



## D 3.1 Defining the RRI Tools Collaborative Platform

How the virtual interaction platform for the RRI Community of Practice was conceptualized

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## 1. Executive summary

As it is stated in the DoW of RRI Tools, and following the expertise derived from projects like EDRENE ([www.edrene.org](http://www.edrene.org)), it is foreseen that the RRI Toolkit (which, in essence, is a resource repository) is widely disseminated, trained in and implemented all across Europe through an RRI Community of Practice, meaning all those individuals and organizations that, being in some measure involved in RRI, are in need of resources that we can provide and, at the same time, might be willing to share the resources they have and collaborate with others in common enterprises. In order to enable this collaboration and given the transnational dimension of the project and its expected CoP, it was decided that a digital collaborative work platform should be provided as one of its main tools regarding outreach and engagement.

### STARTING POINT



### OUR OBJECTIVE

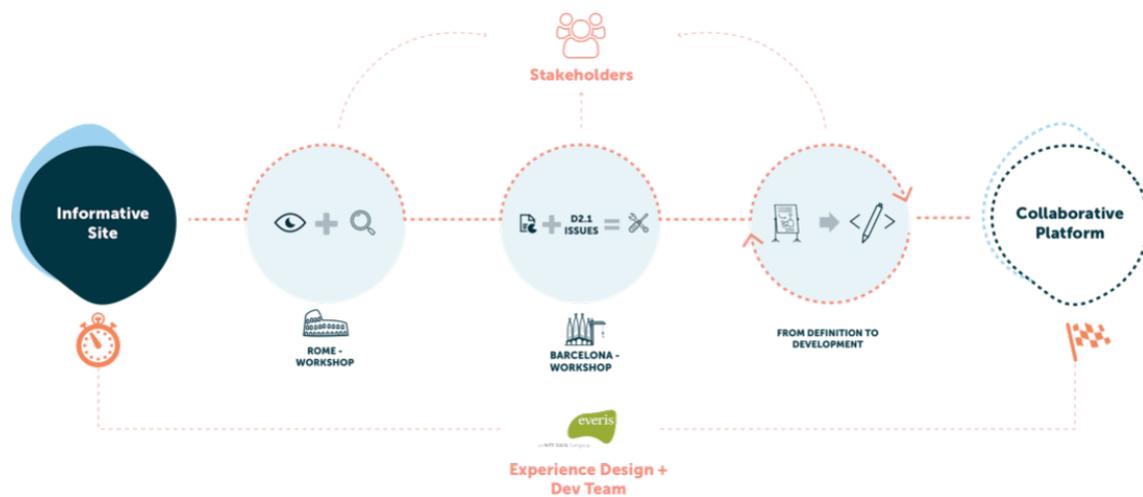


In order to define how the Collaborative Platform we wanted should be, the first step was to run a consultation with potential users to check about which things they considered important. To achieve this goal it was necessary to build a consensus -from the perspective of each of the stakeholder groups involved in RRI- on three key pillars: mission, vision and values.

Once the results of this consultation were analysed, the following step was to translate the values that had been defined into functionalities that can be implemented in a virtual collaborative platform. A number of examples from sites and service providers which already offer their own solutions in terms of functionalities were used to perform a benchmark exercise. Then an 'address + prioritize' exercise was made, matching the mission, vision and values identified by the stakeholders with the functionalities

identified in the benchmark. Second, and working on a scenario in which it would not be possible to develop all identified functionalities, these functionalities were prioritized and in a reflection process that followed certain selected functionalities were discarded.

Once the perceptions of stakeholders were translated into needs, and those needs have been translated into a list of ranked functionalities, this list was grounded as a development plan for the platform. 3 development packages were proposed. Each of these packages contains several core functions of the collaborative platform, being the main one the RRI Toolkit around which the Community of Practice will interact. On the date of release of this Deliverable 3.1, the process is finishing with package 1 and half way of the wireframing phase of package 2.



## 2. Intro: why do we want a digital collaborative platform?

As it is stated in the DoW, and following the expertise derived from projects like EDRENE ([www.edrene.org](http://www.edrene.org)), it is foreseen that the RRI Toolkit (which, in essence, is a resource repository) is widely disseminated, trained in and implemented all across Europe through what we have called the 3rd Sphere or the RRI Community of Practice. Basically, with the concept “RRI Community of Practice” (CoP) we mean all those individuals and organizations that, being in some measure involved in RRI, are in need of resources that we can provide and, at the same time, might be willing to share the resources they have and collaborate with others in common enterprises.

In essence, any CoP is articulated around (and defined by) a collaborative work about some more or less specific topic; this collaborative work facilitates and streamlines communication between people, and makes possible to achieve certain objectives that could not be reached without the cooperation of a diversity of agents.

