PLACECUBE **HISTORIC ENGLAND**

A STEP-BY-STEP GUIDE

Online Communities of Practice (CoP) Review Toolkit

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PLACECUBE

CONTENTS

INTRODUCTION

This guide is designed to help you understand how to use the toolkit effectively to review a community. The toolkit contains templates and guidelines that will help you collect and analyse data to better understand the community that is being reviewed.

A. OBJECTIVES OF THE TOOLKIT

- Help toolkit users set up their own community review.
- Help toolkit users select, adapt and refine the review questions for their needs.
- Provide a set of questions for inclusion in a Community Member Survey.
- Gather qualitative background information about the community.
- Provide a workshop approach for assessing the self-assessments, survey results and designing an action plan.
- Produce a community review toolkit that is in an accessible format.
- Minimise the reliance on external consultants to provide support to communities.

B. ESTIMATED TIMELINES

B1. FULL REVIEW

The estimated timeline for using this toolkit depends on the size of your community and the amount of data you want to collect. Typically, it takes six to eight weeks to complete the full review process, however, it may take more or less time depending on a number of factors, such as resources, availability and response times.

Here is a suggested timeline that you can follow:

- Week 1: Review the toolkit and templates, and plan the process.
- Week 2: Contact community managers to set up the kick-off meeting and send them the background questionnaire for completion.
- Week 3: Conduct kick-off meetings with community managers.
- Week 4: Develop the community member survey.
- Week 5: Send the community member survey to all, or the relevant, community members.
- Week 6: Send self-assessment documents to community managers.
- Week 7: Analyse the data and outcomes.

- Week 8: Set an action plan and / or recommendations timetable and produce the final report of findings.

B2. COMMUNITY MANAGEMENT SELF-ASSESSMENT TIMELINE

If the focus is purely on reviewing the community from the community managers' perspectives, the timelines can be adapted from the full review timeline.

The estimated timeline for using this version of the toolkit is three to four weeks, and may take more or less time depending on a number of factors, such as resources, availability and response times.

Here is a suggested timeline that you can follow:

- Week 1: Review the toolkit and templates, and plan the process.
- Week 2: Contact community managers and send self-assessment documents to community managers.
- Week 3: Analyse the data and outcomes.
- Week 4: Produce the final report of findings.

B3. COMMUNITY MEMBER SURVEY REVIEW TIMELINE

If the focus is on reviewing the community from the community members' perspectives only, the timelines can be adapted from the full review timeline.

The estimated timeline for using this version of the toolkit is four to five weeks, and may take more or less time depending on a number of factors, such as resources, availability and response times.

Here is a suggested timeline that you can follow:

- Week 1: Review the toolkit and templates, and plan the process.
- Week 2: Contact community managers and develop the community member survey.
- Week 3: Send the community members survey to all, or the relevant, community members.

- Week 4: Analyse the data and outcomes.
- Week 5: Produce the final report of findings.

C. COMMUNITY REVIEW TEMPLATES

There are some additional guides created which work alongside this toolkit. These will be highlighted at the appropriate stage in the process where you can choose to use one of the additional guides to help you. The guides are as follows:

1. T1 - Community Background Questionnaire
2. T2 - Kick-off Meeting
3. T3 - Community Member Survey
4. T4 - Community and Community Manager Self-Assessments
5. T5 - Enhancing Communities Workshop
6. T6 - Final Report Template

D. FIVE-STAGE PROCESS FOR THE REVIEW

This guide takes you through a five-stage process to carry out your review.

Stage	Complete when…	Hints
1. PLAN YOUR REVIEW Decide what information you need and how you are going to collect it.	You have identified 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 our **T1 Background Questionnaire**, **T3 - Members Survey** and **T4 - Self-Assessment** templates as a guide.
3. ANALYSE 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 - Members 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.
4. USE THE DATA Showcase the data to the community managers and develop a forward thinking action plan for the community.	You have used the results to prove what's working and what can be improved.	You can use the **T5 - Enhancing Communities Workshop Template** to demonstrate and discuss the SWOT analysis and build the action plan.
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.	Use the **T6 - Report Template** to detail out the review process followed to share more widely how it went and what lessons can be learned for the future.

STAGE 1 OVERVIEW: PLAN YOUR REVIEW

Planning your review before you begin will help you to make sure that you collect the right information. It will also save you time and effort later.

