



WPI

Supplementary Materials For Building Scalable Communities from International Knowledge Networks

Copenhagen, Denmark A - Term 2018

An interactive qualifying project submitted to the faculty of Worcester Polytechnic Institute in partial fulfillment of the requirements for the Degree of Bachelor of Science

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Authorship & Team Contributions

Authorship

Introduction (Ben Longo, Ben Liang & Liam Finnegan)

Background

Knowledge Networks and Communities of Practice Allow Individuals to Share Information And Gather Input. (Caleigh Waskowicz)

Organizational Knowledge Networks Don't Scale Well Without Structure (Liam Finnegan & Ben Longo)

Peer Production Communities Provide Structure that Scales as Social Learning Groups Develop (Ben Longo & Ben Liang)

Collective Leadership Governs Peer Production Communities (Ben Longo & Ben Liang)

Platforms with A High Degree of Usability, Sociability, & Moderation Foster Healthy Community and Network Dynamics (Caleigh Waskowicz)

Cycling Without Age is Experiencing the Problems Associated With Growing an International Knowledge Network (Whole Team)

Methods and Results

Identifying and Developing Proper Knowledge Management and Governance Structures: The Process (Caleigh Waskowicz)

Current Platform Usage (Caleigh Waskowicz)

CWA's Social Learning Group Structure (Ben Longo & Caleigh Waskowicz)

Iteratively Design and Implement new Governance Structures Around Improved Technical Systems

Iteration 1 (Liam Finnegan & Ben Liang)

Iteration 2 (Whole Team)

Iteration 3 (Ben Liang & Caleigh Waskowicz)

Recommendations & Conclusions (Whole team)

Supplemental Materials (Caleigh Waskowicz & Ben Liang)

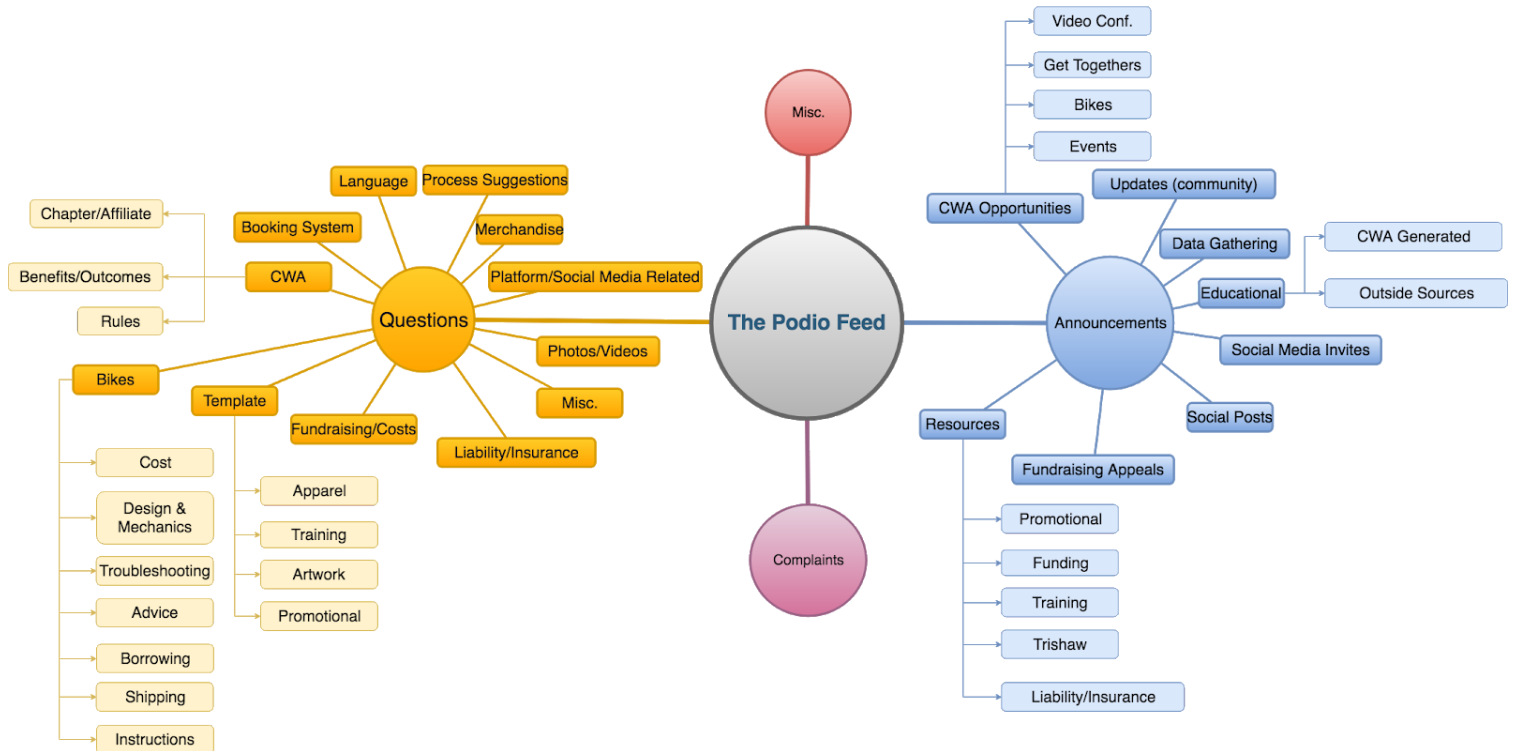
Team Contributions

- **Liam Finnegan** was responsible for coordinating with participants and forming questions for our focus groups, as well as contributing to the consent forms. He also analyzed the Podio feed through the process of coding, compiled the Podio files into a document library application, and identified duplicated documents. He also kept track of meeting minutes and edited the paper.

- **Ben Liang** was responsible for developing revisions for affiliate journey mapping, developing moderator and admin training materials, setting up guidance survey, migrating write-up to booklet, and many small things that he doesn't remember doing.
- **Ben Longo** was responsible for setting up the Discourse platform and developing the research focus for the background. He ran the focus groups with affiliates and performed the network analysis.
- **Caleigh Waskowicz** was responsible for editing our paper and doing the subcodes and analysis work for our work for investigating the current platform usage. She developed the affiliate training materials, the FAQ, and several of the consent forms for our focus groups. She set team internal team deadlines and ensured that the project stayed on track.

File A. Codes Used on CWA's Podio Stream

This chart shows the coding of information gathered from CWA's Podio stream. Each term was given the codes and sub-codes based on the content provided in each post on Podio.



File B. Data management plan for data collected by CWA

Prior to the start of this project, one of our sponsors, Jane Hu, and a team of her affiliates gathered information about the usage of platforms within the organization. This study utilized pile sorting to analyze the tendencies of information organization regarding CWA's chapters as a whole, which will not need to identify the respondents of the data. Therefore, any disclosure of the results of the study on these data will be anonymized. While the data given to us should be anonymized, if the data are not anonymized, the respondents' identities will not be disclosed or published in any way.

File C. Guidance Survey Questions and Consent Form

Informed Consent Agreement for Participation in a Research Study Investigator: Caleigh Waskowicz, Liam Finnegan, Ben Longo, and Hannan Liang **Contact Information:** Investigator team: cycling-a18@wpi.edu

Title of Research Study: Cycling Without Age: Streamlining Knowledge Management For a Global Non-Profit Organization.

Sponsor: Cycling Without Age

Introduction. You are being asked to participate in a research study. Before you agree,

however, you must be fully informed about the purpose of the study, the procedures to be followed, and any benefits, risks or discomfort that you may experience as a result of your participation. This form presents information about the study so that you may make a fully informed decision regarding your participation. The investigators are conducting this study as students from Worcester Polytechnic Institute.

Purpose of the study. The goal of this study is to investigate knowledge management and governance structures in global organizations. To achieve this, we are studying Cycling Without Age's global community and looking specifically at the onboarding process of new chapters, how information is transferred, and what kinds of social structures exist within the Cycling Without Age global network.

Procedures to be followed. During the following survey, participants will be asked to answer questions about your experience at CWA as a chapter.

Risks to study participants. The sponsors of this project, Dorthe Pedersen, Jane Hu and Ole Kassow of CWA, will have access to all study data, including the raw interview data and subject identities.

Benefits to research participants and others. Answers from this survey will be used to help CWA determine who the leaders are within CWA's organization so that we can identify and establish valuable mentors/informants for onboarding members to access.

Record keeping and confidentiality. Records of your participation in this study will be held confidential so far as permitted by law. However, the study investigators, the sponsor or it's designee and, under certain circumstances, the Worcester Polytechnic Institute Institutional

Review Board (WPI IRB) will be able to inspect and have access to confidential data that identify you by name. These individuals include the following: Hannan Liang (study investigator), Caleigh Waskowicz (study investigator), Ben Longo (study investigator), Liam Finnegan (study investigator), Dorthe Pedersen (project sponsor), Jane Hu (project sponsor), Ole Kassow (project sponsor), Professor Holly Ault (WPI advisor), and Professor Katherine Foo (WPI advisor). Any publication or presentation of the data will not identify you.

Compensation or treatment in the event of injury. This research study does not involve any risk of injury or harm to the participant. You do not give up any of your legal rights by signing this statement.

For more information about this research or about the rights of research participants, or in case of research-related injury, contact:

Professor Kent Rissmiller, Tel. 508-831-5019, Email: kjr@wpi.edu

Human Protection Administrator Gabriel Johnson, Tel. 508-831-4989, Email:

gjohnson@wpi.edu

Caleigh Waskowicz, Tel. 860-302-6512, Email: cmwaskowicz@wpi.edu

Liam Finnegan, Tel. 631-603-1486, Email: lrfinnegan@wpi.edu

Hannan Liang, Tel. 631-375-6545, Email: hliang2@wpi.edu

Ben Longo, Tel. 802-227-7838 Email: balongo@wpi.edu

Your participation in this research is voluntary. Your refusal to participate will not result in

any penalty to you or any loss of benefits to which you may otherwise be entitled. You may decide to stop participating in the research at any time without penalty or loss of other benefits. The project investigators retain the right to cancel or postpone the experimental procedures at any time they see fit.

By signing below, you acknowledge that you have been informed about and consent to be a participant in the study described above. Make sure that your questions are answered to your satisfaction before signing. You are entitled to retain a copy of this consent agreement.

.....

Study Participant Signature Study Participant Name (Please print)

Date:

.....

Signature of Person who explained this study

Date:

Should a participant wish to withdraw from the study after it has begun, the following procedures should be followed: the participant's responses will be withdrawn from the survey. The consequences for early withdrawal for the subject and the research are: *none*

Survey Questions:

1. Please list the people in CWA who you rely on for guidance.
2. To what degree do you rely on <the name entered in question 1> for guidance? (5 point Likert scale)
3. How do you usually communicate with <the name entered in question 1>?

