

Growing a Collaborative Online Community

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*by* Cameron Cantrell, Sinead Flanagan, Joseph Moutinho, Natalie Toomey

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Report Submitted to:  
Advisors Karen Oates and Guillermo Salazar  
Sponsor Ole Kassow, Cycling Without Age



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## **Abstract**

Cycling Without Age (CWA) transitioned to its digital Community of Practice (COP), The Hood, from an outdated platform. An effective COP benefits from a well-defined governance structure and a flexible change management plan to encourage productive use of the platform throughout the community. Through communications with the platform's administrators and moderators, this project assisted CWA's transition by effectively introducing and planning for the sustainable operation of The Hood. This project also provided recommendations to support the COP's future growth.

## Acknowledgements

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## **Executive Summary**

The nonprofit organization, Cycling Without Age (CWA), founded by Ole Kassow in 2012, aims to reintroduce the elderly or those with limited mobility to the joy of bicycle riding. As the CWA vision rapidly increases its reach around the world, it is becoming necessary to find opportunities to share information between volunteers in an effective and accessible manner. CWA previously used an online platform, Podio, to communicate between its executive team in Copenhagen and its globally-based chapters. Podio provided a well-used channel of communication for CWA for seven years, but recently lost its ability to facilitate effective knowledge sharing due to the excess of conversational noise that resulted from a build-up of unregulated and decentralized discussions. Therefore, a new platform was created, called The Hood, which is structured as a digital community of practice (COP).

Communities of practice help niche communities grow their engagement by providing a structured space for all members to exchange knowledge and ideas about a shared passion. The Hood's organization as a community of practice invites this type of collaboration among CWA members located around the world. Productive knowledge sharing and engagement within the COP are best encouraged when the platform has a defined governance structure and a well-developed change management plan.

A clearly defined governance of the community of practice is necessary for successful knowledge sharing, as structure provides a balance of freedom and organization to user engagement. When users have an element of freedom to engage with one another on the digital COP, a natural flow of conversation develops that allows users to learn from each other's knowledge. This may be regulated with an element of control from the platform moderators, who ensure that the conversational freedom does not lead to disorganization. It is important that the users know how this balance is established, which may be communicated to them through definitive platform guidelines.

Transitioning from one operational platform to a digital community of practice presents the challenge of properly introducing the new platform in a way that will encourage users to effectively adapt to it. This transition requires careful consideration

and planning, which can be effectively based in principles of change management. John Kotter's eight steps for sustainable change were developed as a conceptual tool to implement, monitor, and strengthen such transitions. Supplementing these eight steps with contextual expertise from the niche community helps to develop a change management plan for the unique transition.

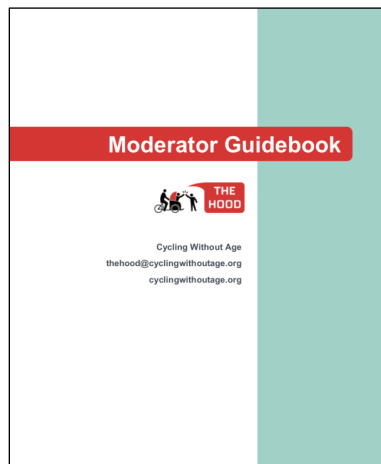
To define the guidelines of The Hood and develop the change management plan for the transition to it, the goal of this project was to assist Cycling Without Age in effectively introducing and planning for the sustainable operation of The Hood by improving its governance and encouraging its use in the CWA community. In order to provide this support, the following two objectives were established:

1. Define The Hood's governance practices to establish the community members' roles on The Hood.
2. Develop a change management plan to smoothly transition Podio users to The Hood as well as tools to implement this plan.

In order to prevent redundant and cluttering activity within The Hood, this project interviewed Maren Warming, the head administrator of The Hood, to inform the development of moderator guidelines. Following this, a workshop was hosted with The Hood's moderators to construct platform-use guidelines for average users of The Hood. In addition, an effective change management plan was developed to facilitate a smooth and successful transition from Podio to The Hood. This plan drew from the change management steps outlined by Kotter, and was supplemented with an interview from Veronica Brandstrader, part of WPI's change management office, and an interview with Maren Warming. Finally, this project developed tools to support the implementation of the change management steps that are important for The Hood's future operations.

The interview with Warming to inform the development of moderator guidelines focused on how to define the role of moderators so that the platform is self-sustaining within the community. The results of this interview were related to protocols for regulating content, expected behaviors when interacting with users, and ways in which the moderators can be supported by administrators. These results were directly

incorporated into the content and format of the moderator guidelines. The guidelines were formatted into a visual Welcome Video and a Guidebook, to personally welcome moderators to The Hood and provide them with a clear description of their role. Below is the front cover of the Moderator Guidebook.



**Front Cover of Moderator Guidebook**

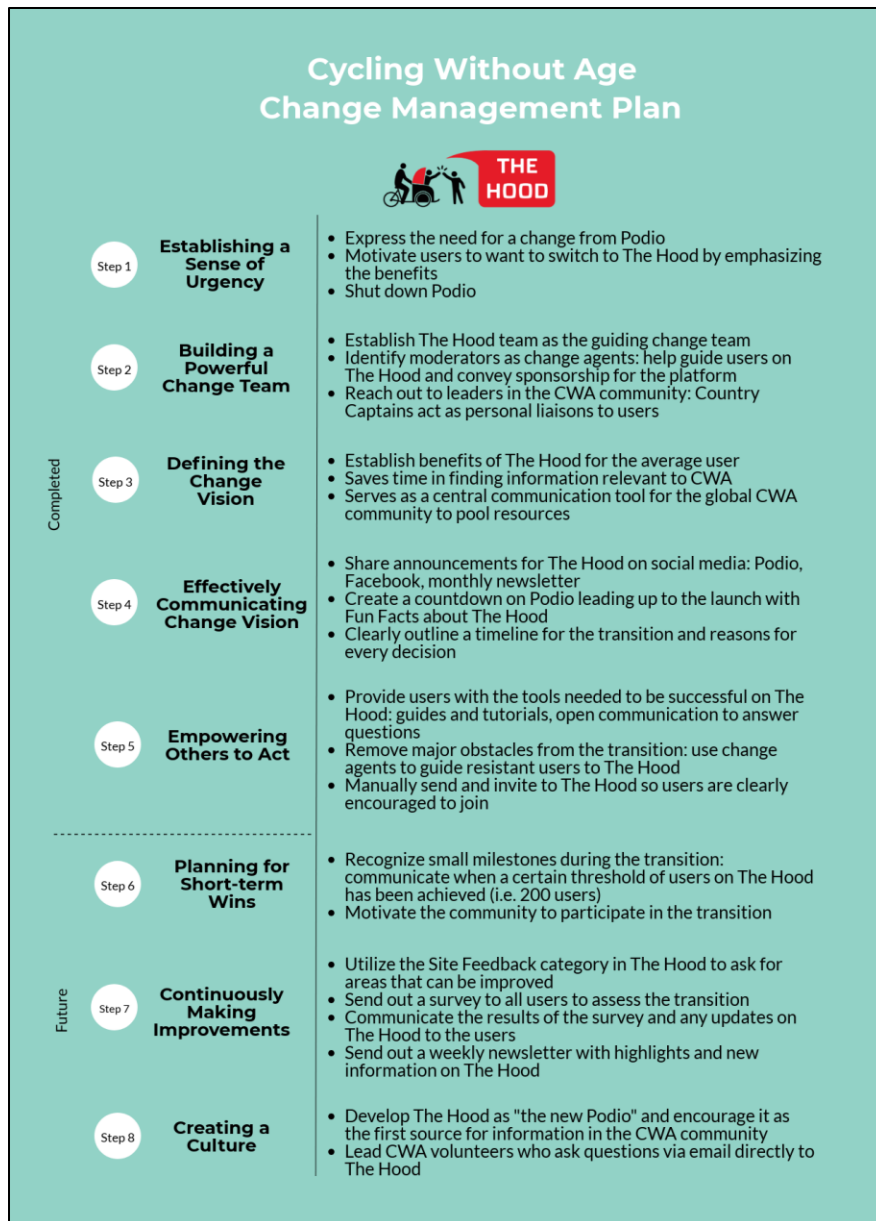
The workshop with moderators to inform the development of user guidelines focused on expectations for how users interact with The Hood and how to communicate these expectations. The results of this interview included positive feedback on The Hood, suggested mediums for presenting the user guidelines, and high-priority content to include in the user guidelines. These results were similarly incorporated into the content and format of the user guidelines. In particular, the guidelines were designed to accommodate multiple learning styles, and thus took the form of a User Tutorial Video, a written summary of this Video, and materials for interactive user Training Sessions. The start of the User Tutorial Video can be seen in the figure below.



**First Frame of User Tutorial Video, as Posted on YouTube**

The interview with Brandstrader and the interview with Warming informed the development of an eight-step Change Management Plan to transition the CWA community from Podio to The Hood. The interview with Brandstrader specifically helped adapt Kotter's eight steps to transitioning online platforms, producing results focused on identifying change agents, deploying an open-ended survey, and planning proactive communications with users. The interview with Warming specifically helped adapt these eight steps to CWA's community, and produced action items for each of Kotter's eight steps. These results were directly incorporated into the content of each step in the eight-step Change Management Plan. The aforementioned workshop conducted with the moderators of The Hood also informed the plan, as the moderators offered feedback on communication efforts done prior to the workshop. The Plan was designed to be sustainable and flexible so that it accommodated potential delays in the launch date. An infographic displaying the Change Management Plan can be seen below.

