

Information Management Resource Kit

Module on Building Electronic Communities and Networks

UNIT 5. ONLINE FACILITATION

LESSON 7. MANAGING MEMBERSHIP AND ROLES

NOTE

Please note that this PDF version does not have the interactive features offered through the IMARK courseware such as exercises with feedback, pop-ups, animations etc.

We recommend that you take the lesson using the interactive courseware environment, and use the PDF version for printing the lesson and to use as a reference after you have completed the course.



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Objectives

At the end of this lesson, you will be able to:

- understand the place of membership management in the life cycle of an online community;
- identify membership management strategies for an online community; and
- recognize change in membership of an online community over time.



Life cycle of online communities

In order to manage community membership effectively, it is important to be aware of the **life cycle of online communities**, and how the group of members may change during this cycle.



Online communities may come together for a short, defined period to achieve specific objectives (**short-term communities**). In this case, the "life cycle" will largely mirror the agenda set for the discussion or meeting.



Unlike short-term meetings or discussions, **ongoing online communities** do not have a structured "agenda". However, there are some [common stages](#) in the life of online communities that influence membership management.

Short term communities generally have the same, or static, membership, while long term communities can have either static or dynamic memberships.

We'll look at the differences in the next few screens.

Life cycle of online communities

Stages of an online community

There are some common stages in the life of an online community. Each stage has consequences for managing membership.

- 1) **Conception:** Someone has an idea for a new online community. Community focus, purpose, target audience, and technical choices need to be defined.
- 2) **Beginning:** The community is new, members begin to join. Discussions should be enriched and updated often to motivate people to participate.
- 3) **Growth:** The community grows in numbers and/or in content and quality.
- 4) **Maturity:** The membership of the community is relatively stable. Members are active, interaction is dynamic, and there is a feeling of community among members. Technologies and discussions may evolve. Evaluation and keeping members interested is still important.
- 5) **Transition:** There are substantial changes in leadership, or purpose, or characteristics of the community. Subgroups may emerge; this can be a healthy sign. If there are signs of decline, ask if the community is still meeting its goals. Consider how to re-energize the community, or whether an exit strategy is needed.
- 6) **Death:** There comes a point when there is no more significant activity in a community. Although people are still subscribed, their interest has shifted to other topics or other online spaces. Perhaps the community has served its purpose, or resources for administration are no longer available. This is a big decision, but it may be time to close the community.

Death of an online community may spark creation of other communities: conception begins, and the cycle continues.

Life cycle of online communities

An **ongoing community** may be **dynamic**, and change over time, with new members joining and old ones leaving, or it may be largely **static**, with membership staying the same.

In your opinion, what challenges are more critical for each type of community?

a	Dynamic community	Harder to build trust and continuity	1
	Static community	Might be more exclusive and less diverse	
		Members might become less involved and less active over time	
		More effort needs to be made to ensure members are made aware of ground rules	

Click on each option, drag it and drop it in the corresponding box.
When you have finished, click on the Check Answer button.

Life cycle of online communities

Let's summarize some considerations and challenges for dynamic and static communities.

DYNAMIC COMMUNITY



Written policies might be more important.

Members tend not to know each other well.

More effort needs to be made to ensure members are made aware of ground rules.

Harder to build trust and continuity.

Some conversations tend to be recycled.

STATIC COMMUNITY



Members might become less involved and less active over time.

Members have an easier time getting to know each other.

It is easier to build trust.

Might be more exclusive and less diverse.

New members might find it difficult to integrate into a more closed group.

Life cycle of online communities

Let's now have a look at how a facilitator can manage membership of an online community: recruiting members, introducing new members into the online community, and managing members' roles and membership changes.

In your opinion, does membership management include both human and technical aspects of recruitment and role management?

Yes

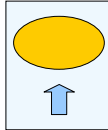
No

Please click on the answer of your choice

Managing membership

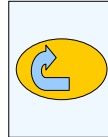
Managing the membership of your online community involves...

Recruiting new members



Unless the community is "ready made" – e.g. an existing community moving online – you will need to recruit members at the start. In an ongoing community, you may want to recruit new members throughout the life of the community.

Managing roles



This includes welcoming and instructing new members, and acknowledging and managing changing roles (particularly in ongoing communities) as members move from being "new members" to being "old hands".

Technical aspects

Depending on the particular system used, the technical aspects of recruitment may include subscribing new members to the list or approving self-subscriptions.

