

## Action notebook



# 10

*This chapter is a practitioner-oriented summary of the book so far. It is couched as an “action notebook.” With checklists, tables, and questions, it takes you through the steps of stewarding technology and outlines what to keep in mind at each step.*

While a summary, this chapter does not follow the order of the book. In the body of the book, chapters are introduced in an order that reflects conceptual prerequisites: which concepts need to be introduced first so that the rest of the text makes sense. Here we revisit what we have said, but in an order that approximates better the way in which these ideas can be put into practice:

- **Preamble:** reflection on the role of tech steward
- **Step 1: understanding your community,** its characteristics, orientation, and current configuration

- **Step 2: providing technology**, choosing a strategy, selecting a solution, and planning the change
- **Step 3: stewarding technology in use**, in the life of the community and at its closing

Of course, the actual work of stewarding technology for community is not quite that linear, but it is still useful to think about it in terms of these steps. For each heading, we provide the reference to the chapter(s) where the material is discussed. We have provided a downloadable document on the book's website. We suggest you use that so you can work with the tables and look at pages together with other community members (<http://technologyforcommunities.com/actionnotebook>).

## Preamble ➔ Being a tech steward

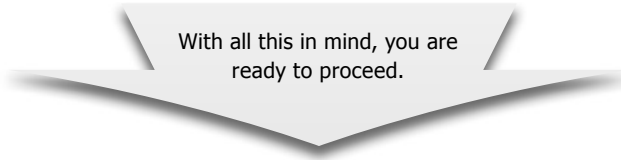
Start with some reflections on your role as a tech steward.

➔ About you as a steward (Chapter 3)	
<b>Personally:</b>	
• Why are you doing this? What do you expect?	
• What is your background (e.g., technology or community) and how does this affect your biases?	
• How much energy and time do you have for stewarding?	
• How will you learn what you need to know?	
• Who can provide support to you personally?	
<b>In your community</b> (For purpose of simplification, we'll use the singular in this chapter, but all that we say also applies to tech stewards who serve multiple communities):	
• What is your relationship to the community?	
• What is your relationship with community leaders?	
• What ways do you have to understand the community activities/practice?	
• What or who gives you the legitimacy to play this role?	
• Who else is interested and could help you by offering resources?	

**Tip:**

Look for labor, financial, and in-kind resources. Don't forget the power of voluntary contributions. They can build the spirit of community.

➔ About the work of stewarding (Chapter 9)	
Check the principles that are particularly relevant to you:	Why are they relevant? What do these mean to you?
<input type="checkbox"/> <b>Vision before technology:</b> What is the vision of your community's success? Place this above a list of technical specifications.	
<input type="checkbox"/> <b>Keep it simple:</b> What is the simplest solution for your community at this point in time? Is that "good enough"?	
<input type="checkbox"/> <b>Let it evolve:</b> Are you helping the community have a sense of its own evolution? Think of technology, not as a system, but as integral part of the evolution of your community.	
<input type="checkbox"/> <b>Use the knowledge around you:</b> Who can you tap to learn with and from?	
<input type="checkbox"/> <b>Always back it up:</b> What is your data back-up plan?	



With all this in mind, you are ready to proceed.

## Step 1. ➔ Understand your community

No matter what your relationship is to your community—a core member, a leader, a peripheral member, not a member at all—the first and foremost step is to understand your community and its circumstances.

**Tip:**


Consult with your community as you build your picture. It could even be useful to set aside a small amount of time to talk about all the following issues as a group—without distracting the community from its main interests. You may gain greater insights about what members experience, what they aspire to, and what technology they do and do not use or want.