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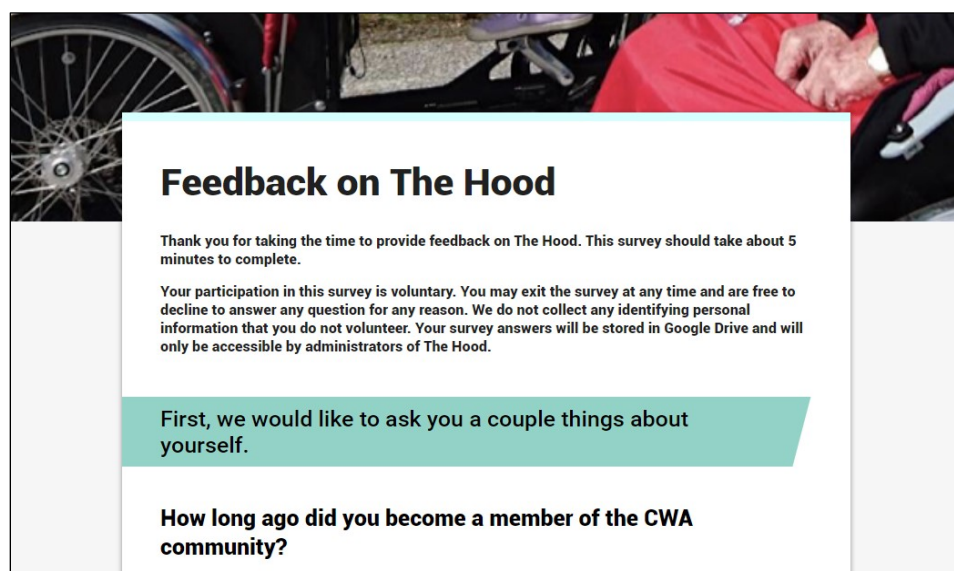


### The Change Management Plan Developed for The Hood

To increase the Change Plan's sustainability, tools to support the steps that were dependent on the launch of The Hood were developed. Based on the results from the interview with Brandstrader, the tool for making continuous improvements would be a survey and an interpretive tool for the survey results. To inform the development of the survey and interpretive tool, the tool for planning short-term wins, and the tool for creating a culture, Warming was interviewed a third time. The main results of this interview were primarily related to the content of each tool, in addition to preferences for



the structure of the survey. These results were directly incorporated into the design and content of the three tools: Administrator Protocols for Planning Short-term Wins, a Survey and Interpretive Tool for Making Continuous Improvements, and Moderator Protocols for Creating a Culture. A screen capture of the first page of the Survey is shown below.



### **Introduction of Survey for Making Continuous Improvements**

In summary, the deliverables developed to be utilized by Cycling Without Age for the transition to The Hood were: a Moderator Guidebook, a Moderator Welcome Video, a User Tutorial Video, Training Session Materials, an eight-step Change Management Plan, Administrator Protocols for Planning Short-term Wins, a Survey and Interpretive Tool for Making Continuous Improvements, and Moderator Protocols for Creating a Culture.

The Moderator Guidebook detailed the responsibilities of being a moderator and protocols to fulfill certain responsibilities, and the Moderator Welcome Video described these topics in a manner that emphasized the overall role of moderator relative to the CWA community. The Guidebook and Welcome Video represent a clear definition of the role of moderators and supported both the community members that hold the role as well as the community members who can benefit from these moderators. This project

recommends that the CWA executive team reviews the Guidebook and Welcome Video periodically and adjust them as necessary.

The User Tutorial Video featured a walk-through of how to perform different functions in The Hood common to the role of users, and the Training Session Materials generalized this walk-through so that an administrator of The Hood would be able to host a live, personalized version with any interested users. The Video and Training Session Materials represent a clear definition of the role of users and addressed the previous lack of user guidelines by advising all users of how The Hood is intended to be used in the community. This project recommends administrators of The Hood offer training sessions that use these materials on a monthly basis or as-needed.

The Change Management Plan included action items for eight steps to support the transition to and sustainable operation of The Hood. These items were developed to be flexible and adapt to the progress of the transition. The first five steps of the Plan that were completed in preparation of the launch of The Hood were implemented to successfully introduce the new platform to the community. The Plan ensured open communication with users, regarding aspects such as the purpose of The Hood and the timeline of the launch. The Change Plan represented a clear and effective strategy to transition to The Hood.

The tools developed to implement the remaining three steps of the Plan, which were dependent on The Hood's launch, were intended to enable the sustainable operation of The Hood upon the completion of this study. The Administrator Protocols detailed step-by-step directions for celebrating certain short-term wins. The Survey and Interpretive Tool focused on measuring expectations for improving The Hood. Finally, the Moderator Protocols included step-by-step directions for creating specific components of a culture around The Hood. These tools represent easy-to-use mechanisms to sustain The Hood.

This project recommends administrators of The Hood implement the suggested protocols for short-term wins and creating a culture, and periodically review these protocols to add new protocols as needed. This project also recommends administrators

of The Hood release the Survey to all users, communicate the results of the Survey, and explain any action items that will be completed based on the Survey results. Finally, this project recommends administrators of The Hood encourage and directly address additional feedback from users by utilizing the Site Feedback category on The Hood. Finally, as moderators play a crucial role in many of these recommendations and the future of The Hood overall, this project recommends administrators of The Hood develop a plan for encouraging and assessing moderator activity in order to keep moderators motivated and present on The Hood.

With the administrator's utilization of the deliverables and completion of the suggested recommendations, The Hood will flourish as a sustainable resource for all CWA affiliates and will continue to grow as an online collaborative community.

# Authorship

<u>Section</u>	<u>Main Author</u>
<b>Introduction</b>	Sinead Flanagan, Joseph Moutinho
<b>Background</b>	
The Use of Digital Communities of Practice to Expand Nonprofit Efforts	Cameron Cantrell
Strategies for the Successful Governance of Digital Communities of Practice	Natalie Toomey
Transitioning to Digital Communities of Practice Utilizing Change Management Strategies	Sinead Flanagan, Joseph Moutinho
Growing a Collaborative Online Community	Sinead Flanagan
<b>Methodology</b>	
Define The Hood's Governance Practices	Natalie Toomey
Develop a Change Management Plan and Implementation Tools	Cameron Cantrell, Sinead Flanagan, Joseph Moutinho
<b>Define The Hood's Governance Practices</b>	
Interview with Warming to Define Moderator Guidelines for The Hood	Cameron Cantrell, Natalie Toomey
Moderator Guidebook and Welcome Video for Moderators of The Hood	Natalie Toomey
Workshop with Moderators to Define User Guidelines for The Hood	Cameron Cantrell, Natalie Toomey
Tutorial Video and Training Session Materials for Users of The Hood	Natalie Toomey

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<b><u>Section</u></b>	<b><u>Main Author</u></b>
<b>Develop a Change Management Plan and Implementation Tools</b>	
Interview with Brandstrader and Interview with Warming to Develop Change Management Plan	Sinead Flanagan, Joseph Moutinho
Eight-Step Change Management Plan for CWA	Sinead Flanagan, Joseph Moutinho
Interview with Warming to Develop Implementation Tools	Cameron Cantrell
Tools to Implement Change Management Plan	Cameron Cantrell, Sinead Flanagan
<b>Conclusions and Recommendations</b>	
Evidence of The Hood's Effective Introduction	All team members
Planning for The Hood's Sustainable Operation through Deliverables and Future Recommendations	All team members

All team members contributed to editing in all sections and final report reviews.

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# 1 Introduction

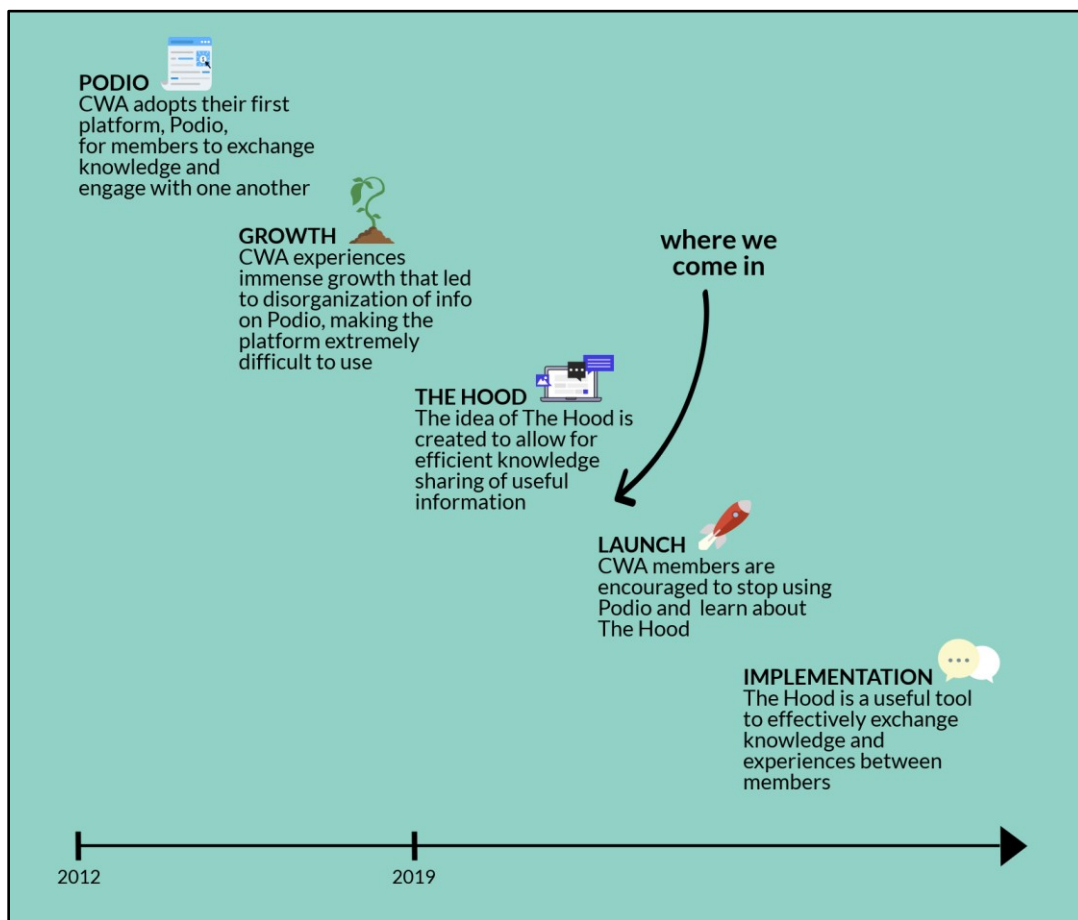
The organization, Cycling Without Age (CWA), founded by Ole Kassow in 2012, aims to reintroduce the elderly or those with limited mobility to the joy of bicycle riding. By facilitating free, volunteer-driven trishaw rides, the elderly is able to get outside more and intergenerational relationships are better able to blossom, connecting the larger community. This idea has proven very popular and affiliates are continuously creating new chapters, with 1,200 active chapters globally, spanning 40 countries (Cycling Without Age, 2017). As the CWA vision rapidly increases its reach around the world, it becomes necessary to find opportunities to share information in an effective and accessible manner.