File D. Focus Group Consent Form

Informed Consent Agreement for Participation in a Research Study Investigator: Caleigh Waskowicz, Liam Finnegan, Ben Longo, and Hannan Liang **Contact Information:** Investigator team: cycling-a18@wpi.edu

Title of Research Study: Building Scalable Communities from International Knowledge Networks.

Sponsor: Cycling Without Age

Introduction. You are being asked to participate in a research study. Before you agree, however, you must be fully informed about the purpose of the study, the procedures to be followed, and any benefits, risks or discomfort that you may experience as a result of your participation. This form presents information about the study so that you may make a fully informed decision regarding your participation. The investigators are conducting this study as students from Worcester Polytechnic Institute.

Purpose of the study. The goal of this project is to help CWA develop a successful and sustainable community of practice that empowers its members and reduces the strain on the organization's core. We accomplished this goal by investigating CWA's current platform usage, characterizing the affiliate journey, characterizing CWA's network structure, and iteratively designing and implementing new governance structures around improved technical systems.

Procedures to be followed. During the focus group, participants will be asked to perform tasks on a new CWA platform after a guided tour. We will then ask participants questions about what they think of the platform.

Risks to study participants. The sponsors of this project, Dorthe Pedersen, Jane Hu and Ole Kassow of CWA, will have access to all study data, including the raw focus group data and subject identities.

Benefits to research participants and others. Ultimately, participants as well as the CWA community as a whole will benefit from information that is easier to access and more effective and defined leadership in the CWA community.

Record keeping and confidentiality. Records of your participation in this study will be held confidential so far as permitted by law. However, the study investigators, the sponsor or its designee and, under certain circumstances, the Worcester Polytechnic Institute Institutional Review Board (WPI IRB) will be able to inspect and have access to confidential data that identify you by name. These individuals include the following: Hannan Liang (study investigator), Caleigh Waskowicz (study investigator), Ben Longo (study investigator), Liam Finnegan (study investigator), Dorthe Pedersen (project sponsor), Jane Hu (project sponsor), Ole Kassow

(project sponsor), Professor Holly Ault (WPI advisor), and Professor Katherine Foo (WPI advisor). Any publication or presentation of the data will not identify you.

Compensation or treatment in the event of injury. This research study does not involve any risk of injury or harm to the participant. You do not give up any of your legal rights by signing this statement.

For more information about this research or about the rights of research participants, or in case of research-related injury, contact:

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Your participation in this research is voluntary. Your refusal to participate will not result in any penalty to you or any loss of benefits to which you may otherwise be entitled. You may decide to stop participating in the research at any time without penalty or loss of other benefits. The project investigators retain the right to cancel or postpone the experimental procedures at any time they see fit.

By sending us an email confirmation, you acknowledge that you have been informed about and consent to be a participant in the study described above. Make sure that your questions are answered to your satisfaction before signing. You are entitled to retain a copy of this consent agreement.

Should a participant wish to withdraw from the study after it has begun, the following procedures should be followed: the participant's responses will be withdrawn from the focus group.

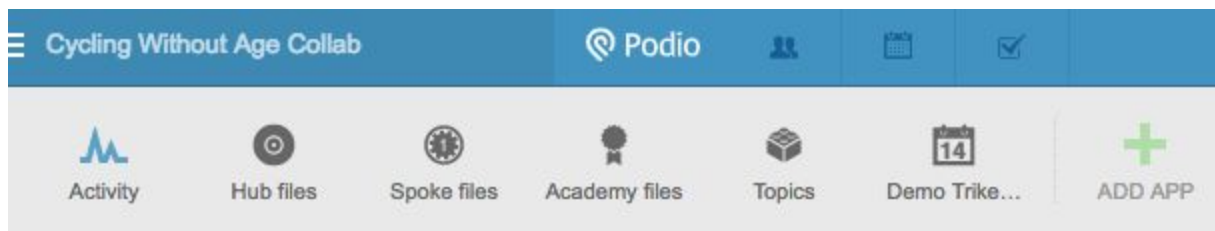
File E. CWA Podio Structure

This is the welcome message on Podio written by the CWA Hub that outlines where information is located on the platform and how they should use the space.

At this stage we have four so-called apps:

1. "Hub files", a repository for files created at the hub in Copenhagen (such as the Brand Book).
2. "Spoke files", a repository of files created by all of you around the world. Just submit them here in any format for everybody to prosper from them.
3. Academy files with information available from CWA Academy classes.
4. Topics. A place where we gather and discuss information matters such as insurance, training etc

We aim to have all discussions about your local endeavors in this forum, but please continue to share stories and pictures on Facebook.



File F. Hub Focus Group Notes: Solution 1

Hub Focus Group Notes: Solution 1	
<p>Leaders: Ben Liang, Liam Finnegan, Caleigh Waskowicz, and Ben Longo Notetaker: Caleigh Waskowicz Participants: Ole Kassow, Dorthe Pedersen, Maren Warming, and Pernille Bussone</p>	
What did you like about this Iteration?	Definitely an improvement. Better organization of content. The organization of content according to affiliate journey is particularly helpful.
What Suggestions do you have for us moving forward?	<p>Make a guide for how to answer questions, where to put your answers, etc.</p> <p>How about a new field called Author? select: Volunteers, The Hub, external. And room for a name maybe, so we can credit the right people. And it also the volunteers in Podio something to be proud of if they have contributed with a document.</p> <p>Can you put the file on top/under the title and not at the bottom? A guide on how to create the perfect title for the documents. I saw there was a category called General Info. People also often ask questions about who owns CWA and how do you become part of the board. But that should maybe have its own category as that is not what people might be looking for when choosing General Info. Or at least that is not that kind of information that we have in there right now. That might be more about the story of CWA and how it works in general on a voluntary basis. So maybe find two new names for those two fields?</p> <p>It might also be a good idea to ask in Podio Collab what kind of information people would like to have in there / what kind of information are you missing? They might come up with some new subjects that no one yet have written about in Podio.</p> <p>Think about how you can put resources in the app as well. Let's say I create a new item and call it Expertise - Instagram and put my name in it (make a new field for member/profile). Maybe call it Resources. Then people can contact me if they need help reg. Instagram. More people can join. Or opposite: People can create an item asking if everyone can put all their specific knowledge in the comment field and/or their name as a recourse if they know something and wants to be contacted by others with questions or help.</p> <p>Look into Zendesk: use it as a ticket system to track peoples problem. Use it to help people who have issues with the GO booking platform. They also</p>

	<p>have an entirely different platform for knowledge bases. Allows people to store information like the way that we have it in Podio. Allows community managers to be available. (something community). Give us their software free of charge</p> <p>Techsoup → (techsoupglobal.org) if you get this there are certain things that you can do for getting donations from certain companies.</p>
<p>Questions:</p>	<p>Can you see any records of how many clicks certain documents get etc.? A: Not one that we can see</p> <p>How will a new affiliate know to go to the FAQ? A: Would have to institute more guidelines on how to use the platform and make sure community moderators enforce people using those guidelines</p> <p>What would the maintenance process be?</p> <p>How do people ask questions? What about things that aren't straight questions? → were bringing attention.</p>
<p>General Takeaways</p>	<p>There Are Several Limitations in Podio that Make it Difficult to Manage the Platform: No way to set up permissions for who can edit things. Can't get comprehensive statistics on community usage. In general is not very user-friendly for the community. The Hub has received several complaints.</p> <p>Need to develop an implementation plan: What should CWA do to get things integrated into the community (Podio first? Then something better? etc.)</p>

File G. Platform Comparative Analysis

Question Adaptation:	Facebook Workplace
Sources:	<p style="text-align: center;">https://www.pcmag.com/review/352013/workplace-by-facebook</p> <p style="text-align: center;">https://www.facebook.com/workplace?source=topbar</p> <p style="text-align: center;">https://www.g2crowd.com/products/workplace-by-facebook/reviews</p>
Is this platform something that users can tailor to their own needs?	Based on the different reviews Facebook workplace, it really functions best and gets utilized as a social website for a company/organization. It is good for communicating but not so much for collaborating. So while this website might be great for networking with members of a community, it misses the mark with development of actual work.
What kind of systems are in place on this platform for managing the user's identity.	Individuals get a profile (much like a Facebook Profile) where their information, picture, status posts, etc. are located.
Does this platform allow users to make the community aware of their availability, and their actions?	There is an Org-Chart feature in Facebook workplace that allows the individuals to quickly look-up the profiles of individuals or information about teams. By clicking someone's name and going to their profile page an individual can see what the person's location is, what their contact details are, what their team's structure is, and what their daily schedule looks like.
Does this system make users aware of the different locations of other users? (important for helping users reach out for face-to-face interaction as well as breaking barriers related to being a part of an online community)	The news feed allows users to see posts from people/projects that you follow so that you can stay in touch with different developments within the community.
Does this platform foster connections and relationship	

building within the online community? If so how?	
Does this platform allow users to share content both privately and publicly?	Users can make groups to collaborate with others that are either open, closed, or secret.
Does the platform provide ways to interact in synchronous (undelayed interaction: example, calling on the telephone) and asynchronous (delayed interaction: example, emailing with someone) manners?	The members of the community can interact through video streaming, voice and video calls (desktop and mobile), and through the workplace and chat apps (with premium and standard options).
Does the platform give the user data on the actions that they are performing on the platform?	The platform has an activity log so that the user can see how they have interacted with the workspace
Does this platform allow users to work collaboratively on projects with other community members?	On Facebook workplace, groups are spaces for individuals to discuss information, share documents, and work together. A user can create as many as they like, invite the people they want (from multiple organizations, not just within one community), and work on documents posted in those groups. Within a group, tasks can be assigned, feedback provided, and updates posted. While the description sounds promising, the space is weak at promoting collaboration on documentation and getting concrete work accomplished. The project management end of this platform is rather weak while the communication end is strong.
Does the system support control mechanisms like peer moderation, governance structures, filters, etc. How?	Premium gives you administrative controls to manage the community. However the administrative controls are rudimentary
What incentive systems are built into the platform to encourage the users to continue using the platform?	Built in incentive systems might include getting likes or comments on posts. General platform incentive would be connecting with other members of the community and seeing what they are up to.

