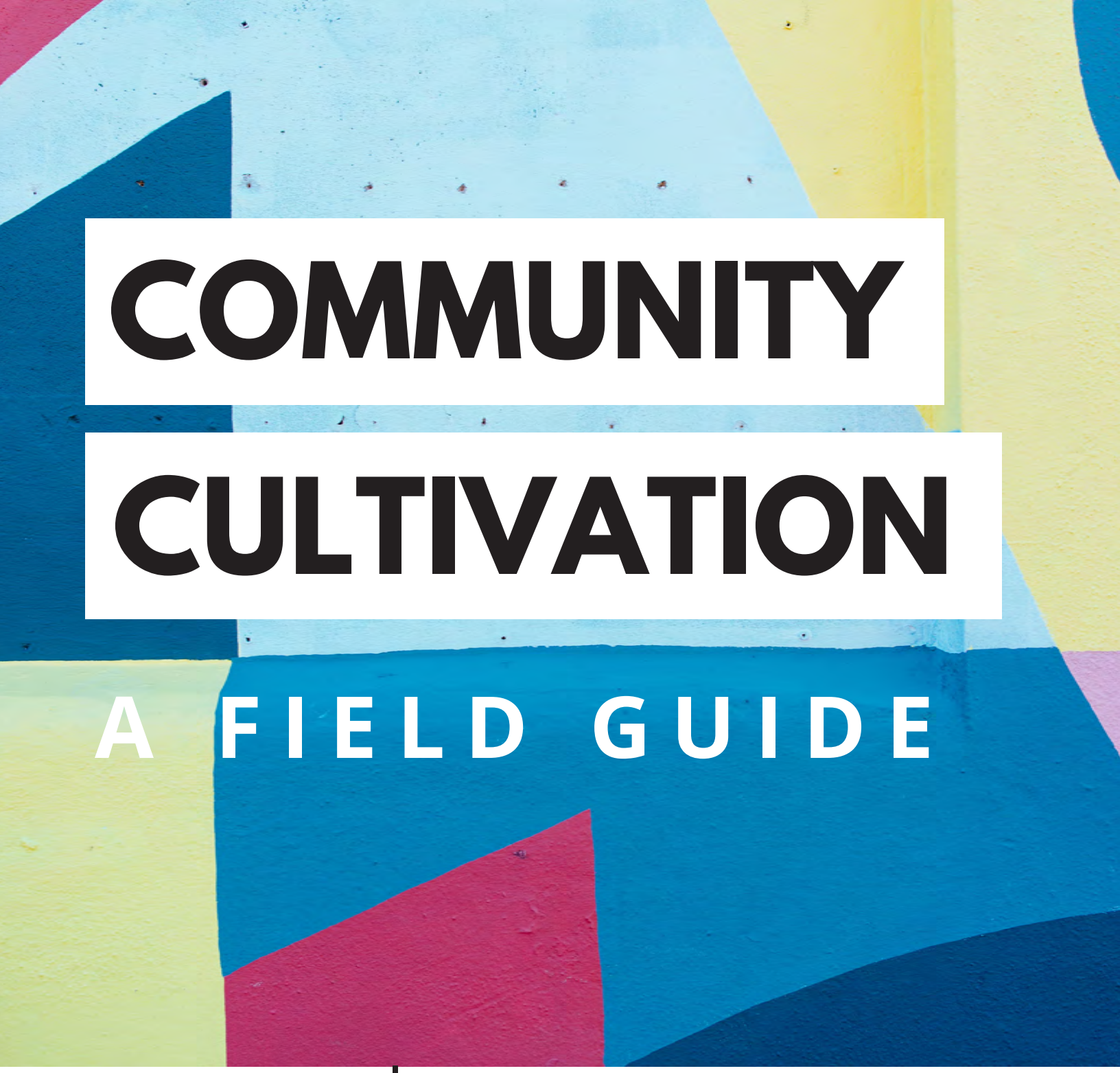

COMMUNITY CULTIVATION

A FIELD GUIDE

RELEASED

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EDUCOPIA INSTITUTE

Community Cultivators

COMMUNITY CULTIVATION:

A FIELD GUIDE

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INTRODUCTION

Community Cultivation - A Field Guide **provides scaffolding and tools that help support and sustain collaborative groups, communities, and organizations.**

THE CHALLENGE

Innovators abound in the fields of libraries, archives, museums, publishing, and higher education. Many of these idea generators find ample support for the creation of tools and technologies that enable new forms of knowledge production, dissemination, or preservation as those tools are first imagined and piloted.

However, when these innovators attempt to sustain their creations, external funding and attention often wane. A well-documented "Valley of Death" stretches between soft-funded projects and sustainable programs. Without deep knowledge of how to build a support community, and how to manage such elements as resources, communications, engagement, and governance, innovators find the bridge between grant funding and ongoing operations very difficult to cross.

Unlike their commercially oriented counterparts, who have access to tech incubators, accelerators, and even federal support infrastructures (e.g., I-Corps, SBIR, STTR), innovators and community leaders in nonprofit spheres often lack models, training, and networking opportunities. Many potential tools and services wither, not due to shortfalls in demand or shortcomings in those products, but rather to a lack of attention to organization and community building.

CREATING THE FIELD GUIDE

At Educopia, we saw this struggle taking place all around us, including in the fields of digital curation, open source software, digital humanities, and digital publishing. We watched tools and services make it past the ideation phase and then become “stuck,” due in large part to the different skillsets required for sustaining this work.

As part of our mission to empower collaborative communities to create, share, and preserve knowledge, Educopia began providing administrative and technical scaffolding for community networks in 2006. Since that time, we have created services and training to bolster promising collaborative efforts and to help communities successfully grow and mature. We have established community assessments that help us recognize and respond with appropriate training when a community is ready for growth and also when a community is ready for transition, including "spin off," “spin down,” or sunsetting processes for projects, programs, and organizations.

We are now openly sharing the model that we have developed and refined over the last twelve years. *Community Cultivation - A Field Guide* provides a powerful lens that can provide both emerging and established communities with ways to understand, evaluate, and plan their own growth, change, and maturation. We are offering this *Field Guide* freely in the hope that it will empower more community facilitators and leaders to invest in the health and sustainability of their own collaborative networks.

The *Field Guide* also offers a snapshot of the tools, resources, and training modules Educopia has developed and regularly uses in its consulting and community-building work. In the near future, we plan to also publish many of these tools, templates, workshop components, and other resources as additional assistance to community facilitators and leaders.

The *Field Guide* provides community directors, managers, facilitators, officers, and staff members with mechanisms to support, evaluate, and encourage community growth.

HOW CAN YOU USE THE FIELD GUIDE?

This *Field Guide* is designed for use by directors, managers, facilitators, governance bodies, officers, and staff members. It provides mechanisms for assessing, developing, managing, and sustaining community projects, programs, and organizational operations. It can be used to support a range of activities, including the following:

- to identify a community's current development status and to assist it in achieving optimal health and stability
- to understand and address challenges that commonly arise in particular lifecycle stages and growth areas
- to pinpoint specific activities and tools that can help a community to grow and mature
- to establish approaches that systematically track and evaluate progress on community activities
- to learn from other communities that have faced the same challenges
- to respond to changes and transitions within a community or within its surrounding environment
- to help change-resistant communities to overcome stagnation and move in new directions
- to forecast external changes that may disrupt or open new opportunities for a community
- to recognize when it is time to "spin off" or "spin down" a project, program, or organization and manage this process to streamline or refocus a community's energy

WHAT DO WE MEAN BY "COMMUNITY"?

In the Field Guide, the term *community* is defined as an intentional collective of people who gather to address common interests and goals. A community commits to empowering its members to govern its operations and guide its development.

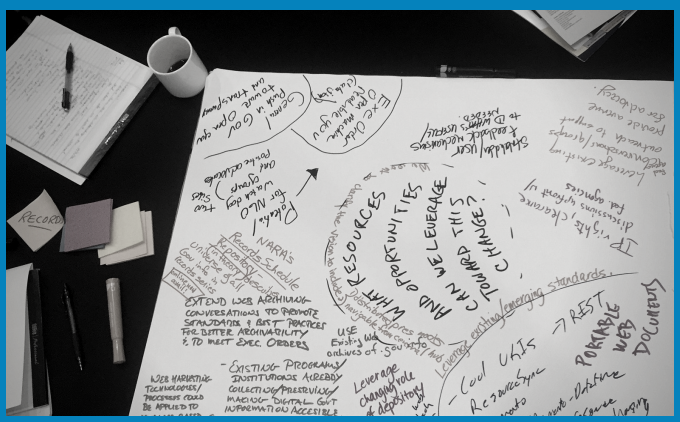
Communities represented in the *Field Guide* range from unfunded volunteer efforts to nonprofits with established revenue and service models.