The use of online platforms as a means of knowledge sharing within an organization is becoming more crucial in a technology-driven world. Global communication via a unique platform is often the only way for an organization's members to connect with each other and ask questions related to their niche community. A proper structure and organization for the platform is necessary to navigate through an overwhelming amount of discussion, as important questions and answers may get lost in the message feed, making it difficult for platform users to determine if information is significant or irrelevant (Wenger-Trayner, E. & Wenger-Trayner, B., 2015). Evidence indicates that organizations wishing to effectively pool their members' knowledge and experiences should structure their online platform as a community of practice (COP): an open-source knowledge-sharing network, where individuals with a common interest can share, learn, and grow as a group (Wenger-Trayner et al., 2015).

Cycling Without Age has previously used an online platform (Podio) for affiliates of the organization to collaborate and connect with one another. The online platform is also used for the executive team in Copenhagen (referred to as the Hub) to communicate with the chapters. Podio provided a well-used channel of communication for CWA. However, Podio recently became cumbersome, difficult to navigate, and in need of significant revisions in order to facilitate effective knowledge sharing within the CWA community (Finnegan, Liang, Longo, & Waskowicz, 2018). Therefore, a new

platform was created, called The Hood, that was designed as a digital community of practice. The digital COP incorporated organizational elements such as introducing the role of moderators and defining the various roles on the platform. The transition to The Hood required significant effort to limit resistance caused by the change and to assist users in effectively adapting to the new platform. Evidence indicates that if this effort takes the form of a change management plan, users will successfully migrate from Podio to The Hood. By focusing on the phases of the transition process, a change management plan eases initial resistance from users and sustains long-lasting change (Kotter, 2007).

The Hood was launched April 12, 2019. For the complete evolution of CWA's online platform, see Figure 1.



**Figure 1: Evolution of CWA's Online Platform**

The goal of this project was to assist Cycling Without Age to effectively introduce and plan for the sustainable operation of their global digital community of practice, The Hood, by improving its governance and encouraging its use in the CWA community. Through a collaborative effort with platform administrators and moderators, the roles of moderators and users in The Hood were defined and a change management plan was developed. Once the platform was introduced to the CWA community, The Hood's growth was supported by the development of tools to implement the sustainable future steps of the change management plan.

## **2 Background**

This study was based on three primary areas of published literature: the application of digital communities of practice in the nonprofit sector, strategies to govern online platforms, and principles of change management relevant to transitioning into digital communities of practice.

### **2.1 The Use of Digital Communities of Practice to Expand Nonprofit Efforts**

The concept of a “community of practice” (COP) was developed by anthropologist Jean Lave and pedagogist Etienne Wenger-Trayner in 1998. A COP is defined as a group of people who develop their shared passion by interacting with other community members (e.g., asking questions, sharing experiences, coordinating work, and championing each other’s successes) (Wenger-Trayner et al., 2015). Successful COPs have respectful members, accurate and well-distributed shared information, and projects that are collaborated on in their designated spaces (Finnegan et al., 2018).

Communities of practice that operate through digital platforms allow niche communities to blossom across physical geographies and social cultures, enabling people to gather online to facilitate extended communication. In his seminal work, Wenger-Trayner argued for the community value that COPs unlock by utilizing modern technologies (2001, as cited by Rosenbaum & Shachaf, 2010). COPs can take forms so diverse that the average Internet user has likely engaged with a digital community of practice without realizing it (Wenger-Trayner 2001, as cited by Rosenbaum & Shachaf, 2010). One common example of a digital COP is a question and answer (Q&A) community, e.g., Yahoo! Answers (Rosenbaum & Shachaf, 2010). The traditional feelings of reciprocity, trust, and belonging associated with a COP are still present in a digital, more informal setting (Gilbert, 2016).

Digital platforms are increasingly valuable to nonprofits as the digital marketplace of ideas allows the nonprofit to grow on scales that would not be feasible in a physical forum (Anderson, 2004; Goncharenko, 2018). By adopting a decentralized structure of

the digital platform, which is achievable with a digital COP, the organization can continue to expand without burdening its personnel (Finnegan et al., 2018). Thus, niche communities increase their potential for growth significantly by transitioning to digital operations.

There are challenges to relying on digital communities of practice, primarily when the platform's users are volunteers for a nonprofit. Such volunteers are not required to engage with the platform, so their COP may not have consistent or useful levels of engagement (Wenger & Snyder, 2000; Ruta, 2005). As such, the digital COP benefits from clearly defined governance practices to encourage productive knowledge sharing.

## **2.2 Strategies for the Successful Governance of Digital Communities of Practice**

As there are challenges associated with implementing a digital community of practice, many strategies can be employed to ensure its success, including establishing a flow of ideas that are regulated by a governance structure and platform administrators. COPs are most likely to flourish when there is open space for members to share their thoughts and experiences. Users of a COP appreciate the opportunity to share their knowledge with the intention of feeling like they are contributing to the community and are likely to benefit in return. Through the platform, participants are able to manage and organize their own ideas, and receive validation from others (Razmerita, Kirchner, & Nabeth, 2013).

It is encouraged that digital COPs give an element of freedom to their users to engage with one another in order to flow with changes of the community and profit from all members' knowledge. This fluidity is defined by shifting boundaries and pressing topics that all support and stimulate the highest level of knowledge sharing (Faraj, Jarvenpaa, & Majchrzak, 2011). In a study that tracked social media posts from 36 nonprofits, almost all of the nonprofits adversely employed a one-way communication model (e.g., simple public information announcements) that lacked productive levels of engagement (Cho, Schweickart, & Haase, 2014). Low engagement is damaging to the

success of early-stage COPs, as they need input from all types of users to determine where to put their focus and how to grow in the most beneficial direction. Evidence indicates that when organizations implement a two-way intercommunication model, members are inspired to engage with each other, so the users can learn and profit from one another's experiences. This intercommunication helps negotiate, resolve conflict, and promote mutual benefits between parties. Users need to be incentivized with resources, such as sharing and commenting features, that allow them to reach this natural conversational fluidity. Members feel valued and encouraged to add their voices to the COP's larger conversations when administrators allow them to engage in high levels of interaction on their platforms (Cho et al., 2014).

Even though this freedom and fluidity is crucial, offering complete freedom to users may lead to disorganization and an overload of information to the point where the knowledge shared is no longer useful. If administrators allow users to post with complete freedom, COPs can become over-crowded with posts and the relevant information can be lost among redundant or incorrect comments (Peregrin, 2016). To address this challenge, evidence indicates that the COP's administrators should maintain some level of control. Scholars recommend that the administering organization guide collaborative COP participation by continuously informing users of the usefulness, achievements, and directions of the COP's decisions (Faraj et al., 2011). This can be done through highlighting and making an example of proper conversation in the COP to encourage members to utilize the platform for its intended purpose. Leadership positions can further support the COP by enabling technical support and mitigating community vulnerabilities. Administrators can appoint community leaders, referred to as platform moderators, for an intermediary level of support that removes workload from the uppermost leadership (Wenger-Trayner & Snyder, 2000). These moderators act as an element of organization to manage the conversational fluidity.

In addition to the ongoing control needed to manage the freedom and fluidity of COP engagement, it is beneficial for administrators to develop guidelines in the form of terms of use, tutorials, and/or interactive elements to regulate what, where, and when members post. Scholars suggest that COP administrators clearly and completely outline



the values and topics that they want emphasized on their platform and their preferred mode of knowledge exchange by users (Helberger, Pierson, & Poell, 2017). These are necessary as a means of allocating responsibilities between the administrators, moderators, and the users. It is important that users in a digital COP know that this is their space to exchange knowledge, but also that their engagement will be organized and regulated to a certain extent. To properly inform the users of their expectations and maintain management over the platform, scholars recommend creating tutorials or friendly user manuals (Helberger et al., 2017).

There are various methods available to present guidelines, each of which appeals to users differently. Every person has a preferred “learning style,” i.e., the method that helps them learn at the most productive pace. The main learning styles types are visual, auditory, reading/writing, and kinesthetic (Rolfe & Cheek, 2012). By establishing informative user guidelines that integrate all learning styles, administrators can effectively communicate expectations in mediums that appeal to all users.

### **2.3 Transitioning to Digital Communities of Practice Utilizing Change Management Strategies**

Transitioning from an online platform to a digital community of practice requires careful consideration and planning. Implementing an information technology (IT) change comes with challenges on user attitudes towards the change. Whether the change is introducing a new IT system altogether or in transitioning from one digital COP to another, the affected users may hesitate to adapt the new platform (Ruta, 2005). Change management helps mitigate this resistance from members by managing and ensuring a smooth transition. There are similar overlaps between theories behind IT user acceptance and change management, specifically in defining the content of the change, the context of the change, the process of the change, and the overall outcome (Ruta, 2005). Accounting for these four aspects allows for organizational change management to be adapted to an IT transition.

Broadly combining two major concepts of behavioral change required by users and the continuous managerial efforts throughout the change creates a robust strategy for change management. The first concept is that the implementation effort of any change can be separated into three main phases. These phases are *unfreezing*: making users aware of the change and why it is going to happen, *moving*: introducing users to the new mental and behavioral frameworks that are required for the change, and *refreezing*: helping users internalize the change (Lewin, 1947). The second concept recommends better-defined approaches to successfully manage transition. These approaches include beginning the transition at the leadership level, creating a systematic mechanism of mutual feedback and support between members and leadership, and continuously monitoring transition at different levels (Ferrara, 2013). To combine these concepts, change management can be described as a fusion of communication and training (Brandstrader, 2019).