Does the system monitor user activity and contributions performed in the software over time? (data analytics)	There are monitoring tools in place for IT teams
How quickly can the system react to requests made by users?	
Is the system highly/widely available?	Yes
Can this platform be extended as the community within it naturally evolves over time (as well as the users within that community)?	
How user friendly/intuitive is this system?	Facebook workplace has the advantage of being familiar to many users. Most people have some familiarity with facebook and Facebook workplace mimics that layout. (probably more difficult to understand and get a hang of if you haven't had experience with facebook).
What is the cost of a platform like this?	The cost is 3 US Dollars per active user per month for the premium plan. It is free for the standard plan.
Comments	Facebook is an excellent location for an online community but not for developing a community

Question Adaptation:	Podio
Sources:	https://podio.com/site/en https://www.merchantmaverick.com/reviews/podio-review/#Negative_Reviews_Complaints

<p>Is this platform something that users can tailor to their own needs?</p>	<p>One of the best aspects of this platform is how customizable it is. The software can be tailored to meet specific business requirements which usually involves a lot of time and money. Allows users to reorganize and customize their workspaces without needing an extensive knowledge of coding.</p>
<p>What kind of systems are in place on this platform for managing the user's identity.</p>	<p>Individuals have a profile that allows them to input basic information about who they are, where they are from, and what their contact information is.</p>
<p>Does this platform allow users to make the community aware of their availability, and their actions?</p>	<p>If you click on the profile of a member, it will tell you whether they are on or offline. You can also see the Podio activity of that person.</p>
<p>Does this system make users aware of the different locations of other users? (important for helping users reach out for face-to-face interaction as well as breaking barriers related to being a part of an online community)</p>	<p>People can list their address in their Podio profile so that other users know where they are located.</p>
<p>Does this platform foster connections and relationship building within the online community? If so how?</p>	<p>People can post information to a feed updating people on their status.</p>
<p>Does this platform allow users to share content both privately and publicly?</p>	<p>Yes, users can post to the Podio activity stream or they can send messages in private.</p>
<p>Does the platform provide ways to interact in synchronous (undelayed interaction: example, calling on the telephone) and asynchronous (delayed interaction: example, emailing)</p>	<p>The platform encourages long-distance communication and has improved long distance communication according to most users.</p>

with someone) manners?	
Does the platform give the user data on the actions that they are performing on the platform?	Yes, the activity feed of a person's profile will tell them where they have posted and what they have posted.
Does this platform allow users to work collaboratively on projects with other community members?	There are extensive project management features on Podio. Projects can be developed that reference clients. However the software doesn't include PDF markup tools or allow users to edit documents together on the site.
Does the system support control mechanisms like peer moderation, governance structures, filters, etc. How?	In Podio, there are clearly defined roles and tools for improving the effectiveness and relationships of teams. People can be granted privileges to control who has access to particular Podio workspaces and make quick adjustments.
What incentive systems are built into the platform to encourage the users to continue using the platform?	N/A
Does the system monitor user activity and contributions performed in the software over time? (data analytics)	There are no aggregate statistics or data - only audit logs are visible on a per item basis.
How quickly can the system react to requests made by users?	Podio customer service is very receptive to user feedback and usually give reliable support quickly when there are issues with the platform.
Is the system highly/widely available?	Yes
Can this platform be extended as the community within it naturally evolves over time (as well as the users within that community)?	Yes

How secure/private is this system?	Podio protects its user by keeping all data with a secure host, encrypting all data, restricting who has access to customer information, and backing up information frequently.
How user friendly/intuitive is this system?	Not a highly intuitive platform and many people find that there is a learning curve involved with using the platform correctly
What is the cost of a platform like this?	The website is free for up to 5 employees.

Question Adaptation:	Discourse
Sources:	https://www.discourse.org/features https://cwa.community/latest
Is this platform something that users can tailor to their own needs?	Yes. There is a vast plugin community that modifies the platform in a variety of ways. For instance there is a plugin that enables complete customization of the signup flow. Arbitrary data can be added to each user such as region.
What kind of systems are in place on this platform for managing the user's identity.	The site allows a basic profile with a biography and avatar; however, the users data can be extended arbitrarily with new fields. Additionally users have 'badges' they can add to signify membership in groups or other things.
Does this platform allow users to make the community aware of their availability, and their actions?	This site gives users a lot of information about their interactions with the site and what they have accomplished on it. It will give you statistics about how long you have visited the site, how many topics you have viewed, how much time you have spent reading, how many posts you have read, etc.. Each person's online status is also visible to every registered user.
Does this system make users aware of the different locations of other users? (important for helping users reach out for face-to-face interaction as well as breaking	If users input their location into the site's profile, then other people will be able to look them up and see where they are from. It would be possible to mandate this information.

barriers related to being a part of an online community)	
Does this platform foster connections and relationship building within the online community? If so how?	Members of the discourse community can form any groups they wish and send private messages, enabling relationships to build.
Does this platform allow users to share content both privately and publicly?	Private messages are possible and posts can be restricted to specific audiences flexibly.
Does the platform provide ways to interact in synchronous (undelayed interaction: example, calling on the telephone) and asynchronous (delayed interaction: example, emailing with someone) manners?	The private messages can function as a real time synchronous chat as there are notifications. The same mechanism can also serve as asynchronous messaging.
Does the platform give the user data on the actions that they are performing on the platform?	Yes, there is tons of information accessible to the user on how they are interacting with the platform.
Does this platform allow users to work collaboratively on projects with other community members?	The site has a wiki feature than enables anybody to edit a post that is marked as 'wiki'. This enables the community to collaboratively maintain a set of categorizable and linkable pages.
Does the system support control mechanisms like peer moderation, governance structures, filters, etc. How?	There is an almost built in governance system to this site that allows users to become more trusted members on the site as they become more active. Different members can also be granted 4 tiers of permissions to the site: basic, member, regular, and leader. This is enables community moderation. There is also a flagging system to get rid of spam or bad content.
What incentive systems are built into the platform to encourage the users to continue using the platform?	Users can attain badges and different trust levels depending on their activity on the site (example: if a users fills out their profile, they receive an autobiographer badge).

Does the system monitor user activity and contributions performed in the software over time? (data analytics)	The system is incredibly good at tracking the activity of different users and offers several different kinds of site statistics.
How quickly can the system react to requests made by users?	The site is performant.
Is the system highly/widely available?	Yes - it is translated into 25 languages currently and has apps for phones.
Can this platform be extended as the community within it naturally evolves over time (as well as the users within that community)?	Yes the plugin system is extremely flexible and the product is open source.
How secure/private is this system?	
How user friendly/intuitive is this system?	The discourse site comes with a tutorial for new members and has a vast community of people on the meta forum answering questions. Overall the site is very intuitive and the UI has gone through many fine tunings.
What is the cost of a platform like this?	It seems like it should be possible to get hosting for free on AWS or Google due to being a non profit. Discourse the company offers a discount off of their regular \$100/month to non profits which seems to be 70% (\$30/month)

Question Adaptation:	Zendesk
Sources:	https://www.capterra.com/p/164283/Zendesk/

<p>Is this platform something that users can tailor to their own needs?</p>	<p>Yes. Users can customize many settings for the large amount of features that Zendesk provides. However, some highly experienced users report that because there are so many customizable settings and there are little support, users have to spent hours to read through manuals to figure out how to do everything that they want.</p>
<p>What kind of systems are in place on this platform for managing the user's identity.</p>	<p>User's profile information fields can be arbitrarily defined by admin users.</p>
<p>Does this platform allow users to make the community aware of their availability, and their actions?</p>	<p>Each articles shows the author.</p>
<p>Does this system make users aware of the different locations of other users? (important for helping users reach out for face-to-face interaction as well as breaking barriers related to being a part of an online community)</p>	<p>Users can have a field on their profile to specify their geographic location</p>
<p>Does this platform foster connections and relationship building within the online community? If so how?</p>	<p>There is an online discussion forum for users. However, it does not provide much interaction between users.</p>
<p>Does this platform allow users to share content both privately and publicly?</p>	<p>Yes</p>
<p>Does the platform provide ways to interact in synchronous (undelayed interaction: example, calling on the telephone) and asynchronous (delayed interaction: example,</p>	<p>Online chat, telephone are available. It also has a ticket system which is excellent at resolving issues. Admins can setup an email to be an input for new tickets.</p>

emailing with someone) manners?	
Does the platform give the user data on the actions that they are performing on the platform?	N/A
Does this platform allow users to work collaboratively on projects with other community members?	N/A
Does the system support control mechanisms like peer moderation, governance structures, filters, etc. How?	There are access control. There is also an voting option for each article indicating whether an article is helpful or not.
What incentive systems are built into the platform to encourage the users to continue using the platform?	N/A
Does the system monitor user activity and contributions performed in the software over time? (data analytics)	
How quickly can the system react to requests made by users?	Users reported that customer support of Zendesk is not helpful.
Is the system highly/widely available?	Yes
Can this platform be extended as the community within it naturally evolves over time (as well as the users within that community)?	Yes
How secure/private is this system?	

How user friendly/intuitive is this system?	It has a clean an intuitive user interface. However, because of there are so many features available, there can be difficulties in using them.
What is the cost of a platform like this?	Free for cwa
Comments	Zendesk is currently rated the best customer service platform. However, it works the best if there is a team of support staff sitting behind computers to resolve tickets for users.

Question Adaptation:	Nuclino
Sources:	<p>https://www.pcmag.com/review/352013/workplace-by-facebook</p> <p>https://www.facebook.com/workplace?source=topbar</p> <p>https://www.g2crowd.com/products/workplace-by-facebook/reviews</p>
Is this platform something that users can tailor to their own needs?	Based on the different reviews Facebook workplace, it really functions best and gets utilized as a social website for a company/organization. It is good for communicating but not so much for collaborating. So while this website might be great for networking with members of a community, it misses the mark with development of actual work.