In the context of RRI Tools, in order to enable this collaboration and given the transnational dimension of the project and its expected CoP, it was decided that a collaborative work platform should be provided as one of its main tools. At the same time, with the RRI Toolkit we have chosen to go digital (instead of, for example, paper publishing), as this solution offers significant advantages regarding outreach and engagement. This means that the RRI Toolkit will be hosted in a digital environment (call it a website, if you prefer) that must also be the base for the collaborative platform. Therefore, we are talking about a digital collaborative platform, which can be defined as a virtual workspace that centralises all the functions related to the conduct of a project, making them available to the different collaborators. These functions will vary according to the needs of the users of the platform and the characteristics of the project they are collaborating at, for example messaging system, files sharing systems, discussion forums etc...



**In summary: RRI Tools relies for its implementation and dissemination on the federation of an “RRI Community of Practice”, composed by individuals and institutions with a shared interest in Responsible Research and Innovation.**

**This Community of Practice will find a common ground in the resources provided by the RRI Toolkit, and we will make available, in the same spot, a virtual workspace that enables fruitful collaborations among users of these resources. This virtual workspace is what we call the RRI Tools Collaborative Platform.**

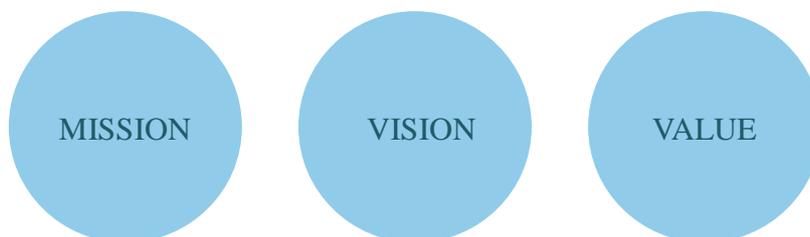
### 3. The vision of the Stakeholders: defining mission, vision and values of the Collaborative Platform

In order to define how the Collaborative Platform we wanted should be, the first step was to run a consultation with potential users to check about which things they considered important. To this end, Everis prepared an exercise taking advantage of a WP3 (Production) held in Rome, where consortium representants from all stakeholders groups were present. The final goal of this “Platform Exercise” was to lay the ground for the coming months’ efforts regarding the project’s digital environment.

Even if there was not enough in this workshop to go through a full process of platform definition, the exercises that were carried out harvested highly valuable insights and expertise for these first stages, when the main characteristics were to be set. Consortium members are among the first members of the RRI Community of Practice; for this exercise, they were asked to put on their “end user” hat, and to imagine themselves as users of the Toolkit and as part of a much larger community that interacts around it.

#### 3.1. Introduction

The first session of the meeting dealt with the design of the collaborative platform where future users will collaborate and interact around the Toolkit, leading to the consolidation of a Community of Practice. The aim of this session was to come up with a crystal clear direction that would help when taking future decisions and stablishing objectives regarding the evolution of the current (informative) website towards a collaborative platform. To achieve this goal it was necessary to build a consensus -from the perspective of each of the stakeholder groups involved in RRI- on three key pillars: mission, vision and values.



- Vision is a statement about the desired state, where the collaborative platform has to go;
- Mission is a statement about the core purpose, why the collaborative platform exists;
- Values will be interspersed throughout both mission and vision. An effective values statement clearly delineates the guiding principles of the project towards the collaborative platform, how the collaborative platform is intended to behave and interact.

These statements are the foundations of an effective strategic plan. Based on the results shown below, Everis will provide a first overview for sharing and being refined by the rest of the Consortium. However, it is important not getting stuck on wording and keeping the momentum in the strategy development and planning process.

### 3.2. Mission, vision and values taglines per stakeholder

Listed below are the final taglines obtained in the first session of the meeting, where the different partners participating in WP3 worked in teams representing the different stakeholders, as described in the Meeting’s Guide. These taglines lead us to a better understanding of the mental model per each stakeholder, knowing their visions and expectations about what will be the collaborative platform.

#### 3.2.1. Vision

##### 1. Vision



Figure 1: Word cloud for the visions by stakeholder group.

Civil Society Organizations	The RRI collaborative platform will offer a structure / guidance to get answers to research requests expressed by CSOs.
Education community	This team suggested calling the collaborative platform Agora and the following tagline: Agora is a network and inspirational platform that transforms your world while transforming the world.
Industry & business	A value adding platform providing useful tools and cases for business and industries that want to be the reference / leaders on RRI.
Policy Makers	The roadmap to RRI, the place where policymakers go for advice in making RRI policy. Also: the easier accessible website to RRI.
Researchers	Accessible one-stop-shop for responsible research and innovation.

Table 1: Visions by stakeholder group.

### 3.2.2. Mission

#### 2. Mission



Figure 2: Word cloud for the missions by stakeholder group.

