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Foundational Community Building and Engagement Training

We cannot expect to engage with and refer to communities unless we first support them to be built from inside out. ‘Community’ should be understood as a verb, not a noun, in other words it is the consequence of our efforts. - Cormac Russell, Rikindling Democracy

Building communities with a sense of purpose and belonging

Hi everyone, I am Malvika Sharan. I am an Open Science practitioner with a strong focus and nudge towards community building. A lot of what I know and teach, comes from my experience working in Open Research projects - previously in bioinformatics and since 2019, in data science and research more broadly. I explore and apply open research practices and approaches to transfer knowledge across different open source or community-led data science projects and also in ‘not so open’ research projects.

You can find more about me via my [homepage](#), and follow me on [Twitter](#) for rare moments where I share something (which has reduced significantly in 2023!)

Topics Discussed in this Training Series

- **Module 1:** Community foundation: What is your community’s story, who started it, what was the reason/purpose and where do we want to take it?
- **Module 2:** Community of Practice basics: Purpose and outcomes, stakeholder mapping, roles and responsibility documentation and communication channels
- **Module 3:** Community engagement: information mapping, a mountain of engagement, incentives and value-exchange
- **Module 4:** Creating and communicating your community charter: vision, mission, milestones, roadmap, ways of working
- **Module 5:** Open Science/research framework: applying open, equitable and participatory approaches for building communities

Contact

For any organisation-related queries or concerns, you can directly reach out to the project lead and author Malvika Sharan by emailing msharan@turing.ac.uk.

License and credits

This work is licensed under the MIT license (code) and Creative Commons Attribution 4.0 International license (for documentation). You are free to share and adapt the material for any purpose, even commercially, as long as you provide attribution (give appropriate credit, provide a link to the license, and indicate if changes were made) in any reasonable manner, but not in any way that suggests the licensor endorses you or your use, and with no additional restrictions.

All referenced resources when reused should be attributed correctly.

Logistics for Facilitators and Attendees

This workshop session brings new community managers or members in community coordination roles together in a cohort format to introduce foundational skills for community management, while encouraging them to share skills, experiences and ideas for collaboration with each other.

Here is a recommendation for participants to help with keeping this workshop series as interactive as possible, while ensuring that everyone the chance to contribute to the discussion:

- If you generally take less space, please use this workshop to take more space.
- If you generally take space, try to give space to others.
- We will have many quiet reflections during the training.
- Silence can be awkward but that is not a sign that others who are often not the first one to speak have nothing to add.

Participation guidelines for the workshops

- The workshop facilitator will introduce topics through short presentation, followed by either a quiet assignment (by yourself) or breakout room (group discussion), followed by full group reflection and sharing insights.
- We will use a shared web-based clock to ensure keeping discussions on time using Cuckoo Clock cuckoo.team <- update for you
- A shared document will be set up for each session with information guiding the format, space for documenting notes collaboratively, and sharing resources (links, thoughts, examples)
 - You can leave and come back to the workshop as it suits
- We encourage sharing feedback to make sure that this and future sessions are beneficial for all of us.
 - If you experience something that makes you uncomfortable (topic, conversation or format of any certain session), please let me (Malvika) know privately (msharan@turing.ac.uk) so that I can act immediately.

- Each call will be paired with an assignment to help you reflect on the practices in the context of your project. We will allocate 10 minutes in the following call to share insights from our assignments with others. Although I can not make it mandatory for you to complete this assignment, it will be more effective if you take some to complete them. If you feel comfortable, you can share the links to your assignment in the shared document.

Format

- Each lesson has been designed for 1 hour.
- Additional 20-30 minutes of the workshop sessions should be reserved for open discussion and sharing insights from our assignments with others.
- Lessons are provided in a format that can be copied directly on a shared document for teaching purpose.
- Each lesson has been paired with practical assignments to help learners reflect on the practices in the context of their projects.
- Before each lesson, please provide details such as date, time and joining link for the session, and create a space for feedback (pluses and delta) and reflections (such as what was the main takeaway for participants personally, what was not clear) at the end of each session.

Join the call

- Please inform participants if the presentation part of this call can be recorded for people who are unable to attend this session.
- The discussion part should not be recorded to allow honest and open discussion.