Examples of the types of communities addressed herein include:

- topically focused communities
- regional communities
- open source software initiatives
- service-oriented communities
- consortia
- advocacy groups
- nonprofits

This *Field Guide* also extends to a broad range of scenarios, including:

- exploring the need for a new community
- seeking to transition a project into a sustainable program
- implementing or updating governance structures
- examining fiscal models and opportunities
- engaging in strategic planning
- managing crisis
- overcoming resistance to change
- contemplating mergers
- hosting or "acquiring" new communities

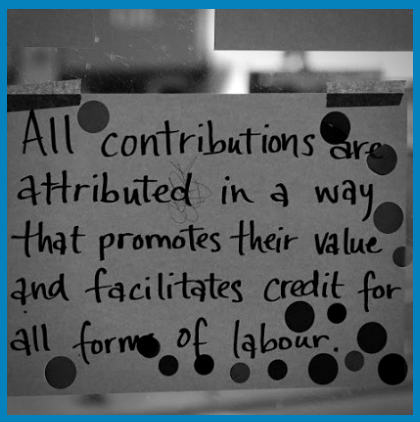


FOUNDATIONS

The team that has produced this *Field Guide* is immersed in both the theory and practice of community building. Educopia's Community Cultivation work has distilled years of collective experience and study into grounded action, drawing upon a range of relevant disciplinary approaches (e.g., social movements, sociology, organizational psychology, business) and influential theorists (e.g., Paul DiMaggio, Pierre Bourdieu, Elinor Ostrom, Yochai Benkler, Karl E. Weick, Glen Carroll, Michèle Lamont, Mancur Olson, and Keith Provan).

Our methods also are infused with community-building tools and methods including, Center for Creative Leadership's *Boundary-Spanning Leadership* (Ernst & Chobrot-Mason, 2010), IBM Center for the Business of Government's *Choosing and Using Collaborative Networks* (Milward & Provan, 2006), *Green Zone Culture/Radical Collaboration* (Blackman, 2015), University of Kansas's *Community Tool Box*, Harvard School of Education's *Good Collaboration Toolkit* (Gardner and Redding 2014), and FSG's *Collective Impact* resources (Kania & Kramer, 2011). We have adopted, adapted, and refined these and many other resources for our clients and affiliated communities as we have created the sets of descriptions, activities, and tools that are now used to guide our work.

The lead author, Katherine Skinner, received her PhD in American Studies from Emory University, and her academic work is steeped in sociology and social movement theories. Since 2006, she has served as the Executive Director of Educopia, where she strengthens networks and collaborative communities to help cultural, scientific, and scholarly institutions achieve greater impact. Contributors to the *Field Guide* include current and past Educopia staff and board members: Hannah Ballard, Alex Chassanoff, Christina Drummond, Martin Halbert, David Horth, Nick Krabbenhoeft, Sarah Lippincott, Sam Meister, Jessica Meyerson, Caitlin Perry, Matt Schultz, Melanie Schlosser, David Seaman, Cal Shepard, John Sherer, Tyler Walters, and Courtney Vukasinovic.



COMMUNITIES WITH WHOM WE'VE WORKED

This *Field Guide* has been deeply informed by our work with communities of various shapes, sizes, forms, aims and needs. Some of these communities have approached us in early "ideation" stages to solicit our advice about community formation activities. Several have asked us to assist with strategic planning, environmental scans, market analysis, and governance and fiscal model creation. Still others have sought us out in times of change or crisis to help them assess their fitness, investigate their options, build consensus, and create plans for forward motion. Our community cultivation work and knowledge have been influenced by each of the groups with whom we've worked, including the following:

Aligning National Approaches to Digital Preservation (2007-2011)
BitCurator Consortium (2013-present)
British Columbia Digital Library (2018)
CLOCKSS (2011)
Coerced Migration Research Alliance (2015-17)
Council of Prairie and Pacific University Libraries (2014, 2016)
Coalition to Advance Learning in Libraries, Archives, and Museums (2015-16)
Digital Preservation Network (2013)
Dodging the Memory Hole (2013-17)
InDiPres (2017)
Library Publishing Coalition (2012-present)
LOCKSS (2011)
MetaArchive Cooperative (2006-present)
National Digital Stewardship Alliance (2012-13)
Persistent Digital Archives and Library Systems (2009)
Preserving Electronic Government Information (2017-present)
Second Breath (2018-present)
Software Preservation Network (2016-present)

USING THE FIELD GUIDE

WHERE TO BEGIN

With the *Community Cultivation Field Guide*, you can assess your community's development status, identify targeted activities and tools to address your community's growth needs, and measure progress toward your community's maturation and sustainability goals.

We suggest that you begin by simply browsing through the *Field Guide* to get a "big picture" view of its scope and form. Depending on your role (e.g., community founder, director, staff member, officer, etc.), you may be drawn to different aspects of the *Field Guide.* As you review the *Field Guide* you may determine that you want to involve several members of your community to help you use this resource to foster your community's growth.

After you gain a basic grounding in the *Field Guide*, we recommend that you use our Community Cultivation Framework to pinpoint your community's current development status across four **Lifecycle Stages** and five **Growth Areas** (described briefly on pages 9-14, and then elaborated with activities, tools, accomplishments, and results for each Lifecycle Stage and Growth Area in the rest of the *Field Guide)*. You can identify your status in each area through matching your own community's activities, accomplishments, and results with the descriptions we provide for each area. Based on your community's current development status, you will then be able to identify targeted activities and tools that you can use to guide your community towards maturity, scalability, and sustainability.

We recognize that every community scenario is unique and ultimately very, very human. Many times, the hardest part of community management is the ongoing process of building, fostering, and sustaining the relationships that undergird its operations.

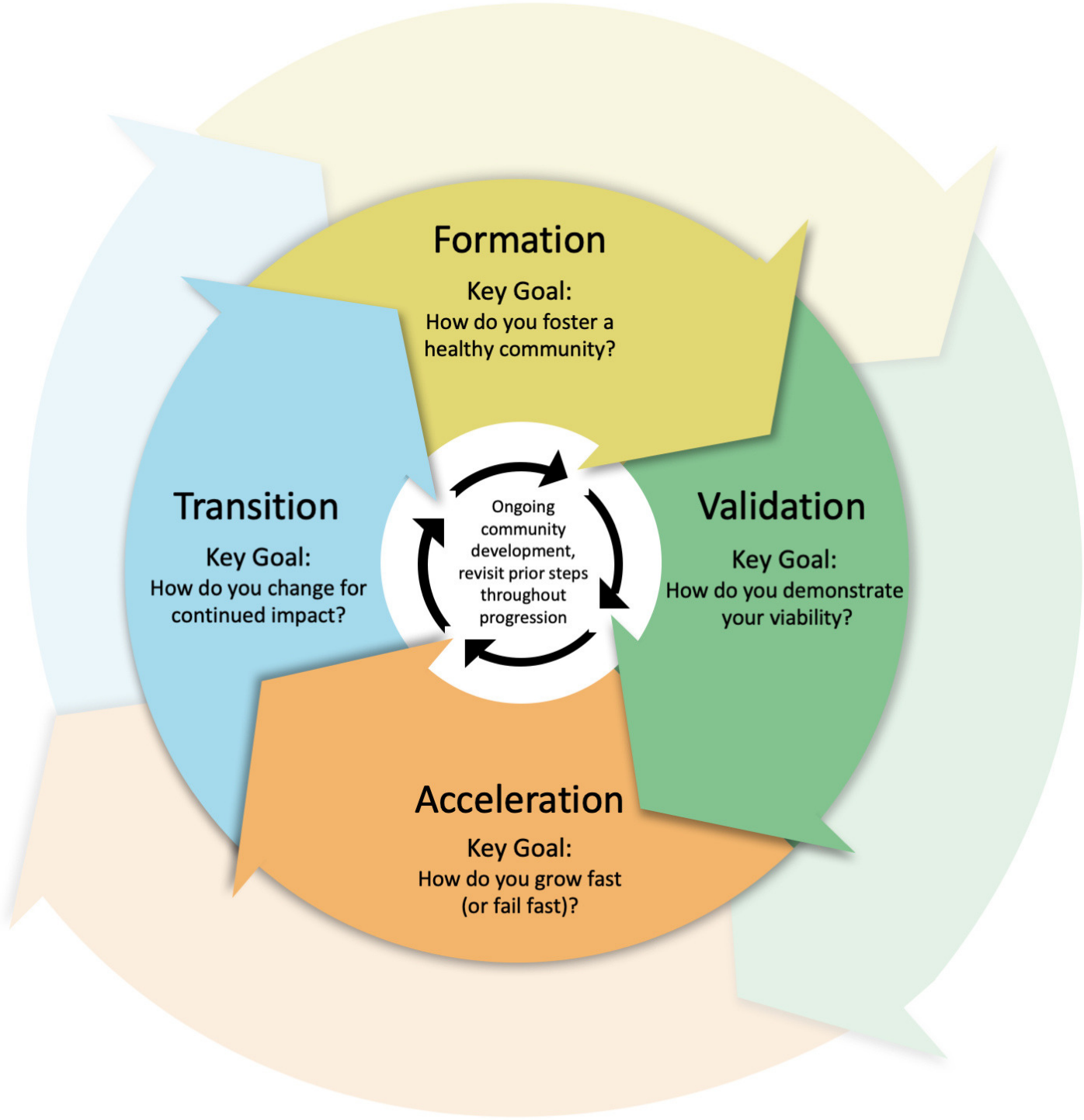
The *Field Guide* will give you a solid, empirically sound framework for community growth. Combined with your own deep knowledge and understanding of your community, the *Field Guide* can help you to establish, refine, and/or recalibrate your community for optimal health and success.