Civil Society Organizations	Provide a unique and inspiring dialogue platform and marketplace accessible on different interfaces.
Education community	We aim for users of the Agora platform to actively engage, contribute, share and become inspired to change their practice towards a more responsible research, development and innovation.
Industry & business	The platform has to be the drive for change showing clearly benefits and offering new opportunities to the decision makers facilitating the proper resources.
Policy Makers	Inspire through best practices that bring the concept to life and build community in order to foster RRI.
Researchers	Engage stakeholders and provide resources for RRI.

Table 2: Missions by stakeholder group.



	<ul style="list-style-type: none"> <li>• creative</li> </ul>
Policy Makers	<ul style="list-style-type: none"> <li>• credible</li> <li>• accessible</li> <li>• inspiring</li> <li>• sustainable</li> </ul>
Researchers	<ul style="list-style-type: none"> <li>• serving society</li> <li>• sustainable</li> <li>• curiosity driven</li> <li>• open</li> <li>• transparent</li> <li>• inclusive</li> <li>• diverse</li> <li>• reflexive</li> <li>• anti-bureaucratic</li> </ul>

Table 3: Values by stakeholder group.

### 3.3. Dichotomies exercise

With this exercise, our objective was to do a deeper analysis of how the potential users would imagine the functioning of the Collaborative Platform. Partners were asked to locate their position between two extremes in a number of statements about the different characteristics that a Collaborative Platform can have, as can be seen in the following figure