This stage will cover:

- A. FORMING A REVIEW GROUP
- B. PLANNING THE PROCESS
- C. FORMULATING A BUSINESS CASE
- D. DEFINING YOUR GOALS OR QUESTIONS
- E. SETTING OBJECTIVES FOR THE REVIEW
- F. AGREEING THE SCOPE
- G. FOCUSING ON YOUR RESPONDENTS
- H. DRAWING UP A DETAILED TASK LIST
- I. SETTING A BUDGET
- J. SETTING A TIMETABLE
- K. CREATING A RISK LOG AND ISSUES LOG
- L. AGREEING QUALITY ASSURANCE MEASURES
- M. CHECKLIST

STAGE 1: PLAN YOUR REVIEW

Once you have completed this stage you will have a clear idea about the requirements for the review.

- You will have a good understanding of the extent and size of the review.
- You will have identified the purpose and objectives of the review.
- You will be aware of the information needed to review the community effectively.
- You will have formulated a business case, specifying the reasons for conducting the community review.
- You will have planned the review process, including the size, complexity, and duration of the review.

This guidance describes a mixed methods review, and covers both qualitative and quantitative data collection. Qualitative data is usually narrative and is gathered via interviews, focus groups or participant observation. Quantitative data is numerical and is usually gathered via surveys, questionnaires and self-assessments.

A. FORMING A REVIEW GROUP

First, you need to decide who will be involved in overseeing and supporting the review. This might just be the main Community Manager and the Community Reviewer, or you may want it to be the Community Management Team and Key stakeholders of the community.

We recommend that you keep this as a small group if this is your first community review or if it is a small process. For a larger scale review, we would recommend a wider group.

Remember that involvement in the group does not have to be onerous, and you may only meet 2-3 times according to time and resources.

B. PLANNING THE PROCESS

Those involved in the review (or the Review Working Group), will need to make decisions about the size and scope of the review, such as:

- why you are doing the review;
- what you hope it will achieve;
- who will be involved;
- how complex you want the review to be;
- how long you will spend on it;
- what budget you may need for it (e.g. travel expenses to meet with beneficiaries, or incentives for beneficiaries who take part), and;
- when the review will take place.

Ideally you will collect information from the community managers to help inform the decision-making process.

C. FORMULATING A BUSINESS CASE

It's important to consider why you are conducting a community review. Writing a business case will help you specify your project appropriately so it is feasible within your available resources. For example, is it appropriate/possible to survey your whole community or a subset of it? How much time will community managers require to provide background and self-assessment details? And, crucially, what are you going to do with the insight, information and data you gather? These elements should be set out clearly at the start of your project, before resources are committed.

D. DEFINING YOUR GOALS OR QUESTIONS

Your review goal is the general, overall purpose of your community review. It succinctly tells others why you are carrying out the review. It is a broad statement of your overall intent and describes what is to be accomplished. For example, are you aiming to get a full review of the community, or are you looking to understand a specific issue within the community?

<u>An example goal might be:</u>

To improve the understanding of the benefits members perceive from being part of the community.

Similarly, your review question is the central issue to be resolved by the community review. It usually recognises a current challenge or opportunity.

<u>An example review question might be:</u>

Where should the community focus its time and effort over the next 12 months?

This toolkit provides a set of templates, questionnaires, self-assessments, and predetermined survey questions in a set of modules that cover different aspects when reviewing a community. Your review goal, aim or review question may determine which modules you choose when reviewing the community.

For project planning purposes, your goal or aim is generally translated into specific objectives.

E. SETTING OBJECTIVES FOR THE REVIEW

Developing your goal, aim or review question will help you focus your objectives. They should be specific, measurable, achievable, relevant and timed. Objectives are the driving force of a project and dictate what you will actually do. Everything you do during the project must contribute toward meeting your objectives, so in this way the review objectives determine the structure of your community review.

It is good practice to only ask the questions for which you require answers to, and only measure what you need to need to know. Otherwise you may spend resources collating and interpreting information, which you do not need or intend to use.

F. AGREEING THE SCOPE

This toolkit has been designed with a focus on supporting those with experience and an understanding of ‘community management’. A person has ‘community management skills’ if they have supported or managed the facilitation and delivery of a community or are a subject matter expert who is demonstrably knowledgeable and experienced in community management.

G. FOCUSING ON YOUR RESPONDENTS

The respondents to a community review carried out using this toolkit will be community managers and members of the community who have been selected for review.

- The community background research will provide the qualitative data from the community managers.
- The survey will ask members of the community to provide quantitative data, and some qualitative insight in the form of text in comment boxes.
- The self-assessments will provide additional specific qualitative data about the skills of the community manager and their review of the community.

H. DRAWING UP A DETAILED TASK LIST

Once you have formulated a business case, defined your review goal or question, set some review objectives and agreed the scope, you will be ready to list the detailed tasks that need to be done to carry out your community review.