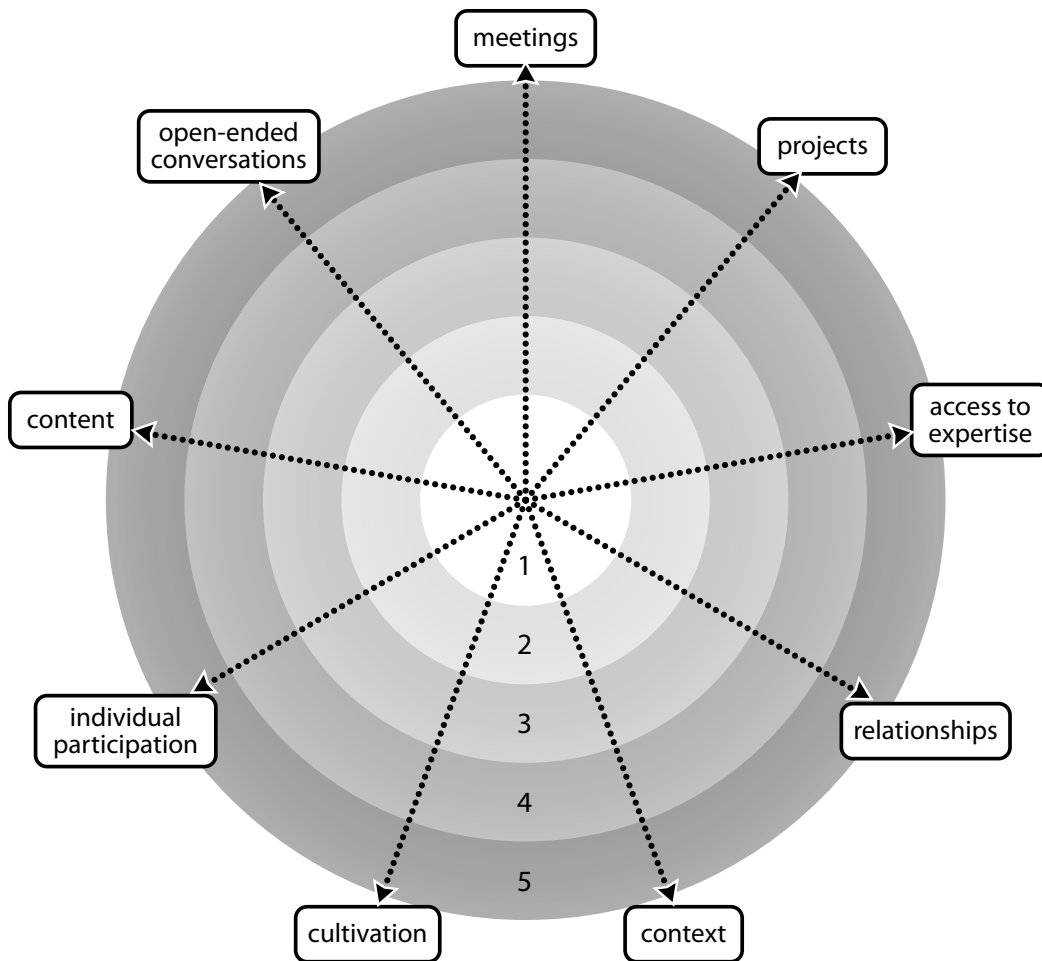
## 1.1 ➔ Community characteristics

(Chapter 7)

Lifecycle		
Where is your community in its lifecycle?	What you need to focus on:	Special needs
<input type="checkbox"/> <b>Just forming:</b> need basic tools to connect, but not sure from there	Discuss the potential of some basic tools with members, explore what ideas it might give them, and see what they might bring in with them.	
<input type="checkbox"/> <b>Self-designing:</b> in formation stage, but with a strong sense of what it wants to accomplish	Contribute ideas to the design. Analyze systematically the implications of their community design for technology, infrastructure, and technology skills.	
<input type="checkbox"/> <b>Growing and restless:</b> ready to add new functionality to its tool configuration	Try to make this a community reflection and self-design event. Does their restlessness suggest a major change, such as a transition to a new platform?	
<input type="checkbox"/> <b>Stable and adapting:</b> just needing some new tools	How much disruption will the community tolerate? How will the new tools be integrated into or affect existing practices?	

Constitution		
<input type="checkbox"/> <b>Diversity:</b> How diverse is your community?		
<ul style="list-style-type: none"> <li>• What are the different types of members and what are their levels of participation?</li> </ul>		
<ul style="list-style-type: none"> <li>• How spread apart is it in terms of location and time zones?</li> </ul>		
<ul style="list-style-type: none"> <li>• What language(s) do members speak?</li> </ul>		
<ul style="list-style-type: none"> <li>• What other cultural or other diversity aspects may affect your technology choices?</li> </ul>		
<input type="checkbox"/> <b>Openness:</b> How connected to the outside world is your community?		
<ul style="list-style-type: none"> <li>• How much do you want to control the boundaries of your community? Does your community need:                             <ul style="list-style-type: none"> <li><input type="checkbox"/> to be private and secure?</li> <li><input type="checkbox"/> open boundaries?</li> <li><input type="checkbox"/> both private and public spaces?</li> </ul> </li> </ul>		
<ul style="list-style-type: none"> <li>• How does your community need to interact with other communities? Do you need common tools for sharing and learning with them?</li> </ul>		