Successful change management strategies should transparently outline the action steps of the transition process, engage leaders with members throughout the transition process, and allow contingencies for organizational lag that may result from a rocky transition (Ferrara, 2013). These processes of change management are supported by leadership professor John Kotter (2007) who developed a general action plan for organizational change management. This plan outlines eight steps to sustainable change, which can become a conceptual tool to implement, monitor, and strengthen organizational transition. Here they are presented in the traditional eight-step version. These steps have been supplemented with expertise from Veronica Brandstrader, an employee in the Project and Change Management Office at Worcester Polytechnic Institute, to be adapted for transitioning from a digital knowledge network to a digital COP:

1. Establishing a sense of urgency
2. Building a powerful change team
3. Defining the change vision
4. Effectively communicating the vision
5. Empowering others to act
6. Planning for short-term wins

7. Making continuous improvements
8. Creating a culture

### *2.3.1 Establishing a Sense of Urgency*

In announcing the transition, emphasizing urgency communicates the organization's need for a change, as well as the organization's decision that "business as usual is totally unacceptable" (Kotter, 2007). This emphasis can come from detailing the anticipated timeline of the transition and explicit reasons for every decision that is made regarding the change (Brandstrader, 2019). The organization can simultaneously share with its members the need for the transition while also encouraging the benefits and potential for the new platform.

### *2.3.2 Building a Powerful Change Team*

The building of a team to guide the change is critical to ensuring a successful transition. Powerful and committed coalitions are able to oversee the change and effectively lead the effort (Kotter, 2007). The change team is often the organization's managerial personnel but may also include other highly active community members (Ruta, 2005). The change team connects the organization's executive decision-making team and the users of the digital COP, such that they maintain strong communication and trust at all times (Barki & Harwick, 1994). Change agents, intermediary leadership between the change team and the affected users, help to convey sponsorship of the change to the affected users (Brandstrader, 2019).

### *2.3.3 Defining the Change Vision*

The vision for the transition and the new platform helps to clarify the outcome the organization plans to accomplish with the change. Without a direction for the transition and goals for the future of the platform, the transition effort can be lost to those who were not on board. A strong vision definition contains an explanation of how the new platform is beneficial to its users and a reassurance that the platform's implementation will be a positive experience (Kotter, 2007).

### *2.3.4 Effectively Communicating the Vision*

The vision for the transition is typically under-communicated by a factor of ten (Kotter, 2007). Using all possible communication channels makes users aware of the change while also guiding them through the transition. This step acts as unfreezing, such that users are prepared to change their previous behavior and make the transition (Lewing, 1947). The best way to clearly inform the users of the management's team vision for the digital COP is through digital engagement (Baruch, May, & Yu, 2016). A strong campaign strategy is required to maintain user activity and increase new user interest. When launching the new COP, it is important to assess the demographic of users so that administrators are able to target them appropriately (Baruch et al., 2016). The initial contact in the campaigning is the first experience a potential user has and can have a lasting impact on their outlook of the community. It is important for the organization to reach out to previous and potential new users, welcoming the users to the COP, informing the overall goals and objectives of the organization and addressing what is new and improved (O'Phelan, 2018).

### *2.3.5 Empowering Others to Act*

Communicating the vision for the transition to the users is in some ways enough to empower users to act on the change (Kotter, 2007). Removing major obstacles additionally strengthens the effectiveness of this transition and begins the moving step of the change (Lewin, 1947; Kotter, 2007). If the obstacle to a smooth transition is that users are resistant to the change, one method to further guide them is to increase user involvement in the transition and also in the new digital COP. Greater participation fosters a sense of ownership for the users, leading to more positive attitudes about the change (Ruta, 2005). The use of profile badges that recognize users' contributions have shown an effect on the likeliness of a member to increase their participation in the online community (Baruch et al., 2016).

Another method to guide resistant users through the process is to release tutorial materials. Video tutorials can better explain how and why to use the online community, while also creating a stronger connection between the users and upper management.

This leads to the users feeling a sense of confidence and that their contributions affect the community more significantly. It is important for the messages to be well thought out and concise to ensure they are reached by the majority of users (Baruch et al., 2016).

### *2.3.6 Planning for Short-term Wins*

The transition to a digital COP can take time to implement and is continuously an ongoing process. Recognizing and celebrating small milestones helps the change team keep up the momentum of the transition. Additionally, as the initial sense of urgency can begin to decrease as the transition continues, actively creating short-term wins maintains the momentum of the transition and motivates the community to participate in the transition (Kotter, 2007). One such short-term win could be reaching a certain number of users registered on the platform (Brandstrader, 2019)

### *2.3.7 Making Continuous Improvements*

Following the launch of the digital COP, collecting feedback from the users on the platform lets the change team adapt accordingly then share any new progress with the community (Barki & Harwick, 1994). Continuously ensuring the user's feel their input is valued by the organization provides the users with a sense of recognition in the new COP. This can be achieved through continuous short quizzes, surveys, and personal outreach that address the user's needs to actively ask where they feel the platform is lacking, giving the users influence on the structure and organization of the platform (Barki & Hartwick, 1994; Baruch et al., 2016).

Another method to gain feedback from the community is through a structured online survey that users can voluntarily complete and leave their comments on the transition. After the survey data has been analyzed, communications between the change team and the users that outline the results of the survey, as well as how the change team will be addressing the results, will strengthen user confidence in the transition (Brandstrader, 2019). The utilization of a feedback thread in the digital COP could also encourage continuous suggestions on improving the platform (Brandstrader, 2019). Acknowledging the feedback from the platform's users helps to address the

purpose and intended use for the COP so that the users are getting the most out of it. The change team should be open to nontraditional ideas and be enthused by new projects that can further promote the change (Kotter, 2007).

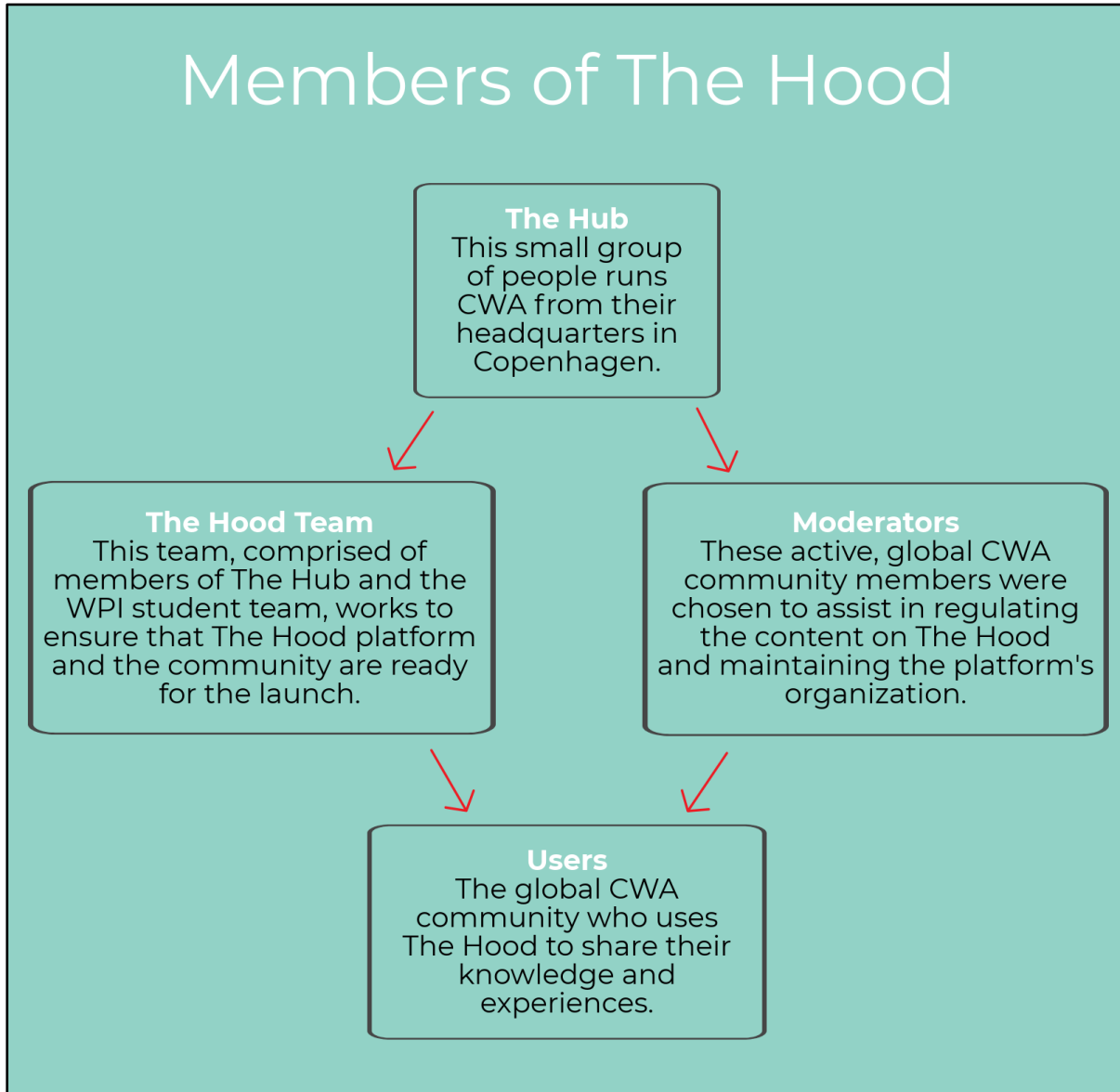
### *2.3.8 Creating a Culture*

At the end of the transition, as the new online community has been established, it is critical to institutionalize the change. This can be thought of as the refreezing step in which users internalize the change through unfamiliar behaviors and patterns (Lewin, 1947). This behavioral change for users can be guided by the managerial team. Scholars recommend the managerial team consciously attempt to vocalize and convey the new approaches for the online community while continuously enforcing and sponsoring the new platform (Kotter, 2007). Additionally, weekly newsletters or emails highlighting activity occurring on the platform connects users with the change while integrating the platform into the organization (Brandstrader, 2019).

## **2.4 Growing a Collaborative Online Community**

As Cycling Without Age transitions to their new online community of practice, The Hood, they require support in governing, launching, and sustaining their platform. To provide this support, this project worked with the Hub (the executive team of CWA in Copenhagen), The Hood team (administrators of The Hood during the transition), and the moderators (users chosen to regulate content on The Hood). For a visualization of these roles, see Figure 2. By collaborating with these groups, this project worked to address The Hood's governance as a beneficial digital community of practice, and to ensure a smooth and effective migration to The Hood with change management principles.