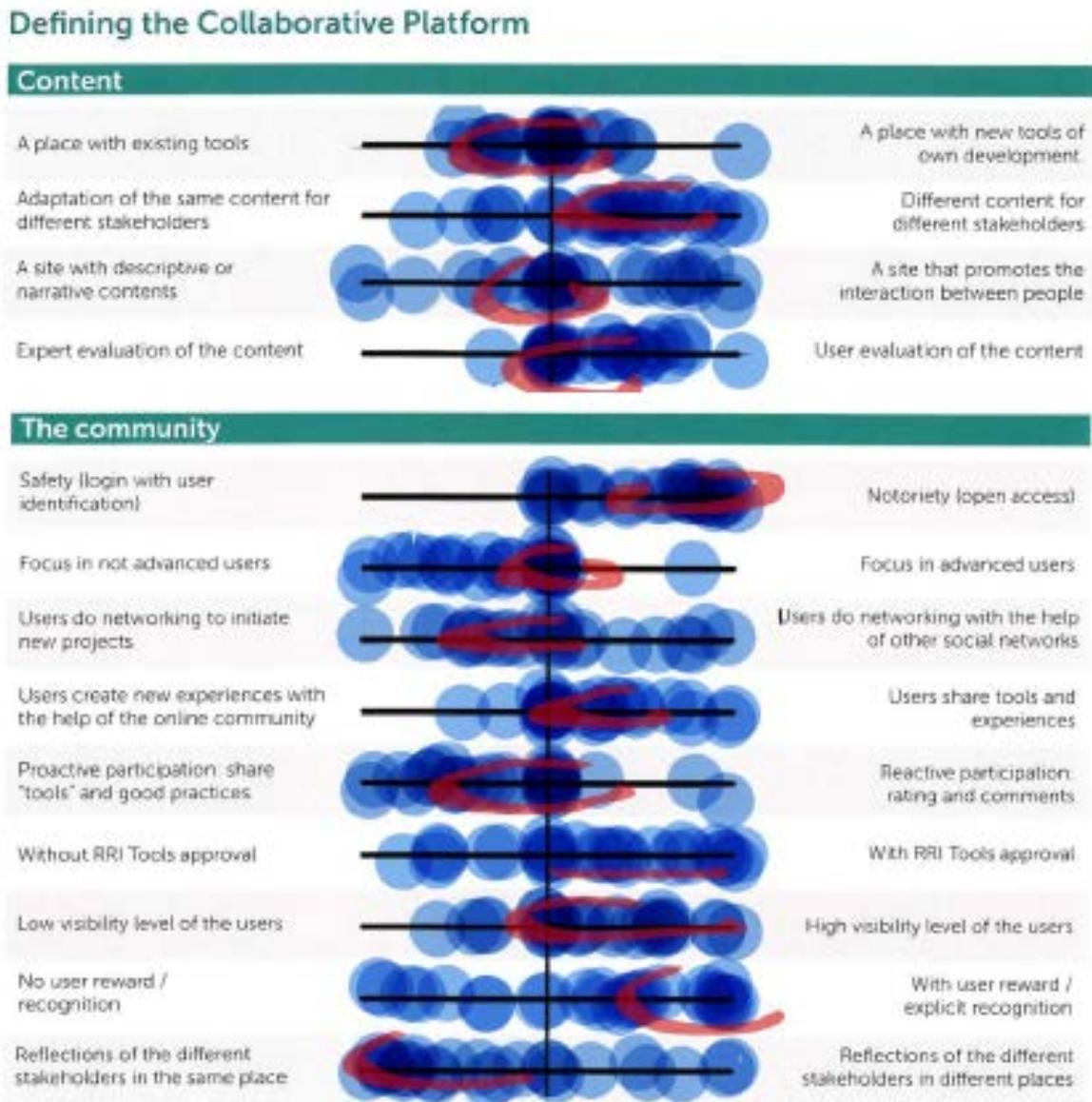


Figure 4: Compilation of the dichotomies questionnaires

### 3.3.1. Conclusions of the Dichotomies exercise

<b>Content conclusions:</b>
• Most partners consider that the CoP must contain both existing and own tools.
• It is important to cluster the information per stakeholder.
• Most partners prefer a site where interacting with people, but also want descriptive and narrative contents.
• Partners give more value to users' evaluation than to an expert-based one.
<b>Community conclusions:</b>
• Partners advocate for notoriety through open access.
• It is important to put the focus on not advanced users.
• Partners advocate for doing networking to initiate new projects.
• The stakeholders want to use the CoP for sharing experiences.
• The stakeholders advocate for a proactive participation sharing tools and good practices.
• Regarding content approval, there is a divided opinion with a slight tendency towards a RRI Tools project approval.
• Most of stakeholders want to be visible for the rest of the community.
• Opinion is divided about reward recognition, with a slight tendency to promote it.
• Most of stakeholders want reflections from all users -regardless their stakeholder group- to be placed in one single place.

Table 4: Results of the dichotomies exercise

## 4. From values to needs, from needs to functionalities

Once the results from the Rome workshop were analysed, the Collaborative Platform core team was ready to move into the following step: how to translate the values that had been defined into functionalities that can be implemented in a virtual collaborative platform.

To explore this question a second meeting was called in Barcelona, with a smaller group of partners. The objective of the session was the definition of those main functionalities needed when creating the RRI Tools Collaborative Platform. All the information gathered until this point was taken into account, in order to address the following objectives:

- Identify the main needs (issues) of each stakeholder.
- Prioritize these issues for each stakeholder
- Respond to these needs through the functionalities presented.

The Barcelona workshop was divided in 3 activities:

- Activity 1: presentation of the benchmark of real examples of functionalities that which resolve the needs of the collaborative platform (inspire)
- Activity 2: identification of the key issues for each stakeholder. (prioritize)
- Activity 3: association of the analysed requirements by stakeholder (“how to’s”) with the functionalities (adress)



### 4.1. Brainstorming on the benchmark

Everis team selected a number of examples from sites and service providers which already offer their own solutions in terms of functionalities that resonated with the idea the participants had about the collaborative platform. The following table shows the main functionalities that were identified in the benchmarking process

Section	Identified functionalities
Home	<ul style="list-style-type: none"> <li>• Very powerful filter, search engine</li> <li>• Related Content component</li> <li>• Projects &amp; skills by tags</li> <li>• Sharing economy: Reputation system around tools and persons</li> <li>• Public opinion monitor</li> <li>• Explanatory and motivating video</li> <li>• Inspiring cases / case studies</li> </ul>
Register /Login	<ul style="list-style-type: none"> <li>• Social media login / auto-fill data</li> </ul>

	<ul style="list-style-type: none"> <li>• Simple and guided information introduction process</li> </ul>
User profile - Form / Private view	<ul style="list-style-type: none"> <li>• Auto-fill information - 'connect' function that imports data from another site</li> <li>• In-box. Integrated messaging component</li> <li>• Dashboarded profile: my groups, my favourite resources...</li> <li>• Infographic self-assessment state</li> <li>• Projects &amp; skills by tags</li> </ul>
User profile - Public view	<ul style="list-style-type: none"> <li>• Official accomplishments badge</li> <li>• Social networks links</li> </ul>
Stakeholder page	Dashboarded profile
Forum	<ul style="list-style-type: none"> <li>• Collective discussions</li> <li>• Import linkedin discussions</li> <li>• Possibility to join groups by interest</li> <li>• Notifications via email and the possibility to answer also by the email.</li> <li>• News aggregator</li> </ul>
Toolkit	<ul style="list-style-type: none"> <li>• Very powerful filter, search engine</li> <li>• Visual results</li> <li>• Tools packaged by method / level</li> <li>• Menu by goals</li> <li>• Iconographic filter</li> <li>• Different ways of visual results classification</li> </ul>
Tool detail	<ul style="list-style-type: none"> <li>• Tutorial/ Wizard during the process</li> <li>• Related Content component</li> <li>• Tool detail information by tabs</li> <li>• Custom &amp; Full downloadable tool</li> <li>• Blog inside the tool detail.</li> <li>• Tools assessment and validation</li> <li>• Share your own experience using the tool</li> <li>• Favourites tools</li> <li>• Inspiring cases / case studies</li> </ul>
Tool upload form	<ul style="list-style-type: none"> <li>• Simple and guided information introduction process</li> <li>• Simple upload process</li> </ul>
Global features	<ul style="list-style-type: none"> <li>• Tooltips</li> <li>• Interconnection</li> <li>• Findability</li> <li>• Gamification techniques</li> <li>• Building relationships systems based on positive thinking</li> <li>• Democratic sharing models and structures</li> <li>• Database</li> <li>• Glossary</li> </ul>