<p>What kind of systems are in place on this platform for managing the user's identity.</p>	<p>Individuals get a profile (much like a Facebook Profile) where their information, picture, status posts, etc. are located.</p>
<p>Does this platform allow users to make the community aware of their availability, and their actions?</p>	<p>There is an Org-Chart feature in Facebook workplace that allows the individuals to quickly look-up the profiles of individuals or information about teams. By clicking someone's name and going to their profile page an individual can see what the person's location is, what their contact details are, what their team's structure is, and what their daily schedule looks like.</p> <p>The news feed allows users to see posts from people/projects that you follow so that you can stay in touch with different developments within the community.</p>
<p>Does this system make users aware of the different locations of other users? (important for helping users reach out for face-to-face interaction as well as breaking barriers related to being a part of an online community)</p>	
<p>Does this platform foster connections and relationship building within the online community? If so how?</p>	
<p>Does this platform allow users to share content both privately and publicly?</p>	<p>Users can make groups to collaborate with others that are either open, closed, or secret.</p>

<p>Does the platform provide ways to interact in synchronous (undelayed interaction: example, calling on the telephone) and asynchronous (delayed interaction: example, emailing with someone) manners?</p>	<p>The members of the community can interact through video streaming, voice and video calls (desktop and mobile), and through the workplace and chat apps (with premium and standard options).</p>
<p>Does the platform give the user data on the actions that they are performing on the platform?</p>	<p>The platform has an activity log so that the user can see how they have interacted with the workspace</p>
<p>Does this platform allow users to work collaboratively on projects with other community members?</p>	<p>On Facebook workplace, groups are spaces for individuals to discuss information, share documents, and work together. A user can create as many as they like, invite the people they want (from multiple organizations, not just within one community), and work on documents posted in those groups. Within a group, tasks can be assigned, feedback provided, and updates posted. While the description sounds promising, the space is weak at promoting collaboration on documentation and getting concrete work accomplished. The project management end of this platform is rather weak while the communication end is strong.</p>
<p>Does the system support control mechanisms like peer moderation, governance structures, filters, etc. How?</p>	<p>Premium gives you administrative controls to manage the community. However the administrative controls are rudimentary</p>
<p>What incentive systems are built into the platform to encourage the users to continue using the platform?</p>	<p>Built in incentive systems might include getting likes or comments on posts. General platform incentive would be connecting with other members of the community and seeing what they are up to.</p>

Does the system monitor user activity and contributions performed in the software over time? (data analytics)	There are monitoring tools in place for IT teams
How quickly can the system react to requests made by users?	
Is the system highly/widely available?	Yes
Can this platform be extended as the community within it naturally evolves over time (as well as the users within that community)?	
How secure/private is this system?	
How user friendly/intuitive is this system?	Facebook workplace has the advantage of being familiar to many users. Most people have some familiarity with facebook and Facebook workplace mimics that layout. (probably more difficult to understand and get a hang of if you haven't had experience with facebook).
What is the cost of a platform like this?	The cost is 3 US Dollars per active user per month for the premium plan. It is free for the standard plan.
Comments	Facebook is an excellent location for an online community but not for developing a community

File H. Hub Focus Group Notes: Solution 2

<h1>Hub Focus Group Notes: Solution 2</h1>	
<p>Leaders: Ben Liang, Liam Finnegan, Caleigh Waskowicz, and Ben Longo Notetaker: Ben Liang Participants: Ole Kassow, Dorthe Pedersen, Maren Warming, Pernille Bussone, and Kelly Talcott</p>	
<p>What did you like about this Iteration?</p>	<p>This is an incredible step up from what we currently have. The trust system and the badge system would be excellent ways to motivate people. It looks like something that has the potential to get more people involved.</p>
<p>What Suggestions do you have for us moving forward?</p>	<p>Develop an integration plan. We need to know how we are going to get everyone on this platform. Perhaps demo Discourse with the people that don't already have</p> <p>Investigate what motivates people to be active respondents. Why are certain people on Podio more interested in interacting than others? How can we incentivize people to stay motivated and invested in the overall community?</p>
<p>Questions:</p>	<p>How would we integrate the community as a whole?</p> <p>Should we get rid of our other platforms and move everything over to Discourse?</p>
<p>General Takeaways</p>	<p>Integration plans and establishing regional moderators have to be a key portion of our final iteration.</p>

File I. Discourse Featured Functionalities That Made it Ideal for CWA

To support the existing knowledge network within CWA, Discourse provides topic posting functionality that is similar to that of an open forum, which is roughly equivalent to the current usage of Podio and Workplace. Users can post information as a topic to connect to other people or ask for specific guidance within the network. If users want to connect with specific people, such as nearby affiliates, they can private message them as well. Discourse also provides the functionality to establish a community of practice. With a built-in Wiki feature, Discourse allows users to collaboratively work on knowledge documentation in one designated location and easily find information within the platform. The built-in trust system also provides a natural means of establishing proper governance. As users increase their contributions to the community, they can gradually raise their trust level and gain more privileges and responsibilities such as editing posts and moderating other users' behavior. Discourse also provides a way to create regional groups that can have their own local knowledge network and communities of practices to collect and maintain local information and discussion that only apply to them. Besides features that support the existing knowledge network and community of practice, Discourse also has multiple extra plugins that are very useful tools for communication within the platform such as interactive maps that enable affiliates to connect to local chapters and online language translation.

File J. Functionality that We Specifically Added to the Platform for CWA

We developed 7 Categories on the main Discourse Page specifically designed to promote collaboration within the CWA community: **Announcements, Knowledge base, Questions, Discussions, Regional, Chapters, and Site Feedback.**

Announcements

The Announcements category is where members of the global CWA community can post announcements meant for the whole community. Here they can find updates from global CWA affiliates, updates from the Hub, and information about global opportunities. Affiliates can click on the announcements category, scroll through the community updates, and read up on what members of the community are doing. They can comment on other people's posts by hitting the reply button or you can update the global community with your own information by creating a new topic.

Example: This is a post about the Scottish Rollout made to CWA's Discourse announcement category. Just like on Podio, affiliates can read and comment on the post.

The screenshot displays a Discourse forum post in the 'Announcements' category. The post title is 'Scottish Rollout'. The main text of the post is: 'Delighted today to announce that the Scottish Government has given us the backing to roll out Cycling Without Age across Scotland - providing us with all the financial support required to give all of our elderly citizens across Scotland the right to wind in their hair!'. A link is provided: <https://beta.gov.scot/news/nationwide-rollout-of-cycling-without-age/>. The post has 1 reply, 17d ago, 1 heart, 6 replies, 16 views, 6 users, 1 like, and 1 link. Below the post, there are three replies from other users, also with redacted names. The first reply says 'Endlessly brilliant!'. The second reply says 'Oh my gosh this is just awesome 😊 Well done to all who pushed for this and hope this will influence other'. The post and replies show engagement metrics: 1 reply, 17d ago, 1 heart, 6 replies, 16 views, 6 users, 1 like, and 1 link. A sidebar on the right shows a date filter for 'Sep 14' and a page indicator '1/7'.

Users can also see significant data on the post and how people interacted with the post. This can be useful for the people who post to see how many people have seen and engaged with the content they've uploaded.

created last reply 6 16 6 1 1 [redacted] [redacted]

17d 17d replies views users like link

The Knowledge Base

The Knowledge Base is the place to keep all organization wide innovations and documents as well as being a place to collaborate and combine knowledge. Each post in the knowledge base is a wiki, meaning that anyone in the community can edit the information contained inside the post.

Example: Insurance Matters wiki, you can hit the drop-down menus to see what other chapters have done to manage their insurance matters. You can also contribute your own chapter's experience with insurance by hitting the edit button and adding your experiences.

Insurance Matters

■ Knowledge Base



Caleigh Waskowicz Caleigh

4  5d

When starting a chapter one of the first challenges you will encounter is the question of insurance - both accident insurance, third party liability insurance and bicycle theft insurance. We receive many questions about insuring pilots and passengers during the rides, and since this is very individual from country to country, we thought it would be best to gather some inspiration from around the world. The idea is that we try to compile information here about insurance for everyone to collaborate on and benefit from. Please add a description of your own insurance set-up in this document 😊🚲

- ▶ [redacted] Director Therapeutic Support Services, from Bruyère Continuing Care in Ottawa, Canada
- ▶ [redacted] Development Director, Lutheran Homes, Oshkosh (LHO), WI, USA
- ▶ In Denmark
- ▶ [redacted] CWA Marin County:
- ▶ [redacted] CWA Brighton
- ▶ [redacted] The Denver Bicycle Touring Club

Questions

The Questions category is meant to be a place for people to ask questions that the whole community could contribute to or benefit from. Here, affiliates can ask, answer, or learn from other people's questions. At the top of the Questions Category feed is a FAQ post that contains answers to some of the most commonly asked questions in the Cycling Without Age community:

🔑 Frequently Asked Questions ✎

📄 Questions



Caleigh Waskowicz Caleigh

23 📄 4d

Here is a space to find and provide answers to some of the most commonly asked questions in Cycling Without Age. Please feel free to elaborate on answers! 🚲 😊

- ▶ Now that I am officially an affiliate, what should I do next? How do I get my chapter up and running? What are some of the common roadblocks that I should expect?
- ▶ What are the different fundraising strategies for things like bikes, ongoing costs, and getting your chapter started?
- ▶ What Risk Assessment Documentation should I have available for my CWA operation?
- ▶ What are your recommendations for insurance? (theft, third party liability, etc.)
- ▶ What are the benefits of Cycling Without Age?
- ▶ Where can I purchase Cycling Without Age merchandise?
- ▶ How do I go about training pilots?
- ▶ Is there any formal Cycling Without Age constitution? What are the rules and regulations of the organization?
- ▶ How much does it cost to get a bike?
- ▶ Where can I buy my bike?

🔗 ↩️ ⋮ ✎ Edit

When readers hit the drop downs on the FAQ questions they are provided with answers and links to where more comprehensive information is provided. For instance, under the question “What are your recommendations for insurance?”, there is a link that will take the user to the Insurance Matters wiki which contains comprehensive information answering that question.



Caleigh Waskowicz Caleigh 🇺🇸

24 📄 1m

Here is a space to find and provide answers to some of the most commonly asked questions in Cycling Without Age. Please feel free to elaborate on answers! 🚲 😊

- ▶ Now that I am officially an affiliate, what should I do next? How do I get my chapter up and running? What are some of the common roadblocks that I should expect?
- ▶ What are the different fundraising strategies for things like bikes, ongoing costs, and getting your chapter started?
- ▶ What Risk Assessment Documentation should I have available for my CWA operation?
- ▼ What are your recommendations for insurance? (theft, third party liability, etc.)

Check out the [Insurance Matters](#) Wiki Post for detailed information about what other chapters have done for insurance.

- ▶ What are the benefits of Cycling Without Age?
- ▶ Where can I purchase Cycling Without Age merchandise?
- ▶ How do I go about training pilots?
- ▶ Is there any formal Cycling Without Age constitution? What are the rules and regulations of the organization?
- ▶ How much does it cost to get a bike?
- ▶ Where can I buy my bike?