# Members of The Hood



**Figure 2: Definitions of CWA Community Members' Role**

### 3 Methodology

Cycling Without Age transitioned to a digital COP from its outdated platform, Podio. The goal of this project was to assist CWA to effectively introduce and plan for the sustainable operation of their global digital community of practice, The Hood, by improving its governance and encouraging its use in the CWA community.

In order to meet this goal, the following two objectives were established:

1. Define The Hood's governance practices to establish the community members' roles on The Hood.
2. Develop a change management plan to smoothly transition Podio users to The Hood as well as tools to implement this plan.

The methodology used to attain the objectives of this research is displayed in Figure 3. It primarily relied on interviews and workshops to collect opinions, directives and suggestions of the Hub and moderators of The Hood. See Appendix 1 for a detailed chronological description of this project's methodology.

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**Figure 3: Research Methodology**

### **3.1 Define The Hood's Governance Practices**

Cycling Without Age's last platform, Podio, had no specified guidelines for users (Warming, 2019). This created an undesirable environment where users were posting redundant or irrelevant material throughout the platform. In order to prevent this situation in the operation of The Hood, a face-to-face interview with Maren Warming (head administrator of The Hood and member of the executive team, the Hub) was conducted in CWA's Copenhagen office to gain insight of potential governance practices for moderators of the platform. Following this, workshops with the moderators of The Hood were conducted to gain insight on potential plans for instructing users on proper platform-use procedures. The interview with Warming and the workshops with moderators were hosted in semi-structured environments to allow for open conversations from all parties involved. The interview and the workshops were based in a combination of background knowledge about effective COPs and the expertise of the administrators and moderators of The Hood.

#### *3.1.1 Interview with Warming to Define Moderator Guidelines*

As the role of moderators is new to the CWA community, this interview helped to inform the development of moderator guidelines to properly introduce the moderators to The Hood and clearly outline their responsibilities. The questions asked aimed to gather information about potential ideas for moderator guidelines in order to understand the head administrator's expectations for the role. There were also questions regarding potential methods to create effective protocols that would inform moderators of how to edit posts, monitor content, and answer questions on The Hood (for the full list of questions asked during the interview, see Appendix 2). The answers to the questions of this interview were documented through typed notes.

#### *3.1.2 Defining the Moderator Guidelines*

The results of this interview were analyzed to inform the creation of effective moderator guidelines. First, after completion of the interview with Warming, the notes taken were reviewed in order to determine the main results that were established

throughout the conversation. This study was able to conclude which aspects discussed were most important by identifying topics and ideas that Warming expressed interest in, found urgent, or mentioned more than once. From there, these topics and ideas were summarized to list the main results of the interview. These main results assisted in the development of moderator guidelines that strategically incorporated the administration's expectations for moderators. It was determined that two separate guidelines for moderators would be created, which would include the content that was deemed important and would be presented in the formats that Warming believed to be most helpful. These two guidelines consisted of a Welcome Video and a Moderator Guidebook.

The Welcome Video was created by using the video editing software, iMovie, to compile screen-captured videos. Based on what the interview conversation established as the moderators' soft-skilled responsibilities, a short PowerPoint presentation was designed to give a quick overview on the moderators' purpose in The Hood and how they are expected to be respectful, exemplary users. A voice recording was overlaid using iMovie software to narrate the slides and provide a personal touch to the Video. This Video was then uploaded to YouTube to allow for easy access, then the link to the Video was sent by email to all moderators and posted in the moderator-only category on The Hood (for the script of and link to this video, see Appendix 3).

To begin the Moderator Guidebook, a welcome message to moderators of The Hood was created to initially thank them for volunteering and introduce them to their role. Next, knowledge about the functionalities of The Hood was obtained in order to write the detailed step-by-step protocols of how and when to perform certain functions. Finally, moderator areas of focus were established and explained in the Guidebook, detailing how a moderator can sign up for an area of their choosing and what it means to be in charge of an area. The Moderator Guidebook was initially created using Google Docs to allow for collaboration, then converted to a PDF for the official copy. The PDF was delivered to Warming for her final review, and when it was determined that no further changes needed to be made, this PDF version was sent by email to all

moderators and posted in the moderator-only category on The Hood (for the full Guidebook, see Appendix 4).

### *3.1.3 Workshops with Moderators of The Hood to Define User Guidelines*

To conduct these workshops, moderators of The Hood were contacted in order to obtain their insight on key points for the user guidelines. To gather a sample of participants, Warming supplied a list of the nineteen active moderators so that they could all be contacted and have the opportunity to respond if they were willing to participate in a workshop. Based on the overlapping time zones of the moderators, two identical, one-hour long workshops were planned to accommodate all participants. The first call was planned for March 26, 2019 at 10:00am CET, which hosted participants from various countries in Europe. The second call was planned for March 28, 2019 at 1:00pm CET, which hosted participants from Europe and North America.

The moderators were given access to explore The Hood for at least one week before their workshop took place. The moderators who had volunteered received an email a few days prior to the workshop with a reminder of the time of the workshop, a short list of topics that would be discussed in order to ensure that they felt prepared to participate, and instructions on using Google Hangouts. Google Hangouts is an online conference call software chosen based on its frequent use within the CWA community (for the content of this email, see Appendix 5). Warming was also invited to each workshop so that she could provide an administrator's opinion in developing governance strategies for users of The Hood.

Multiple tasks had to be addressed and completed prior to the workshops to ensure that the workshops would run smoothly. A fifteen-minute walkthrough of The Hood was prepared, by learning all about the platform and choreographing what steps a new user would typically go through when they first enter The Hood. A PowerPoint presentation was also created beforehand to display during the workshop, consisting of the questions that would be asked in an easy-to-read format (for the full list of questions asked during the workshops, see Appendix 6). Prior to the workshop, a successful

technology test was performed to assess the effectiveness of Google Hangouts for this purpose.

The questions asked during the workshops were designed to gather the moderators' feedback and collaboratively determine general guidelines for all users of The Hood.

The layout of the workshop was planned as follows:

1. Walkthrough of The Hood via screen-sharing. (Duration: ~15 min)
2. Answer any preliminary questions from participating moderators.  
(Duration: ~5 min)
3. Ask for feedback on the moderators' general experiences on The Hood so far, and which aspects of the platform were confusing to them. (Duration: ~10 min)
4. Move to more specific questions about governance structure, after participants stated they had nothing more to contribute on earlier topics. (Duration: ~20 min)
5. Discuss the best mediums to inform users of these guidelines, such as training videos or manuals, after establishing what moderators believe were the correct guidelines for users. (Duration: ~10 min)

This study documented the answers to these questions by transcribing every participant's contributions individually. Pseudonyms were assigned to maintain anonymity.

### *3.1.4 Defining the User Guidelines*

The results of the workshops were analyzed to create user guidelines with moderator insight. After the completion of both workshops, the transcribed notes taken were reviewed to identify the overarching themes of the workshop conversations. This was done first by determining how many times words were recorded in the notes, excluding prepositions, conjunctions, extent qualifiers, pronouns, and conjugations of the non-connotative verbs "be," "have," "do," and "can." Nouns that appeared in singular and plural cases, or in their verbal form, as well as conjugations of the same verb were grouped together as a singular term. The frequencies of all words were tracked and

sorted using Microsoft Excel. Of the 509 words recorded, words with over a one percent relative frequency were graphed on a chart to visualize how often they were said as compared to other words. From there, four themes emerged that categorized the high-frequency words. These themes aligned with important conversational aspects from the workshops, particularly topics and ideas that the moderators expressed interest in, found urgent, or mentioned more than once. Based on insight from the moderators' ideas and these themes, two user guidelines were created: a Tutorial Video and Training Session Materials.

To create the Tutorial Video, the functions available to users on The Hood and the steps to perform them were identified. Then a script was developed that detailed these step-by-step instructions. Six short videos were recorded based on the script, using screen-capture to allow the user to follow along with the actions performed on The Hood. Each video was edited to ensure that the content was understandable and clearly auditable. iMovie software was utilized to combine these six segments into one cohesive, thirteen-minute-long video, which was then uploaded to YouTube for easy access by users on The Hood. This Video was sent to The Hood team for their final review, and when it was determined that no further changes needed to be made, a welcome message was created on The Hood that directed all new users to this Tutorial Video as soon as they made their account. The post with the Video link on The Hood included a description of the Video sorted by its six components, where each component had a short description so that the users could read about the different functions available to them (for the script of and link to this video, see Appendix 7).

The Training Session Materials were designed to provide The Hood team with resources that allowed them to host multiple video call training sessions for new users of The Hood. These materials consisted of the purpose and goal of the sessions, the script for the sessions, and the choreographed steps for the walkthroughs of The Hood. The script was developed based on the Tutorial Video script and adapted to accommodate the more personal aspects of the training sessions. For example, this adapted script dedicated time for those on the video call to introduce themselves to one another and for the users to ask The Hood team questions. These materials were

reviewed by Warming, and a PDF of this script was sent to The Hood team for them to host these training sessions in the future as a means to personally introduce new users to The Hood (for these materials, see Appendix 8).

### **3.2 Develop a Change Management Plan and Implementation Tools**

A change management plan was developed in order to facilitate a smooth and successful transition from Podio to The Hood. This plan drew from the change management steps outlined by John Kotter, involving: establishing a sense of urgency, building a powerful change team, defining the change vision, effectively communicating the change vision, empowering others to act, planning for short-term wins, making continuous improvements, and creating a culture (Kotter, 2007). Through this project's research, Kotter's steps were supplemented with an interview from Veronica Brandstrader (an employee in the Office of Project and Change Management at WPI) to add her experience with change management for a digital platform. These steps then needed to be informed further to address the change specific to the Cycling Without Age community. To make this addition, Maren Warming was also interviewed regarding Kotter's eight steps.

In order to plan for the implementation of the change management steps that were dependent on The Hood's launch date, tools were designed that support such implementation for The Hood team to use in the future, beyond the scope of this project. This included tools for Kotter's sixth, seventh, and eighth steps. The tool for Kotter's seventh step, making continuous improvements, took the form of a survey as value statements that would productively support the future growth of The Hood are best captured in this form (Handwerker, 2001; Patton et al., 2002). To derive succinct feedback from the survey responses, this tool also included analytical steps to take with the survey results. In order to support the development of this survey, and the tools for Kotter's sixth and eighth steps, Warming was interviewed on the structure and content of these tools.