<b>Technology aspirations</b>	
<input type="checkbox"/> <b>Technology savvy:</b> What are your community's technology interests and skills?	
<ul style="list-style-type: none"> <li>How interested is your community in technology?</li> </ul>	
<ul style="list-style-type: none"> <li>What is their capacity for learning new tools?</li> </ul>	
<ul style="list-style-type: none"> <li>What is the range of skills? If their interests and/or skills are diverse, could it cause conflict or distraction?</li> </ul>	
<input type="checkbox"/> <b>Technology tolerance:</b> What is your community's patience with technology?	
<ul style="list-style-type: none"> <li>How tolerant are members of the adoption of a wide variety of tools?</li> </ul>	
<ul style="list-style-type: none"> <li>How many technological boundaries are they willing to cross—for example, sign in to more than one web-based tool, learn to use new tools, or give up old favorites? This helps you understand what level of integration you need.</li> </ul>	
 <p>Little things can have big effects. Having an extra login, URL, or tool can discourage participation. Making something a little bit easier can make a big difference.</p>	
<input type="checkbox"/> <b>Technology factors:</b> What constraints are imposed by technology factors?	
<ul style="list-style-type: none"> <li>What are your members' technology constraints (e.g., bandwidth, operating systems, etc.)?</li> </ul>	
<ul style="list-style-type: none"> <li>How much time are members able to be online and from where (office, home, field)? Some people have limited online time, or are able to be online only in specific locations. Others are always on. Very diverse situations can affect participation.</li> </ul>	



## 1.2 ➔ Orientations

(Chapter 6)

You can use the following chart and table to create an orientation profile of your community. If you don't recall what the orientations or their variants mean, refer to Chapter 6. First you can use the chart to create a "spider diagram" of your community's profile by rating each orientation (from 0 being irrelevant to 5 being very important) and then joining the dots. You can also use the chart to ask different community members to create spider diagrams of their perceptions of the current state of the community. You can also ask them to chart their desired states. It is interesting to compare their views and discuss them. If you want to get more detailed, you can also use the table to check the relevant variants, and describe the key activities.

0	1	2	3	4	5	Orientations	Variants	Key activities
						<b>Meetings</b>	<input type="checkbox"/> Face-to-face/blended <input type="checkbox"/> Online synchronous <input type="checkbox"/> Online asynchronous	
						<b>Open-ended conversation</b>	<input type="checkbox"/> Single-stream discussions <input type="checkbox"/> Multi-topic conversations <input type="checkbox"/> Distributed conversation	
						<b>Projects</b>	<input type="checkbox"/> Practice groups <input type="checkbox"/> Project teams <input type="checkbox"/> Instruction	
						<b>Content</b>	<input type="checkbox"/> Library <input type="checkbox"/> Structured self-publishing <input type="checkbox"/> Open self-publishing <input type="checkbox"/> Content integration	
						<b>Access to expertise</b>	<input type="checkbox"/> Questions and requests <input type="checkbox"/> Access to experts <input type="checkbox"/> Shared problem solving <input type="checkbox"/> Knowledge validation <input type="checkbox"/> Apprenticeship/mentoring	
						<b>Relationships</b>	<input type="checkbox"/> Connecting <input type="checkbox"/> Knowing about people <input type="checkbox"/> Interacting informally	
						<b>Individual participation</b>	<input type="checkbox"/> Levels of participation <input type="checkbox"/> Personalization <input type="checkbox"/> Individual development <input type="checkbox"/> Multimembership	
						<b>Community cultivation</b>	<input type="checkbox"/> Democratic governance <input type="checkbox"/> Strong core group <input type="checkbox"/> Internal coordination <input type="checkbox"/> External facilitation	
						<b>Service context</b>	<input type="checkbox"/> Organization as context <input type="checkbox"/> Cross-organizational <input type="checkbox"/> Other related communities <input type="checkbox"/> Public mission	

### 1.3 ➔ Technology configuration: inventory

(Chapter 4)

It is useful to inventory the current technology configuration of your community as a way to understand it better. If yours is a new community, it may not have any specific technology yet, but even for brand new communities, the current configuration may not be empty, for instance if general tools like email or phone are going to be used. You can use a version of the table on the next page to inventory and analyze the current configuration of your community:

1. Get the big picture. Make a list of all the platforms and stand-alone tools in your community's configuration.
2. For each platform, list the tools and check the ones that are being used. Why are some not being used? Are there duplicates? Are there issues around integration between tools?
3. To the left, make a note of which community activities/orientations the tools currently support in your community.
4. To the right, identify the key features of tools. Are some of these features commonly or rarely used? What are the reasons for that?
5. Assess actual tool use. Identify which are dominant and which are only used by smaller groups and individuals.



**Tip:**

It is better to do the technology inventory after you look at orientations so you don't let the technology shape the definition of actual and potential orientations.

<b>Platform 1:</b>			
<b>Supported Activities</b>	<b>◀ Tools ▶</b>	<b>Key Features</b>	<b>Usage Notes</b>
	<input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____		
<b>Platform 2:</b>			
<b>Supported Activities</b>	<b>◀ Tools ▶</b>	<b>Key Features</b>	<b>Usage Notes</b>
	<input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____		
<b>Platform 3:</b>			
<b>Supported Activities</b>	<b>◀ Tools ▶</b>	<b>Key Features</b>	<b>Usage Notes</b>
	<input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____		
Etc...			
<b>Stand-alone tools</b>			
<b>Supported Activities</b>	<b>◀ Tools ▶</b>	<b>Key Features</b>	<b>Usage Notes</b>
	<input type="checkbox"/> _____		
	<input type="checkbox"/> _____		
	<input type="checkbox"/> _____		
Etc...			