Examples of detailed tasks are:

- Arranging meetings with community managers.
- Sending out background information requests.
- Writing email communications to prepare members for the survey.
- Uploading agreed survey questions to your selected online survey tool and testing it.
- Sending out self-assessments to community managers.
- Gathering data and responses.
- Arranging and conducting an Enhancing Communities Workshop.
- Writing a final report on the community review.

A detailed tasks list is an important project management tool, as you can check progress and performance against it. It is also useful for determining your community review project budget and timetable.

I. SETTING A BUDGET

You may be able to carry out a community review project using this toolkit from your own in-house resources. However, you may still need to allocate internal resources that would otherwise be used on different activities. You may also require additional resources or need to anticipate third-party costs for example a survey tool, which should be budgeted for during the review planning stage.

J. SETTING A TIMETABLE

All projects should have a timetable. Like the detailed task list, it is an important project management tool, against which you can check progress and performance.

We suggest allowing eight weeks for the project from start to finish.

- Week 1: Review the toolkit and templates, and plan the process.
- Week 2: Contact community managers to set up the kick-off meeting and send them the background questionnaire for completion.
- Week 3: Conduct kick-off meetings with community managers.
- Week 4: Develop the community member survey.
- Week 5: Send the community member survey to all, or the relevant, community members.
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- Week 7: Analyse the data and outcomes.
- Week 8: Set an action plan and / or recommendations timetable and produce the final report of findings.

K. CREATING A RISK AND ISSUES LOG

A risk is an area of uncertainty identified during review planning. Anticipating risks allows for appropriate mitigation planning and for monitoring procedures to be put in place.

A risk log is a document created during review planning and updated throughout your community review project. It identifies, evaluates and suggests counter-measures for all project risks, small or big.

Risks are to be distinguished from issues, which refer to unforeseen developments that may lead to a change to the project's delivery.

An issues log is a document listing issues raised once the project is underway and used for keeping track of their status.

More details and examples can be found via:
https://historicengland.org.uk/images-books/publications/morphe-project-managers-guide/

L. AGREEING QUALITY ASSURANCE MEASURES

You may have your own quality assurance processes, and if you do, you should apply them to any surveys and self-assessments you set up using this toolkit. Otherwise, we recommend that once you have set up your survey and self-assessments, you do the following:

- Pause, do not rush, take your time to check the design, layout and settings.
- Proofread your survey and self-assessments a few times to check for typos and any other errors - we recommend this is done by at least two people.
- Test the survey and self-assessments, ideally with someone who has not been involved in setting them up.

M. CHECKLIST

STAGE 1 CHECKLIST
Have you.... ● Formed a Review Group to oversee the community review? ● Formulated a business case that plans the process, defines the goals or questions, sets the objectives and agrees the scope? ● Identified the audience who will take part in the review? ● Drawn up a tasklist, timetable and budget for the review? ● Agreed the quality assurance measures and identified the risk and issues of the review?

STAGE 2 OVERVIEW: COLLECT THE DATA

In this stage, you will develop your approach to data and evidence collection for the review.

There are many ways to collect data. You will be introduced to the three main methods used in this review.

This stage will cover:

- A. DESIGNING YOUR COMMUNITY BACKGROUND QUESTIONNAIRE
- B. DESIGNING YOUR COMMUNITY MANAGER SELF-ASSESSMENTS
- C. DESIGNING YOUR COMMUNITY MEMBER SURVEY
- D. GETTING THE RIGHT SAMPLE
- E. CONFIDENTIALITY AND ETHICS
- F. CHECKLIST

STAGE 2: COLLECT THE DATA

Once you have completed this stage you will have a clear idea about:

- Designing a community background questionnaire and survey to understand the community's purpose, target audience, existing activities and how the community members feel about the community.
- Creating a review criteria, metrics, and activities for community managers to assess themselves in the self-assessment process.
- Choosing an appropriate online survey tool for the community member survey and ensuring it is clear, concise, and easy to complete.
- What a representative sample is and how to motivate community members to participate in the survey to minimise response bias and ensure accurate findings.
- The ethical considerations, confidentiality, and anonymity when designing and conducting the review.

Don’t worry if this is the first time you have carried out a community review. We have created three different templates for you to use.

These are:

- **T1 - Community Background Questionnaire Template**
- **T3 - Community Member Survey Template**
- **T4 - Community and Community Manager Self-Assessment Templates**

A. DESIGNING YOUR COMMUNITY BACKGROUND QUESTIONNAIRE

If you're new to designing background questionnaires about communities, here are some of our top tips to help you in the process. You may choose to adapt the questionnaire from the **T1 - Community Background Questionnaire Template**.