### *3.2.1 Interview with Brandstrader to Inform Change Management Plan*

To gain a better understanding of change management for online platform transitions, an in-person interview with Brandstrader was held. Brandstrader worked closely with the IT transition between an enterprise-wide online application and has had experience in applying Kotter's change management techniques to digital platforms. The questions asked were intended to gain Brandstrader's perspective on Kotter's eight steps (for the full list of questions asked during the interview, see Appendix 9). The conversation was documented with typed notes, which were reviewed to inform the development of the change management plan.

### *3.2.2 Interview with Warming to Inform Change Management Plan*

An in-person interview with Warming was held in order to determine the components CWA needed in a change management plan to ensure a smooth transition to The Hood. This interview was conducted during the first week of this project and contextualized Kotter's eight steps to CWA's unique global community. The questions of the interview sought to define action items that could be feasibly implemented during the transition by defining each of Kotter's steps and proposing possible methods to carry out each step (for the full list of questions asked during the interview, see Appendix 10). The interview also intended to identify areas of flexibility that could be incorporated into the plan. This conversation was documented with typed notes, which were reviewed to inform the specific steps of the change management plan.

### *3.2.3 Developing a Change Management Plan*

The notes from the interviews with Brandstrader and Warming were reviewed to identify summary points based on the relevancy of the notes to the change management steps and the overall takeaways from the interviews. The notes of both interviews were then synthesized into the Change Plan by combining Kotter's steps with the data from the interviews with Brandstrader and Warming. The action items outlined in the Plan for steps one through five were then carried out by The Hood team during the completion of this project.



### *3.2.4 Interview with Warming to Develop Implementation Tools*

An in-person interview with Warming was held to determine the content and structure of tools needed for the implementation of steps six, seven and eight of the Change Management Plan, which rely on The Hood's launch. A discussion took place on how to complete the action items developed for the sixth and eighth steps by outlining protocols for planning for short terms wins and creating a culture. The discussion also included the matter of the seventh step, which identified general ideas to be included in the survey, as needed for making continuous improvements (for the full list of questions asked during this interview, see Appendix 11). This conversation was documented with typed notes, which were reviewed to inform the development of the three tools.

### *3.2.5 Developing Implementation Tools for the Change Management Plan*

The results of this interview were analyzed to develop implementation tools for planning short-term wins (step six), making continuous improvements (step seven), and creating a culture (step eight) of the Change Management Plan. This study was able to conclude which aspects of the content and structure of the tools were most important by identifying topics and ideas Warming expressed interest in, found urgent, or mentioned more than once. From there, these topics and ideas were summarized to list the main results of the interview. These main results informed the development of tools that fully incorporated both the action items developed for the Change Plan as well as Warming's additional input. It was determined that a set of administrator protocols would be developed to implement the sixth step and a set of moderator protocols would be developed for the eighth step. It was also confirmed that a survey and interpretive tool to implement the seventh step was practical for administrators of The Hood.

The Administrator Protocols and Moderator Protocols were created using similar methods to each other. To begin each, a brief explanation of the tool's value was created to emphasize the protocols' significance. Next, detailed step-by-step protocols to complete the action items were written, with accompanying summaries of the reason for completing each specific action item. Specifically for the Administrator Protocols,

general steps to help administrators identify future action items were explained in order to increase the sustainability of the tool. These protocols were written in Google Docs to facilitate collaboration, then converted to a PDF and delivered to Warming for her final review. The PDF version of the Administrator Protocols was sent by email to administrators and uploaded to the Google Drive for thehood@cyclingswithoutage.org, accessible only to administrators. The PDF version of the Moderator Protocols was sent by email to moderators and uploaded to the moderator-only category on The Hood. For the Administrator Protocols, see Appendix 12; for the Moderator Protocols, see Appendix 13.

Based on what was identified during the interview as the primary purpose of the Survey, the Survey questions were designed and then the Survey itself was created in Google Forms. The Survey was shared with Warming for her final review, and when it was determined that no further changes needed to be made, the Interpretive Tool was developed. Based on what was discussed to be the most useful form of feedback for the Hub and The Hood team, the Interpretive Tool was constructed to input all potential Survey data by programming the Google Sheet that collects that data. The program was written following these steps:

1. An example response was submitted to the Survey to allow for debugging during the program's development.
2. Columns on the response Sheet were created to correspond to the respondent's characteristics and their answers to certain multiple-choice questions.
3. Equations were written in these columns that input both the response data on the respondent's characteristics and certain multiple-choice questions and output an identifier that represented the response's characteristic-multiple choice pairings.
4. Visualizations were created based on these identifiers and set to automatically update with any additional responses.

When it was determined that no further changes needed to be made to the Interpretive Tool, the Form and Sheet were uploaded to the Google Drive account for thehood@cyclingswithoutage.org. For the full survey, see Appendix 14; to access the interpretive tool, see Appendix 15.

## **4 Define The Hood's Governance Practices**

This chapter details the results and subsequent analyses obtained from the interview with Warming and the workshops with moderators in order to create materials for the guidelines for moderators and users of The Hood.

### **4.1 Interview with Warming to Define Moderator Guidelines for The Hood**

The interview with Warming provided opinions about an efficient operation of The Hood to inform the development of the moderator guidelines.

#### *4.1.1 Results from the Interview with Warming to Define Moderator Guidelines*

On March 12, 2019, Warming was interviewed to help finalize the Hub's expectations for the moderators. Through asking appropriate questions and having productive conversations, there were definite outcomes collaboratively established regarding protocols for creating, editing and regulating posts on The Hood. For the full notes taken on this interview, see Appendix 16. There were four main results of this interview:

1. Moderators are expected to regularly check user-made posts throughout The Hood to ensure that the users are sharing relevant information and that the posts are located in the correct category on the platform.
2. Moderators are encouraged to choose an area of focus to be the expert on this category in The Hood.
3. It is important for moderators to be exemplary users on The Hood by inspiring the rest of the community to be active on the platform and respectful to one another.
4. Moderators need encouragement and recognition from administrators to best perform their duties as volunteers.

These four summarized results assisted in creating and distributing moderator guidelines that would best fit the CWA community's needs and understandably outline their role.

## 4.2 Moderator Guidebook and Welcome Video for Moderators of The Hood

The results of this interview were analyzed to be directly incorporated into the content and format of the moderator guidelines.

### 4.2.1 Analyses of Interview with Warming to Define Moderator Guidelines: Moderator Welcome Video

Based on the summarized results of Warming's interview, it was determined that it would be best to create two guidelines for moderators of The Hood to inform them of their roles in the platform: a Moderator Welcome Video and a Moderator Guidebook. The Welcome Video for moderators, specifically focusing on how The Hood can benefit them as Cycling Without Age volunteers, was created as a friendly welcome to the new platform and a visual presentation of their expected softer-skills (for the introductory slide of this Video, see Figure 4).



**Figure 4: Initial Slide of Moderator Welcome Video**

This Video placed additional emphasis on how The Hood can streamline community information in attempts to encourage the moderators to utilize The Hood as platform leaders. With this Video, moderators, who are often chapter leaders, can better understand that they can refer the CWA volunteers in their community to The Hood for resources rather than having to answer affiliate's questions themselves (for a link to and script of the Video, see Appendix 3).

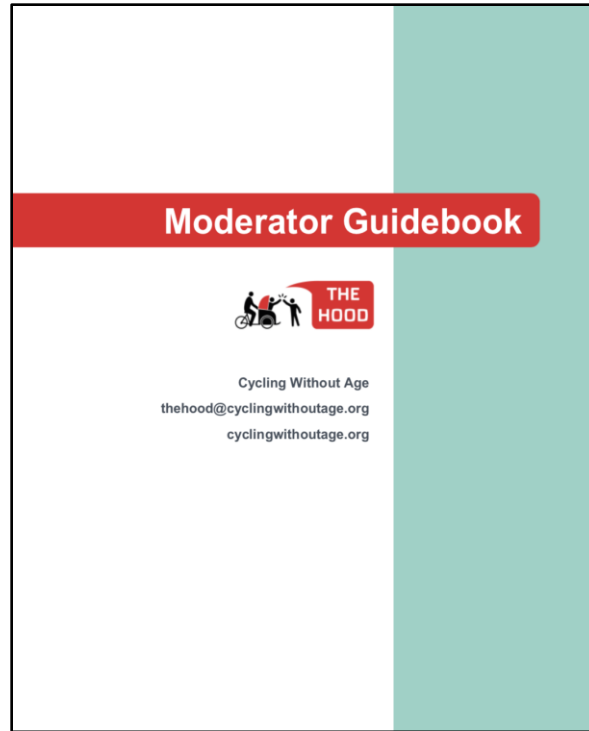
#### *4.2.2 Analyses of Interview with Warming to Define Moderator Guidelines: Moderator Guidebook*

A Guidebook was developed as an effective mean to have all resources for the moderators in one, centralized document. This Guidebook appealed to moderators who prefer reading as their learning style and was created with the ability to be edited in the future by administrators of The Hood. Based on the results from Warming's interview, the Moderator Guidebook:

1. Details the purpose and structure of The Hood to define where moderators fit into this structure.
2. Provides general and specific responsibilities of moderators, such as how to welcome new users and when to edit posts.
3. Explains how moderators can choose different areas of focus to concentrate their activity in on The Hood in order to encourage them to contribute their expertise.