Below are some potential topics for additional modules:

- **Facilitating community events:** Good practices for online vs in person facilitation of community events
- **Impact assessment and reporting:** What are some good practices and frameworks for impact assessment in the community, and how do we report them
- **Conflict management** and handling a difficult situation

Anything else?

Have suggestions for more topics? Share them with me by emailing msharan@turing.ac.uk.

Happy community building!

Session 1: Community Narrative

I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel. - Maya Angelou

Key lessons

- Understanding your community's narrative
- Identifying the main stakeholders who hold historical knowledge about the community
- Documenting the reason/purpose of the initial vision and where do the current stakeholders want to take the community

Roll call

- **Name / Roles / social handles (Twitter, GitHub, etc.) / emoji/GIF/art/music that expresses your feeling of a community.**
- Malvika / Senior Researcher - Open Research / @malvikasharan /
- Participants response ...
-
-

Intro and Icebreaker question

__ What is one characteristic about a community you most admire? Have you been able to replicate that for your project? If yes, how? If not, why not? __

- *Name / answer*
- Participants response ...
-
-

Part 1: Community and Community of Practice (CoP)

[\[Link to the Google Slides\]](#)

Example 1

— In 2012 at an office party, two employees exchanged their interest in — *growing vegetables and flowers. They decided to set up an interest group who would like to exchange their tips, tricks and produce from their gardens/farms. Within a few months, they set up an Instagram to post pictures of their products to share online. Next year, more members joined them by renting an allotment near their office space and met after work to go to the allotment and grow vegetables together. Following summer, a few members wrote a proposal for their organisation to fund their group to pay for the allotment rent, purchase common tools and seeds and support their group to improve socialisation. Now, every year their organisation hosts a yearly harvest party where produce from the shared allotment is sold to the staff members to raise funds for a local charity. Their music band plays live music and a baking group shares free cakes and tea to engage more people at this event.*

Example 2

— In 2019, two employees exchanged their scientific goals for — *open science training for people in the biology field. They connected with another member who had a similar interest to write a proposal to join an accelerator programme and build a project that will allow them to train and mentor early career researchers in open science. Soon, they launched their programme and opened a call for experts in their area to join as mentors. In 2020, they received 20 applications from researchers interested in receiving training. The program's success attracted 60 applications the next year and the previous trainees joined to mentor the next group. In 2021, they received grants to hire people, provide funding to their participants and scale their effort by offering this programme to people in other research fields. Now their trainees are not only mentors but also trainers of this programme in their network and frequently answer questions from new members.*

Example 3

— In 2018 at a Data Study Group workshop, two industry leaders, one from academia and one from the private sector, exchanged their interest in each other's work — *in AI and Health Research. They went back to their organisations to find organisation buy-in to set a formal collaboration so that researchers across these organisations can collaborate on exciting and innovative ideas that advance each organisation's mission and reputation as industry leaders. They invested funding to hire community managers and researchers to work in the interface of their organisation. Soon, they launched engagement initiatives and opened a call for experts in their area to apply for funding schemes on topics of shared interest. They were successful in their first year, and are excited about the possibility of the next 5 years.*

Open discussions

Q1: What trend do we see in these two scenarios?

- Initial opportunity to connect
- Growth over time is purpose-driven
- Participants response ...
-
-

Q2: What are the differences?

- *Some need more funding and institutional recognition than others to grow.*
- Need to create funding structures/models
- Participants response ...
-
-

Starting with “Why”?

- Why does the project need a community?
- Why did you take on this community role?
- Why would others join this community?
- How do these different sets of ‘purpose’ align?

Silent note-taking using prompts

Project: Why does the project need a community?

- What is your community project’s story, who started it? Why is it important to build this community? - **What is the purpose?**
- Reflecting on the status of your project, where next do you want to take your community/project? **What is the next step** , and what resources do you need to make that happen?

NOTES

- *Name / answer*
- Participants response ...
-
-

You: Why do you or those who started the project care about community and community/your role? Why would others join this community?

- There will be a combination of multiple reasons why you or those leading the project chose to support the community and community management. Let's start by sharing the reasons (from what you know about the project) that are most important to you?
- What is one of the most rewarding community experiences you have had? (one that made you feel included or valued for your contribution/participation!) – Reflecting on your experiences, why do you think people will join your community? What experience do you want them to have?