Table 5: Brainstorming on functionalities

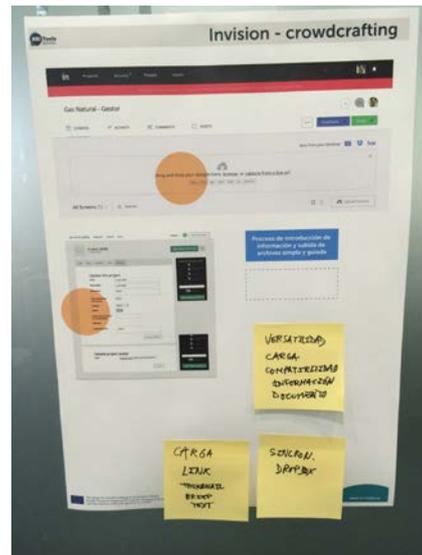
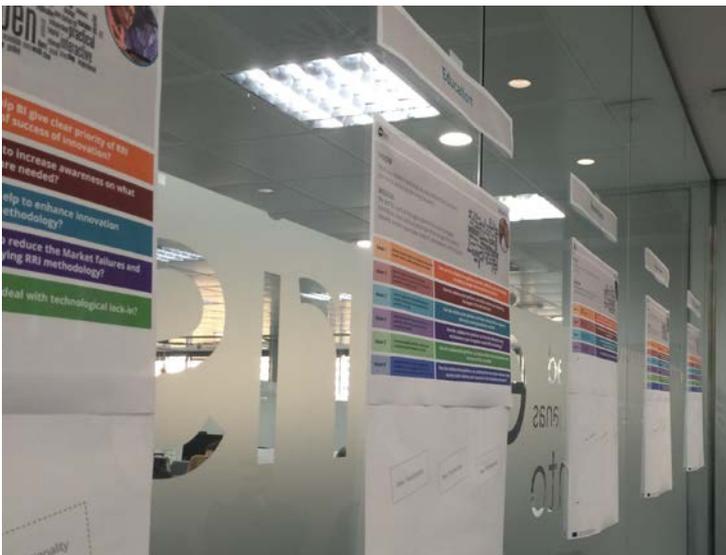
## 4.2. Prioritizing functionalities

The second part of this workshop consisted of a ‘address + prioritize’ exercise. First, participants matched the mission, vision and values identified by the stakeholders with the functionalities identified in the benchmark. Second, and working on a scenario in which it would not be possible to develop all identified functionalities, these functionalities were prioritized. In this sense, they were ranked according to the number of matches they had with the stakeholder views; after that, a reflection process followed, in which certain selected functionalities were discarded. This way, a preliminary work plan for the development of the collaborative platform emerged, summarized in the following table:

Functionalities (in order of priority)	Description	Related features
Related Content component	Contents (resources, user profiles, documents etc...) are tagged and can be interrelated, clustered and linked using these tags	User profile Form & Public view <ul style="list-style-type: none"> <li>• Projects &amp; skills by tags</li> <li>• Tool detail</li> <li>• Tool upload form</li> </ul>
Reputation system	User profiles include information about the performance of the user in the community (activity rate, quality of contributions, participation in conversations etc...)	<ul style="list-style-type: none"> <li>• Forum</li> <li>• User profile Form &amp; Public view</li> <li>• Projects &amp; skills by tags</li> </ul>
Search engine	A “device” able to search on the full content database (resources, user profiles, documents etc...)	Filter <ul style="list-style-type: none"> <li>• Projects &amp; skills by tags</li> <li>• Visual results</li> <li>• Tool detail</li> <li>• Tool upload form</li> </ul>
Database	A structured collection of all available contents (resources, user profiles, documents etc...)	<ul style="list-style-type: none"> <li>• User profile Form &amp; Public view</li> <li>• Projects &amp; skills by tags</li> <li>• Tool detail</li> <li>• Tool upload form</li> </ul>
Discussion Forum	A virtual space that allows conversations among users	<ul style="list-style-type: none"> <li>• Collective discussions</li> <li>• Import linkedin discussions</li> <li>• Possibility to join groups by interest</li> <li>• Notifications via email and the possibility to answer also by the email.</li> <li>• News aggregator</li> </ul>
Official accomplishments badge	A distinction that can be awarded to users for the accomplishment of certain goals (linked to the reputation system)	<ul style="list-style-type: none"> <li>• Tools assessment and validation</li> <li>• Self-assessment tool</li> <li>• Forum</li> </ul>
Inspiring cases / case studies	A collection of case studies that are of interest to the community	User profile Form & Public view <ul style="list-style-type: none"> <li>• Projects &amp; skills by tags</li> <li>• Tool detail</li> <li>• Tool upload form</li> </ul>
Customized Institutional/User	Collection of data around a user,	<ul style="list-style-type: none"> <li>• Auto-fill information -</li> </ul>