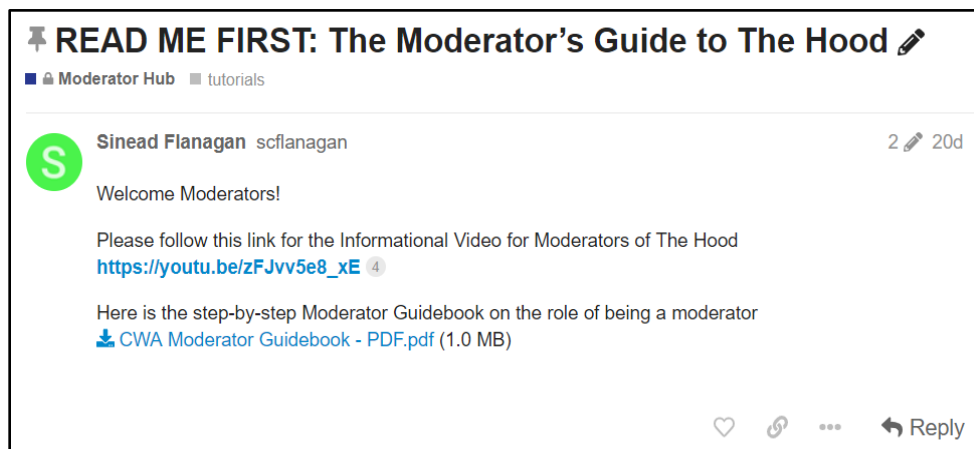
The front page of the Moderator Guidebook can be seen in Figure 5 displaying the title, organization name, and the email that moderators can contact if they encountered any problems. For the full Moderator Guidebook, see Appendix 4. With this Guidebook, moderators only need to reference one resource if they have questions on any aspect of their role.

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**Figure 5: Front Cover of Moderator Guidebook**

Both the Welcome Video and the Moderator Guidebook were distributed to all nineteen moderators over email. They were also posted in the moderator-only category in The Hood to be available as reference to any present and future moderators (for this post, see Figure 6).



**Figure 6: Post in The Hood Containing Welcome Video and Guidebook**

## 4.3 Workshop with Moderators to Define User Guidelines for The Hood

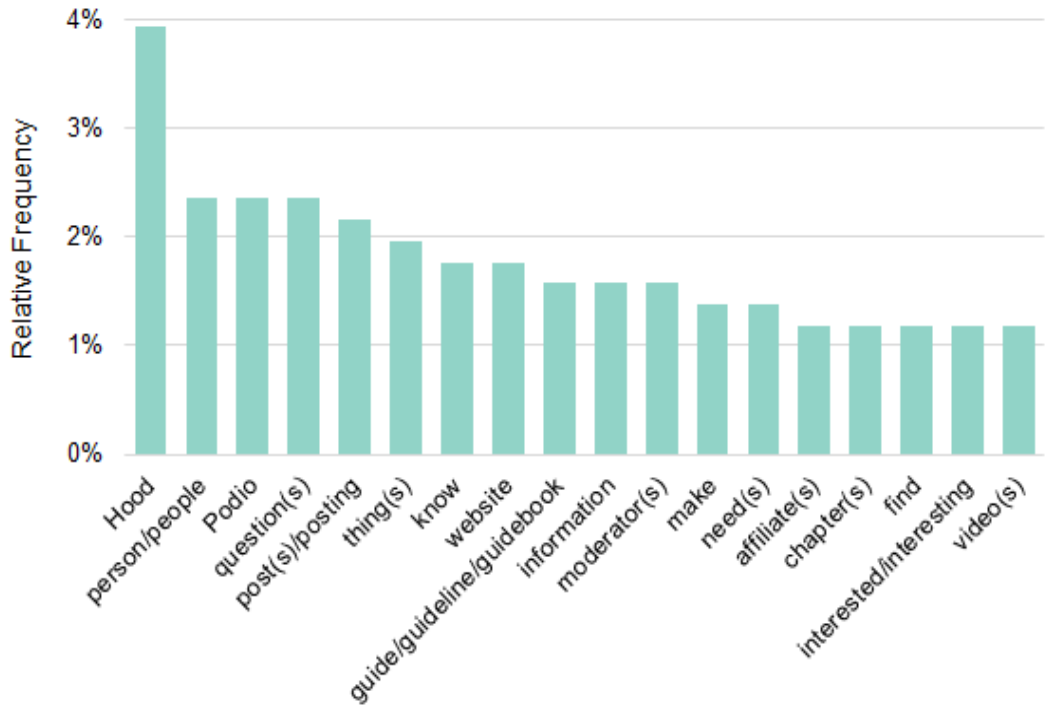
The workshop with moderators provided opinions about expectations for users' roles within the platform to inform the development of user guidelines for The Hood.

### *4.3.1 Results from the Workshop with Moderators of The Hood to Define User Guidelines*

From the nineteen active moderators invited to join the workshop, nine of them (47%) participated. The workshops were conducted in two separate sessions based on the geographical location of the participants. The first workshop on March 26, 2019 had four participants, based in Europe, and the second workshop on March 28, 2019 had five participants, based in North America and Europe. Warming was present in both workshops to provide the perspective of an administrator.

The notes taken on both workshops were combined and reviewed to determine how often certain words were said (for more detailed data on all words mentioned during the workshop, see Appendix 17). For the full notes taken on the first workshop, see Appendix 18; for the notes on the second workshop, see Appendix 19. Eighteen words appeared across all moderator workshop contributions with over 1% relative frequency compared to all 509 words mentioned across all contributions (a word with over 1% relative frequency means it comprised over 1%, or 6 or more words, of the 509 words mentioned across all contributions). The relative frequencies of these eighteen words are displayed in Figure 7.

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**Figure 7: Words in Moderator Feedback, >1% Relative Frequency**

By categorizing these words, four common themes were identified, as displayed in Table 1. These themes helped to determine the overall important components that should be emphasized to prepare the users for The Hood.

**Table 1: Themes from Moderator Feedback**

<b>1. <u>Mediums</u></b>	<b>2. <u>Relevant Players</u></b>	<b>3. <u>Community Values</u></b>	<b>4. <u>Platform Features</u></b>
<ul style="list-style-type: none"> <li>• guide/ guideline/ guidebook</li> <li>• video(s)</li> </ul>	<ul style="list-style-type: none"> <li>• moderator(s)</li> <li>• affiliate(s)</li> <li>• chapter(s)</li> </ul>	<ul style="list-style-type: none"> <li>• person/people</li> <li>• question(s)</li> <li>• thing(s)</li> <li>• know</li> <li>• information</li> <li>• make</li> <li>• need(s)</li> <li>• find</li> <li>• interested/interesting</li> </ul>	<ul style="list-style-type: none"> <li>• Hood</li> <li>• Podio</li> <li>• post(s)/posting</li> <li>• website</li> </ul>



There were six main results of the moderator feedback from the workshops in conjunction with the four themes:

1. Based on the time moderators have spent on The Hood so far, they prefer it to Podio and find it user-friendly.
2. With regards to preparing the wider CWA community for using The Hood, the purpose and value of The Hood should be better highlighted.
3. Certain categories in The Hood need clearer descriptions to mitigate confusion.
4. The user guidelines should be presented in both written text and visual mediums.
5. The user guidelines should be presented with personable elements, as the CWA community has heavily interpersonal values.
6. The differences between The Hood and Podio should be emphasized, and the future roles of each should be clarified.

#### **4.4 Tutorial Video and Training Session Materials for Users of The Hood**

The results and recommendations of these moderators were directly incorporated into the content and format of the user guidelines. These guidelines were delivered in two informative formats, based on the feedback provided by the moderators.

##### *4.4.1 Analyses of Workshop with Moderators of The Hood to Define User Guidelines: User Tutorial Video*

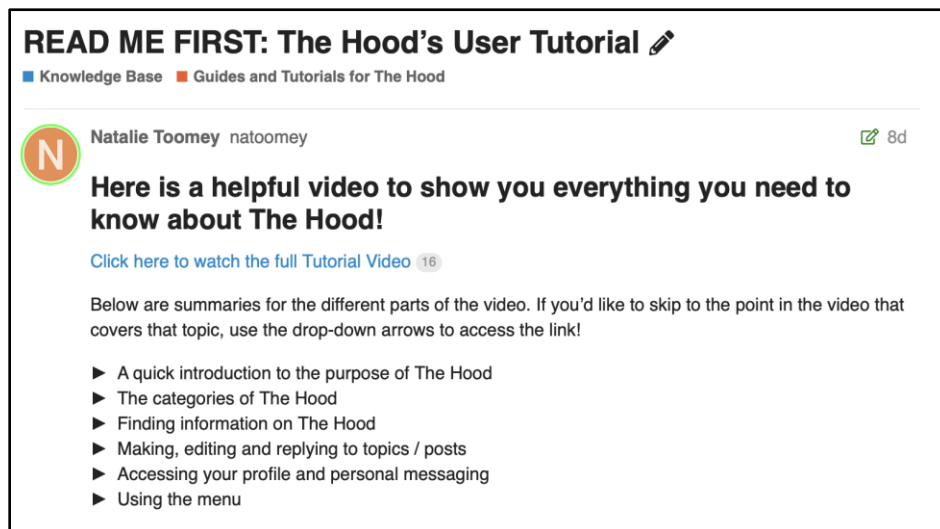
As the first form of user guidelines, a User Tutorial Video was recorded that included a caption with a written summary of the Video to explain different aspects of The Hood (for a screenshot of the beginning of the Video and its YouTube link, see Figure 8). The results from the workshop with moderators reflected that users should have guidelines in the form of written text and a video, as different people have various learning styles. The moderators also helped to advise the content of the User Tutorial Video by emphasizing that most of their confusion came with where The Hood will fit

into their community versus Podio, and how to differentiate between the multiple categories on The Hood. It was decided that both of these aspects would be explained in the User Tutorial Video, along with other important features of The Hood (for the link to and summary of the Video, see Appendix 7).



**Figure 8: First Frame of User Tutorial Video, as Posted on YouTube ([https://youtu.be/\\_Nhs2conG40](https://youtu.be/_Nhs2conG40))**

The link to the User Tutorial Video and its summarizing caption were posted under the “Guides and Tutorials for The Hood” category in The Hood (for a screen shot of this post, see Figure 9).