COMMUNITY CULTIVATION FRAMEWORK: LIFECYCLE STAGES

This first layer of the Community Cultivation Framework helps communities to identify and understand the **Lifecycle Stage(s)** they are experiencing. This layer provides an overview of the traits common to each of these four stages and the core question that communities tend to grapple with during each stage, as follows:

Formation	A community organizes (or reorganizes) and develops services, tools, or shared resources to meet a need held in common by its constituents. It articulates an ethos and culture that binds the major players together.
Validation	A community demonstrates its value and validity, broadening its constituent base and sphere of influence. It focuses primarily on external validation, exploring how others may understand, join, or relate to its work.
Acceleration	A community scales its services, tools, or resources in order to quickly grow, demonstrating its stability both internally and externally. Communities in this stage sometimes grow fast; they also may fail fast and shift gears towards a spin-off or spin-down process for projects, programs, or the community itself.
Transition	A community evaluates its constituents' changing needs and engages in purposeful transition. It analyzes both external and internal changes and determines how its work can remain vibrant and relevant. Communities and their associated projects and programs may merge, spin off, or spin down.

The four **lifecycle stages** operate on a continuum, each feeding into the next. If a community moves through these four stages more than once, it does so in a spiral (as depicted below). When a community encounters a lifecycle stage for a second or third time, it will experience the same general needs and challenges of that stage, but both the community and its surrounding landscape will bear different characteristics.



COMMUNITY CULTIVATION FRAMEWORK GROWTH AREAS

The second layer of the Framework briefly summarizes five key **Growth Areas**. Each of these growth areas represents a core facet of a community's development.

Vision

Who are we, what do we do, and how do we do it?

Infrastructure

How do we communicate, what tools do we use, and how do we track our growth?

Finances and HR

How do we manage our accounting structures, fiscal planning, and HR?

Engagement

How do we recruit members, design committees, and ensure ongoing community participation?

Governance

How do we implement our governance structure, document our bylaws, and train our leaders?

Each of these five growth areas occurs in every lifecycle stage. Taken together, these two layers—the lifecycle stages and the growth areas—provide a powerful mechanism for understanding community maturation.

A community may experience more than one lifecycle stage simultaneously for different key growth areas. For example, if a community is in the "Formation" lifecycle stage in its “Finances and HR” growth area, it will focus on establishing its administrative costs (overhead), evaluating its HR needs, creating its financial plan, and setting its initial pricing for services/products. At that same moment, it may be in the "Validation" lifecycle stage for its "Vision" growth area, externally articulating and testing the veracity of its mission and its services, tools, and products. The relationships between these lifecycle stages and growth areas is illustrated on the next page.

COMMUNITY CULTIVATION FRAMEWORK LIFECYCLE STAGES AND GROWTH AREAS BRIEF

The image below illustrates the layered relationship between the **Growth Areas** (Vision, Infrastructure, Finance & HR, Engagement, and Governance) and the **Lifecycle Stages** (Formation, Validation, Acceleration, and Transition).

This brief is provided in a horizontal layout as an Appendix to this document. This graphic provides a quick, one-page overview of the "Activities" a community will likely undertake in each lifecycle stage and growth area (it is more legible in the Appendix!).

	Formation	Validation	Acceleration	Transition
Vision	document the core problem/ challenge/opportunity the community addresses; set initial goals & assessments; pilot services/ products; build alignment map	establish mission/vision/values statements, and articulate these to external audiences; test, evaluate, & improve services; conduct SWOT & market analysis; establish brand	build strategic plan & evaluation measures; show ROI & impact; monitor landscape; scale up services/products & evaluate at milestones; recalibrate as needed	revisit mission, vision, values; evaluate all projects' and programs' viability; identify service/product gaps & challenges; consider landscape changes and opportunities
Infrastructure	establish communications & administrative structures; document current dependencies (e.g., host organization(s), service providers) & exit strategies	refine communications & administrative structures; create & implement communications plan; explore relationship management (CRM) & digital preservation tools	implement communications plan; streamline member onboarding procedures; add relationship management & digital preservation tools & strategies	evaluate platforms and operations; establish new communications & administrative support as necessary for transition(s); test promising new platforms and tools
Finances and HR	establish administrative costs; evaluate HR needs; create financial plan; document fiscal milestones; establish initial pilot pricing for services & products	test & refine financial plan; build accounting framework, COA, and manuals; establish financial reserves; ensure HR structure supports staff & complies with laws	diversify funding streams; cover costs + 10% (reserves); evaluate scaling costs & returns; consider staff changes & prof. development; explore endowment opportunities	analyze income/expenses; explore available/needed resources to support change; consider endowment-building activities; evaluate/adjust HR infrastructure
Engagement	foster relationships between community members; establish subgroups & regular meeting schedules; document who is engaged; host event(s)	give credit/awards to community members for engagement; formalize committee rules & processes; engage strategic affiliates, begin regular reporting to community; host event(s)	broadcast services & products through members & affiliates; engage new members & affiliates; evaluate committees; exercise the community's voice; host event(s)	maintain transparency about changes; identify & pursue key relationships in support of the transition(s); survey/ interview members & affiliates to help identify new directions; host event(s)
Governance	establish & grow community leadership; develop prioritization plan for formation activities; document governance procedures; establish member MOUs/contracts	formalize leadership group, name leadership roles & create descriptions of roles/responsibilities, refine & formalize governance procedures; establish Privacy Policy	spin up/spin down leadership subcommittees; document governance functions; cultivate next-gen leaders; plan recalibration and/or spin downs if needed	evaluate & revise governance procedures; consider leadership changes (board, officers); maintain openness & transparency wherever possible with members & affiliates

ACTIVITIES AND TOOLS

For each lifecycle stage, *Community Cultivation - A Field Guide* provides a brief synopsis of the activities (e.g., page 17 below) and tools (e.g., page 18 below) that a community can deploy to move from one lifecycle stage to another within each growth area.

FORMATION ACTIVITIES

While formation tends to be exciting for community members, it is often taxing for a community's facilitator(s) and leadership. Having a clear game plan that addresses multiple layers of dependencies can help to provide a strong foundation that supports future growth.

A key challenge at this initial phase of development is that so many elements need simultaneous attention. Putting time and energy into developing infrastructure, finance/HR, engagement strategies, and governance models may seem like a distraction from building the service or product; however, without these elements, even great services and products will flounder.

The set of activities described here can help community coordinators and leadership plan, prioritize, and implement what we've found to be key cornerstones for community management.