NOTES

- *Name / answer*
- Participants response ...
-
-

Aligning your community's 'purpose' with the organisation's motivation for community management

Reference: <https://communityroundtable.com/what-we-do/models-and-frameworks/community-skills-framework/>

- What skills and resources does your community have
- What skills and resources do the project team including you have
- What gaps exist - skills and resources do you and your team or community need
- What up-skilling for your community, you and your team will be needed
- Who from outside your community should be invited to fill those gaps

Knowing what you know through your responses to these prompts, what goals in your projects will you prioritise?

After this session

Assignment: [\[MAKE A COPY\] 1 - Community background](#) ← **[MAKE A COPY]**

Identify the origin story of the community that existed before you joined. Interview key stakeholders in your project to fill any gaps your narrative may have. This process will help identify your community's mission, purpose and possible pathways you want to build.

Reading recommendation:

- The Turing Way - Managing a new community: <https://the-turing-way.netlify.app/collaboration/new-community.html>
- Community Roundtable - Community Skills Framework: <https://communityroundtable.com/what-we-do/models-and-frameworks/community-skills-framework/>

Community Skills Framework™

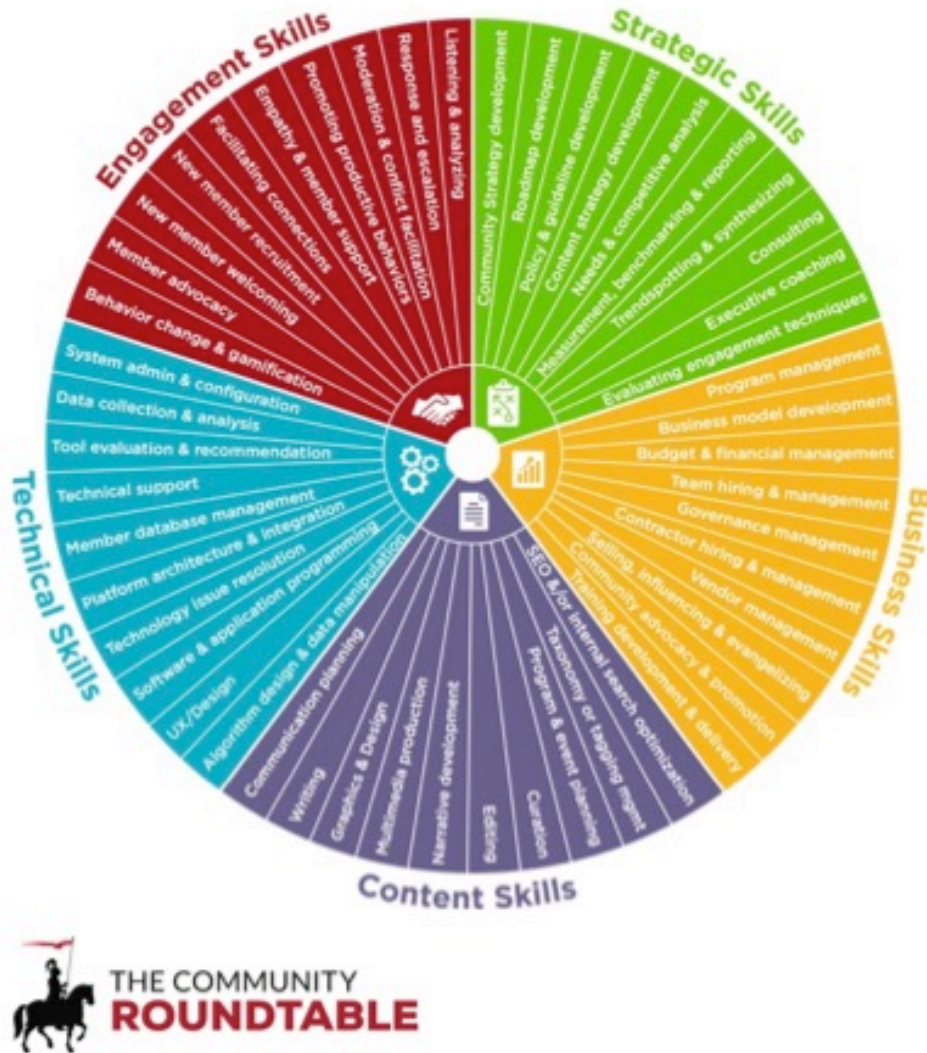


Figure 1: Community Skills Framework - shown as a wheel with five main areas of skills that a community manager may use - Engagement Skills, technical skills, content skills, business skills and strategic skills

Key takeaways

In this session, we discussed the concepts and purpose of community and community of practice mean.

