PLACECUBE **HISTORIC ENGLAND**

Overview

Online Communities of Practice (CoP) Review Toolkit

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The Project Team comprised of Michael Norton, Dimple Rathod and Liz Copeland.

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OVERVIEW

INTRODUCTION

Placecube were commissioned by Historic England to provide Historic England's online community managers with a practical community of practice review toolkit that will:

- enable them to measure and review their own communities;
- help them understand the value their communities bring to their members, to their organisations and to the sector;
- provide them with a way to further improve the engagement with online communities within the heritage sector.

This introduction and guidance should be read in conjunction with our step-by-step Guide and Templates, which provides a modular approach to reviewing your community.

Note: throughout the toolkit, "community" will be used as an all-encompassing term to describe all the different types of communities of practice and online community approaches that could be taken.

A. WHY HAS THE ONLINE COMMUNITIES OF PRACTICE TOOLKIT BEEN DEVELOPED?

This toolkit has been designed and developed to enable users to carry out an in-depth review of a community. Using a combination of self-assessments, surveys and questionnaires, users will be able to review a community's performance, impact and plan for the future.

The results will allow for a comparison between different communities and identify the key skills and processes required to assist a community to achieve its purpose and objectives.

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It aims to support the development and sustainability of communities, in this instance in the heritage sector, and informs decision-making when new communities are being established in terms of resources, skills and practice.

Edmund Lee, Sector Resilience Manager at Historic England, helps us to define what we mean by “community” for the purpose of this toolkit.

To be a community, the system will:

- Be online: operate mainly online using peer-to-peer messaging technology.
- Be transparent: have a membership list so it’s possible to say who is a member and receives messages.
- Be inclusive: allow any member to initiate and send a message to all other members.
- Be a record: save messages and make them accessible to new members.

B. WHO IS THE GUIDE FOR?

The practical toolkit has been developed primarily for professionals that represent the organisations and individuals in the heritage workforce across the UK. However, the measures and outcomes are relevant to all community managers working in all areas of public sector improvement. We expect a wide range of organisations involved in facilitating and managing communities to be able to put this toolkit to use and apply it to their own communities.

C. IS IT RIGHT FOR MY PROJECT?

The toolkit is aimed at community managers who want to measure and review their own communities, taking into account the community’s performance, progress and achievements. It is designed to help them understand the value their communities bring to their members, to their organisations and in this instance, the heritage sector. Research methods will be used to assess whether a community has been or is effective at achieving its stated purpose and objectives.

This review is best suited to a community that has passed the ‘ideation’ stage, and is progressing well into the ‘initiation’, ‘growth’ or ‘maturity’ stages of a community’s life cycle. It can also be useful for a community that is reaching its ‘decline’ stage to help review what will happen in the future.

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D. WHAT LEVEL OF SKILL DO I NEED?

Whether you are running a community review for the first time or have previous experience running community reviews, this toolkit is for you. The toolkit provides an easy to follow process covering simple, yet effective tools and techniques that can be adapted to suit your needs. It uses tried and tested methods and directs you to advance the review further if this is required. For first time community reviewers, we recommend keeping the process as simple as possible to begin with. The toolkit will provide the minimum input needed and highlight where it's possible to dive deeper into the review process based on your requirements and experience.

E. WHAT TYPE OF REVIEW AM I UNDERTAKING?

The Online Communities of Practice Review Toolkit will focus on the the processes of the community, where through the use of the key templates in the toolkit, you will be able to choose qualitative, quantitative and benchmarking tools and techniques that best fit the needs of the community and those of the community managers.

Initial steps will involve gathering qualitative data about the community and quantitative data from the community members to gain an insight into how active and/or engaged members are in the community. This is followed by self-assessments with the community managers and a SWOT analysis. Responses received can be analysed and used to form the review of the community.

