



# Seven Steps to Building Electronic Communities

*Philippa's note: This paper was originally written with Terry Grunwald for the nonprofit community in 1993, as electronic bulletin boards and e-mail were becoming more widely used. It was the basis of a talk that we gave at several international conferences in the early 90's, and continues to be referenced in publications around the world.*

*As I edit it for appearance on my new Website at the end of 2009, I am struck by how much of it is still relevant to the effective use of social networks today. I have chosen not to reword or update it - this is the original!*

## Introduction

This document provides a set of guidelines to aid managers in:

- assessing your organization's current readiness to network
- identifying activities which are most appropriate for the telecommunications environment
- evaluating existing systems, or deciding to develop an independent network

Additionally, once the technology issues are resolved, we suggest methods for:

- attracting appropriate users and sustaining their interest and participation
- developing a plan for user training and technical support
- determining the scope, content, and format for the promotion of public information
- establishing a "feel" or "culture" for the network
- generating creative ways to utilize the network to maximum advantage

## Step 1: Develop a Networking Plan

### A: Define your Community

- Will this be a community of individuals, organizations or a combination?
- Is there a common agenda? a vision?
- Does the group already work collaboratively?
- Is there a core group with the capacity to network during the planning phase?
- Who else needs to participate within the next 1-3 years?
- Who might be connected in the future?
- Connection to other existing and planned online communities:
- Is anyone doing similar things in your community? in the region/state/nationally?
- If so: how do their activities compare with your plans?
  1. where are the gaps in what is accomplished?
  2. are there opportunities for collaboration?

### B: Identify the Needs that Electronic Communities Might Address

- Cost-effective communication / information sharing with multiple sites
- Collaborative work (e.g. co-authoring documents to be edited and revised)
- Easily-updated library of information and record of organizational history
- Searchable relational databases, research opportunities using Internet tools
- Public visibility via Internet gophers and World Wide Web pages
- A private forum/conference to plan strategy
- A means of disseminating wide scale ALERTS for lobbying efforts
- Ongoing dialogue and debate through moderated Usenet newsgroups and mailing lists
- "Real time" online discussions
- An informal, online gathering place to build relationships

### C: Survey your Potential Users

- How do they currently communicate?
- Is there consensus on a common agenda?
- Do they agree with the needs you've outlined?
- What tasks would they like to accomplish online?
- What kind of hardware (computer / modem / mouse) do they have, if any?
- Are they using a local area office network?
- Are they computer literate?
- Do they have access to:
  1. training opportunities
  2. technical assistance?
- How much can they afford to spend per month on telecommunications?
- What kind of information are they willing to share?
- Who else do they want to participate?
- What's their vision for your online community?

### D: Determine Which of the Following Resources You Will Need

- A committed facilitator and / or information specialist
- A skilled system operator (sysop) / Internet guru
- Additional information providers
- Clerical support
- Computer hardware / software
- A method of inputting large amounts of information (e.g. scanner)
- Subsidies to support the participation of financially-strapped users
- Grants to support facilitator/information provider activities
- Basic computer training for novice users
- Technical support / computer mentoring for users
- Ongoing source for funding for the years it will take to make the community self-sufficient

## Step 2: Select a Networking "Platform"

### A: "Go it Alone": Setting up Your Own Bulletin Board System

- What are your hardware needs? Enough storage for growth? Phone lines?
- What features should the software have?
- Can you customize existing software to meet your needs / will you develop your own?
- Do you have an experienced sysop?
- Will you have Internet connectivity?
- Are there no existing resources which can meet your needs?
- Might you be "reinventing the wheel?"

### B: Selecting the "Host" Network. Issues to Consider:

- Ease of use
- Compatibility among different operating systems
- Availability of functions identified in your needs assessment, e.g.
  1. group e-mail;
  2. ability to send disk files & faxes;

- 3. conferencing with message threading; private discussion areas; keyword search; etc.
- Costs:
  1. proprietary software;
  2. one time and monthly subscription;
  3. online charges (peak / off-peak);
  4. availability of toll-free or local untimed call access.
- Connectivity to other networks, echoing of bulletin boards, level of Internet facilities
- Who are the current users? Quality of current information? Quality of communications?
- Availability and type of technical support, training and documentation
- Ability to delegate management functions to you & your facilitator(s)
- Stability of host: Are costs likely to rise or fall?

