to get involved in a mature community
- Can be hard to search for and find previous and future events
- Can be hard to search for and find previous content and documents
- No clear direction on how to participate / get involved
- Same or similar questions tend to get asked on a regular basis
- Functionality only allows you to post the question to everyone
- Need for more HER Training
- Main contributors are Historic England and the ALGAO HER Committee

OPPORTUNITIES

- Identify ways to help new members participate and become engaged
- Highlight key content to members based on segmentation of their role and career stage
- Training and development

- Review content and ask members if content is still relevant to their needs
- Membership cleanse to keep the membership current and relevant
- Demonstrate the value of HERs
- Rotating HER updates
- Identify the common tasks and issues for key roles of the membership
- Themed and topical discussions
- Target specific audiences to become members
- Promotion of the benefits of being a member
- Referral programme by members
- Debates on known topics of interest
- Introductions of the community managers to the community
- Identify key knowledge wants and offers of members
- Identify stories of success to encourage new members to participate
- Develop a forward calendar to generate interest and a buzz around key events
- Adapting 'off the peg' tried and tested business orientated structures

THREATS

- Potential gaps in the facilitation team if they leave / move on
- Lack of succession planning
- Out of date content
- Conversations developing further outside of JiscMail
- Changes in technology and functionality available
- Retirement of core members
- Inadequate staffing of organisation
- Inadequate training opportunities

Section 4: RECOMMENDATIONS

1. Identify ways to make new members feel more welcomed into the community. Examples could include:
 - a. Introduction days (e.g. Newbie Tuesday) where new members are highlighted to the community by asking them to introduce themselves, share what they are currently working on and what they are looking for as part of the community.
 - b. Regular hints and tips on how to get the best out of using JISCMail.
 - c. Regular reminders on how to access and use the file store.
 - d. Highlighting the top discussions and content based targeting towards different career progressions.
2. Grow the membership:
 - a. Identify those local authorities and organisations that are not currently members of the community, and explore where the gaps are and how different audiences could be engaged.
 - b. Target the organisations through sharing stories on what the community has achieved together and how it has helped members daily and with their career progression.
3. Identify recurring themes from the discussion history:
 - a. Check back through the recent history of discussions to identify recurring themes and topics to help with easy access to relevant discussions.
 - b. Identify future topics based on the history of recent activity.
 - c. Investigate the option to organise/theme the discussions and editing subject lines, where needed, to make this clearer.
4. Review key content in the file store and ask key members to help identify content that can be highlighted to members and content that is out of date and needs refreshing.
5. Identify the current benefits of the community's membership and any key stories that can help to support any future promotion or growth of the community.
6. Develop a benchmarking of skills and experience of members to assist in building content, events and training to build the capability of members. For example, using Chris Collison's benchmarking 'River Diagram' tool:

<https://www.chriscollison.com/blog/2010/09/16/km-tools-creating-a-river-diagram>

7. Creation of a succession plan to support the future transfer of the lead community management roles to other key members or recruit new community managers to support the transformation to allow the continuation of the community for the long term.
8. Investigate other technology solutions that will fulfil the requirements of the community members and understand where the current solutions will be going in the future.
9. Review the community in 12 months' time to revisit the recommendations, what has been implemented and any future options for evaluation based on **Impact Evaluation** and **Value for money**.

Section 5: APPENDIX

Copies of Key Content from the Community Review.

- Community Background Questionnaire Responses
- Kick Off Meeting Presentation
- Community Member Survey Results
- Community and Community Manager Self Assessments
- Enhancing Communities Workshop Presentation
- Image of SWOT Analysis