We reflected on the following aspects: - Why it is important to start with “Why”, the original purpose of your community - Why did you or those who started the community care about community and community/your role? - Why build a strong and authentic narrative for your community - reason why would others join this community? - How to align your community’s ‘purpose’ with the organisation’s motivation for community management?

Q&A and suggestions after the call - response will be shared through notes

- Participants response ...
-
-

Feedback from this session

What worked? What didn't work? What would you change? What surprised you? - Participants response ...

Session 2: Community of Practice Basics

As a community, great things can happen when each individual contributes, according to their strengths, toward a common goal. Idowu Koyenikan

Key lessons

- Purpose and outcomes of your community
- Creating stakeholder map
- Developing roles and responsibility documentation
- Community communication channels

Roll call

- __ Name/reflections from learning about your community and building a narrative - what was most surprising? __
- Participants response ...
-
-

Part 2: Mapping Stakeholders and their engagement needs

[Link to the Google Slides](#)

Q1: Why invest in community building?

- Participants response ...
-
-

****Q2: What are some good examples of community building have you experiences**

- Participants response ...
-
-

2.1 Purpose and outcomes

Each participants can create a table to add details from their projects.

Project/subproject Names	Purpose	Outcomes

2.2 Identifying Stakeholders

Contributors	Role	Nature of participation

2.3 Optional for projects with many stakeholders: Prioritising Stakeholders

Find templates for reuse:

- Lucidparks: <https://lucidspark.com/blog/a-guide-to-stakeholder-mapping>
- Mural: <https://www.mural.co/templates/stakeholder-mapping>
- Miro: <https://miro.com/templates/stakeholder-map/>

2.4 Resources and engagement/communication platforms

Resources and infrastructure:

- Tools/platforms:
- Documentation:
- Infrastructure:
- Events:
- [Anything else?](#)

Types of engagement:

- Primary: GitHub
- Asynchronous: Newsletter, talks, Slack, Twitter, documentation
- Synchronous: Co-working calls, Collaboration Cafe, Book Dash