## 1.4 ➔ An emerging picture

(Chapters 4-6)

When you are done with the previous steps, use the following table to compare the Orientations worksheet (1.2) with the current configuration in the Inventory table (1.3):

Covering the orientations	
Compare the left-hand column of the Inventory table (1.3) with the right-hand column of the Orientations table (1.2). What do you notice about the match (or mismatch) between your dominant community orientations and the current configuration of tools?	
<ul style="list-style-type: none"> <li>How well does the technology inventory cover the orientations?</li> </ul>	
<input type="checkbox"/> Are you almost there? <input type="checkbox"/> Are there big gaps?	
<ul style="list-style-type: none"> <li>What is the range of skills? If their interests and/or skills are diverse, could it cause conflict or distraction?</li> </ul>	
Achieving integration	
Look at all the pieces of your configuration.	
<ul style="list-style-type: none"> <li>What level of integration and interoperability has been achieved?</li> </ul>	
<ul style="list-style-type: none"> <li>Where are there big gaps?</li> </ul>	
Balancing the polarities	
<ul style="list-style-type: none"> <li>How is the configuration balanced with respect to each polarity?</li> </ul> <div style="text-align: center;"> <p>The diagram shows three horizontal double-headed arrows. The top arrow is labeled 'synchronous' on the left and 'asynchronous' on the right. The middle arrow is labeled 'participation' on the left and 'reification' on the right. The bottom arrow is labeled 'group' on the left and 'individual' on the right. Each arrow has vertical tick marks along its length.</p> </div>	
<ul style="list-style-type: none"> <li>How well does this balance fit your community?</li> </ul>	
<b>Note:</b>	This emerging picture becomes the input to Step 2.3.

Now that you understand your community,  
you are ready to proceed with technology  
planning.

## Step 2. ➔ Provide technology

With a good picture of your community and its aspirations, you can start the process of providing technology.

### 2.1 ➔ Resources and constraints (Chapters 3 and 7)


First consider the resources and constraints in your environment that will influence your decisions.




<b>Organizational context</b>	
<input type="checkbox"/> <b>Within an organization:</b>	
<ul style="list-style-type: none"> <li>Do you need to develop your technology strategy in collaboration with the IT department?</li> </ul>	<input type="checkbox"/> High level of control <input type="checkbox"/> Some flexibility <input type="checkbox"/> Relative freedom
<ul style="list-style-type: none"> <li>What specific resources and constraints come from the IT department? (Get these details in writing if you can).</li> </ul>	
<ul style="list-style-type: none"> <li>What community-oriented technology do they have already? Is it usable?</li> </ul>	
<ul style="list-style-type: none"> <li>Does community-oriented technology need to interoperate with other enterprise software?</li> </ul>	
<ul style="list-style-type: none"> <li>What standards do you need to adhere to?</li> </ul>	<input type="checkbox"/> firewalls and security standards? <input type="checkbox"/> databases or data standards? <input type="checkbox"/> single login protocols? <input type="checkbox"/> company look and feel? <input type="checkbox"/> policies?
<input type="checkbox"/> <b>Across organizations:</b>	
<ul style="list-style-type: none"> <li>Which organizations can host the community or provide resources?</li> </ul>	
<ul style="list-style-type: none"> <li>What strings are attached?</li> </ul>	
<ul style="list-style-type: none"> <li>What problems can boundaries create across organizations:</li> </ul>	<input type="checkbox"/> firewalls and security? <input type="checkbox"/> data standards? <input type="checkbox"/> login protocols?
<input type="checkbox"/> <b>Outside any organization:</b>	
<ul style="list-style-type: none"> <li>Where will resources for technology and for tech stewardship come from?</li> </ul>	
<ul style="list-style-type: none"> <li>What tools can members contribute and what will happen if they leave?</li> </ul>	
<ul style="list-style-type: none"> <li>What open web standards do you need to adhere to?</li> </ul>	
<ul style="list-style-type: none"> <li>Do you want to "brand" your community through its look and feel?</li> </ul>	
<ul style="list-style-type: none"> <li>If you are an open community, how will you deal with spam?</li> </ul>	




Financial strategy	
<input type="checkbox"/> <b>Investment factors: What are your financial constraints and plans?</b>	
• What is your budget?	
• What are your short- and long-term goals and investment strategies?	
• What are the must-haves for today, and what are longer-term needs that could be deferred?	
<input type="checkbox"/> <b>Installation factors: Are you planning to acquire software?</b>	
• Who will install and configure your software?	
• Where will the software be hosted?	<input type="checkbox"/> Hosted service (ASP)? <input type="checkbox"/> On your own servers?
• What is your plan for ongoing technical support?	