Formation

17

VISION

- Identify and document the core problem, challenge, and/or opportunity that the community is forming to address
- Set initial goals (1-3 yrs) and establish how to assess progress and how to recalibrate as necessary at regular intervals
- Pilot services and/or products
- Establish and document project charter(s) for all affiliated work
- Build an alignment map marking gaps, overlaps, and opportunities between the services and/or products the community is building and other efforts in this area

INFRASTRUCTURE

- Establish communications structure (e.g., mailing lists, social media, website, videoconferencing)
- Establish administrative structures (e.g., file sharing, calendaring, registration, project management, survey tools)
- Document current dependencies (e.g., host organization(s), service providers)
- Document exit strategies for each of those dependencies

FINANCES AND HR

- Establish administrative costs (overhead for running the service/product)
- Evaluate HR needs
- Create financial plan
- Document initial (three year) fiscal milestones
- Establish initial pilot pricing for services/products

ENGAGEMENT

- Foster relationships within the community
- Establish and facilitate subgroups and regular meeting schedules
- Document who is engaged in what activities
- Solicit community feedback
- Develop an outreach strategy
- Plan event(s) (virtual or in person)

GOVERNANCE

- Establish and grow the community's leadership
- Develop prioritization plan for formation activities
- Establish membership/contract documents
- Document governance procedures

VISION

- "Articulating Your Community's Purpose" training series and templates
- "Project-to-Program" training series and templates
- "Establishing Shared Evaluation Metrics" training series and templates
- "Planning a Pilot Launch" training series and templates
- Community evaluation guide
- Project Charter template
- Alignment map template and exercises

INFRASTRUCTURE

- "Your Communications Backbone" training series and worksheets
- "Project Management" training series and templates
- "Organizational Management and Hosting Scenarios" overview, worksheets
- Audience profile template
- Website review checklist

FINANCES AND HR

- "Creating Your Financial Plan" training series and examples
- Fiscal modeling and product/service cost analysis worksheets
- HR worksheets
- Pilot project launch planning documentation

ENGAGEMENT

- Subgroup formation guide and template
- Soliciting community feedback training & worksheet
- Outreach strategy template
- Event planning template

GOVERNANCE

- "Establishing Your Governance Procedures" training series and models
- "Layers of Leadership" framework, development map
- Community Cultivation - Formation task prioritization worksheet
- Service/Membership MOU and contract models

Formation

18

FORMATION TOOLS

The tools listed here have been built, tested, and refined by Educopia in our consulting work and in our ongoing work with our Affiliated Communities.

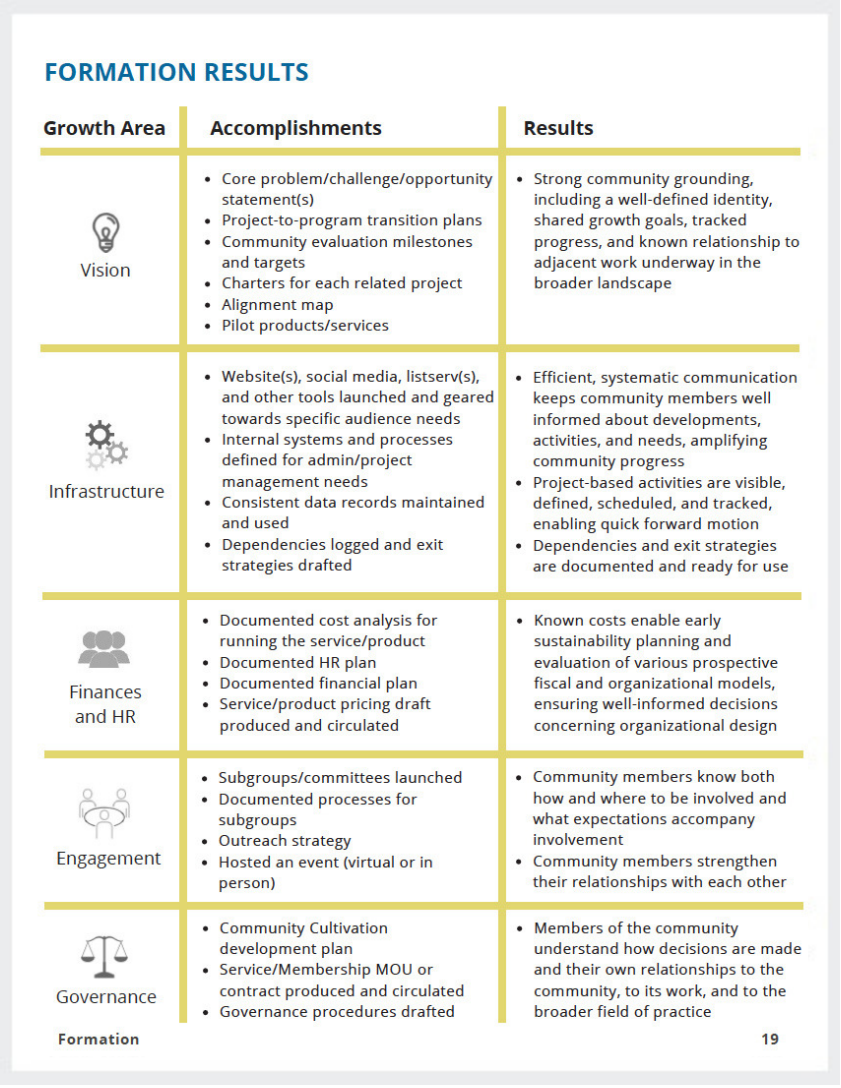
Many of these tools have been adapted from open resources located in such treasure troves as the Community Tool Box (University of Kansas), Tamarak Institute Resource Library (Tamarak Institute), and the Collective Impact Forum's Resource Library (FSG). For groups using the framework who are not working directly with Educopia, you can likely find relevant resources in these arenas that you can adapt for use with your community.

Some of these tools are also available as open tools and curriculum produced by Educopia Institute and its collaborative partners (e.g., our Nexus LAB Leadership framework and curriculum).

We are hoping to make more of these tools openly and freely available in the future.

ACCOMPLISHMENTS AND RESULTS

For each lifecycle stage, the *Field Guide* also details the accomplishments and results a community can use to evaluate and audit its movement from one lifecycle stage to the next in each growth area (e.g., page 19 below).



FORMATION RESULTS

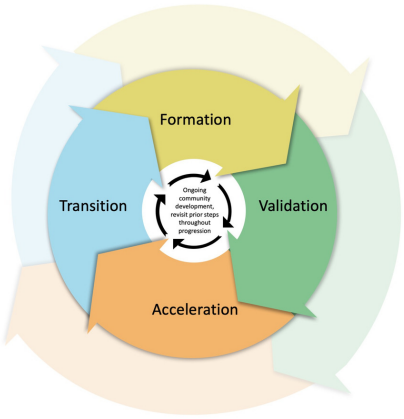
Growth Area	Accomplishments	Results
Vision	• Core problem/challenge/opportunity statement(s) • Project-to-program transition plans • Community evaluation milestones and targets • Charters for each related project • Alignment map • Pilot products/services	• Strong community grounding, including a well-defined identity, shared growth goals, tracked progress, and known relationship to adjacent work underway in the broader landscape
Infrastructure	• Website(s), social media, listserv(s), and other tools launched and geared towards specific audience needs • Internal systems and processes defined for admin/project management needs • Consistent data records maintained and used • Dependencies logged and exit strategies drafted	• Efficient, systematic communication keeps community members well informed about developments, activities, and needs, amplifying community progress • Project-based activities are visible, defined, scheduled, and tracked, enabling quick forward motion • Dependencies and exit strategies are documented and ready for use
Finances and HR	• Documented cost analysis for running the service/product • Documented HR plan • Documented financial plan • Service/product pricing draft produced and circulated	• Known costs enable early sustainability planning and evaluation of various prospective fiscal and organizational models, ensuring well-informed decisions concerning organizational design
Engagement	• Subgroups/committees launched • Documented processes for subgroups • Outreach strategy • Hosted an event (virtual or in person)	• Community members know both how and where to be involved and what expectations accompany involvement • Community members strengthen their relationships with each other
Governance	• Community Cultivation development plan • Service/Membership MOU or contract produced and circulated • Governance procedures drafted	• Members of the community understand how decisions are made and their own relationships to the community, to its work, and to the broader field of practice

Formation 19

The next four sections of the *Field Guide* provide multi-page synopses for each lifecycle stage in order - Formation, Validation, Acceleration, and Transition. Each section begins with an overview of the lifecycle stage, and then documents the specific activities, tools, accomplishments, and results for that stage. Each section ends with a case study exemplifying the lifecycle stage, based on Educopia's work with a specific community.