Technical aspects

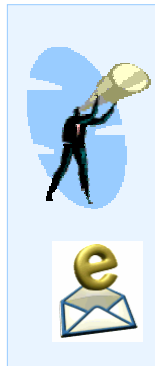
Again this will depend on the system used, but may include changing member permissions or access to sections of the web site as their roles within the community change.

Approaching membership systematically and setting out a **membership management strategy** will help you manage your membership more effectively.


Managing membership



When you are **recruiting new members**...



Be clear about the purpose of your community, and make sure that your target audience matches the purpose.

 See next slide for examples of potential members of online communities

Think about [where you can look](#) for potential members:

- 1) Individuals and organizations you already know and work with – the stakeholder groups identified as part of the needs analysis for your online community.
- 2) Organizations, networks, and other communities which you don't know – do some background research to identify them.

Contact people directly and send messages to other online communities providing information on your community (it is often a good idea to ask the list moderator or facilitator if it is ok to post information about another group).

Post information about the community on your Web site.

Ask existing members of the community to assist in recruitment by "spreading the word" about the community. Provide them with ready-made text containing a brief description of the community and precise instructions about how to join.

Managing membership

Examples of potential members of online communities

Depending on the nature of the community you may have very strict requirements for members (such as women or extension workers only) or broad ones (anyone with an interest in the community).

The following table shows examples of potential members of three online communities:

Online community purpose	Potential members
Seed-exchange-list Purpose: To promote, explain, and discuss seed exchange as part of local and global biodiversity protection.	Biodiversity activists, seed producers, extension officers, staff of non-governmental organizations and community-based organizations working in agriculture, researchers, community educators, farmers. (Members must be broadly interested in seed exchange as part of biodiversity protection).
Heritage-seed-Africa-list Purpose: To promote the exchange and protection of heritage and indigenous seeds in Africa.	Seed activists in Africa, IPR activists, agricultural policy makers, biodiversity researchers, local knowledge centres. (Members must have a particular interest in <i>African</i> seed heritage issues).
PlantPathWomen Purpose: To share and increase information about plant pathology.	Support network for women plant pathologists. (Members must be women, and active in plant pathology or related fields).

Managing membership



Members often come and go in an ongoing community, and their roles and levels of participation in the community change. As facilitator, you will need to **plan and manage roles in your community**.

The range of roles includes:



Core participants

They are members who participate actively and consistently. Understanding and meeting their needs, rewarding their contributions, and harnessing them as allies can go a long way to making your community successful.



New members

New members are an important source of fresh perspectives, new ideas, and can add their network into the community. However, they may need guidance in the ways of the community, the topics that have already been discussed, and the technologies which support it. As they grow in experience they may move from seeking assistance to giving it. New members may be new to your community but be experienced users of online technologies, or they may be new to both your community and the technologies that support it.



"Lurkers"

These are members who read the correspondence on the list, but who seldom or never contribute to discussions themselves. There are many possible reasons for "lurking". New and even longstanding members may be lurkers because they do not feel comfortable enough to post themselves – or because they are not sufficiently interested or committed, or because their needs are being met just by "watching" the discussion. However, lurkers are key members. Often they take what they learn from a community and spread it far and wide.

During the life of your community, members will take on different roles as they move from being new to being experienced members.

It is important to make sure your community can accommodate the different roles that members occupy. So, you will need to guide new members (also called newbies), while recognizing and harnessing the experience of longer-term members.

Managing membership



Effective principles for growing your community and accommodating different roles are...



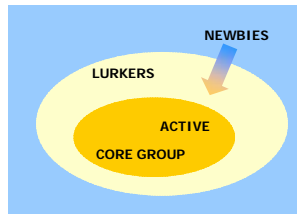
Start small, simple and focused and allow your community to grow in response to the changing needs of members and the conditions or the environment.



Provide opportunities for community members to give you feedback to ensure you are keeping up-to-date with your members' needs, ideas and suggestions.



Empower your members: as your community grows, your members should play a bigger role in building and maintaining the community.



Actively try to **move people onto new roles**:

- from newbie to old hand
- from lurker to active participant
- from active participant to mentor and facilitator

Bear in mind, however, that participants may be comfortable in their existing roles. Encourage people to take on new roles and responsibilities, but don't try to force them to do so.

Managing membership



In order to get people to move from the periphery to the active layer of the community the facilitator can put out calls for volunteers to accomplish **specific tasks**.