Further research can be conducted after this review through looking at a value for money review, through the use of storytelling techniques (Anecdote Circles) and calculating the value of communities (see the methods described in Measuring the Impact of Communities by Richard McDermott).

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F. WHAT CAN I DO IF I FIND IT CONFUSING?

Carrying out a review can seem like a daunting task. For the purpose of this specific toolkit, you do not require any specialist research and review skills. The steps involved are designed to provide an easy to follow toolkit that delivers constructive feedback. The aim is to help a community learn, grow and take the next best steps according to its needs, without having to invest heavily into your research budget. Prompts are provided where a deeper level of research could be undertaken if there is a need, and if you have the resources available.

If you are unsure of anything, take a step back from the toolkit and then come back to it after a break. Use the toolkit to divide your workload into manageable bite-sized tasks and let your colleagues act as a sounding board to help sense check your approach to using the toolkit.

G. WHERE CAN I GO FOR ADDITIONAL HELP?

This toolkit is a guide and provides information and a process whether or not you are new to reviewing communities. If you require any additional information, contact Historic England by emailing: Train@HistoricEngland.org.uk.

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H. WHAT IS THE REVIEW TOOLKIT PROCESS?

The Online Communities of Practice Review Toolkit process consists of five stages.

Stage	Process
01. PLAN YOUR REVIEW	Decide what information you need and how you are going to collect it.
02. COLLECT THE DATA	Gather information on the community using questionnaires, surveys and self-assessments and other data collection tools.
03. ASSESS THE DATA	Find out what the data can tell you about the community regarding what's working and what could be improved.
04. USE THE DATA	Draw together the findings from the review into the final report.
05. DISSEMINATE, USE AND LEARN	Determine how you intend to share and publish the review, and implement your lessons learned.

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I. WHAT ARE THE KEY STAGES OF THE REVIEW TOOLKIT PROCESS?

The diagram below identifies how you will know that you have completed a stage in the process and provides hints to help you. You can download the templates here.

Stage	Complete when...	Hints
1. PLAN YOUR REVIEW Decide what information you need and how you are going to collect it.	You have identified the review questions and all the information you need to review the community.	You can use the **T1 - Background Questionnaire** and **T2 - Kick-off Meeting** to clarify the information requirements.
2. COLLECT THE DATA Gather information on the community using questionnaires, surveys and self-assessments and other data collection tools.	Your Background Questionnaire, Member Survey and Self-Assessments have been completed by the right number and type of respondents.	You can use the **T1 Background Questionnaire**, **T3 - Member Survey** and **T4 - Self-Assessment templates** as a guide.
3. ASSESS THE DATA Find out what the data can tell you about the community regarding what's working and what could be improved.	You have identified the Strengths, Weaknesses, Opportunities and Threats for the Community and the key areas of focus for the Community Managers.	Bringing the results together from the **T1 - Background Questionnaire**, **T3 - Member Survey** and **T4 - Self Assessment** will help you identify the SWOT and focus on areas of improvement for the Community Management Team to take action on as part of the **T5 - Enhancing Communities Workshop**.
4. USE THE DATA Draw together the findings from the review into the final report.	You have used the results to prove what's working and what can be improved.	Use the **T6 - Report Template** to detail out the review.
5. DISSEMINATE, USE AND LEARN Determine how you intend to share and publish the review, and implement your lessons learned.	Your review is complete and you are in a position to share your findings and learnings.	Identify who to disseminate the report to and how the lessons learned can be used to improve the review process.

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J. WHAT IS THE STRUCTURE OF THE REVIEW?

The Online Communities of Practice (CoP) Review is broken down into multiple sections to help you pick and choose what is relevant for your community review.

- Communities of Practice Review: A Step-by-Step Guide
- T1 - Community Background Questionnaire
- T2 - Kick-off Meeting
- T3 - Community Member Survey
- T4 - Community and Community Manager Self-Assessments
- T5 - Enhancing Communities Workshop
- T6 - Final Report Template

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