FORMATION

During Formation, collaborative groups need to articulate an ethos and culture that binds the major players together.



HOW DO YOU FOSTER A HEALTHY COMMUNITY?

Community development begins when a network of people identify a common set of needs, challenges, or opportunities and then choose to band together to explore or address them.

Successful communities navigating the “Formation” stage of the lifecycle have to attend not only to what content the community produces together, but also how the community’s members associate, interact, and identify with each other as individuals and as a group.

What differentiates communities that grow and flourish from those that wither often is not the brilliance of the tools, services, or resources they create. Instead, it is the human element that makes or breaks most of these ventures.

Focusing early attention on the emergent community’s relationships, expectations, communications apparatus, and engagement strategies can dramatically impact the speed and ease with which an initiative may later expand and scale its activities.

FORMATION ACTIVITIES

While formation tends to be exciting for community members, it is often taxing for a community's facilitator(s) and leadership. Having a clear game plan that addresses multiple layers of dependencies can help to provide a strong foundation that supports future growth.

A key challenge at this initial phase of development is that so many elements need simultaneous attention. Putting time and energy into developing infrastructure, finance/HR, engagement strategies, and governance models may seem like a distraction from building the service or product; however, without these elements, even great services and products will flounder.

The set of activities described here can help community coordinators and leadership plan, prioritize, and implement what we've found to be key cornerstones for community management.

VISION

- Identify and document the core problem, challenge, and/or opportunity that the community is forming to address
- Set initial goals (1-3 yrs) and establish how to assess progress and how to recalibrate as necessary at regular intervals
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- Establish and document project charter(s) for all affiliated work
- Build an alignment map marking gaps, overlaps, and opportunities between the services and/or products the community is building and other efforts in this area

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- Establish communications structure (e.g., mailing lists, social media, website, videoconferencing)
- Establish administrative structures (e.g., file sharing, calendaring, registration, project management, survey tools)
- Document current dependencies (e.g., host organization(s), service providers)
- Document exit strategies for each of those dependencies

FINANCES AND HR

- Establish administrative costs (overhead for running the service/product)
- Evaluate HR needs
- Create financial plan
- Document initial (three year) fiscal milestones
- Establish initial pilot pricing for services/products

ENGAGEMENT

- Foster relationships within the community
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ENGAGEMENT

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- Outreach strategy template
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- "Layers of Leadership" framework, development map
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Infrastructure	• Website(s), social media, listserv(s), and other tools launched and geared towards specific audience needs • Internal systems and processes defined for admin/project management needs • Consistent data records maintained and used • Dependencies logged and exit strategies drafted	• Efficient, systematic communication keeps community members well informed about developments, activities, and needs, amplifying community progress • Project-based activities are visible, defined, scheduled, and tracked, enabling quick forward motion • Dependencies and exit strategies are documented and ready for use
Finances and HR	• Documented cost analysis for running the service/product • Documented HR plan • Documented financial plan • Service/product pricing draft produced and circulated	• Known costs enable early sustainability planning and evaluation of various prospective fiscal and organizational models, ensuring well-informed decisions concerning organizational design
Engagement	• Subgroups/committees launched • Documented processes for subgroups • Outreach strategy • Hosted an event (virtual or in person)	• Community members know both how and where to be involved and what expectations accompany involvement • Community members strengthen their relationships with each other
Governance	• Community Cultivation development plan • Service/Membership MOU or contract produced and circulated • Governance procedures drafted	• Members of the community understand how decisions are made and their own relationships to the community, to its work, and to the broader field of practice

FORMATION CASE STUDY: LAUNCHING A NEW COMMUNITY

Standing at the intersection of industry and memory, the Software Preservation Network (SPN) aligns the efforts of gamers, artists, engineers, designers, curators, archivists, librarians, programmers, and publishers around common preservation needs.

The goal of this emergent network is to attend to a problem shared by industry, academia, and libraries, archives, and museums: the persistence of the software we use to create and access most of the knowledge objects created today. The fusion of these diverse voices is not always easy—different drivers activate different pockets of stakeholders within the growing community.

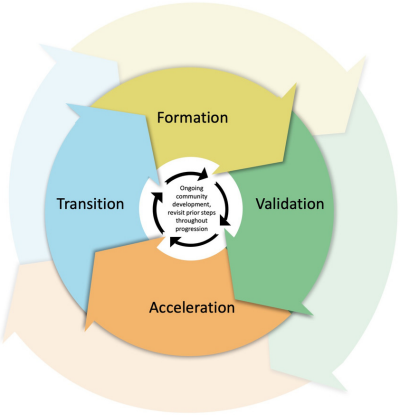
Educopia Institute has worked with SPN for several years, helping the Network to hone its mission, vision, values, and initial strategic goals. We have co-authored with the community a concrete, two-year plan (2019-2020) to shift SPN from a soft-funded, project-based initiative to a full membership community. The resulting Prospectus and communications plan are now out in the field, garnering steady support from a quickly expanding network of sponsors and members.

During the two-year start up period, Educopia will continue to guide the community through capacity-building activities designed to lay a strong communications and administrative foundation. We will also help SPN formalize its governance processes, and assist in the development of its service roster and fiscal model.

This vibrant, cross-sector community will enter its "Validation" phase of growth in January 2019 with established services, a range of research and development activities, and a strong, nimble, and focused human network.

VALIDATION

During Validation, a community often reaches out to external audiences beyond its initial members to assess its growth potential.



HOW DO YOU DEMONSTRATE YOUR VIABILITY?

During the "Validation" stage, a community articulates its value and legitimacy to new audiences, broadening its constituent base and sphere of influence. In this shift towards external validation, the community circulates its ideas, services, and products into ever-widening arenas, informing and influencing prospective members, affiliates, and even competitors.

A primary challenge faced by communities navigating the "Validation" stage of the lifecycle is striking the right balance between two competing needs and functions: continuing to build up the service/product while simultaneously expanding the network of support and engagement. Communities often also grapple with transparency during this phase, particularly around financial plans and governance operations.

Networks that have successfully managed this "fulcrum dance" have evidenced that having strong on-boarding procedures for new members, well organized and openly accessible documentation, and a game plan that includes regular "small wins" that can be celebrated with the expanding community help immensely with navigating this stage of work.

VALIDATION ACTIVITIES

Once a community is formed and grounded, its efforts can begin to shift from the internal (who are we, how do we relate to one another, and what can we accomplish together?) to the external (how can we welcome and involve new voices in our community and its activities?).

Focus on “small wins,” or tangible progress markers, to ensure your community can both announce and celebrate its work on a regular basis. Be flexible and recalibrate often during this lifecycle stage in preparation for the faster pace of the “Acceleration” stage that will come next.

Remember, most often communities are not solely in the “Validation” lifecycle stage (or in any single lifecycle stage); instead, they usually will be in different lifecycle stages for different growth areas. Keep track of where your community is in each of these growth areas (Vision, Infrastructure, etc.) in order to facilitate your community’s ongoing maturation.

VISION

- Establish and document the community's mission/vision/values with community leadership, and vet and refine these documents with the extended community
- Articulate the mission/vision/values to external audiences, including prospective members and potential affiliates
- Test, evaluate, & improve services/products
- Conduct SWOT analysis and market analysis
- Establish a strong, consistent identity (“brand”)

INFRASTRUCTURE

- Refine communications and administrative structures, adding new tools as needed
- Establish and document procedures for how to use usage data (e.g., views/usage/engagement)
- Create and implement a communications plan
- Explore relationship management tools and strategies (e.g., CRM) to track and analyze connections
- Explore digital preservation tools and strategies

FINANCES AND HR

- Test and refine the financial plan
- Build a clear accounting framework and manuals
- Establish fiscal transparency and strong checks and balances in accordance with Generally Accepted Accounting Principles (GAAP)
- Establish financial reserves
- Ensure HR structure supports staff and complies with laws

ENGAGEMENT

- Establish a community engagement reward system
- Formalize committee rules and processes (how to form, populate, sunset)
- Engage strategic affiliates (entities operating adjacent to the community)
- Begin regular reporting to the community
- Host event(s)/training(s)

GOVERNANCE

- Formalize the community’s leadership group
- Name leadership roles (e.g., “Treasurer”) and create descriptions of roles and responsibilities
- Build leadership relationships and trust
- Refine and formalize governance procedures
- Establish and publish a Privacy Policy (GDPR)

VISION

- Mission/vision/values training series and templates
- SWOT training series and worksheets
- Market analysis training series and worksheets
- Brand guidelines template
- Services/products/tools evaluation examples

INFRASTRUCTURE

- Usage analytics training and worksheets
- Communications plan template
- "Managing Relationships" training series and CRM/data management options worksheet
- Digital preservation planning brief

FINANCES AND HR

- "Financial Basics" training series and Generally Accepted Accounting Principles checklist
- Chart of Accounts brief, examples
- Accounting Manual template
- P&L reports brief
- HR checklist and templates

ENGAGEMENT

- Intrinsic and Extrinsic Rewards brief and worksheet
- Committee charter template
- Strategic Affiliate program training and worksheets
- Quarterly, Annual report templates
- Event hosting template (roles, responsibilities, activities, evaluation)

GOVERNANCE

- Governance profile and roles description templates
- Elections guide and template
- Governance group facilitation and trust-building exercises
- "Governance Options" training series, brief, and examples
- Privacy policy template and checklist

VALIDATION TOOLS

The tools listed here have been built, tested, and refined by Educopia in our consulting work and in our ongoing work with our Affiliated Communities.