## 2.2 ➔ Select an acquisition strategy (Chapter 8)



Taking into consideration both your circumstances and the options available in the marketplace, shape an acquisition strategy by selecting one or more from the list below. If you select more than one to create a composite strategy, you will need to think about integrating the outcomes.


• Do you want to get up and running quickly but aren't ready to invest in technology yet? ➔	<input type="checkbox"/> <b>Strategy 1: Use what you have</b>
• What are members already using in their daily lives (email and telephone)?	
• What might hosting organizations let you use?	
• Could you repurpose an existing tool or make small adjustments for your community's use?	
• Do skill gaps in the community prevent an existing tool from serving the community fully?	
 <b>Tip:</b> If this is not enough, combine with strategy 2 (using free platforms) and/or 7 (patching pieces together).	


<ul style="list-style-type: none"> <li>• Do you need something that works across organizations and requires no money? </li> </ul>	<input type="checkbox"/> <b>Strategy 2: Use free platforms</b>
<ul style="list-style-type: none"> <li>• Are these tools widely accessible enough?</li> </ul>	
<ul style="list-style-type: none"> <li>• Can you live with some advertisements?</li> </ul>	
<ul style="list-style-type: none"> <li>• How important is control of your community data?</li> </ul>	
 <p><b>Tip:</b> Make sure to pick options that allow you to back up your membership list, archives, and so on.</p>	
<ul style="list-style-type: none"> <li>• How much work is it to use/support these tools?</li> </ul>	
 <p><b>Tip:</b> Look for tools with active user communities. They usually can offer quicker support than the company providing free tools to such large numbers of people.</p>	

<ul style="list-style-type: none"> <li>• Does your community live in an organization with an existing IT infrastructure? </li> </ul>	<input type="checkbox"/> <b>Strategy 3: Build on an enterprise platform</b>
<ul style="list-style-type: none"> <li>• What parts of the infrastructure could you reconfigure to suit your community?</li> </ul>	
<ul style="list-style-type: none"> <li>• Have you built relationships with people in the IT department and sought their support?</li> </ul>	
 <p><b>Tip:</b> IT folks are a key to this strategy, and it is worth investing time in those relationships.</p>	
<ul style="list-style-type: none"> <li>• Are other communities in your organization using the enterprise platform?</li> </ul>	
 <p><b>Tip:</b> If you want to do additional development or customization, it might be easier if you pool resources.</p>	

<ul style="list-style-type: none"> <li>• Do you want one platform with a variety of tools and features all bundled together? Is that convenience critical to your community? →</li> </ul>	<input type="checkbox"/> <b>Strategy 4:</b> <b>Deploy a community platform</b>
<ul style="list-style-type: none"> <li>• Is the platform as good as it looks?</li> </ul>	
<ul style="list-style-type: none"> <li>• Is the functionality what you need?</li> </ul>	
 <p><b>Tip:</b> As you shop for a community platform, make sure you can try it out. Look carefully not only at the tools offered, but the features that make them usable.</p>	
<ul style="list-style-type: none"> <li>• Does the platform and the vendor have a history of focus on your critical orientations?</li> </ul>	
 <p><b>Tip:</b> Get feedback from other communities that have used the platform, especially communities that show similarities in their orientations.</p>	

<ul style="list-style-type: none"> <li>• Do you have very unique needs that are not met by tools in the marketplace? →</li> <li>• Do you have deep technological knowledge in your community or access to financial and technical resources?</li> </ul>	<input type="checkbox"/> <b>Strategy 5:</b> <b>Build your own</b>
<ul style="list-style-type: none"> <li>• Are you sure you are ready for this? Really sure?</li> </ul>	
 <p><b>Tip:</b> Define your needs first in terms of your community orientations and activities, then in terms of technological functionality. Work closely with your developers throughout the process so they have clarity on the tools' functionality you're looking for.</p>	
<ul style="list-style-type: none"> <li>• What are your long-term plans to support a custom-designed platform?</li> </ul>	
 <p><b>Tip:</b> Make sure more than one person knows the specifics of the system, so you are not stuck when a key member or a developer leaves the community.</p>	