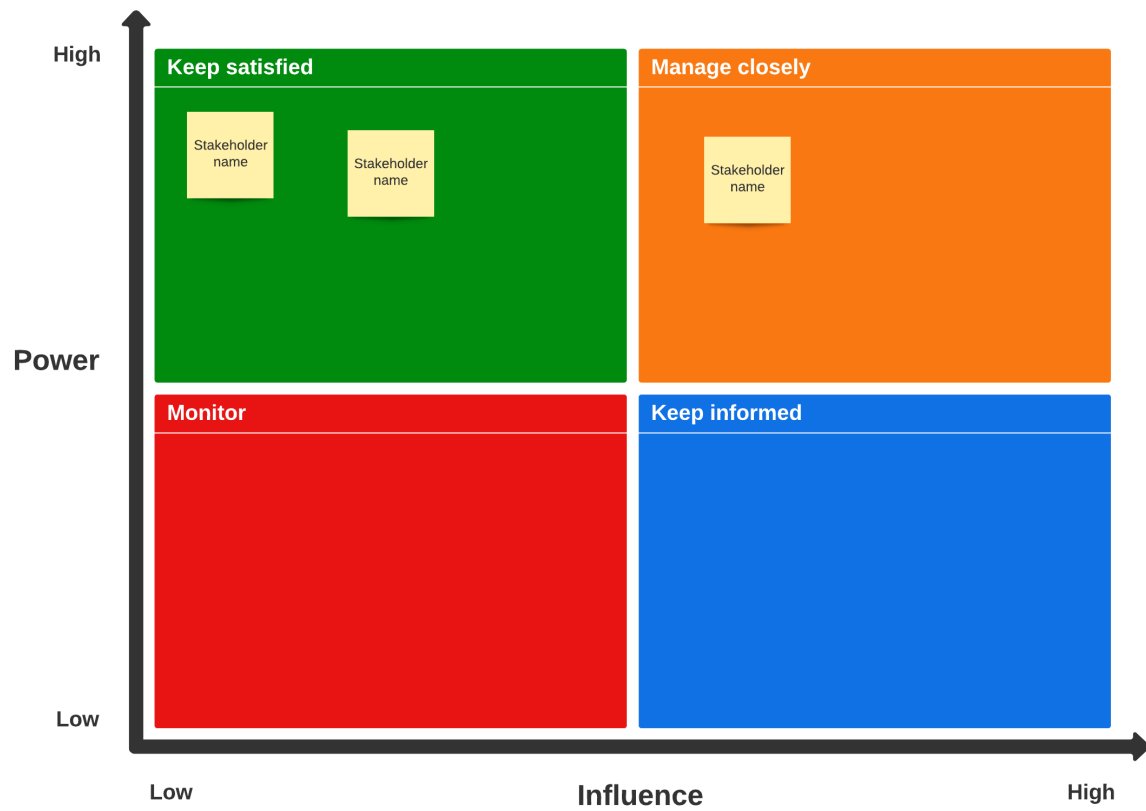


Figure 1: Stakeholder map example with four quadrants - Keep satisfied (high power, low interest), Manage closely (high power, high interest), Inform regularly (low power, high interest), Monitor and anticipate needs (low power, low interest)

- Anything else?

Notes

- Participants response ...
-
-

Assignment 2 + Discussions: [MAKE A COPY] 2 - CoP Basics ← [MAKE A COPY]

1. What is the purpose of your CoP or project? What are the main and expected outcomes of the project?
2. Who are your stakeholders and what are their roles?
3. How do you facilitate their participation, collaboration and contributions - what are the engagement and communication platforms?

Reading recommendation

- Research culture: let's reimagine how we work together: <https://wellcome.org/what-we-do/our-work/research-culture>

Note:

- The assignments from this session is for you to come back to, update and reflect on periodically, such as in the mid-year or annual review.
- You can exchange this with other community managers to get some feedback.

Key takeaways

In this session, we discussed the Mountain/Matrix of engagement to understand what different levels of engagement look like and how we facilitate that.

We explored questions and frameworks to understand these aspects: - How do we move from one level to another? When to recognise someone can move from one band to another? - Mountain of Engagement should be a living document, reflecting on what your community experiences are and where you should modify them.

Q&A and suggestions after the call - response will be shared through notes

- Participants response ...
-
-

Feedback from this session

What worked? What didn't work? What would you change? What surprised you? - Participants response ...

Session 3: Community Engagement

Just because you can draw a detailed map, doesn't mean you are accurately representing the territory! - Yuval Noah Harari

Key lessons

- information mapping for your community
- Building a mountain/matrix of engagement
- Understanding and mapping incentives and value-exchange

Roll call

Name / reflect on what you as a community builder/facilitator/participant bring into your community space and what do you receive+give back? (kindness, empathy, professional expertise, resources, technical knowledge, mentorship etc.) / **Does this balance seem right?**

- Participants response ...
-
-

Part 3: Community participation and Value-exchange

[\[Link to the Google slides\]](#)

In this session, we will build a clear understanding of :

- what different resources and processes in our community exist
- what do different kinds of community participation and engagement look like
- what values do we create for our community members to participate in our community and engage with our work
- what processes work that can be used to iterate and improve all forms of participation and build a fair value exchange (support and acknowledgement) system

__ Mapping community information, community process, the mountain of engagement and value exchange __

- Discover how people interact with your community, organisation, or project and its culture.
- Discover how people identify and move between different types of interactions.
- Develop pathways for people to move from first contact to sustained engagement to leadership
- Embed value-exchange and fair recognition process in the project

Notes

- Participants response ...
-
-

Assignment:

[MAKE A COPY] 3 - community participation and engagement ← [Make a Copy]

TODO: Bring one or multiple of these resources to share with others

- Your favourite community document - from your or another project - these documents could be an annual report, a community health report (how is your community doing, what are the indicators)
- A community policy from your work (contributing guideline, code of conduct etc.)
- Strategy or communication document.