<p>profile</p>	<p>may it be an individual or the representative of an organization.</p> <p>Each user can enrich their personal profile adding their favorite resources, contacts etc...</p>	<p>'connect' function that imports data from another site</p> <ul style="list-style-type: none"> <li>• In-box. Integrated messaging component</li> <li>• Dashboarded profile: my groups, my favourite resources...</li> <li>• Infographic self-assessment state</li> <li>• Projects &amp; skills by tags</li> <li>• Tools assessment and validation</li> <li>• Self-assessment tool</li> <li>• Forum</li> </ul>
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Table 6: List of prioritized functionalities and related features



## 5. From definition to development

Once the perceptions of stakeholders were translated into needs, and those needs have been translated into a list of ranked functionalities, this list was grounded as a development plan for the platform.

Following the working methodology suggested by Everis (Agile Methodology)<sup>1</sup>, 3 development packages were proposed. Each of these packages contains several core functions of the collaborative platform, being the main one the RRI Toolkit around which the Community of Practice will interact.



The following table summarizes the work plan for the development of the collaborative platform; on the date of release of this Deliverable 3.1, the process is finishing with package 1 and half way of the wireframing phase of package 2.

<i>Package</i>	<i>Functions</i>	<i>Associated functionalities</i>
1	<b>Toolkit</b>	Search engine User centred menu Visual results
	<b>Resource Sheet</b>	Detailed information by tabs Tag-related content Download options External links Discussion conversations Shareable
	<b>Register + Login</b>	Social Media Login Simple process
2	<b>Tool upload form</b>	Simple, inviting, guided process Different levels of information
	<b>User profile</b>	Different levels of enrichment Contains Customized features
3	<b>Stakeholder's landing pages</b>	Tailored version of the Toolkit Tailored information
	<b>New home page (RRI Tools definitive website)</b>	Suitable home for the Toolkit Entry points by stakeholder Simple and easy to understand

Table 7: Collaborative Platform development plan

<sup>1</sup> <http://agilemethodology.org/>

## 6. Technical specifications

As the first version of the RRI Tools website, the Collaborative Platform, including the Toolkit, will be developed based on the latest version of LifeRay Enterprise, taking advantage of the components and functionalities it offers.

Many of these components require little customization besides adapting them to the general visual scheme of the platform:

- Definition of the different RRI resource typology using the classification system.
- Searching of resources through the Lucene search engine that comes with the product. This engine is powerful enough to provide for the platform's needs, namely the filtering of resources by given criteria (resource type, user profile, location, ...)
- Integration of message boards in different parts of the platform to encourage users to collaborate.

Other components of the platform will need to be further developed to add new functionalities or extend the already existing ones:

- Customization of the Liferay default users to store their multiple and diverse information: user profile, experience, skills and interests... It will also provide a "My Toolkit" page for the users to save their favorite toolkits and easily access them in the future.
- Extension of the login and register functionalities to add social network support (Facebook, Twitter, Google+ and LinkedIn), as well as allowing users to share resources.
- Editing of resources will be customized so that resource information can be edited from the platform's pages instead of having to access the backend. This will allow regular users to edit their own information.

## 7. Annex I: Some theory: Resource Repositories, Communities of Practice and Collaborative Platforms

In this section we have compiled advice from experts and preceding projects regarding the main components of the Collaborative Platform: some tips about repositories, communities of practice and collaborative platforms. It is done in the shape of bullets that summarize concrete sources of reference in the form of synthetic tips, inputs and insights.

### 7.1. Resource Repositories<sup>2</sup>

#### Introductory tips

- Most promising strategies: building repositories on existing communities of practice with defined needs; bottom-up approaches or user-based repositories seem to have more success
  - starting point: a personal network
  - encourage ownership and trust: essential requirements for sharing.
  - personalisation and social aspects of repositories.
  - sustainability of services: members move away, the underlying needs remain.
- it is not easy to make users share materials.
- know your target groups well, it is important to know who the users are, where they come from, what they are doing (and not doing)
- with a built-in dedicated community manager.
- Keep it simple: you don't need an excessive number of features.
- With a focus on a community approach and more user generated content

#### Repository homepage provides...

- potential users with a clear idea of why they should join
- existing users (logged in) with personalized news and activity
- possibilities of a user tailored front page

#### The need for personalization

- The use of "My" would take the point of view of the user.
- use of "Your" instead reinforces the conversational dialogue
- elements found on other social networks including: Profile pages; personal settings/options; list of favourites / personal collections; ; accounts of recent activity; personal messages; possibility to follow/unfollow users; sharing; inviting etc..
- The user wants to associate, communicate, and interact with other people (such as friends, family, and colleagues) online
- ensure an engaged community actually willing to tag, rate and comment.