🔗 ↩️ ⋮ ✎ Edit

Insurance Matters

■ Knowledge Base



Caleigh Waskowicz Caleigh

4  5d

When starting a chapter one of the first challenges you will encounter is the question of insurance - both accident insurance, third party liability insurance and bicycle theft insurance. We receive many questions about insuring pilots and passengers during the rides, and since this is very individual from country to country, we thought it would be best to gather some inspiration from around the world. The idea is that we try to compile information here about insurance for everyone to collaborate on and benefit from. Please add a description of your own insurance set-up in this document 😊🚲

- ▶ [REDACTED] Director Therapeutic Support Services, from Bruyère Continuing Care in Ottawa, Canada
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- ▶ In Denmark
- ▶ [REDACTED] CWA Marin County:
- ▶ [REDACTED] CWA Brighton
- ▶ [REDACTED] The Denver Bicycle Touring Club

Discussion

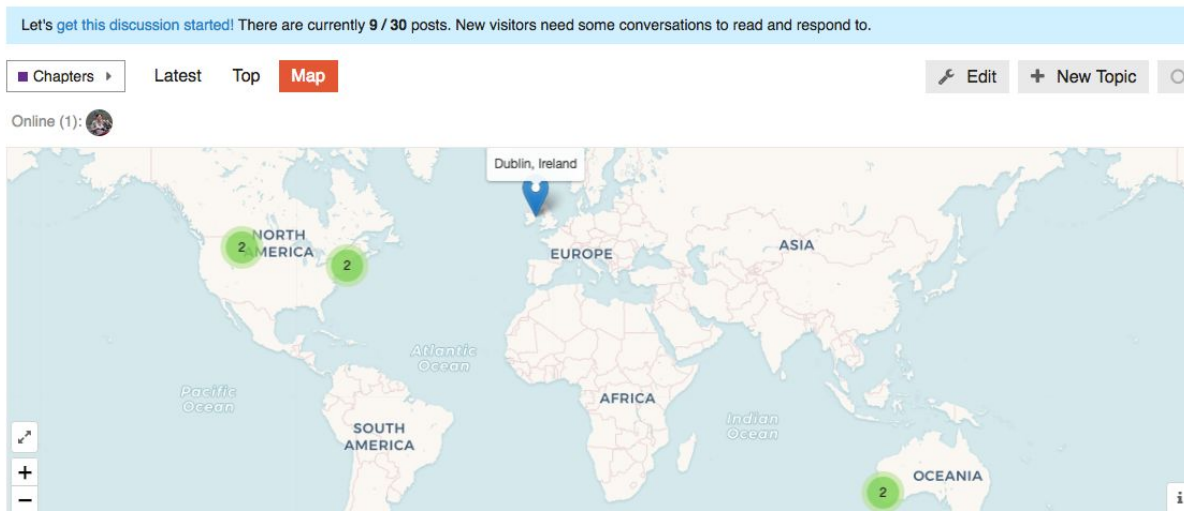
The Discussion category is the space for affiliates to post general information that is not meant to be collaborated upon that users think the community will find useful. These could include innovations that the community can find valuable.

Chapters

The Chapters category is a space where affiliates can find all the listed Cycling Without Age chapters and locate chapters near them on the map. The goal of this category is to help affiliates connect with nearby individuals since that was something that community members sometimes looked for on the Podio platform. By clicking on any of the listed chapters, individuals can access information about the chapter, its accomplishments, and contact information for members of that chapter.

Topic	Users	Replies	Views	Activity
✦ About the Chapters category		0	13	18h
Southington, CT		0	2	18h
Dublin, Ireland		0	9	5d
Worcester, MA		0	7	5d
Lakewood, CO		0	5	5d
Perth & Regions, AU		0	3	5d
Beaumont, Leduc County, CA		0	6	5d

Affiliates also have access to this map, where they can locate chapters across the globe and zoom in on ones close to their region. Clicking on a chapter location on the map will also bring the user to the post with information about that chapter.



Regional

The Regional category is the place for CWA affiliates to interact with individuals in their region and ask questions or upload content that is only relevant to those local communities. For instance, if a region is hosting an event specific to affiliates in a certain area or if an affiliate wants to ask a

question specifically to people near them they can do so in the Regional categories. Affiliates can only contribute content in their region but they can view the posts in any other region.

CYCLING WITHOUT AGE

Let's get this discussion started! There are currently 9 / 30 posts. New visitors need some conversations to read and respond to.

Regional all Latest Top Edit New Topic

United States Canada Australia Australian Get Together Ireland

Online (2):

Topic	Category	Users	Replies	Views	Activity
About the Regional category Subcategories of this category contain information only relevant to a specific region. Check this category out to see if your region is here.	Regional		0	10	4d
Australian Get Together	Australia		4	10	4d

Each category will have designated regional moderators for monitoring content and making sure everyone is posting and behaving appropriately. Furthermore, if someone posts something in a regional category that would be useful to the global community, regional moderators have the power to move that post to a global category (like Questions or Knowledge Base).

Site Feedback

The Site Feedback category is the space for everyone to discuss the Discourse site, its organization, how it works, and how it can be improved.

File K. Protocol For Affiliates Focus Group

Show them Networking Functionality

1. User profile
 - a. Have them set up their account first
 - b. Have them add their flag
2. Questions category (same features as Podio and workplace but implemented better)
 - a. Walk through the layout of existing questions
 - b. Have them create a question themselves.
 - c. **Question** How do they feel about this in comparison to Podio/Workplace
3. Search features
 - a. Demo how to search (search within a topic, global search)
 - b. Ask them to search for something
 - c. **Question** How might you use this search feature? (What information would you search?)
4. Location Features & private messaging - Map (highlight other plugins as well)
 - a. Demo location map
 - b. Ask them to add their chapter to map (add new topic in "Chapter" and add location)
 - c. message the person who created the chapter
 - d. Add or remove people in private messaging
 - e. **Question** How would you feel about using this feature?

Community

1. Wiki Pages/Linking (make some better demo content)
 - a. Demo how it works
 - b. Have them modify one of the wiki posts
 - c. **Question** How do you feel about collaboratively working on the same knowledge base? Do you think knowledge base wiki would help make information more accessible?
2. Translation - Multiple Interface Languages
 - a. Have them translate the Chinese post
 - b. **Question** Thoughts?
3. Regional Groups and Categories
 - a. Demo how it works (adding new people to a group; local knowledge base for each region)
 - b. **Question** How do you see yourself engaging with local communities?
4. User stats
 - a. Have them check out their user stats in profile

- b. **Question** Do you think this is useful? How do you see yourselves using it?
- 5. Trust system & badge system
 - a. Promote people to leaders
 - b. Explain the trust system (reaching set milestones can upgrade your trust system)
 - c. **Question** What badge system would motivate you to use this platform?
- 6. Regional moderator groups & Moderation tools
 - a. Demo how it works
 - b. Subscribing to particular categories
 - c. Have them try it out
 - d. **Questions**
- 7. Daily Email Digests
 - a. Send daily email digests to people
 - b. **Question** Would you use this feature?
- 8. Misc. features that are nice...
 - a. Mobile support (mention the apps)

Final questions:

1. How do you feel about this platform comparing to the current ones (Podio/facebook workplace)?
2. What are the features that you liked?
3. How might you use this platforms? Some specific features?
4. What else would you like to see in this platform that wasn't included?
5. What would motivate you to use this platform?

File L. Affiliates Focus Group Notes: Iteration 2

1st Affiliates Focus Group Notes: Iteration 2

Leaders: Ben Liang, Liam Finnegan, Caleigh Waskowicz, and Ben Longo

Notetaker: Caleigh Waskowicz

Participants: 3 elderly members of the organization whose identity will be kept confidential. One was from Ireland, one was from France, and the other was from the United States.

General
Conversation Notes

How do You Feel About the Translation Feature?:

Participant 3 - Is it a real translation or a google translation?

Answer: Its a google one and not always the best translation but its what we got.

Participant 2 - I like the translations.

Have you felt intimidated by the Podio community?

Participant 1 - most people just ignore Podio because they don't know what it is.

What Can We do To Motivate You To Use the Platform?

All Participants - making it clear how to use and interact with the platform. Have to know how to get to it.

Participant 1 - Something that would help is short and clear YouTube Videos that explain how to use Discourse. If someone had a video on the CWA website specifically people then would use them. She could send direct people to that website directly to get their questions answered. However, keeping it short is key. No one is gonna sit still for 20 minutes. 3 or 4 minute videos that deal with a single topic would be great. Pernille put some together for biking went really well because its short and clear and you can see what she is doing.

Participant 2 -- I am definitely a YouTube fan!! It would help to have videos.

Valuable Quotes

Topic: Regional knowledge bases:

Participant 1 - "I'm just looking at insurance matters there, that's very specific to each country.

And even fundraising, I mean just looking at it there are mostly American models there, but that's very different to here where the law is different, and how you go about doing things is different, and all kinds of regulations are just quite different to us."

Participant 1- "I think people might feel a bit more comfortable doing that, and also it's more relevant. If you see a question from California and another one from Australia, you're gonna say what's it got to do with me?"

"Here, laws are different, bylaws are different, insurance is definitely different. So they need to know that it's specific to Ireland if they're asking these questions."

Topic: Implementation:

Participant 2 - "There's definitely a learning curve, as everything else in technology. Same problem."

"My big problem is getting to the platform"

Participant 1 - "Run a pilot with this and see how we're all getting on with it"

Topic: What would motivate you to use this platform?

Participant 1 - "If it was easy to use, if the headings were clear so you knew your problem was insurance or fundraising or issues with the bike. If that was clear so you know where to find it on the site."

Participant 1: "Some people will want to share information but others won't."

Participant 1: "How do I start, what do I do, how do I fundraise, what about insurance...its keeping information like that live and active for me is my job." "It[the platform] would make my job easier if they could find it and operate it."

General Takeaways	<p>Participants generally liked the functionality of the platform but not how hard it is to get to.</p> <p>Running a pilot would be a great first step. Having people who know how to use the platform is absolutely essential.</p> <p>The platform will be worth using because it contains helpful information.</p>
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2nd Affiliates Focus Group Notes: Iteration 2

Leaders: Ben Liang and Ben Longo

Notetaker: Caleigh Waskowicz

Participants:

- Participant 1 - from Belgium
- Participant 2 - from Sydney, Australia
- Participant 3 - from Singapore
- Participant 4 - from Perth, Australia

Date: 10/05/2018

Responses to Focus Group Questions	<p>How Do The Question Feel Compared To Podio</p> <p>Participant 2 - “looks nice and clear actually”</p> <p>Participant 1 - “Its the same functionality. The presentation is a little bit better because you can see how many responses there are which is something better. Can see upfront how long this conversation is. That is useful addition to the existing functionality in Podio. Need something like this in a community of course. When someone asks a question they share their experience and knowledge.”</p> <p>Knowledge Base Comments:</p> <p>Participant 1 - “That’s nice. You have general parts and then region specific parts.” Participant 2 - “That’s so good”</p> <p>How do you feel about Regional Categories?:</p> <p>All participants say yes</p>
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Participant 1 - "There is a need to coordinate across Europe but there is also a need to coordinate across Belgium because there are so many different categories. Perhaps after you discuss things in one region we can share it to other regions"

Participant 3 - "If has something interesting Belgium might post it but it could be useful to Singapore. Would you not be able to access that information if you were in a different region?"

What do you think of Translation Features?

Participant 1- "is good to be able to speak in your native language with people in your region."

People try to connect to their local chapters but it often isn't easy to determine where other affiliates are located. The Chapters Feature is meant to be a place for people to find other chapters. If you go to Chapters and press on the Map you can see all of the chapters. If you click on the chapters in Australia and click on a specific Chapter, they get linked to their specific chapter:

Participant 3 - "Who is able to be part of this community?"