TOP TIPS

- Start by gathering information about the community's intended goals, objectives, and mission. Ask community managers to provide a brief overview of why the community was established and what it aims to achieve. This will help you understand the community's overarching purpose.
- Request insights on the community's target audience. Community managers can provide details about the demographic characteristics, interests, and preferences of the community members. This will help you understand the target audience of the community.
- Ask community managers to provide an overview of the existing activities within the community. Enquire about the types of discussions, events organised, and content shared. This will help you understand the current engagement strategies employed by the community and identify areas for improvement or expansion.
- Request data on community engagement metrics, such as active membership count, participation rates, or interaction frequency. Community managers can provide insights into the levels of engagement among community members and any trends they have observed over time.
- Enquire about the strategies employed by community managers to foster engagement, resolve conflicts, and ensure a positive community environment. Ask for feedback on the effectiveness of these strategies and any challenges or successes experienced in managing the community.
- Request information on the overall satisfaction levels of the community. Community managers can share their observations regarding member satisfaction, conflicts, or any issues affecting the community's well-being. This will help identify areas that require attention or improvement.
- Enquire about the communication channels and platforms preferred by the community members. Community managers can provide insights into the most effective channels for engaging with the community, as well as any platforms where the community is most active.

- Ask community managers for their perspectives on potential areas for community growth or expansion. Find out about their ideas for new initiatives, content, or engagement strategies that could benefit the community in the future.
- Allow open-ended feedback. Provide an opportunity for community managers to share any additional feedback, challenges, or suggestions they might have that were not covered by the previous questions. This will allow them to provide comprehensive insights and perspectives on the community and their role in managing it.

Lastly, ensure that the questionnaire is clear, concise, and easy to complete. Offer the option to provide anonymous feedback if preferred. The goal is to gather valuable insights to enhance the community management strategies and support the growth and success of the community.

B. DESIGNING YOUR COMMUNITY MEMBER SURVEY

If you're new to designing surveys, here are some of our top tips to help you in the process. You can adapt the survey from the **T3 - Community Member Survey**.

We strongly recommend setting up your community review survey online. This is because online surveys are generally:

- Faster to set up and complete. For example, you don't have to call people or wait for respondents to return paper questionnaires.
- Cheaper, because there are no postage or telephone call costs involved.
- Quick to analyse via data downloads or automated tabling and charting.
- Easier for respondents to complete, as they can do so in their own time or on the move.

However, you may feel it more appropriate to set up your community review survey using other techniques such as telephone or face-to-face surveys, or a combination of options. It is up to you to determine the ideal community review technique based on the community and members involved.

TOP TIPS

The following tips are based on using an online survey tool for your community review.

- Promote your survey to potential respondents before you need them to complete it. This can be done via your community directly or through newsletters, emails or social media channels depending on what communication methods work best for your community.
- Highlight the reasons for conducting your community review survey, when the survey opens and when it closes, and including contact details for someone to answer any questions.
- Keep it as short as you can, preferably so that it takes no longer than 10-15 minutes to complete. A long survey will put people off.
- You may wish to include an optional question asking respondents to provide their email address for you to follow up with them, if they are willing to share their experiences about any time savings and avoidable costs that the community has supported them with.
- Include your organisation/community logo, and use your branding to set the survey's colour, font, style and formatting. This will give your community review survey the same look and feel as your organisation/community and may help increase your response rate.
- Begin with a short introduction explaining the purpose of the survey, who is conducting the review, confidentiality, consent and contact details in case the respondents have any questions.
- Choose from a wide range of question types, including matrix questions, drop-down lists, etc.
- Include additional explanatory text at the beginning of the survey, at the top of a page, and underneath questions to provide enough information where it's required.
- Export data, as this will enable you to share your survey results quickly and easily and it may also enable you to do more detailed analysis.
- Send emails/reminder messages to potential respondents and nudge them to complete your survey within the given timeframe.

Here are some examples of widely used online survey platforms you may wish to explore:

- Google Forms
- Microsoft Forms

- Survey Monkey
- Typeform
- Zoho Survey

[Note: Not all online survey platforms are free and some have paid plans for more advanced features or based on the number of questions and respondents. Ensure you have detailed your survey requirements and choose the right tool for your needs.]

When you have a draft of your survey ready, it is always a good idea to test it out with the Community Management Team. This will be part of the **T2 - Kick-off Meeting**. This process of testing is called piloting. It will help you to identify any questions or instructions that may be unclear, giving you the opportunity to improve the survey before you finalise it and give it to the Community Management Team to share with the Community Members.

Further advice on designing surveys:
https://analysisfunction.civilservice.gov.uk/policy-store/top-tips-for-maintaining-quality-when-designing-surveys-at-pace/

C. DESIGNING YOUR COMMUNITY MANAGER SELF-ASSESSMENTS

If you are new to designing self-assessments for community managers, here are some of our top tips to help you in the process. You can adapt the self-assessments from the **T4 - Community and Community Manager Self-Assessment Templates**.