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<sup>2</sup> The information of this section has been distilled from the „Repository Strategies Thematic synthesis report“ developed by the EDRENE project and published in March 2010

### **About building – or supporting – communities**

- A repository is not a success if it is not actively used
  - locating an existing community of practice and supporting it efficiently online.
  - combined with an area of broad interest and with many stakeholders
- Importance of building communities of practice, where users share resources, evaluate them and inspire one another on how to use them.
  - strongest communities are often subject based or built upon personal relations
- Initially share experiences, ideas on practice and advice on specific questions
  - sharing of resources as a side effect; it might prove easier to start with discussing practice and exchanging experiences than actually sharing content.
  - This is in contrast with where focus has traditionally been: providing an infrastructure for “sharing” (as in depositing) content, with the community aspect only recently being added as an important strategy component.
- Successful social networks are not just about connecting people – there needs to be “social objects” included in the equation .

### **When engaging producers**

- if producers should take any interest in a repository, there should be a high number of users: active and engaged user communities are important for content producers
- repositories can also help in providing easier content delivery to the most important platforms by supporting (enforcing) common formats for content production and delivery.

### **Resource description page**

- the most detailed view of an individual resource present all available (relevant) metadata to the user
  - most possibilities for interaction with a resource is provided – including those not available from a list of search results.
- Apart from interactions (including rating, tagging, commenting, previewing, downloading, adding to favorites/collections, sharing...) this is also where a site typically makes use of other user generated metadata/attention metadata to for example recommend other relevant content.

### **Collecting and sharing resources**

- users would need to collect interesting resources to review later, share with others, discuss or collaborate around ->users build personal collections
- possibility to save searches, keep track of your search history and being updated about new relevant content.
- allow them to share these both through the repository itself, but also to other communities they participate in, allowing the connection of people that share interests, attracting new users from other communities and recommending other resources.

### **Keep users updated**

- Often repositories are not in use every day by their primary target group of users.
- important to provide possibilities for users to be updated when activity relevant to them occurs.
- email newsletters which can be customized to information relating to specific subjects
- email alerts, feed subscriptions to user defined searches and providing widgets to be embedded in

### **Adding descriptive metadata**

- When users deposit content they are required to provide descriptive metadata: important area to optimize design of.
- As describing a resource is one of the most difficult tasks for users to perform, and often cited as a perceived barrier

### **Analyzing repository use**

- Essential to have as much knowledge as possible about the behaviour of its current users.
  - Identifying popular functions/pages
  - Determining popularity of individual links on pages
  - following changes in user behaviour after layout changes
  - Identifying popular searches, content missing in repository
  - Identifying traffic sources
  - Characterization of user types such as:
- A number of repositories report that they (infrequently) also do surveys of users visiting their repository, often in order to prioritize between different development strategies and/or obtain impressions of user satisfaction.

## 7.2. Community of practice<sup>3</sup>

Here we share some cherry-picked reflections about the concept of Community of Practice

### A community of practice is

- a group of people
- who share a concern or a passion for something they do,
- and learn how to do it better as they interact regularly.

The main **key elements** to a community of practice are:

- The domain: members are brought together by a learning need they share (whether learning is the motivation for their coming together or a by-product of it)
- The community: their collective learning becomes a bond among them over time
- The practice: their interactions produce resources that affect their practice

The first three things we must know **to get a community of practice started** are:

1. You cannot start a community by yourself: you cannot start a community at all, the only people who can form a community are the members themselves as a collectivity.
2. Conversations with potential members, to know what they do, what they need, what they think
3. Find some potential members who are willing to join you in your vision of a community of practice and to invest their own identities as practitioners in making this happen. Engage a dedicated core group in designing a process by which the community can get going.

Often this will entail organizing a launch event. But in some cases, it could just entail starting working on an issue and letting the process attract others. The level of visibility of the launch process will depend on the degree to which it can build on existing identities associated with the domain of the community.

Some insights regarding the **level of participation**

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<sup>3</sup> Most of the information of this section has been distilled from <http://wenger-trayner.com> (as consulted in January 2015), a site of two social learning practitioners that develop conceptual frameworks and practices to address the learning challenges facing public and private organizations today.

- Participation in communities of practice is rarely a person's main activity or job, so expected levels of participation should reflect this reality.
- It is not unusual to have a smaller core group of members who identify very strongly with the community and contribute most
- Mainly participation should reflect the level of relevance of the domain to the main activities of members. This means that levels of participation will likely be quite different for different people.
- Concentric bands of participation from very active members to merely passive. In a healthy community there is usually a flow of people moving across these levels of participation.