There are lots of interesting tasks that the facilitator can assign to members by asking for volunteers. A variety of tasks will appeal to members with different interests and skills. For example...

- Some people who are not very interested in conversation are excellent researchers and love to put together resource lists.
- Others may find writing summaries/synthesizing a thread to be a novel challenge.
- Book/research reviews are interesting tasks for members who are not so conversation-oriented.
- Translation is another possible role.

Managing membership



Planning and managing the membership of your community will be a lot easier if you know your members.

This is especially important for new communities and communities with a changing membership. And of course, in any online community it is important for members to **get to know each other**.

One way to make it easier to get to know each other is by asking members to create and maintain a **member profile**.

Key elements of member profiles

Key elements of member profiles are:

- Name
- Gender
- Nationality
- Geographic location
- Institutional affiliation
- Interests/expertise relevant to the community
- Information about any specific roles they have in the community
- Contact details
- Photo (optional)

Managing membership

As facilitator, you should **keep track of your membership** throughout its life cycle.



For example, you can monitor records of subscriptions and unsubscriptions, lists of members etc. Set your listserv or forum software to inform you when new members subscribe or unsubscribe (some online communities have "exit questionnaires" which are automatically sent to members who unsubscribe), or to require your approval before the subscription becomes active.

Another way to keep track of your membership is watching out on the list for changes in members' levels of participation: if a core participant stops posting for a long period, consider contacting them off-list to see whether there is a problem.

Welcoming and instructing new members

When **new members** join a meeting at your offices, how do you welcome them? How do you motivate them to participate, and how do you make sure they come again?



These will often be the same strategies you would use when visitors join your online community.

You need to make sure that the space you have created for your community is **welcoming to those not familiar** with it.

You will recognize new members and invite them to participate.

You might also ask them for some feedback as to how they found the interaction, and encourage them to return.

Welcoming and instructing new members



When new members subscribe to your online community you can:

- send a private message welcoming the new members, summarizing discussions thus far, providing ground rules and information on how to proceed;
- send a message to the community asking the new members to introduce themselves and (if the group is small enough) for members to introduce themselves in response; and
- ask the new members to create a member profile and guide them to the profiles of all the other members.

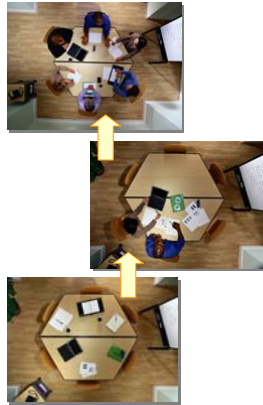
Creating a "history" for your community

Another technique to instruct new members is creating a "history" for your community on your Web site: a place where new members can read archived messages or summaries, be introduced to existing members' profiles, read the ground rules and orientate themselves to the culture and tone of the community.

This is a very useful tool for a longer-term online community and eliminates the need to keep re-introducing existing members to new ones.

Welcoming and instructing new members

As the membership of your online community grows, you will need to **integrate new members** into the community.

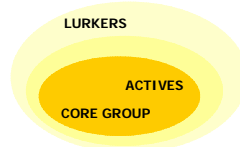


Your main tasks are to:

- introduce yourself and ensure that they know how to contact you if they have any questions;
- familiarize them with the purpose and ground rules of the community;
- familiarize them with the technical aspects of the community space;
- introduce them to the community or encourage them to introduce themselves and briefly state their reason for joining and their expectations; and
- provide any required background information – new members often arrive part way through a conversation.

Welcoming and instructing new members

Acknowledging longstanding members and core participants and empowering leaders have an important role to play in building your online community.



Acknowledging and rewarding participation

Acknowledging and rewarding **active and longstanding members** encourages members to continue or start participating in this way.

Acknowledgement is often a reward in itself. Make a habit of praising postings (from newbies and old hands alike) that are particularly informative, supportive, or valuable in other ways. Post affirming messages to the list, or privately to those you wish to acknowledge.

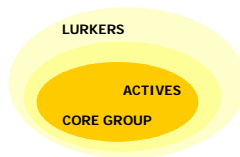
Link your acknowledgement to community goals and objectives: link the contribution people are making towards meeting the community's shared goals.

In a web based forum or directory it is easy to assign longstanding or particularly active members (i.e. Champions) a new status such as "old-hand" or "star performer" to acknowledge their contribution, and to help other members recognize them as possible sources of assistance.

Some communities give members special privileges on the community Web site such as the option of customizing the display, or access to member-only sections.