Reading recommendation

- Personas and Pathways: <https://the-turing-way.netlify.app/project-design/persona.html>
- Jones, C. M. (2022). How to Reward Your Community Members And Keep Them Engaged. CMX. <https://cmxhub.com/how-to-reward-your-community-members>
- Creating Pathways: [Creating Pathways That Invest in New Maintainers](#)
- Map is not the territory: <https://conceptually.org/concepts/the-map-is-not-the-territory>
- How do we manage conflict and difficult situations
 - Positive Deviance. (2018, July 12): <https://involve.org.uk/resources/methods/positive-deviance>
 - Code of Conduct and Restorative practice: https://github.com/alan-turing-institute/open-community-building/blob/main/CODE_OF_CONDUCT.md#6-restorative-practice-statement-and-principles
 - What is Conflict Management? | peopleHum: <https://www.peoplehum.com/glossary/conflict-management>

- Restorative Practices – Conflict Resolution Education Connection: https://creducation.net/conflict_resolution_education_practice_areas/restorative_practices
- The Positive Value of Conflict: The Power of Resolution: <https://www.psychologytoday.com/gb/blog/inside-out-outside-in/202103/the-positive-value-conflict-the-power-resolution>

Key takeaways

In this next session we discussed the Mountain/Matrix of engagement to understand what different levels of engagement looks like and how we facilitate that.

We explored questions and frameworks to understand these aspects: - How do we move our community contributors/stakeholders from one level to another? When to recognise someone can move from one band to another? - Mountain of Engagement should be a living document, reflecting on what your community experiences are and where you should modify them.

Q&A and suggestions after the call - response will be shared through notes

- Participants response ...
-
-

Feedback from this session

What worked? What didn't work? What would you change? What surprised you? - Participants response ...

Session 4: Creating and Communicating Community Charter

Values are the rules by which we live – the filters through which we evaluate possible actions, the base upon which we make decisions in support of the achievement of our collective and individual vision and purpose. – Michael Cavanagh

Key lessons

- Framing your community vision
- Communicating your community mission
- Defining roadmaps and milestones
- Establishing ways of working

Roll call

__ Silent reflection 5 mins, exchange thoughts with the group __

- **Identify your core values (pick 3)** ([LIST OF PERSONAL CORE VALUES](#))
- Choose one and define how you see it, Offer examples of your chosen value in action - share with others

Name / Three Values (based on where you currently are - this may change in the future)

- Malvika / Accountability, **Transparency** , Kindness,
- Participants response ...
-
-

Personal Reflections

- *How do your values align with the work you do?*
- *How would you help a contributor align their values, vision and goal?*
- *What will this discussion between you and them look like?*

[\[Link to the Google slides\]](#)

“A goal is not always meant to be reached, it often serves simply as something to aim at.”
Bruce Lee

Vision: Articulating your big ideas (for the future)

Prompts for vision

- What you are doing - Why you are doing this - the impact or change your project will bring - Who are users and contributors

Mission: Where you are right now, what your objectives are, what is next.**

Prompts for Mission

- What the objectives are - What does your project offers and what makes it unique - What the next steps are (Process for community engagement and project development)

Roadmap: an overview of the project’s goals and outcomes presented on a timeline.

- Roadmap is supplemented with details such as scope, resources, ways of working, risks
- Roadmap does not provide task-level details. (For task-level details, see project charter).
- Information gathered so far can be put together in a project charter, or maintained through separate documents. You can consider adding more details. (Prompts in the assignment)

Reflection for the future

What is the definition of success for us in 6 months/12 months/2 years (based on where you are)?

Shared notes/thoughts/insights

- A vision statement can be hard to draft when other stakeholders are not in the same room

- Writing something short and succinct can take more time than multiple sentences - it can be iteratively improved, but you need to start somewhere
- Participants response ...
-
-

Next steps: In your own time after the workshop!

__ Integrating values and intentional efforts for inclusion and diversity in your project. __

Before doing the assignment:

Identify your community's values and represent them in all processes (policies, guidelines, onboarding, decision-making, communication etc.)

Assignment 4 + Discussions: 4 - Community Vision, Mission, Roadmap, Charter← [Make a Copy]

Reading recommendation:

- [6-AuthenticPrinciplesCommEng.pdf](#) (reference: *Principles of Authentic Community Engagement* - Minnesota Dept. of Health. (2014, September 28).)

Key takeaways

In this session, we learned how to build a community charter - emphasising the importance of building clarity in your work through writing.

Q&A and suggestions after the call - response will be shared through notes

- Participants response ...
-
-

Feedback from this session

What worked? What didn't work? What would you change? What surprised you? - Participants response ...

References

- will be added