Many of these tools have been adapted from open resources located in such treasure troves as the Community Tool Box (University of Kansas), Tamarak Institute Resource Library (Tamarak Institute), and the Collective Impact Forum's Resource Library (FSG). For groups using the framework who are not working directly with Educopia, you can likely find relevant resources in these arenas that you can adapt for use with your community.

Some of these tools are also available as open tools and curriculum produced by Educopia Institute and its collaborative partners (e.g., our Nexus LAB Leadership framework and curriculum).

We are hoping to make more of these tools openly and freely available in the future.

VALIDATION RESULTS

Growth Area	Accomplishments	Results
Vision	• Mission/Vision/Values developed, vetted, and refined • Mission/Vision/Values circulated to external audiences • SWOT report • Market analysis • Concrete branding guidelines • Service/product refinement	• The community understands its growth trajectory and goals • External groups understand the role, ambitions, and work of the community • Potential allies and competitors known and understood by the community
Infrastructure	• Web and social media analytics actively used • Website, social media, and other tools refined according to need and usage feedback • Communications plan • CRM planned or implemented • Digital preservation plan	• Communications grow more effective with every release • A growing number of prospective members and affiliates are well informed about community opportunities and activities • The community becomes known for regular, iterative accomplishments
Finances and HR	• Chart of Accounts • Accounting Manual • Monthly financial tracking, reporting, and approval processes are in place • HR plan activated	• Fiscal responsibility and transparency are considered key to the community ethos • Effective HR and community documentation enable staff retention
Engagement	• Community engagement reward system • Strategic Affiliate program launched • Regular community reporting • Hosted event(s)	• Community members feel valued for their efforts • Allied groups want to collaborate with the community • Community members understand and articulate the ROI they receive
Governance	• Leadership group and leadership positions formalized & documented • Elections scheduled and held for leadership positions • Published Privacy Policy	• Community members feel tremendous buy-in, knowing they lead the community • Leadership group applications exceed available positions

VALIDATION CASE STUDY: ESTABLISHING A VIABLE COMMUNITY

The BitCurator Consortium (BCC) is an independent, community-led membership association launched in 2014 to support digital forensics practitioners and to provide a foundation for the BitCurator software environment. Initially developed by UNC Chapel Hill's SILS with support from the Andrew W. Mellon Foundation, the BitCurator environment provides an open source suite of digital forensics tools for managing born-digital content.

The BCC began engaging in “Validation” work with Educopia in 2015 as the membership organization formally launched and opened to new members. As a key component to this effort, BCC's elected leadership established its mission, vision, and values statements, and also conducted a market analysis and SWOT analysis. To strengthen its community engagement levels, BCC designed and implemented multiple channels for members, prospective members, and allied organizations to engage in communications, events, and research projects.

Simultaneously, BCC's leadership began working with Educopia to ensure its fiscal records are available, transparent, community reviewed, and able to appropriately inform budgeting, fundraising, and other functions. In compliance with its new Privacy Policy (released in 2018), the community also fully integrated and is now using CRM software (Salesforce) to improve its understanding of its extended community of members, software users, and collaborative partners across sectors. The net result to date is a strong, growing network of individuals and institutions that are embracing and adapting digital forensics methods and tools within libraries, archives, and museums.

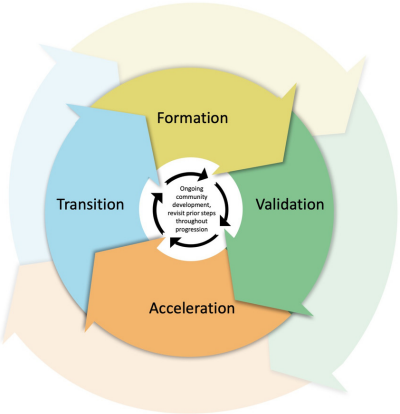
With its improved infrastructure, BCC is now working with Educopia’s Communications Manager to create tailored outreach addressing specific user needs. Due to its market analysis and extensive research work into digital curation workflows, BCC is able to inform this outreach effort with detailed ROI data that can be presented to different groups of prospective members, explicitly addressing how the BCC adds value to each group’s digital curation efforts. Using email campaign tools (e.g. MailChimp) the BCC is also able to both efficiently reach a wider audience of potential members and analyze the effectiveness of specific campaigns.

The significant growth of the community's infrastructure through concrete, well-planned activities during "Validation" positions the BCC beautifully for the next step in its maturation: moving into "Acceleration" in 2019.

BitCurator CONSORTIUM

ACCELERATION

After a community validates its efforts, it is ready to scale up its operations. In the Acceleration stage, a community needs to be ready to embrace quick growth or to respond to slower-than-expected growth by revising or even spinning down projects, programs, or the community.



During Acceleration, communities scale up their efforts in order to establish a stable and sustainable level of operations. As they do so, they use benchmarks and milestones to guide a continual cycle of evaluation and refinement of their work.

This stage provides communities with chances to explore the growth potential for the services or products they offer. Approaching this stage with elasticity and curiosity can help community leaders to navigate this stage without rigidly pursuing a specific outcome.

Accelerating communities often must shift their outreach efforts towards organizational decision makers, not just those who will serve as representatives or volunteers. Articulating a strong case to administrators requires different skills and messaging.

This stage also requires community coordinators and leaders to attend carefully to on-boarding practices and the integration of new members into the community. Both quick growth and slower-than-expected growth can be disconcerting to existing members, and if the impact of these scenarios is not closely monitored, these members may feel the community is no longer "theirs" and disengage accordingly.

By openly examining and explicitly addressing the pace, results, and effects of Acceleration with the community, facilitators and officers will offset the potential for change-resistant behavior and encourage even deeper buy-in and participation from members and affiliates.

ACCELERATION ACTIVITIES

Once a community has established a solid foundation, it is time to explore its growth potential and test the scalability of its offerings. Doing so requires new types of activities, shifting energies of community coordinators and leaders from planning and piloting to implementing and evaluating.

Not all communities or services and products need to grow, and swift recognition that an idea is not able to scale or sustain can be a form of success, particularly if the community is equipped for and supported through a spin-off or spin-down process, and its energy and resources are redirected effectively towards new pursuits.

For communities that do scale up and reach operational stability, excitement generated in this stage may open additional opportunities, including establishing an endowment to support the community.