-end goal is for everyone to be on there but right now it's more for chapters and affiliates.

Participant 3 - "This information is very valuable for new members and new chapters.

-something that's great about this is pieces of it are publicly visible. We aim to make the knowledge base publically available. If you are a new affiliate, you should be able to access it immediately even if you are not signed up on the site.

Participant 1 - "New affiliates can already consult all the information about fundraising and stuff"

Participant 3 - Who will be the moderators?

-we know in certain areas there are regional moderators. Those people would be the moderators on the platform if they want to. For each region there is a moderator and they have total control over the platform and can onboard new members if they want.

<p>Valuable Quotes and General Takeaways</p>	<p>“You need something like this in a community of course where someone asks a question and other people share their experience and their knowledge. And then in fact afterwards it could be useful that someone sort of makes a round-up of the conclusion and publishes this in the knowledge base. To make a community working you not only need a software platform but you also needs people to manage it.” - Participant 1</p> <p>“That’s nice, if you add to this project a description of roles and responsibilities that’s good.” - Participant 1</p> <p>“I think the thing that is in common is the insurance needs - what do I need to insure the pilots, what risks do I need an insurance for - that’s something you could describe once as a common thing, and then of course you have locally different solutions because of different insurance projects, different laws and stuff.” - Participant 1</p> <p>“Okay, so it enables having sort of sub-communities because it needs to organize something specifically for a certain region then.” Participant 1</p> <p>“I can imagine there is a need to, for example, coordinate across Europe, but there's also a need to coordinate within Belgium because we already have a lot of chapters here as well. Regional on different levels. There’s certainly a need to have a platform where after you discuss things regionally, perhaps you could share it other regions easily.” - Participant 1</p> <p>“Yeah, there’s certainly a need in Regional platform to be able to talk and discuss in your mother tongue - in your native language.” - Participant 1</p> <p>“But I guess, they’d have to have an input themselves as so that they are all under the same governance themselves. You know those community moderators would need to work collaboratively as well so that you know we are not duplicating work or duplicating responsibilities I suppose.” - Participant 4</p>
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"I think you will need us in each community sharing knowledge and information with some best practices and guidelines on how to publish and consolidate this information, and some people should take some responsibilities. The software product itself can't solve everything, it's just an instrument and you will have to explain to people how to use it in the best way. There's something we will have to learn, and If you can get a start with the kind of roles and responsibilities and guidelines, that would be an extra." - Participant 1

"I think you would find a lot of what we all experience is like across the world really you know it's the same big topics that always seems come out." - Participant 3

"And it just becomes overwhelming, and then you look at something and it's so out of date. In some ways I've lost a little bit of faith in some of it - I go "I won't go on there because it's just too hard". And sometimes we've just reached out locally by email [and we've done it that way], so we've bypassed what was originally set up as a community." - Participant 4

"I reached out to you guys to ask for some documents because I was like Podio is not up-to-date, and it's not giving me the information that I need." Participant 3

"Yeah and that shows as well that the platforms that are in use are not user-friendly enough to use." Participant 3

"For us, in the Singaporean chapter, we are extremely busy. We just started a new project and with 10 new trishaws and there's a lot of extra work because we're training youth pilots and there's a lot of training for them as well outside the trishaw handling. But so for us, to be engaged in the more global community is sometimes very hard so we are not really into that. So as well I'm always trying to figure out, how to be in touch with the global community because there is so few coming back. You know, it's not a two-way traffic by times." - Participant 3

	<p>“and sometimes too, we've actually got a girl that's helping as well (you may have met her, Participant 3). She's so good on social media, and it takes somebody like that. I'm not - as you can see it took me so long to log in - somebody who's actually really tech-savvy as well. that this becomes a second nature, and this could become a dedicated volunteer role or something like that.” - Participant 4</p> <p>“I think it's a terrific idea, just whittling it down to one website. I think it seems terrific for a start.” - Participant 2</p>
<p>Questions From Participants</p>	<p>Participant 1 - Why Did you Decide To Make Something New from Scratch?</p> <ul style="list-style-type: none"> - Longo - Part of our research was to try and improve Podio but we found it wasn't a very intuitive platform and doesn't have the functionality of a good platform. Everything in the Podio feed that gets posted gets buried. Documents get posted there unorganized. <p>Participant 1 - Can you Tag Posts to Aid With Searching</p> <ul style="list-style-type: none"> - Longo - You can tag and the already existing tags. - Longo - Helps to reuse existing tags otherwise you get to many varieties and can't find all the stuff you need. <p>Participant 2 - If for example with fundraising, if there is a template and someone has done one, would that be in the tags?</p> <ul style="list-style-type: none"> - Longo - That is a good example of someone who would have created a document that is specific to a region. If you click on the regional category you can see that this is a place for people to put information taht is only relevant to a region. You could have a generic template in the knowledge base and then have an Australian specific template for that community - Participant 1 - if you have a need to create something specific to a region, you can do that. - Longo - sometimes posting to the whole community can be intimidating to people. Regional category will help people feel more comfortable reaching out

Participant 3 - “If has something interesting Belguim might post it but it could be useful to Singapore. Would you not be able to access that information if you were in a different region?”

- Longo - anyone can see, not everyone can edit.
- Participant 1 - that is good.

Participant 1 - User interface is english only or can you change it to your native language?

- Longo - You can change the interface to over 25 different languages so that you can see it in whatever language you are most comfortable with.

Participant 3 - How will the information get in there? Does it need to be in a certain format or can it be a PDF, Word, or whatever else you might want?

- Longo - you can embed a PDF in the post. It is a little much to ask for all the chapter leaders to migrate all their information into Discourse.

Participant 3 - Lets say I wanted to have a document about training pilots. If everyone is uploading documents on training pilots, is there a way to search for everyone's documents. I can imagine that 50% of Chapters have documents about training Pilots. If I want to see what Perth and Sydney are doing, there would be multiple documents that are

- Longo - for each chapter because it is a knowledge base, you can see what every chapter is doing and add information to the same space.

Who Decides the Topics in the Knowledge Base?

- Longo - we would create topics based on our research and the research done by the guiding team. Insurance, fundraising, marketing, pilot training would all be high level topics.

Let's say someone is blind and they don't see that there is a topic for pilot training. Who is keeping this database updated so there is not overwhelming of topics categories.

- Longo - that's the idea of moderators. If someone messes up on the platform, as a moderator you have total control over who is interacting on the platform.
- Participant 3 - The people that do all the work of monitoring and making sure that people are behaving responsible. The community moderators would have to work collaboratively as well so that we are not duplicating documents themselves and are behaving at the same level.
- Participant 1 - I think you will need best practices and guidelines on how to publish and consolidate this information and assume responsibilities. The platform itself cannot solve everything. You will have to explain to everyone how to use it best in every way. If you could get that started.

Participant 4 - “is there a guideline for how we can find information or do we have to rely on metadata?”

- Longo - can search for information on the whole site.

Participant 3 - “any other system that i’ve used is data in gives better quality with data out. So putting data in would impact the search results.”

Participant 3 - “Is there version control or something like that in this platform”

- Longo - a document like that would probably end up in the knowledge base. Can you see the version histories on the post and if you want to update a

Participant 3 - “If I became the moderator for Australia and had governance over them, would it be my responsibility to worry about say Berlin?”

- Longo - Wouldn't be your job to worry about. There are really nice tools for you to work with things and move around content. Will only have the responsibility of your region. If you accidentally delete something it can be recovered.

Participant 3 - “Documents change, visions change. Is there something built into the system so that the person who owns the

document posted in the system a call if the document is still relevant”

- Longo - I haven't thought about that. I don't know if you could automatically ask people if information is up to date.
- Participant 3 - worked with a platform where you could set it up so that after a year, it would ask the poster if that information was still relevant.
- Longo - can set a timed reminder on a topic for yourself but I don't believe it does that automatically

Participant 3 - “Obviously there has been a cost involved in having this. Would that be covered by Denmark?”

- Longo - It costs us currently 10 dollars a month to use, even for thousands of users. The 10 dollars per month is only the hosting feature

Participant 4 - how do we get upgrades for the platform

- Longo - we set it up so that if there is upgrading to do you just have to press a button and it will add all the updates.

Participant 3 - “Is the idea then to replace Podio”

- Longo - We think that the best way to do things would be to train regional members how to use the platform and then do a big kick off at an international summit. We think launching at a summit and then removing Facebook Workplace and Podio would be the best way to launch something like this
- Participant 3 - it would be a waste of time to redo the stuff that's already on Facebook Workplace and Podio. Would have to import the documents from there
- Participant 3 - “I completely agree that you would have to get rid of other platforms. It would just become confusing”

Participant 3 - “is there any plans to have a project management tool alongside this?”

- Longo - Project management is different enough from discourse where it might make sense.
- Longo - There is a plugin where you can assign tasks to people in discourse.

Participant 3 - “What are you or the group in Denmark envision for the timeline of this”

- Longo - We are meeting later today to discuss this with the Hub but our overall plan is to do a big kick off at one of their Summits.

Participant 1 - “Will there be a pilot group giving it feedback before launching it to everyone?”

- Longo - That is something that we have considered, especially with piloting it with a group who currently isn't using a platform
- Participant 4 - “You will find that the same topics seem to come up”
- Longo - Getting people who are already used to it will help people get used to the new platform. We found that only 60-80 people who are usually in leadership roles would be immensely valuable to the success of our platform.
- Participant 4 - “it just becomes overwhelming and find that everything is so out of date. In some ways I have lost a lot of faith in it and we reach out locally instead because everything is just so out of date”
- Participant 4 - “Podio is not up to date and giving me the information I need”
- Longo - We find that no one is actually using the platform. The platforms that are in use are not user friendly enough to use.

Participant 4 - “Once this gets put out it will be across the board for everyone to use?”

- Longo - We want to minimize the parallel time with Podio and Workplace as much as possible.

Participant 4 - “Is there a way to integrate pilot scheduling into this platform?”

- Longo - we didn't look at that end of it because they are already developing a pilot scheduling system.

Participant 2 - “If people want to know who is in there area, they could find that quite quickly. Would it be possible for me to send someone a link to this site so they can find it themselves?”

- Longo - That is exactly the idea. Documents get duplicated and it is difficult for one person to put in the work to combine knowledge and documents in an email to every new member. If a new chapter would like to join, you would send the new members a new chapter guide with all the documents and information they need on the platform.

File M. Affiliates Guide to Discourse

A Breakdown of CWA's Discourse Page

The Cycling Without Age discourse homepage is broken down into 7 community categories:


- **Announcements**
- **Knowledge Base**
- **Questions**
- **Discussions**
- **Regional**
- **Chapters**
- **Site Feedback**


Understanding how to interact with each of these categories can help you collaborate and connect with the overall community.