TOP TIPS

- Clearly define the criteria for evaluating time spent on key activities. Specify what aspects you want to assess and the desired outcomes. For example, you might consider evaluating time spent on community engagement, moderation, content strategy, and relationship building.

- Identify specific metrics that can be used to measure time spent on key activities. This could include hours dedicated to moderation, events and activities, and technology.
- Develop self-assessment questionnaires that community managers can complete to evaluate their time allocation and activities. Design questions that prompt reflection and provide an opportunity to rate their performance or quantify their efforts.
- In addition to quantitative assessments, provide space for community managers to provide qualitative feedback. Allow them to share challenges faced, lessons learned, and suggestions for improvement. This qualitative feedback can provide valuable insights into their experiences and help identify areas for growth.

Remember, the self-assessment process should be supportive and empowering, encouraging community managers to reflect on their efforts and explore opportunities for growth and improvement.

D. GETTING THE RIGHT SAMPLE

One of the key aspects of running a successful survey is who responds to it. In this case you will be asking members of the community to complete the survey. The higher the proportion that completes the survey – this number is known as the response rate – the more accurate your findings will be.

For example, if a community has 200 current members and 20 members respond, 20 members out of a total of 200 - 10% - is considered a relatively high response rate when it comes to participation inequality in online communities. More details about participation inequality: https://www.nngroup.com/articles/participation-inequality/

It can be difficult to get everyone to complete a survey, however you should aim to get as many responses as possible. This will help to ensure you have a representative sample.

Another factor to be aware of is that sometimes only those who have had a very positive or very negative experience of the community will feel inclined to fill in the survey. This is known as a response bias and may skew the results. Try to think of ways to motivate a good cross-section of members to complete the survey by explaining how important the results are to improving the future of the community and their membership of it.

It is also important to let them know that they can say anything – good or bad – in their responses. If people do not feel comfortable giving critical feedback, you won't know how to improve your community or make it as effective as it could possibly be.

You should also consider whether there is a particular time span when the members are more likely to fill in the survey. Try to avoid timing it around seasonal events or other forthcoming events your members may be involved in.

If you are using an online survey tool, bear in mind that the response rate is likely to be higher if you ask members to complete the survey within a set timescale.

Finally, if you are conducting this sort of review you will need to check what sample size you need in order to run the appropriate statistical analyses. You can get further help online or through many online courses, some of which are free of charge.

E. CONFIDENTIALITY AND ETHICS

It is vital that the review is conducted in an ethical manner and is inline with best research practice. Your review may involve collecting sensitive information, and possibly from vulnerable people. This is something that should be discussed before the review takes place.

We highly recommend enabling members to respond anonymously - this will help to encourage them to complete the survey honestly. If you are asking questions about sensitive subjects, think carefully about whether you really need to gather that information. Ensure that what you are collecting is what you actually need for the purpose of the review only. Personal data and information should not be collected unless there is a genuine reason for it, and knowing it will help to improve the community.

If you decide you do need to collect it, think about the best way of doing so. Sometimes it may be more appropriate to carry out the survey face-to-face, especially for very sensitive information.

It is important that the wording of the questions in the survey is the same for all respondents. However, you can alter the way you introduce the question or discuss their response to it. Your pilot with the community management team should be a way to pick up any issues with how questions are phrased and where they could be improved.

Online surveys can help with this. Make sure the questions don't request any personal information that can identify individual participants. Any paper surveys should also be stored securely and destroyed once the review is complete.

You may also wish to include a consent statement as part of your survey to make participants aware of how much privacy they can expect from their involvement, be it confidentiality or anonymity. Ensure it includes the community management team's contact details in case participants have any queries.

Let the participants know that completing the survey is optional and also make it clear what will happen to the data you are collecting (e.g. how it will be used and shared).

F. CHECKLIST

STAGE 2 CHECKLIST
Have you.... ● Gathered information about the community's goals, objectives, and mission for the background questionnaire? ● Designed a survey and piloted it with the Community Management Team? ● Considered the research ethics of the survey and any confidentiality and data protection issues? ● Gathered information about the community managers and how they see the community?

STAGE 3 OVERVIEW: ASSESS THE DATA

In this section, you will find out how to analyse the results of your community review and how to interpret the results.

This stage will cover:

- A. COLLATING THE DATA
- B. ASSESSING THE DATA
- C. INTERPRETING THE RESULTS
- D. DRAWING ALL YOUR FINDINGS TOGETHER
- E. CHECKLIST

STAGE 3: ASSESS THE DATA

Once you have completed this stage you will have:

- A detailed background about the community.
- Brought together the research from the **T1 - Community Background Questionnaire, T3 - Community Members Survey** and **T4 - Community and Community Managers Self-Assessments**.
- Conducted the **T5 - Enhancing Communities Workshop**.