VISION

- Build a strategic plan and evaluation guidelines
- Launch strategic plan and monitor progress via milestones
- Demonstrate ROI and impact
- Scale up services/products and establish clear milestones for measuring and conveying impact of growth to members
- Establish recalibration and/or spin-off or spin-down plans if milestones are not achieved

INFRASTRUCTURE

- Implement communications plan, including messaging geared toward administrators
- Streamline member on-boarding processes
- Operationalize CRM and integrate it with other systems
- Add digital preservation tools and strategies

FINANCES AND HR

- Diversify funding streams
- Cover operational costs + 10% (reserves)
- Conduct an internal financial audit
- Evaluate growth/scaling activities iteratively, recalibrating expectations as necessary
- Consider what professional development or even staffing changes are needed to facilitate acceleration activities
- Investigate endowment-building activities

ENGAGEMENT

- Members and strategic affiliates broadcast services/ products to help expand the community's reach
- Formalize strategic affiliates
- Effectively engage and integrate new members/affiliates
- Tend to existing members, maintaining open communication about the impact of change
- Potentially host large(r) scale event/forum
- Exercise the community’s voice within the broader field

GOVERNANCE

- Spin up leadership committees as needed to attend to specific operations (finances, communications, fundraising) or projects (strategic planning)
- Evaluate committees and workgroups
- Document procedures for all governance functions
- Cultivate the next generation of community leaders
- Plan for potential recalibration and/or spin-down if benchmarks and milestones are not reached

VISION

- "Strategic Planning and Evaluation" training series and worksheets
- "Measuring Impact and Conveying ROI" training series and exercises
- Environmental scan worksheet
- Mergers, spin offs, and spin downs workshop and brief

INFRASTRUCTURE

- Member orientation session template
- "Relationship Management" training session, including how to choose a CRM
- Digital preservation plan survey, template

FINANCES AND HR

- "Diversifying Revenues" training series & worksheets
- Internal financial audit checklist
- "Fundraising" training series (including endowment building); fundraising basics brief
- Conduct staff evaluations; investigate professional development needs and opportunities

ENGAGEMENT

- "Change Management" training series
- "Strategic Affiliate" training series and worksheets
- Forum planning guide, including examples of contracts, catering and AV estimates, hosting options
- Field-level leadership development training series (Nexus LAB)

GOVERNANCE

- Treasurer training tools
- Governance group orientation guide (for new leadership members and officers)
- Documentation template library
- "Building a cadre of leaders" brief
- Committee evaluation tools

ACCELERATION TOOLS

The tools listed here have been built, tested, and refined by Educopia in our consulting work and in our ongoing work with our Affiliated Communities.

Many of these tools have been adapted from open resources located in such treasure troves as the Community Tool Box (University of Kansas), Tamarak Institute Resource Library (Tamarak Institute), and the Collective Impact Forum's Resource Library (FSG). For groups using the framework who are not working directly with Educopia, you can likely find relevant resources in these arenas that you can adapt for use with your community.

Some of these tools are also available as open tools and curriculum produced by Educopia Institute and its collaborative partners (e.g., our Nexus LAB Leadership framework and curriculum).

We are hoping to make more of these tools openly and freely available in the future

ACCELERATION RESULTS

Growth Area	Accomplishments	Results
Vision	• Strategic plan created and implemented • Evaluation methods established and implemented to monitor growth • ROI and impact clearly documented for different stakeholders • Services/products demonstrate scalability	• Members are united through the strategic plan, and all committees and volunteers are pulling in the same direction • Growth is monitored and scaling is adjusted to ensure operational stability and sustainability is accomplished
Infrastructure	• CRM implemented and integrated • On-boarding for new members streamlined and documented • Communications plan implemented, utilizing full communications infrastructure • Community data and documentation are preserved	• Efficient and effective outreach quickly reaches target audiences and accomplishes recruitment goals • New members swiftly integrate into the community and increase its capacity • Data produced by the community is secure & available for long-term use
Finances and HR	• Financial operational reserves or endowment established • Funding streams diversified • Fiscal audit completed • New forms of fundraising underway • Staff enrichment achieved	• Fiscal stability increases and continuity of operations is ensured • Investments are made to reinforce and support scaling activities • Staff is strengthened through evaluation and training
Engagement	• Membership expansion • Strategic affiliate program expands • Hosted event(s) • Integration of new and existing members • Community voice carries farther and influences the field	• A growing, integrated community increases its impact on the system and field in which it operates • Strategic affiliates provide advising and help to maintain connections between the community and its peers
Governance	• Leadership committees undertake specific operations • Governance procedures documented • Leadership orientation guide • Next-gen leaders trained	• Stable, transparent, and effective governance group continues to increase the efficiency and impact of the community's work

ACCELERATION CASE STUDY: SUPPORTING A GROWING COMMUNITY

The Library Publishing Coalition (LPC) spent its first three years building community, developing an effective set of committees and task forces to carry out the work of the organization, and producing publications, events, and other resources for library publishers. In 2017, its foundation firmly in place, the LPC Board and Educopia began a strategic planning process to help the organization focus its future efforts.

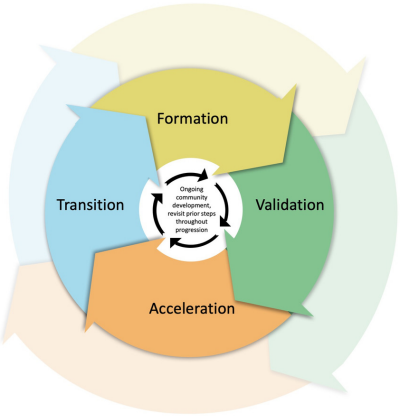
LPC already had extensive community input to draw on in developing the plan, including membership meeting discussions and a summer 2017 member perspectives survey. To provide community members with an opportunity to be involved more directly in the strategic planning process, the LPC Board put out a call for volunteers for a strategic planning "support group." This group of more than 20 community members served as a sounding board, an extra set of eyes, and a pool of volunteers for working groups. LPC's leadership kept them continually updated about progress, ensuring that there was a pool of active community members who knew that headway was being made on strategic planning.

Educopia staff guided the Board through a series of exercises, including an environmental scan; a SWOT analysis; and a revision of the organization's vision, mission, and values; culminating in the drafting of the plan itself. Educopia facilitators helped both to keep the process moving (convening meetings, facilitating conversation, and following up on tasks) and to guide the Board towards a plan that would help them achieve their goals. The final draft of the plan was shared with the LPC membership for comment, and went through one final round of revision before its public release in August of 2018.

Understanding that a strategic plan is only as good as its implementation, the Board encouraged the community to make use of the plan. The sustained attention of Educopia staff has helped to keep the plan front-and-center for LPC's committees as they begin their work for the 2018-19 program year, and the result has been not only helpful guidance for those groups, but also a more coherent set of programs and projects, all pulling towards the same set of goals.

TRANSITION

During Transition, communities need to evaluate change in both external and internal environments to determine how to remain vibrant and relevant.



HOW DO YOU CHANGE FOR CONTINUED IMPACT?

No matter how stable or successful a community becomes, both its external and internal environments will remain in flux due to myriad factors, including the speed of technical change, evolving organizational forms and players, leadership and staffing changes in member and affiliate institutions, and funding increases and decreases in the system over time.

Monitoring these ebbs and flows in a community's environments is an ongoing task that leadership must address during every developmental stage. Communities tend to enter a "Transition" lifecycle stage when these changes either open significant new opportunities for a community or when they threaten to disrupt or challenge a community's viability.

Communities in "Transition" evaluate how and why their constituents' needs are changing and then engage in a change process based on that information. A key challenge is maintaining appropriate transparency without scaring or unsettling the members. Successful transitions may lead to modest tweaks or significant changes in services and products, in membership or service models, or in the size or shape of a community. They may also lead to spin-offs or spin-downs of projects, programs, or the community itself.

TRANSITION ACTIVITIES

Being alert to signals of imminent change can help a community embrace Transition rather than becoming engulfed by it. If a community waits until it is experiencing member loss and duress, its options become more limited. Even in extreme circumstances, the activities and tools of Transition can help you identify what factors you can change in order to lift your community out of crisis.