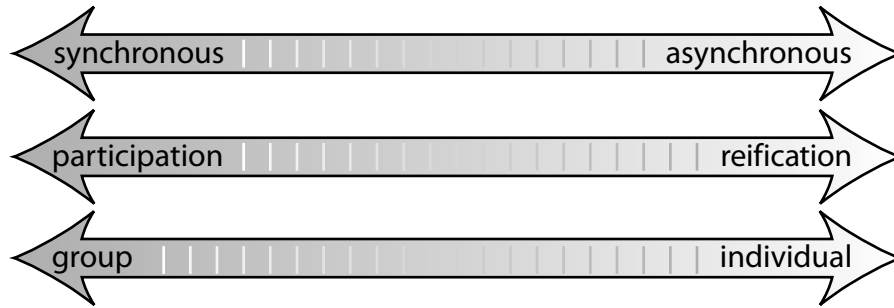
<ul style="list-style-type: none"> <li>• Does your community wish to benefit and contribute to a larger network of people using the same software? →</li> <li>• Do you have a philosophical preference for free or open-source software?</li> </ul>	<input type="checkbox"/> <b>Strategy 6: Use open-source software</b>
<ul style="list-style-type: none"> <li>• Do you have the technical skills required to customize current open-source offerings?</li> </ul>	
<ul style="list-style-type: none"> <li>• Have you allocated some of your time to being involved with the open-source community?</li> </ul>	
 <p><b>Tip:</b> Participating in the open-source community is the best way to use the software.</p>	

<ul style="list-style-type: none"> <li>• Are you interested in new tools that quickly allow you to combine new functionality into basic tools like blogs and web pages? →</li> <li>• Do you like quick, low-cost experiments?</li> </ul>	<input type="checkbox"/> <b>Strategy 7: Patch pieces together</b>
<ul style="list-style-type: none"> <li>• How will you test the functioning and usefulness of a new tool that you patch into the existing mix?</li> </ul>	
<ul style="list-style-type: none"> <li>• Who will do the addition of pieces and how will that be negotiated?</li> </ul>	
<ul style="list-style-type: none"> <li>• How do you balance potential benefits/cost to the community of dealing with new things or things that just "sort of work?"</li> </ul>	
 <p><b>Tip:</b> Balance innovation with the community's attention and energy.</p>	

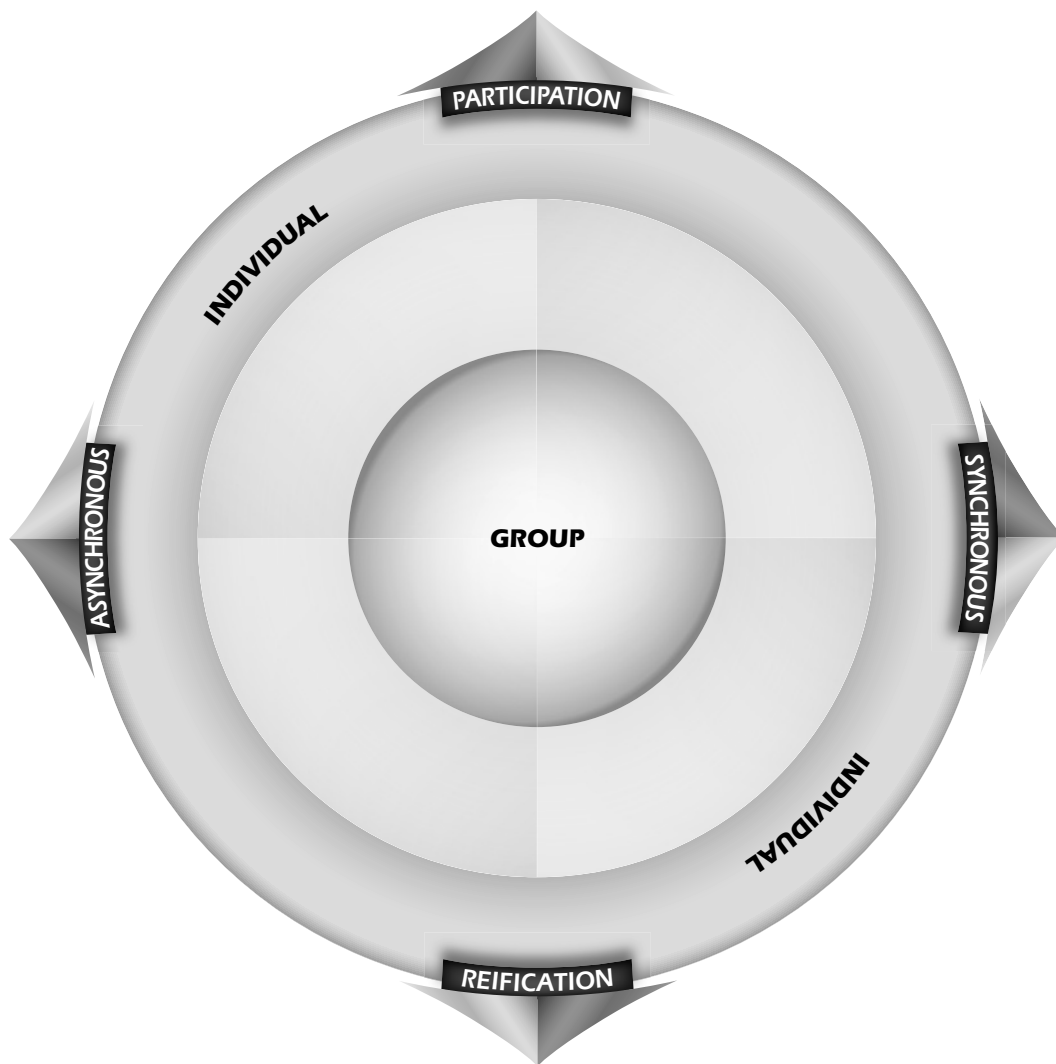
## 2.3 → Seek a solution

It is now time to apply your chosen strategy and all the information you have gathered so far to put together a technology configuration for your community.