A. COLLATING THE DATA

Before you begin to analyse the data, you will need to collate it in one place. Depending on the tool you have selected, you may choose to create a spreadsheet to store and analyse the data.

If you have used an online survey tool, the data entry will already have been done for you and is ready for you to analyse right away. If not, you can simply export the data to a spreadsheet for your own analysis.

Even if you have used a paper survey you could enter the responses into an online survey tool (such as Survey Monkey or Google Forms), and use it to automatically generate your spreadsheet.

B. ASSESSING THE DATA

Once you have gathered data through your community member survey and community manager self-assessments, you will need to analyse the data in order to understand it. Once you understand the data, you can comment on it so that others understand it and you can begin to form conclusions and, if appropriate, recommendations.

An initial data assessment is a good idea, as this means you can:

- Check that you have collected data from crucial respondents.

- See if the data collected is from a representative sample of the members, where this is applicable.
- Remove any obvious errors.
- Remove any duplicate entries.
- Remove completely blank responses.

C. INTERPRETING YOUR RESULTS

Interpretation turns your information into community intelligence that you and others can use to guide decision-making. Information already interpreted by someone else may need further interpretation.

Research is not an exact science and so the results and conclusions drawn from the community review will need to be used alongside your own strategic thinking.

TOP TIPS

Tips for interpreting the community review information:

- Make sure you have fully understood the information.
- Teach a colleague – if you can explain it clearly to someone else, you must have understood it.
- Can you talk and write about the subject without consulting notes?
- Get a colleague to ask you a question, e.g. can you define X?
- Does the answer you have given represent a small part of your overall understanding of the subject?
- Write key messages and check that they fit the purpose and definition.
- Use your own knowledge/judgement to draw out meaning from the information.
- Consult with colleagues.
- Be confident in your own abilities.

D. DRAWING YOUR FINDINGS TOGETHER

You should now be able to report your findings to the Community Management Team via the Enhancing Communities Workshop. Your findings should bring together all the research gathered from the following, and will help to design an outline of future activities for the community.

- T1 - Community Background Questionnaire
- T3 - Community Member Survey

- T4a - Community MOT
- T4b - Community Manager Benchmark
- T4c - Community Manager Time Spent

See T5 - Enhancing Communities Workshop for details and key elements of the workshop.

E. CHECKLIST

STAGE 3 CHECKLIST
Have you.... ● Checked the data is complete and clean? ● Asked any follow up questions or clarification questions? ● Brought the results together? ● Conducted the Enhancing Communities Workshop?

STAGE 4 OVERVIEW: USE THE DATA

The data and information brought together and built upon in the Enhancing Communities Workshop is the basis for the final report.

This step guides you through building the final report for the review of the community.

This stage will cover:

- A. BUILDING YOUR REPORT
- B. CHECKLIST

STAGE 4: USE THE DATA

Once you have completed this stage you will have developed the final report for the community.

The Community Final Report plays a pivotal role in the entire process. Throughout this review, you might uncover disparities in the benefits received by different members, or encounter unexpected outcomes. Embracing these revelations is immensely valuable, as they serve as guideposts, illuminating areas that necessitate improvement and evolution within the community. With this newfound knowledge, you are empowered to make informed changes, ensuring the continued enhancement and success of the community.

A. BUILDING YOUR REPORT

It is important to produce a written report at the end of a community review project to help disseminate the results and to aid understanding.

A good review report includes:

- A table of contents
- An executive summary
- Direct answers to your review objectives
- Clearly organised results, usually by question or topic
- Charts and other graphics to aid understanding
- Minimal methodology information
- Recommendations and / or action plan
- Appendices containing tables and other dense data

The **T6 - Final Report Template** provides an outline and key questions to help you build up the final community review report.

B. CHECKLIST

STAGE 4 CHECKLIST
Have you.... ● Created your final report? ● Checked it over with other team members? ● Brought together the appendices? ● Shared a draft with community managers for comment and included their responses?

STAGE 5 OVERVIEW: DISSEMINATE, USE AND LEARN

You should now have a rich and detailed picture of the quality and effectiveness of the review. You will know what the outcomes have been, to what extent they have been achieved, and with whom.

The next stage is to disseminate and put the learnings back into the review process.