**C: Get your Core Group Online & Planning as Quickly as Possible**

- Use e-mail gateways / Internet
- Develop simple protocols
- Make it as informal as possible
- Select an interim facilitator
- Pursue fundraising as needed

## Step 3: Market to your Users

**Marketing Hints**

- Define the unique selling points of the network to your community
- Concentrate on getting the high profile users online first
- Where possible, market to the decision-makers within an organization
- Use network demonstrations with overhead projectors. Know which features you want to showcase, and make sure there is plenty of recent, high quality information online
- Plan to participate in major conferences attended by your target audience
- Try to get on the formal agenda
- Make sure marketing materials can be easily revised. Things change quickly!

## Step 4: Training & Technical Support

**A: Why Train?**

- Computerphobia
- Manuals are often poorly written, overwhelming in their detail, and intimidating to non-technical people
- Internet tools, while improving, are still extremely complex
- Users need both basic training and tips to use software more efficiently
- Opportunity for users to share experiences and build relationships

**B: Develop a Training Plan**

- Identify trainers (preferably members of your online community)
- Explore opportunities for hands-on training at conferences & other events
- Provide for advanced training as well
- Develop a training curriculum which goes beyond the mechanics to include *"real work"* activities and homework
- If group is dispersed, consider a series of online exercises
- Develop a simple step-by-step protocol for those not interested in using the more sophisticated features
- Create a *"buddy system"* to pair experienced networkers with novices
- Use all resources of your *"host"*: online tours, help features, etc.
- Don't put all your resources into an initial training. Staff turnover will necessitate ongoing training.
- **\*\*Avoid jargon. Go slow. Be patient.**

**C: Develop a Technical Support Plan**

- Suggest users get compatible hardware and software
- Encourage users to identify computer support options including volunteers in their own communities.
- Potential resources include:
  1. local colleges;
  2. computer vendors;
  3. computer user groups.
- If you provide technical support directly, set your limits. Will you offer general computer support or only respond to network-related problems?

## Step 5: Set Up and Manage a Public Information Forum

**A: Why Have a Public Information Area?**

- Supplements e-mail communication
- Creates an online *"home"* you can customize for your community
- Provides an organizational memory for new generations of users
- Serves as a link to other communities on your host network
- Gives your issues greater visibility
- Possible recruiting tool

**B: Tips for Managing a Forum**

- Have a paid facilitator if at all possible. Facilitation needs tend to grow; not diminish
- Consult with experienced newsgroup or mailing list moderators
- Identify and post the kinds of information most important to your users
- Make sure the information is relevant, timely, and posted at regular intervals
- Encourage all users to post items, make it as easy as possible, applaud every contribution
- Make the forum simple to access, navigate, and search. Remove outdated items. Keep the information fresh
- Keep up to date with technological developments, e.g. multi-media applications

## Step 6: Using Networks for Collaboration & Problem Solving

**A: How Can Networks Promote Collaboration?**

- Allows communication with a dozen or even hundreds of users as easily as with one (group addresses)
- Expands the pool of practitioners available to respond to inquiries and calls to action
- Reinforces existing relationships within your community and creates new ones
- Maintains the momentum created at conferences
- Promotes co-authoring of proposals

**B: Tips for Successful Online Collaboration**

- Create enough value on the network that it becomes indispensable for the work of the community
- Seek out opportunities for occasional face-to-face meetings to reinforce online activities
- Establish a formal *"buy-in"* to the process of collaboration
- Document and publicize your successes
- Practice what you preach. Use the net wherever possible for your own planning and administrative activities

- Nudge people -- nicely, but consistently
- Understand and respect the limitations of networks

## **Step 7: Creating the Spirit of Community**

### **Environmental Hints**

- An informal style of communication helps build a sense of community
- Networking is an exercise in electronic democracy. Facilitators should try to empower as many users as possible to actively contribute
- Be inclusive and remember that many users will "*read only*" at first and need to be coaxed to participate
- Expect to handhold, encourage, and cheerlead. Positive strokes only!!!
- The core group should try to model the culture of networking in their online discussions
- Use networks to sustain the relationships formed elsewhere

The authors would welcome your [questions, comments or suggestions](#).

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