Before Investigating what each of these categories is for, you should gain a better understanding of how to interact with the community through Discourse. Check out [Discourse New User Tips and Tricks](#).

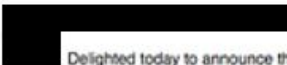

Announcements

The **announcements** category where you and other members of the global CWA community can post announcements meant for the whole community. Here you can find updates from global CWA affiliates, updates from the Hub, and information about global opportunities. Click on the announcements category, scroll through the community updates, and read up on what members of the community are doing. You can comment on other people's posts by hitting the reply button or you can update the global community with your own information by creating a new topic.


CYCLING WITHOUT AGE 





Scottish Rollout 




■ Announcements

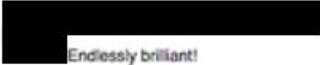

 1  17d

Delighted today to announce that the Scottish Government has given us the backing to roll out Cycling Without Age across Scotland - providing us with all the financial support required to give all of our elderly citizens across Scotland the right to wind in their hair!





<https://beta.gov.scot/news/nationwide-rollout-of-cycling-without-age/> 



1     Reply

created	last reply	6	16	6	1	1	
 17d	 17d	replies	views	users	like	link	

 1  17d

Endlessly brilliant!

    Reply



 1  17d

Oh my gosh this is just awesome 😊 Well done to all who pushed for this and hope this will influence other

Sep 14

1/7
Sep 14

17d ago

Rules The only posts that should be in announcements are those that you wish to share with the community as a whole. If you want to announce something only to the people in your region, you should instead post in the Regional Category.

Knowledge Base

The **Knowledge Base** is meant to be a place to collaborate and combine information. Each post in the knowledge base is a wiki, meaning that anyone in the community can edit the information contained inside the post. For example, in the Insurance Matters wiki, you can hit the drop down menus to see what other chapters have done to manage their insurance matters. You can also contribute your own chapters experience with insurance by hitting the edit button and adding your experiences.

Insurance Matters

■ Knowledge Base



Caleigh Waskowicz Caleigh

4  5d

When starting a chapter one of the first challenges you will encounter is the question of insurance - both accident insurance, third party liability insurance and bicycle theft insurance. We receive many questions about insuring pilots and passengers during the rides, and since this is very individual from country to country, we thought it would be best to gather some inspiration from around the world. The idea is that we try to compile information here about insurance for everyone to collaborate on and benefit from. Please add a description of your own insurance set-up in this document 😊🚲

- ▶ [REDACTED] Director Therapeutic Support Services, from Bruyère Continuing Care in Ottawa, Canada
- ▶ [REDACTED] Development Director, Lutheran Homes, Oshkosh (LHO), WI, USA
- ▶ In Denmark
- ▶ [REDACTED] CWA Marin County:
- ▶ [REDACTED] CWA Brighton
- ▶ [REDACTED] The Denver Bicycle Touring Club

Rules You should only use the Knowledge Base category for posts that you wish to be collaborated upon. If the information you wish to post does not add to the contributions OR you do not want that information to be edited in anyway, make your post in the discussion category.

Questions

The **#questions** category is meant to be a place for people to ask questions that the whole community could contribute to or benefit from. Here you can ask, answer, or learn from other peoples questions. Before asking the community a question, check the FAQ. This FAQ contains answers to some of the most commonly asked questions in the Cycling Without Age community.

Frequently Asked Questions

■ Questions



Caleigh Waskowicz Caleigh

23  4d

Here is a space to find and provide answers to some of the most commonly asked questions in Cycling Without Age. Please feel free to elaborate on answers! 🚲😊

- ▶ Now that I am officially an affiliate, what should I do next? How do I get my chapter up and running? What are some of the common roadblocks that I should expect?
- ▶ What are the different fundraising strategies for things like bikes, ongoing costs, and getting your chapter started?
- ▶ What Risk Assessment Documentation should I have available for my CWA operation?
- ▶ What are your recommendations for insurance? (theft, third party liability, etc.)
- ▶ What are the benefits of Cycling Without Age?
- ▶ Where can I purchase Cycling Without Age merchandise?
- ▶ How do I go about training pilots?
- ▶ Is there any formal Cycling Without Age constitution? What are the rules and regulations of the organization?
- ▶ How much does it cost to get a bike?
- ▶ Where can I buy my bike?

  ...  Edit

Rules The only posts that should be made in this category are questions that you wish the whole community to answer.

Discussion

The **discussion** category is the space for you to post general information that is not meant to be collaborated upon that you think the community will find useful. These could include innovations that the community can find valuable.

Rules This is a place for users to upload information that they feel will be relevant to the community as a whole. If your post is something that the community can contribute to, should be posted in the knowledge base instead.


Chapters


The **#chapters** category is a space where you can find all the listed Cycling Without Age chapters and locate chapters near you on the map. The goal of this category is to help you connect with people near you and get to know more about the chapters around you.

Chapters ▾		Latest	Top	Map	Edit	+ New Topic	○
Online (1):							
Topic	Users	Replies	Views	Activity			
⚡ About the Chapters category		0	13	18h			
Southington, CT		0	2	18h			
Dublin, Ireland		0	9	5d			
Worcester, MA		0	7	5d			
Lakewood, CO		0	5	5d			
Perth & Regions, AU		0	3	5d			
Beaumont, Leduc County, CA		0	6	5d			

Let's get this discussion started! There are currently 9 / 30 posts. New visitors need some conversations to read and respond to.

Chapters ▾ Latest Top **Map** Edit + New Topic ○


Online (1): 




If your Chapter isn't present on the map, you can add it your chapter through the **New Chapter Setup Wizard**.

Regional

The **#regional** category is the place to find and ask for information specific to an individual region. For instance, if you are hosting an event exclusive to people in your region or want to ask a question meant only for the people in your area. You will only be able to contribute content to the region you belong to but you can view the posts in any other region. Please consider whether the question you are asking or the content you are posting could be useful to the community at large rather than just the individuals in your region.

CYCLING WITHOUT AGE 

Search ☰ 

Let's get this discussion started! There are currently 9 / 30 posts. New visitors need some conversations to read and respond to.

Regional ▾ all ▾ **Latest** Top Edit + New Topic ○



United States



Canada

Australia

[Australian Get Together](#)

Ireland

Online (2):  

Topic	Category	Users	Replies	Views	Activity
<p>🔧 About the Regional category</p> <p>Subcategories of this category contain information only relevant to a specific region. Check this category out to see if your region is here.</p>	Regional		0	10	4d
Australian Get Together	Australia		1	10	10d

Rules Before you make a post to the regional category, consider if it is something that the global Cycling Without Age community might find valuable or might add value to.

Site Feedback

The **site-feedback** category is the space for everyone to discuss the discourse site, its organization, how it works, and how it can be improved.

Rules Only post topics here that pertain to the Cycling Without Age discourse site.

File N. Moderators Guide to Discourse

NOTE: This Moderators was adapted from an existing guide to discourse online.

Moderators Guide to Discourse

So you're a staff on this Discourse forum - congratulations! As a forum staff, it's your role to help oversee the forum, ensuring that users and content are in line with your Terms of Service (TOS), Frequently Asked Question (FAQ), and other published rules/guidelines. Discourse comes with numerous tools to help you accomplish this.

Let's take a look at some common scenarios and see how each can be handled with Discourse.

Contents

- Welcoming New Users
- Helpful Users
- Getting User Information
 - Public profile
 - User admin page
- Complicated Topics
 - Poor title
 - Off-topic digression
 - Duplicate topic
 - Heated, difficult, non-productive discussion
- Inappropriate Content
 - Flags
- The Difficult User
 - Don't make assumptions
 - Reach out directly
 - Send an official warning
 - Silence the user
 - Suspend the user
 - Locking trust level

Welcoming New Users

Part of keeping a community friendly and helping it grow involves being an example to others. When you notice a new user on the site (many times evidenced by a light-grey username instead of dark-grey, which shows that a user is Trust Level 0), say hi and welcome them to the site. Even if you have nothing else to say, that initial interaction is important for new members to feel welcomed.

Users Asking Questions

As a community moderator, there is a very high chance that other users will ask you questions about all sorts of things. While you can answer them directly, it is recommended that you utilize the Knowledge Base and FAQ category by sending a link of the appropriate topic to the asker and redirect them. This will help training users to look for information themselves first before asking for help. Although the two categories might not necessarily contain the information needed at first, however, you can always add and collaborate with other users to document missing information down and make it easier for everyone else to find it.

Helpful Users

Most users are good citizens on the forums and will do their best to participate properly. Some users, however, will go above and beyond what is expected. It is to your advantage to recognize these users and encourage them to keep doing what they do. Active helpful users may reach Trust Level 3 (TL3), which allows them to help edit titles and change topic categories. Users can also be manually promoted to TL4, which grants them global edit privileges on any topic or post they can see.

Getting Users Information

Discourse maintains information on all users who register and interact with the site.

Public profile

You can get an overview of a user from their public profile. To access a profile click the user's avatar or username in a topic, their avatar in the topic list, or search for them. Above their profile is a count of official warnings, suspensions, flags received, and helpful flags given by the user. Just below are details on the user's account: when they last visited, posted, and registered.

You can review all public activity by the user, as well as review the notifications they received. If you are also an Admin, you will have access to the user's private messages as well.

You can also view and modify the user's preferences. This can be very helpful if a user is reporting an issue with their account that you suspect may be related to a preference change.

User admin page

From a user's public profile you can access the user's Admin page.

The Admin page can also be accessed from the hamburger menu, and then by clicking on Users. There you can search for users by username, email, or full name. Once opened, you can review additional details about the user, including non-public information like their registration and last-used IP address. IP information can be helpful if a user appears suspicious or acts too similar to another user. As mentioned in "The Difficult User" section, this is also where users can be

silenced/suspended, and their trust level adjusted.

Complicated Topics

Public discussion on Discourse takes place inside of topics. Each topic has a title and category, and it is important that the discussion within relates to the title/category.

Poor title/incorrect category

If users provide a poor title or select the wrong category, you can edit the topic to update one or both. Scroll to the top of the topic and click the pencil next to the title. From there, the title and category can be modified.

Off-topic digression

Topics, especially longer ones have a tendency to veer off-topic. When this happens, you can select posts to move to a new topic or an existing topic on the subject. This helps keep each topic organized and “on-topic”.

Duplicate topic

Sometimes users will start a new topic when one already exists. If the posts in the duplicate topic add to the discussion, they can be moved to the existing one. Moving all posts in a topic will automatically close the topic.

Heated, difficult, non-productive discussion

If discussion in a topic is no longer productive or discussion is no longer focused on the topic, but instead on “attacking” other users instead of ideas, moderators should step in.