**Key success factors** for communities of practice

- Communities of practice are complex social structures, whose voluntary and self-governing nature makes them quite sensitive to subtle dynamics.
- Identification: Communities of practice thrive on social energy, which both derives from and creates identification. Passion for the domain is key.
- Leadership: A key success factor is the dedication and skill, energy and time of people who take the initiative to nurture the community, to take care of logistics and hold the space for the inquiry.
- Time: Time is a challenge for most communities, whose members have to handle competing priorities. A key principle of community cultivation is to ensure "high value for time" for all those who invest themselves.
- Other candidates for success factors include:
  - self-governance,
  - a sense of ownership,
  - the level of trust,
  - recognition for contributions,
  - value creation,
  - organizational voice,
  - connection to a broader field,
  - interactions with other communities.

## 7.3. Collaborative Platforms success: engaging users and producers <sup>4</sup>

### Conclusions

In order for a Collaborative Platform to be a success it needs to:

- to attract a high number of returning users
- support this goal by building active and engaged user communities.
- take longer in planning the community – including why, when and how to contact users - than in the design and coding stage.

### Recommendations:

- Make the community the centre of your web site - never hide it
  - users are the most important asset
  - make sure that all members of your community know that there is a real person behind each user name.
  - Encourage people to have as complete profiles as possible. If you wish to involve your users, their effort should be visible
- Describe why you want an online community – to yourself and all involved stakeholders
  - Give importance to the *naming* in your community
  - Adopt a conversational tone and use clear indications to possible actions
- A dedicated and skilled community manager is essential
  - time and a strong personality
  - approachable, consistent, personable, visible, proactive and not least passionate, who actively engages with the community.
  - show visible guidelines and rules
  - matchmaker by introducing members to other members,
  - give lots of encouragement and compliments
  - asking questions is the single most effective way of generating activity, ideas and responsibility in an online community. It takes hard work to make users answer the first questions posed in any forum.
- Plan for long term sustainability: a strong community cannot be built quickly –
  - It is successful because it has been available for a long time, not vanishing when a given project is finished
  - One major challenge is to add community features which could make the high number of returning users contribute and not only consume
- Keep it simple
  - Keep features down to a minimum, and be confident that your community is easy to use.
- Make it easy to participate – for all members
  - barrier to actively contribute should be lowered.
  - should be very clear to users that they can do things on a site, otherwise they won't.
  - have a continuous but often updated call to action to turn observers into contributors;
  - don't focus exclusively on "power members", but work hard to get new and dormant members active and involved.

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<sup>4</sup> Most of the information in this section is distilled from the "Engaging users and producers Thematic synthesis report" (March 2010) produced by the EDRENE project, that can be found here: <https://files.itslearning.com/data/826/open/co6/758.pdf>

- Welcoming and nursing new members is often well worth the effort.
- multiple entry points and ways to access the online community and use personal, actionable language.
- Build trust and defend your brand
  - The reputation of the community is important
  - does not edit or delete negative comments, but instead respond to them openly.
- It should be easy for users to invite friends
  - Find out where your users also can be found
  - Keep your community as open as possible:
  - you will need to actively go and find new users – and should make it easy for them to do the same.
  - Whenever possible befriend your “competitors”
- Reward user activity
  - Examples of this include highlighting new and/or quality content, awarding special status or bonus to active members
- Keep moderation to a minimum
  - Once you get users to contribute their content be timely about posting it
  - Time lags on user-submitted content getting posted to the site will in general interrupt the natural flow and make users feel moderated instead of part a community
  - When possible, trust your users to do most of the necessary moderation - the more you moderate or intervene, the less active your community will be
- Encourage and facilitate real life meetings between users
  - Successful communities often excel because they are seen as an opportunity to become part of a meaningful dialogue with other professionals in the field, and/or experts
  - face-to-face meetings can lead to more active use and suggestions to improvements that will help further strengthen the online community
- Find out as much as possible about the usage patterns of your repository
- Do careful usability studies - be inspired by best practice from other sources

## Annex II- List of people that participated in the definition exercises

### 1- Rome Workshop

#### ATHENA

1. Jacqueline Broerse
2. Pim Klaassen

#### CARIPLO

3. Carlo Mango
4. Ricardo Porro
5. Valentina Amorese

#### CIENCIA VIVA

6. Gonçalo Praça

#### CIPAST

7. Norbert Steinhaus
8. Michaela Shields

#### EBN

9. Cedric Hananel

#### ECSITE

10. Luisa Marino
11. Marzia Mazzonetto

#### EUN

12. Maite Debry

#### EUROSCIENCE

13. Jean Pierre Alix
14. Alexia Harambure
15. Luc Van Dyck

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16. Sheena Laursen
17. Mai Murmann

#### EVERIS

18. Sergio Marco
19. José Ramón Varela
20. Jorge Márquez
21. Isabel García
22. David Serras

#### FLC

23. Ignasi López Verdeguer
24. Guillermo Santamaría
25. Daniel García
26. Paola Isetta
27. Belén Perat

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28. Rosina Malagrida
29. Josep Carreras

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30. Sara Heesterbeeck

#### UCL

31. Melanie Smallman
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#### ZSI

33. Ilse Marschalek
34. Katharina Handler

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