Welcoming and instructing new members

Acknowledging longstanding members and core participants and empowering leaders have an important role to play in building your online community.



Giving longstanding participants leadership roles

Giving longstanding core participants a **formal leadership role** makes your job as facilitator easier, makes the community more sustainable, builds community ownership of the initiative, increases the diversity of the "voices" of the facilitators, and gives new members the benefit of a wider pool of experience.

Leadership roles can include welcoming new members, sharing facilitation, organizing discussions and playing the role of "expert presenters" in discussions. Identify leadership tasks for your particular community, and recruit community members to assist with them.

Offering members the possibility of running and leading subgroups within the community encourages ownership, loyalty, accommodates members whose roles have evolved, and rewards longer-term members with their own space. It can also help to keep members within the community if their interests change.

Managing subgroups

The need to create **subgroups** can be a sign of community success and indicate that discussions are very active.

You can use subgroups in the following ways:

When a discussion diverts and a significant amount of members are clearly interested in pursuing this diversion.



When people within your community have an interest or expertise in only one aspect of your discussion (and tend to dominate the discussion with these aspects, neglecting others).

When you have a shorter term discussion and not a lot of time for all aspects to be discussed, simultaneous subgroups can be created for different aspects of your discussion.

When longer-term members would like to create a new space for discussion which will contribute to your purpose and which will meet the needs of a significant number of members.

Managing subgroups

seed-exchange-l@ngo.org



seed-exchange-heritage-Africa-l@ngo.org

Imagine that you are facilitating a discussion list about seed-exchange (e.g. **seed-exchange-l@ngo.org**). You can create subgroups by setting up separate listserv with names indicating the relationship. For example, **seed-exchange-heritage-Africa-l@ngo.org**.

Another option is to provide the group with its own web based forum or discussion thread.

Ensure that subgroups remain "connected" to the main community, for example by:

- asking subgroup facilitators to post updates and summaries to the main list;
- making subgroup archives available to all participants;
- listing all subgroups on the community web space.

Managing subgroups



You are the facilitator of a seed-exchange list.

After one year, a group of members became more interested in seed ownership issues and how these affected the free exchange of seeds. This discussion starts to dominate the seed exchange list, so you propose to establish a subgroup for the discussion of seed ownership.

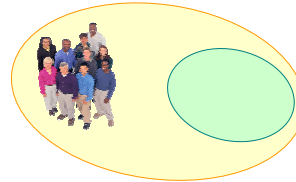
Imagine you notice the most active members of your community are focusing on this subgroup only. What would you do?

- Accept the fact that your community is moving on and nurture the new subgroup.
- Ask the most active members to post their messages to the main group to keep it active.

Please click on the answer of your choice

Managing subgroups

If the most active members of the community become members of the same subgroup you should accept the fact that your community is moving on: as facilitator, you should nurture this new subgroup as it may become a role model for the other communities.



When subgroups are created within a community, their **boundaries are not always very clear**. It takes time before a subgroup becomes a group with its own specific purpose.

Especially in the beginning, members of a community and its subgroups tend to post their messages to all groups, especially if it is an announcement or news.



What the facilitator should do

As facilitator, you have several options to deal with this situation...

Create a web space for announcements and news of interest to all groups or create a special news and announcement list.

- Ban all cross-posting.
- Discuss cross-posting in a general message to all groups and in an off-list message to the main perpetrators of cross-posting.

Summary

When recruiting members be clear about the purpose of your community.

In an ongoing community, member roles change over time. Make new members welcome, and harness the experience of established members.

Get to know your members, and make your members get to know each other by developing member profiles, if possible.

Keep track of membership by monitoring subscription records and observing activity in online spaces.

Ensure your community is welcoming to "latecomers".

Acknowledge longstanding community members, and empower new leaders in order to encourage participation.

Use subgroups to manage discussion and reward longstanding members, but ensure that subgroups remain linked to the main community.

If you want to learn more...

Online resources

Full Circle Associates. "Community Member Roles and Types".
<http://www.fullcirc.com/community/memberrroles.htm>

Kollock, P. 1996. "Design Principles for Online Communities".
<http://www.sscnet.ucla.edu/soc/faculty/kollock/papers/design.htm>

Lurkers
<http://www.groups-that-work.com/GTWedit/GTW/lurkerprojectcopworkshopspring03rev.pdf>

Additional reading

Kim, A.J. 2000. *Community Building on the Web*. Berkeley, CA: Peachpit Press.