**The polarities:** In the new configuration, do you want your choice of tools to affect the polarities of your community in ways that differ from the current configuration? Which way?



**Listing the tools:** Using the comparison between the current Inventory and the Orientations tables, sketch out what tools you need to include in the new configuration, referring to Figure 5.1, p.60.





This is an iterative process where assumptions of linearity are misleading. Looking for tools is likely to reshape the picture of your community: the relative importance of orientations, the desired balance of polarities. You may even discover new orientations or imagine new uses for existing tools. The interplay between technology and community evolution is truly a mutual process.

Platform issues		Chapter 4
<input type="checkbox"/> <b>Adequacy:</b>		
• Is there one platform that has most of the tools that your community needs?		
• Using the features questions below, are the versions of these tools adequate?		
• Which critical tools are not covered?		
• Which are extra (there, but currently not needed)?		
<input type="checkbox"/> <b>Integration:</b>		
• How simple (or intuitive) is the platform to use?		
• How well does it combine the tools that your community needs?		
• Are key features such as menus, navigation cues, new material indicators, graphic elements, and controls deployed consistently and appropriately across the platform?		
• Can tools be turned on or off at will?		
<input type="checkbox"/> <b>Performance:</b>		
• How many concurrent members can it handle? How much activity?		
• Does it support multiple communities and are new ones easy to launch?		
<input type="checkbox"/> <b>Access:</b>		
• Can subcommunities be formed easily?		
• Can individual access rights be assigned flexibly to various spaces and items?		

<input type="checkbox"/> <b>Pricing:</b>		
<ul style="list-style-type: none"> <li>Is the pricing structure per:               <ul style="list-style-type: none"> <li><input type="checkbox"/> free</li> <li><input type="checkbox"/> community</li> <li><input type="checkbox"/> seat</li> <li><input type="checkbox"/> activity</li> <li><input type="checkbox"/> platform</li> <li><input type="checkbox"/> other</li> </ul> </li> </ul>		<ul style="list-style-type: none"> <li>What are the implications for your community?</li> </ul>
<ul style="list-style-type: none"> <li>What is included in the price:               <ul style="list-style-type: none"> <li><input type="checkbox"/> hosting</li> <li><input type="checkbox"/> support</li> <li><input type="checkbox"/> upgrades</li> <li><input type="checkbox"/> other</li> </ul> </li> </ul>		<ul style="list-style-type: none"> <li>What other costs are not included?</li> </ul>
<ul style="list-style-type: none"> <li>How does the overall cost compare with alternative platforms?</li> </ul>		
<input type="checkbox"/> <b>Vendor relationship:</b>		
<ul style="list-style-type: none"> <li>What is the reputation of the vendor?</li> </ul>		
<ul style="list-style-type: none"> <li>What ongoing relationship do they offer?</li> </ul>		
<ul style="list-style-type: none"> <li>Are they willing to develop the platform and work with you as your needs and technology evolve?</li> </ul>		
<ul style="list-style-type: none"> <li>Is the data in a standard format that can easily be moved to another platform/vendor?</li> </ul>		

<b>Features issues</b>		<b>Chapter 4</b>
<input type="checkbox"/> <b>For any given feature:</b>		
<ul style="list-style-type: none"> <li>Does the feature support the specific ways in which a community conducts its activities?</li> </ul>		
<ul style="list-style-type: none"> <li>Does it add or reduce complexity? Can it be turned on or off to make the technology more useful or easy to use?</li> </ul>		
<ul style="list-style-type: none"> <li>Does a feature inherently appeal to beginners or to more experienced users? What members' skill levels make a feature valuable?</li> </ul>		
<ul style="list-style-type: none"> <li>Is the absence of a feature problematic for the usefulness of a tool or platform?</li> </ul>		
<ul style="list-style-type: none"> <li>Will members expect a feature or recognize it because of previous experience?</li> </ul>		


Configuration issues		Chapter 4
<input type="checkbox"/> <b>Completeness:</b>		
• Are some important functions missing in the overall configuration?		
• Do some tools duplicate each other, and if so, could subgroups evolve from using different tools for the same purpose?		
<input type="checkbox"/> <b>Integration:</b>		
• What level of integration is required between existing tools and platforms in the configuration?		
• Where are there integration gaps and how are you going to address them?		
• How compatible is the configuration with other platforms or tools that members use?		
• Do features that support integration across tools or platforms have the quality and consistency that you need? Do security features, for example, conflict with tools such as RSS feeds?		
• Are there features that help make content portable across tools (e.g., content from conversation board to wiki)?		
• Can members import content from other tools into the configuration?		
<input type="checkbox"/> <b>Security:</b>		
• Is the overall configuration secure enough for your purpose?		
• Are some security features likely to get in the way of the community's togetherness?		