Make a staff post. Many times, a simple reminder is enough to solve the issue. You can create a post reminding users to be polite, warn them they’re talking in circles, etc, and then use the post admin wrench to mark the post a staff post. This indicates to users that the post is the official position of the site.

Set a topic timer. If the staff post doesn’t help, or discussion seems so heated that a reminder won’t help, you can “pause” the topic. Use the topic admin wrench to set a topic timer for auto-open. This will immediately close the topic, preventing new posts, and display a notice when the topic will reopen.

Inappropriate Content

Note: On most forums inappropriate content is rare.

Discourse allows all users to help keep the forums clean, appropriate, and on-topic via the Flag system. When a topic or post is seen that does not belong, users and moderators can flag it for review.

Flags

Flags can be your best friend or the entrance to a rabbit hole. When a user doesn't like a post, they can choose to flag it for moderators. The flag dialog has 5 options: message user (does not cause a flag, simply opens up the PM dialog), off-topic, inappropriate, spam, and something else. Off-topic, inappropriate, and spam simply cast a flag, and the user is done. Something else allows for a custom message and then casts the flag. Once a flag is in the queue, moderators will see a red notification on the hamburger menu and can open the flag queue. From there, you can decide what to do about the flag. There will be 3 options: Agree, Disagree, and Defer. Agreeing with the flag signals that you confirm the post is off-topic (or spam, or inappropriate, or ...). You can then message the user to edit it (automated message, no option to customize), or delete the post. Disagreeing with the flag says that the post is not an issue, and there is nothing to do. Defer means the flag doesn't need further action. For example, a user might flag their own post if they need help with something. You would then defer the flag so it doesn't hurt their trust level. Agreeing will hurt their trust because their post was flagged, disagreeing may eventually hurt it because a moderator disagreed with their flag (disagree trust level impact is not developed yet). If you are ever uncertain about which option to choose, pick defer and handle the post manually.

Note that resolving a flag with a custom message will automatically generate a PM to the user who flagged the post. If you pressed "Defer" or "Disagree", they will get a reply with "Thanks for letting us know. We're looking into it.". If you "Agree" with a custom flag, the message will instead say "Thanks for letting us know. We agree there is an issue with the post and are looking into it." There is also a third version of this message for when the post was deleted.

Posts with 3 flags will be automatically hidden without waiting for moderator action.

You might be wondering why flags can be the entrance to a rabbit hole. 99% of the time flags are easy to handle - the post is clearly spam, a user needs some help, etc. However, sometimes the issue can be harder to address. Maybe a user is continually swearing in their posts and abusing others after being warned. Maybe the request isn't easy to solve. In those cases, don't be afraid to reach out to your fellow moderators, or the forum owners for advice and support. Unless you are the only moderator, you shouldn't ever feel like you have to make a decision on your own, that's why you have a team. The auto-created staff category is a great place to have a discussion with your team in private. At the same time, don't hesitate to make your own decisions - you were made a moderator because you are trusted to do the right thing.

The Difficult Users

Note: On most forums difficult users are rare.

Most users will be respectful, post appropriate content, and not cause any issues. However, you may encounter a user that just doesn't want to follow the rules, is rude, posts inappropriate material, etc. How can you handle them? Keep in mind, the below progression is a suggestion. There may be instances where one of the steps doesn't make sense or the action was so egregious that a step (or steps) are skipped.

Don't make assumptions

First, try to avoid assuming that the user has a negative intent. They may simply be ignorant of the rules, may not speak your forums language well, may be young, or have another reason for the way they act.

Reach out directly

Try to contact the user privately via PM to let them know what is wrong with their behavior. Remember to talk about the negative behaviors - don't attack the user themselves. When possible, link to existing rules, guidelines, FAQs, or similar.

In most cases, this contact will be enough. However, if it is not...

Send an official warning

When sending a PM to a user as a moderator, you can make the message an "official warning". This PM will automatically gain staff color, and a notice that the user has received an official warning will appear on the user profile for other moderators to see.

In the official warning, be sure to explain the negative behavior you have seen, detail specifically what you'd like them to do instead, and the consequences of not changing their behavior.

If the behavior continues, be sure to follow through with the listed consequences. You may choose to...

Silence the user

Silenced users are prevented from creating new topics, replies, or PMs on the site. They are still able to complete other actions, like "liking" posts, reading topics, etc. Additionally, they can communicate with moderators via PM, so you can continue to communicate with them to try and address the behavior.

Silencing a user is done from the user's Admin page. To access it:

Navigate to the user's profile, click Admin, then click Silence.

Once silenced, a user must be manually unsilenced to be able to resume posting. When silencing a user, explain to them what they need to do before they can be unsilenced.

If the behavior still continues...

Suspend the user

Suspended users are prevented from logging in, and thus from completing any actions on the forums. A suspension is the strongest possible recourse you have for a user and should be used sparingly. Like silencing, suspending a user is done from the user's Admin page. Unlike silencing, suspensions are for a specific period of time. You may want to suspend the user for a short period of

time first, and if the user returns and continues the behavior, increase the suspension time.

Locking trust level

If a user posts too much, includes too many and/or inappropriate images, abuses the flag system, or similar an alternative to the above is locking the user to trust level 0. This will limit the number (and frequency) of topics and posts the user can create, as well as prevent them from including too many images/links and prevent the user from casting flags. Trust levels can be configured from the user's Admin page.

File O. Administrators Quick Start Guide

NOTE: This Hub’s guide to Discourse was adapted from an existing one online.



Congratulations, you are now the proud owner of your very own Civilized Discourse Construction Kit

Getting Started

If you haven’t already, launch the setup wizard [1](#) and go through the steps to configure your site. You can run the wizard as many times as you want, it’s completely safe!

Admin Dashboard

Exercise your admin superpowers any time via the admin dashboard at `/admin`


You can also access it via the “hamburger”  menu in the upper right: Admin functions are generally marked with the wrench  icon, so look for that.

Staff

Staff members are official representatives of this community. There are two kinds of Staff:

1. **Admins**, who can do anything and configure anything on this site.
2. **Moderators**, who can edit all posts and users, but cannot add categories or change any site settings.

To add additional staff members:

- have them sign up on the site (or send out an invitation to join via your user page)
- click the admin button  on their user page
- look for the Grant Admin and Grant Moderator buttons there

Social Logins

Users can log in with traditional local username and password accounts. You may want to add:

- Google logins
- Twitter logins
- Facebook logins
- GitHub logins

You can also set up single-sign on, or even build your own login method.

Test Your Email

Email is required for new account signups and notifications. **Test your email to make sure it is configured correctly!** Visit the admin email settings [1](#), then enter an email address in the “email address to test” field and click send test email.

- You got the test email? Great! **Read that email closely**, it has important email deliverability tips.
- You didn’t get the test email? This means your users probably aren’t getting any signup or notification emails either.

- Email deliverability can be hard. Read **Email Service Configuration**.

If you'd like to enable *replying* to topics via email, see this howto.

Categories

You have three default categories:

1. Site Feedback – general discussion about the site itself. It's important!
2. Lounge – a perk for users at trust level 3 and higher
3. Staff – visible only to staff (admins and moderators)

Don't create too many initial categories, as you can overwhelm your audience. You can always add more categories, and easily bulk recategorize topics later. It's better to figure out the organization as you go rather than assuming you'll get it all right from the beginning (hint: you won't). To add a category, visit the categories page, then click Create Category at the upper right. You can set security per-category so only certain groups of users can see topics in that category. Every category has an initial "About this category" topic. This topic will be pinned to the top of the category, and the description you enter will be used in a bunch of places. Be sure to give your new category a good, clear description, so people understand what belongs there!

Pinned Topics and Banners

Note that pinning topics does work a little differently in Discourse:

- Once someone reads to the bottom of a pinned topic, it is automatically unpinned for them specifically. They can change this via the personal pin controls at the bottom of the topic.
- When staff pins a topic, they can pin it globally to all topic lists, or just within its category.

If a pin isn't visible enough, you can also turn one single topic into a **banner**. The banner topic floats on top of all topics and all primary pages. Users can permanently dismiss this floating banner by clicking the × in the upper right corner.

To make (or remove) a pin or a banner, use the admin wrench at the top right or bottom of the topic.

New User Sandbox and the Trust System

If your discussion area is be open to the public, new visitors will arrive that are initially strangers to the community. Discourse has a trust system where users can, over time, earn the trust of the community and gain abilities to assist in governing their community.

Discourse is designed to offer safe defaults for public communities, even with no active moderation.

0 (new) → 1 (basic) → 2 (member) → 3 (regular) → 4 (leader)

All new users start out in a sandbox with restrictions for everyone's safety. **Trust level 0 (new) users cannot...**

- post more than 2 hyperlinks
- post any images or file attachments
- send personal messages
- flag posts or topics
- have actual links in the "about me" field of their profile
- @name mention more than 2 users in a post

Every action a user can take is rate limited for safety, and especially so for new users. But don't worry, new users can transition to trust level 1 in about 10 minutes of reading.

These defaults are safe, but note that while in “bootstrap mode” after you set up your site, all new users will be granted trust level 1 until you reach 50 users.

Building Your Community

Be patient; building communities is hard. Before launching, be sure to:

1. Clearly define your community’s purpose in a pinned or banner topic.
2. Seed the discussion with interesting topics.
3. Commit to visiting and participating regularly.
4. Link your community everywhere and promote it so people can find it.

There’s more advice at [Building a Discourse Community](#).

Sending Invitations

One way to get people to visit your site is to invite them via email. You can do this via:

- The Invite button at the bottom of the topic.
- The Invite area on your profile page.

The invite area on your profile page also includes advanced Staff methods of sending bulk invites, and inviting users into groups.

Maintenance

- One CPU and 1GB of memory, with swap, is the minimum for a basic Discourse community. As your community grows you may need more memory or CPU resources.
- Our Docker container install is the only one we officially support. It guarantees easy updates, and all recommended optimizations from the Discourse team.
- You should get an email notification when new versions of Discourse are released. To update your instance via our easy one click upgrade process, visit `/admin/upgrade`.
- Some other things you might eventually want to set up:
 - Automatic daily backups
 - HTTPS support
 - Content Delivery Network support
 - Reply via Email
 - Import and Export your data
 - Change the domain name
 - Multiple Discourse instances on the same server
 - Import old content from vBulletin, PHPbb, Vanilla, Drupal, BBPress, etc
 - A firewall on your server? Configure firewall.
 - A user friendly offline page when rebuilding or upgrading?
 - Embed Discourse in your WordPress install, or on your static HTML site

Need more Help?

For more assistance on configuring and running your Discourse forum, see meta.discourse.org.

Have suggestions to improve or update this guide? Submit a pull request.