This stage will cover:

- A. DISSEMINATING AND SHARING THE RESULTS
- B. IDENTIFYING THE LESSONS LEARNED
- C. ARCHIVING YOUR OUTPUTS
- D. CHECKLIST

STAGE 5: DISSEMINATE, USE AND LEARN

Once you have completed this stage you will have:

- Disseminated the key learning to the relevant stakeholders
- Planned follow-on actions arising from your review
- Archived the content for future reference

A. DISSEMINATING AND SHARING YOUR RESULTS, RECOMMENDATIONS AND/OR ACTION PLAN

After finalising your report, there are various avenues to disseminate its contents effectively. Alongside engaging with relevant stakeholders, consider exploring alternative methods such as blogs and infographics. These versatile formats can significantly amplify the reach of your insights, fostering broader understanding and collaboration among the participating communities and their members.

Historic England not only encourages dissemination, but also offers support in promoting and sharing lessons across online communities engaged in the reviews. Additionally, they can facilitate connections with other like-minded communities and community managers, expanding your network and allowing the exchange of insights gained from the review process.

B. IDENTIFYING THE LESSONS LEARNED

Evaluating the process that you have taken for the review, and sharing those lessons learned with future reviewers, are key to the enhanced performance and continuous improvement of your community overtime.

One proven technique we recommend using is an After Action Review (AAR) where you can systematically assess the strengths, weaknesses, and lessons learned from the review.

This section of the Online Communities of Practice Review Toolkit provides guidance on how to use the AAR process, specifically for the review process itself, with a focus on generating actionable lessons learned.

Define the AAR objectives

Clearly establish the objectives of the AAR process for evaluating the review. These objectives should be based on the approach you have taken to the community review and follow the simple steps set out to conduct the AAR.

Assemble the AAR team

The team should ideally include representatives from the same team that have been part of the community review. The choice will be yours if you would like to include the key community managers that have taken part in the review, as they can provide a different perspective to the team. The facilitator of the AAR session can be a team member or someone external to the project.

Prepare the AAR session

- Schedule a dedicated time and place for the AAR session, allowing sufficient time for a thorough review and discussion. We recommend scheduling a minimum of one hour to evaluate the review and allow relevant stakeholders to provide input and share their views.
- Prepare relevant documents to help inform the AAR, such as the review plan, data collection tools, reports, and any other materials necessary for the AAR team to reference during the session.
- Develop an agenda outlining the key topics to be discussed during the AAR session. This will help maintain focus and ensure all aspects are covered.

Conduct the AAR session

- Begin the AAR session by clearly articulating the objectives, process, and expected outcomes to the team members. Encourage an open and non-judgmental atmosphere that promotes honest and constructive feedback.

- Evaluate the review process step-by-step using the AAR's technique based on the following four questions:
    - What was supposed to happen?
    - What actually happened?
    - Were there any differences, and if yes, what were they?
    - What did you learn?

Extract the lessons learned

- After the AAR session, the facilitator should compile the generated list of lessons learned and identify common themes or patterns. Categorise the lessons into specific areas of improvement or recommendations for ease of use.
- Summarise the lessons learned in a concise and actionable manner. Clearly articulate the key findings, recommendations, and any supporting evidence or examples to ensure clarity and ease of understanding.

Disseminate and implement lessons learned

- Share the lessons learned with relevant stakeholders and other individuals involved in the review process.
- Develop an action plan that outlines specific steps for integrating the lessons learned into future review processes. Assign responsibilities to relevant individuals or teams and establish a timeline for implementation.

C. ARCHIVE YOUR OUTPUTS

A properly curated and accessible archive is key to any review project, and is just as important as a project's more high-profile outputs, like a published report. An archive should be systematically organised as it is required to follow current standards for creation, maintenance, ordering, formatting and indexing.

Your organisation may have its own procedures and guidelines for archiving the products of your review.

D. CHECKLIST

STAGE 5 CHECKLIST
Have you.... • Identified and disseminated the final report and any additional data with the correct stakeholders? • Identified the key lessons learned that can be passed on to the relevant stakeholders? • Identified the relevant outputs from the review and archived them based on the information management procedures for your organisation?

GLOSSARY

Action Plan: A plan of steps and strategies to address the findings and improve the community based on the community review's results.

Background Questionnaire: A set of questions for the community managers to answer, designed to gather initial information and context about the community.

Budget: The allocated resources and finances required for the community review project.

Business Case: A document outlining the reasons and objectives for conducting the community review, ensuring it is feasible within available resources.

Checklist: A list of essential tasks and actions to be completed during each stage of the community review process.

Community / Community of Practice - refers to a group of individuals who come together with a shared interest, expertise, or profession to actively engage in learning, knowledge sharing, and collaborative problem-solving.

Community Reviewer: An individual who manages and conducts the community review process to understand how a community operates, how best to evaluate its performance and identify areas for improvement.

Community Review: The process of assessing and analysing a community to understand its strengths, weaknesses, and areas for improvement.