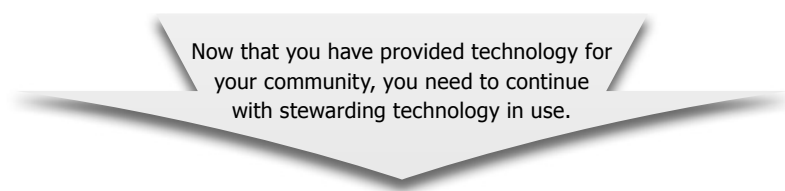
## 2.4 ➔ Plan for change

(Chapter 9)

Major technology changes are about more than technology. They involve change management.

<input type="checkbox"/> <b>Timing:</b> Time your transition/implementation to fit your community schedule		
• Are you ready for the attention you will get when technology issues move to the foreground during a major transition?		
• Are there times when "messaging with technology" will ...	<input type="checkbox"/> be a good community-building activity? <input type="checkbox"/> cause a problem?	
• What external events or schedules do you need to take into consideration (budget cycles, holidays, availability of support, for example)?		

<input type="checkbox"/> <b>Implementation:</b> Plan for the change process	
• What are your plans for the practical implementation of the new technology?	
• Who are your main partners for the implementation process?	
• Do you know enough about your community to know what to expect?	
 <b>Tip:</b> Talk to as many people as you can.	
• If you have to make a lot of assumptions, how are you going to leave room to adjust as you move forward?	
<input type="checkbox"/> <b>Learning:</b> Plan for a learning curve	
• Will new tools affect their work and community focus in a significant way?	
• How much beta testing can you do or do you want to do? Can you test software from a vendor or in other communities using it?	
• How will you orient, train, and share good practices with your community?	
<input type="checkbox"/> <b>Integration across tools:</b> Help the community develop new practices	
• Are there integration issues in the new configuration?	
• How do you plan to help the community develop new practices to achieve a productive level of integration?	



## Step 3. ➔ Stewarding technology in use

### 3.1 ➔ Everyday stewardship (Chapter 9)

Even when technology is not the focus, the work of stewardship goes on in the background. A number of tasks require attention.

<input type="checkbox"/> <b>New members:</b> Support new members in their use of the community's technology	
• How many new members do you have per month?	
• Does the community have a welcoming activity for them?	
• How do you plan to onboard them on the community's technologies?	
• What is the minimum they need to know to be able to participate meaningfully?	
• What resources do you have for this? Who can help you?	
<input type="checkbox"/> <b>Practice:</b> Identify and spread good technology practices	
• How are you going to identify the new practices that the community is developing to use technology, especially ones that might be going unnoticed?	
• How are you going to share and spread them unobtrusively?	
<input type="checkbox"/> <b>Experimentation:</b> Support community experimentation	
• Is your community changing? Is it curious about new tools?	
• How will you support technology experimentation without disrupting the whole community?	
<input type="checkbox"/> <b>Boundaries and access:</b> Attend to community boundaries created by technology	
• How will you manage access as the community and people's roles evolve?	
• What unexpected boundaries does technology create?	
• Do technology preferences or skills create boundaries?	
<input type="checkbox"/> <b>Technology integrity:</b> Assure continuity across technology disruptions	
• Who has administrative permissions so they can help you "keep the lights on" over time?	
• How do you make sure vendors get paid on time and domain registrations don't lapse?	
• What are your practices for system backup?	

### 3.2 ➔ Community end-of-life closure

Community end-of-life situations have important implications for tech stewardship. Work with the community to design a process for “turning off the lights.”

<input type="checkbox"/> <b>Shutdown:</b> Attend to disposition of the community's technology resources	
• Is the community ending or merely going dormant? Who can decide?	
• When should online spaces be closed down?	
• Who will cancel contracts with technology services such as ASPs?	
• What to do about member profiles and account information?	
<input type="checkbox"/> <b>Community history:</b> Pay particular attention to the preservation of community artifacts	
• Does the community want to archive and preserve parts of its history?	
• How will you identify which artifacts should be preserved?	
• Do privacy agreements or concerns dictate that you erase sensitive materials?	
• Where and how will the material be archived? Should members receive a copy of the archive?	
• Who will have access to the archive?	
• Who will take care of it? Could other communities have an interest in being the caretakers of a legacy left by a defunct community?	

**Good Journey!**