Your community may be entering "Transition" if some of the following ring true:

- Our service/product depends on technical systems that are becoming outmoded
- New competitors are emerging and thriving
- Staff turnover in member/client institutions rises
- Funding in our market is dropping or uncertain
- New member applications or service/product requests are down
- Low application numbers for leadership positions
- Our communications are being read and spread by fewer people
- Attendance at events is dropping
- Our overall number of members is dropping

VISION

- Revisit mission, vision, values with community members
- Identify service/product gaps and challenges
- Evaluate landscape changes and opportunities
- Consider and pursue partnerships with other communities that share similar mission/vision/values
- Rigorously evaluate all activities and let go of outmoded or energy- and resource-draining projects and programs

INFRASTRUCTURE

- Audit your existing communications and administrative structures to identify sprawl and streamlining opportunity
- Sunset and/or replace outmoded platforms and operations
- Establish new communications and administrative support structures as necessary to support transition(s)

FINANCES AND HR

- Analyze income, expenditures, and assets
- Explore potential changes and identify what resources are available and needed for each
- Fundraise to support new features, R&D, or other needs
- Evaluate and adjust HR infrastructure
- Evaluate and adjust staffing; often different skills are needed for this stage

ENGAGEMENT

- Maintain internal transparency about changes
- Identify and pursue key relationships with other communities, funders, field leaders, etc., in support of the transition(s)
- Survey/interview members, strategic affiliates, and field-level leaders to help identify what activities you should alter or end and where to direct energy and resources

GOVERNANCE

- Evaluate & revise governance policies and procedures
- If significant changes to the community are necessary, maintain openness about them, highlighting this as an opportunity for excitement about and involvement in new directions rather than sounding an alarm
- Evaluate organizational hosting structures to ensure solid fit-for-purpose for continued impact
- Develop spin-down plans and identify the triggers for spin down for your community

VISION

- "Recalibrating Mission, Vision, and Values" training series and templates
- "Change Management" training series
- "Mergers, Spin-offs, and Spin-downs" training series for projects, programs, and organizations

INFRASTRUCTURE

- Operations audit
- Best practices guidance for technology, administration, and communications (based in part on NTEN guidance)

FINANCES AND HR

- "Financial Change Management" training
- HR and change management evaluation tool, brief, and checklist
- Managing staff through transitions brief
- Fundraising options exploration

ENGAGEMENT

- "Explaining Transition in a Community" training series and brief
- Managing transparency brief
- Survey/interview frameworks for exploring change options prior to implementation
- Survey/interview frameworks for evaluating change options during implementation

GOVERNANCE

- Hosting models overview, worksheets (review)
- Succession planning training and resources
- Merger planning training and resources
- Spin down and spin off trigger identification worksheet
- "Spin downs and Sunsetting Projects, Programs, and Communities" training and resources

TRANSITION TOOLS

The tools listed here have been built, tested, and refined by Educopia in our consulting work and in our ongoing work with our Affiliated Communities.

Many of these tools have been adapted from open resources located in such treasure troves as the Community Tool Box (University of Kansas), Tamarak Institute Resource Library (Tamarak Institute), and the Collective Impact Forum's Resource Library (FSG). For groups using the framework who are not working directly with Educopia, you can likely find relevant resources in these arenas that you can adapt for use with your community.

Some of these tools are also available as open tools and curriculum produced by Educopia Institute and its collaborative partners (e.g., our Nexus LAB Leadership framework and curriculum).

We are hoping to make more of these tools openly and freely available in the future

TRANSITION RESULTS

Growth Area	Accomplishments	Results
Vision	• Mission, vision, values refreshed • Landscape map produced and used to inform potential collaboration/merger options • Service/product recalibrations	• Community is re-grounded with renewed energy channeled in common directions • Work of the community is well aligned with the needs and offerings available in the broader landscape
Infrastructure	• New platforms and operations in place where needed to support administrative and/or communications infrastructure needs	• Information channels are open and flowing efficiently between community leadership, community members, strategic affiliates, and prospective members
Finances and HR	• Staff changes are made in congruence with community transition choices • Funds raised to support transition and/or redirected to spin-off or spin-down activities • HR infrastructure altered according to community changes	• Proactive fundraising and planning ensures that whatever transitions, mergers, spin offs, or spin downs are pursued are well supported by available funds
Engagement	• Survey and interview data from internal and external audiences is gathered and analyzed • Announcements about changes are circulated both internally and externally	• Community members know how and where to direct their energies and what to expect at pivotal transition moments • External audiences are well informed about changes and resulting opportunities
Governance	• Revised governance policies and procedures • Organizational hosting audit conducted • If needed, merger, spin-off, and or spin-down plans are made and enacted	• Community members and governance representatives make well-informed decisions about the community's future directions

TRANSITION CASE STUDY: MANAGING CHANGE

Founded in 2004, the MetaArchive Cooperative is a collaborative digital preservation network. Its strong, international membership has constructed a rigorous storage and curation system through which member institutions ingest and monitor copies of each others' content on their locally hosted servers, united in a virtual network. Members have achieved broad, multi-continental content replication and distribution in a community-controlled network that protects against various types of risks and loss.

From its inception, MetaArchive has deliberately integrated a broad, cross-sector range of institutions, including research libraries, public libraries, liberal arts colleges, museums, art galleries, and community organizations. Many of these sectors still struggle to implement basic digital preservation activities, due to limited IT support, cost of current solutions, and lack of time and expertise.

At its 12-year anniversary, this award-winning service and methodology was celebrated via the George Cunha and Susan Swartzburg Preservation Award as a trustworthy, durable solution for digital preservation storage and a strong, cross-sector community of practitioner support. However, by 2016, the community was also witnessing technical changes that could unsettle the network's distributed infrastructure. A mass shift from on-site servers to cloud-based IT services began to transform the infrastructure options available to members and prospective members. Reliance on member-owned-and-controlled servers, which had been a hallmark of MetaArchive's model, suddenly became a potential future liability.

The community entered a period of "Transition" and began planning, surveying members, and engaging with other preservationists around the world to explore its options. In 2018, the network has kicked off the SuperNode Pilot Project to explore the feasibility and specific requirements for a technical infrastructure evolution. This includes use cases that blend member-owned servers with cloud-based services to minimize the pressure on current and prospective members to maintain local server infrastructures. This opens MetaArchive's services to new organizations, especially small-to-medium sized institutions seeking affordable, trustworthy community-based solutions.

The SuperNode Pilot Project will move to full production in 2019, positioning the MetaArchive community to stay true to its founding principles while adapting to the changing landscape.

RESOURCES

At Educopia, we are firm believers in "standing on the shoulders of giants," and this publication and our work owes much to the resource body we name below.

We are indebted to the many, many community-builders whose work has inspired and enriched our own. These include a wide range of activists, theorists, and experimentalists in a variety of fields, disciplines, and specialty areas.

This is not an exhaustive list, but rather a representative one. For more resource ideas on particular topics, please reach out to any Educopia staff member and we will do our best to share our knowledge of the literature, exemplars, and models that continue to influence our work on a daily basis.

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	Formation	Validation	Acceleration	Transition
Vision	document the core problem/ challenge/opportunity the community addresses; set initial goals & assessments; pilot services/ products; build alignment map	establish mission/vision/values statements, and articulate these to external audiences; test, evaluate, & improve services; conduct SWOT & market analysis; establish brand	build strategic plan & evaluation measures; show ROI & impact; monitor landscape; scale up services/products & evaluate at milestones; recalibrate as needed	revisit mission, vision, values; evaluate all projects' and programs' viability; identify service/product gaps & challenges; consider landscape changes and opportunities
Infrastructure	establish communications & administrative structures; document current dependencies (e.g., host organization(s), service providers) & exit strategies	refine communications & administrative structures; create & implement communications plan; explore relationship management (CRM) & digital preservation tools	implement communications plan; streamline member onboarding procedures; add relationship management & digital preservation tools & strategies	evaluate platforms and operations; establish new communications & administrative support as necessary for transition(s); test promising new platforms and tools
Finances and HR	establish administrative costs; evaluate HR needs; create financial plan; document fiscal milestones; establish initial pilot pricing for services & products	test & refine financial plan; build accounting framework, COA, and manuals; establish financial reserves; ensure HR structure supports staff & complies with laws	diversify funding streams; cover costs + 10% (reserves); evaluate scaling costs & returns; consider staff changes & prof. development; explore endowment opportunities	analyze income/expenses; explore available/needed resources to support change; consider endowment-building activities; evaluate/adjust HR infrastructure
Engagement	foster relationships between community members; establish subgroups & regular meeting schedules; document who is engaged; host event(s)	give credit/awards to community members for engagement; formalize committee rules & processes; engage strategic affiliates, begin regular reporting to community; host event(s)	broadcast services & products through members & affiliates; engage new members & affiliates; evaluate committees; exercise the community's voice; host event(s)	maintain transparency about changes; identify & pursue key relationships in support of the transition(s); survey/ interview members & affiliates to help identify new directions; host event(s)
Governance	establish & grow community leadership; develop prioritization plan for formation activities; document governance procedures; establish member MOUs/contracts	formalize leadership group, name leadership roles & create descriptions of roles/responsibilities, refine & formalize governance procedures; establish Privacy Policy	spin up/spin down leadership subcommittees; document governance functions; cultivate next-gen leaders; plan recalibration and/or spin downs if needed	evaluate & revise governance procedures; consider leadership changes (board, officers); maintain openness & transparency wherever possible with members & affiliates