Community Manager: The person whose primary role is to cultivate and maintain positive relationships with community members, facilitate communication and interaction, and ensure the community's growth and well-being.

Community Management Self-Assessment: A set of assessment tools specifically designed to focus on the perspective of community managers and their evaluation of the community.

Community Member Survey: A questionnaire designed to gather feedback and information from the members of the community based on their membership, how they use the community and the value it brings to them.

Data Analysis: The process of examining and interpreting the collected data to identify patterns, trends and insights relevant to the community review.

Data Cleaning: The process of removing any errors, duplicates or blank responses from the collected data to ensure its accuracy.

Data Collection: The process of gathering data through surveys, questionnaires, and self-assessments to inform the community review report.

Disseminate: To share or distribute the review findings and results with relevant stakeholders.

Enhancing Communities Workshop: A meeting or session where the research findings from the community background questionnaire, community member survey, and community manager self-assessments are presented and discussed with the Community Management Team.

Estimated Timelines: The projected duration required to complete the different stages of the community review process.

Review Group: A team of individuals responsible for overseeing and supporting the review process.

External Consultants: Professionals external to the community who have been contracted to provide specialised support and guidance during the review process.

Full Review: The comprehensive review of the community, considering both community managers' perspectives and community members' perspectives.

Historic England: Historic England is an executive non-departmental public body of the UK Government sponsored by the Department for Digital, Culture, Media and Sport. It is the public body that helps people care for, enjoy and celebrate England's spectacular historic environment.

Interpretation: The process of making sense of the raw data and drawing meaningful conclusions from the results of the community review.

Kick-off Meeting: An initial meeting to initiate and start the review process with relevant stakeholders.

Lessons Learned: Insights, knowledge, and experiences gained from the community review process that can be shared and used to inform future projects and improve performance.

Objectives: Specific, measurable, achievable, relevant, and time-bound goals that drive the project and guide the community review process.

Online Survey Platform: A digital platform or tool used to create and conduct online surveys, facilitating data collection and analysis.

Placecube: Placecube has been working with the public sector for over twenty years, co-creating open digital platforms that enable reuse and offer good design and open standards at a price that’s affordable; delivering better connected services that are easy to integrate. Our approach to reuse saves organisations from unnecessary escalating costs, because every development consists of reusable code that is made available to all customers without charging for the code a second time. Through our product Digital Place for Communities and our own open knowledge exchange platform, the Knowledge Hub (https://khub.net), we support the public sector to develop its knowledge management and collaboration capability and capacity.

Quantitative Data: Numerical data collected through surveys, questionnaires, and self-assessments, allowing for statistical analysis and measurement.

Quality Assurance Measures: Procedures and processes to ensure the accuracy, reliability, and validity of surveys and self-assessments used in the review.

Qualitative Background Information: Descriptive and non-numeric information about the community, its purpose, history, and characteristics.

Qualitative Data: Non-numeric data collected through interviews, focus groups, or participant observation, usually in the form of narratives or descriptions.

Report Template: A standardised format to present the review process and outcomes for wider sharing and learning.

Review Goal: The overall purpose of the community review, describing what is to be accomplished.

Review Objectives: The specific goals and purposes of the community review, which guide the research process and data collection.

Review Questions: Specific enquiries or topics that the review aims to address in order to gain insights into the community.

Review Report: A formal written document summarising the community review process, findings, and recommendations.

Review Question: The central issue or challenge to be resolved by the community review.

Respondents: Participants or individuals who will provide data and feedback for the community review, including community managers and community members.

Response Bias: Behaviours or opinions that occur which affect how some individuals may respond to a survey, e.g. making them more likely / less likely to respond, and leading to skewed results.

Response Rate: The percentage of individuals who respond to the survey out of the total number of potential respondents.

Results: The outcomes of data analysis presented in the review report, usually organised by review questions or topics.

Risks and Issues Log: A document identifying and evaluating potential risks and unforeseen developments that may impact the review process, along with suggested counter-measures.

Scope and Scale: The extent and size of the review, determining what aspects will be evaluated and how extensive the review will be.

Self-Assessment: The process of community managers reviewing and reflecting on their own performance and the state of the community.

Stakeholders: Individuals, groups or organisations that are directly or indirectly impacted by the services or projects being reviewed.

SWOT Analysis: An assessment of the community's Strengths, Weaknesses, Opportunities and Threats to inform decision-making and planning.

Task List: A comprehensive list of tasks required to conduct the community review, aiding project management and tracking progress.

Timetable: A schedule outlining the timeline and milestones for the community review, helping to monitor progress and performance.

Toolkit: A set of tools, templates and guidelines designed to assist users in a specific task or process, in this context, to review a community.