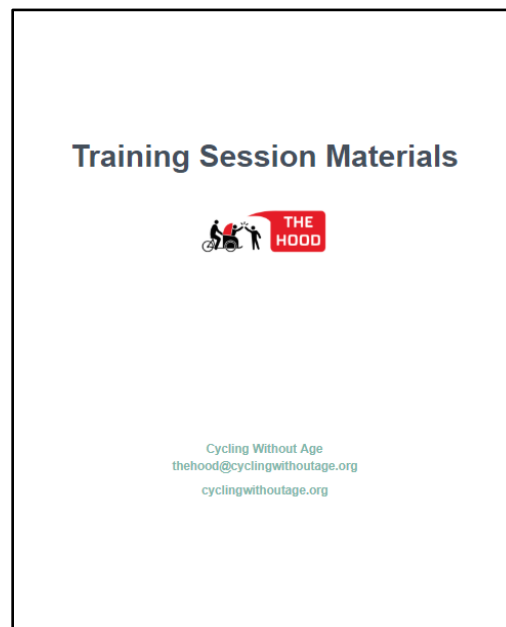
**Figure 9: Post Providing User Tutorial Video in The Hood**

#### *4.4.2 Analyses of Workshop with Moderators of The Hood to Define User Guidelines: Training Session Materials*

A second form of user guidelines included materials for online training sessions for using The Hood. These materials took the form of an outlined script that can be followed by future members of The Hood team. These materials included:

1. A structured walkthrough of The Hood.
2. An explanation of the setup of the platform.
3. Protocols for performing certain functions on The Hood.
4. Specified times to allow users to ask The Hood team questions.

For the full materials, see Appendix 8. The front page of the Training Session Materials can be seen in Figure 10 displaying the title, organization name, and the email that readers can contact if they encountered any problems.



**Figure 10: Front Cover of Training Session Materials**

The results from the workshop with moderators reflected that, as the CWA community has a large emphasis on interpersonal interactions, such training sessions give all users the opportunity to enjoy semi-personal walkthroughs of the platform hosted by members of The Hood team. This additional medium also accommodated

individuals who prefer different learning styles. The results from the moderator workshop reflected that due to different learning styles, some users would be more likely to participate in a training session rather than watch the User Tutorial Video on their own, and that they may appreciate the chance to directly ask The Hood team questions. The materials for these training sessions were developed to be hosted by The Hood team in the future over online video conference calls to accommodate the global participants.

## **5 Develop a Change Management Plan and Implementation Tools**

This chapter presents the results obtained from the interviews with Veronica Brandstrader and Maren Warming. It also presents the subsequent analysis conducted to achieve the second objective of this study in the form of both an eight-step Change Management Plan to transition the CWA community to The Hood and Tools to implement the steps of this Plan that depended on The Hood's launch.

### **5.1 Interview with Brandstrader and Interview with Warming to Develop Change Management Plan**

The purpose of the interviews with Brandstrader and Warming was to develop a change management plan based on John Kotter's steps (Kotter, 2007). These three sources were combined to inform the steps needed in a change management plan specifically for Cycling Without Age's transition from Podio to The Hood.

#### *5.1.1 Results from Interview with Brandstrader to Develop Change Management Plan*

The February 14, 2019 interview with Brandstrader helped inform another perspective on Kotter's change management steps and apply them to a digital platform transition. Brandstrader further explored each of the eight steps and gave examples of strategies that could be used to carry out the change management at CWA (for the full notes taken on this interview, see Appendix 20). There were three main results of this interview:

1. Change agents should help guide resistant users into using The Hood.
2. Proactively communicate ahead of the launch of The Hood and be transparent with the timeline of the transition.
3. An open-ended survey about the transition to The Hood can gather useful feedback.

### *5.1.2 Results from Interview with Warming to Develop Change Management Plan*

On March 14, 2019 Warming participated in an interview to provide further adaptation of Kotter's eight steps. During this interview, Warming provided insight on the direction CWA sought for their new online platform and where CWA would benefit most from Kotter's eight steps (for the full notes taken on this interview, see Appendix 21). There were eight main results of this interview:

1. When establishing a sense of urgency, it was more important to emphasize the value of having a more structured online community, rather than alarming users that Podio will be shut down soon after the launch.
2. The role of moderators is to act as exemplary users, promote sponsorship for the platform, and guide resistant users.
3. The vision for The Hood is that it is a central communication tool that makes it easy to find information the community needs.
4. In effectively communicating the vision and transition to The Hood, specific communication mediums were available to reach the global community. These tools could be utilized differently depending on the progress of the transition. If there are any delays in the launch of The Hood, the community should be aware.
5. User tutorials and profile badges to reward activity could enable users and remove resistance to joining The Hood.
6. Announcing community achievements shortly after the launch could be used to plan for short-term wins.
7. The site feedback category and a survey could ensure continuous improvements are being made.
8. Frame The Hood as "the new Podio" in order to create a culture around using the platform.

## **5.2 Eight-Step Change Management Plan for CWA**

Synthesizing John Kotter's eight change management steps and the results from interviews with Brandstrader and Warming allowed for the development of the Change Management Plan for CWA's transition to The Hood. The workshop conducted with moderators of The Hood also helped to guide the Change Management Plan as moderators could offered feedback on The Hood team's communication efforts. Each of the Plan's steps was developed with specific action items to be carried out by The Hood team. Additionally, this Plan was designed to be sustainable and flexible so that it accommodated potential delays in the launch date.

A summary of the action items for each step of this Plan is provided in an infographic, as seen in Figure 11. The Hood team carried out the action items for the first five steps in preparation of The Hood's launch. The action items for the final three steps, which were dependent on the launch date, were intentionally designed to be carried out in the future.

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# Cycling Without Age Change Management Plan

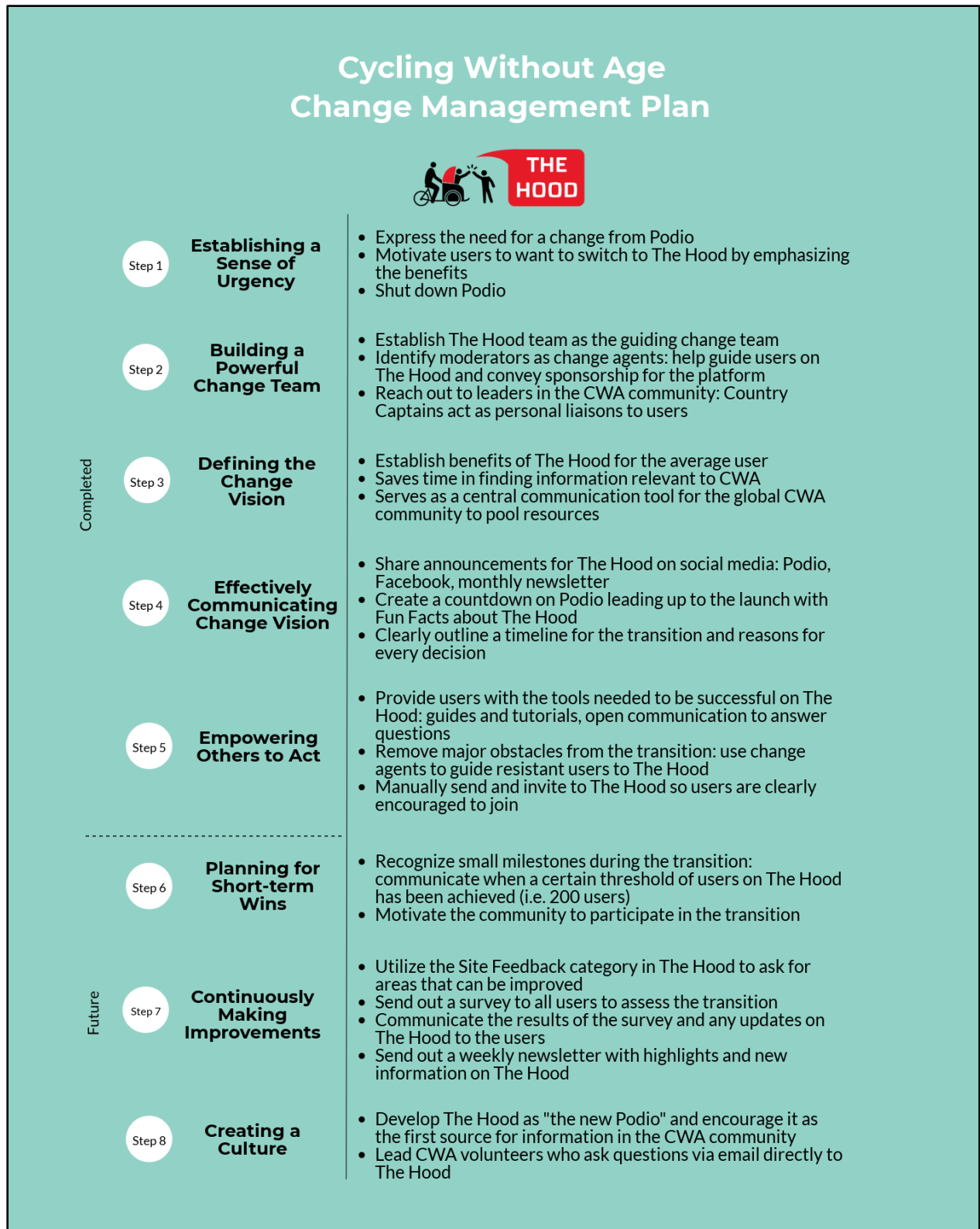


Figure 11: Change Management Plan Developed for The Hood



### 5.2.1 Analyses of Interviews with Brandstrader and Warming to Develop Change Management Plan: Five Pre-Launch Steps

The following five steps (one through five) were planned prior to the launch of The Hood, with completed action items corresponding to each step.

The first step of the Change Plan, *establishing a sense of urgency*, consisted of both expressing to the community why the new platform is necessary and interesting, while also motivating users to join The Hood by shutting down the old platform, Podio. Warming expressed in the interview that it was not necessary to create a “burning platform,” in which everyone will be at a loss after Podio is shut down. Instead, communications should emphasize The Hood and creating excitement for it, so that users are eager to transition. Each strategy appealed to different members of the CWA community, therefore both were used to increase the number of users that transitioned from Podio to The Hood.

Before the transition to the new platform can commence, the second step was *building a powerful change team*, which meant forming the guiding coalition as The Hood team. The Hood team comprised of the administrators of The Hood and the students from WPI. An email, [thehood@cyclingswithoutage.org](mailto:thehood@cyclingswithoutage.org), was created as an official point-of-contact for the team. Based on the suggestions from Brandstrader to establish change agents as part of the change team and the definition of moderators for the platform provided by Warming, the moderators were identified in the Change Plan to fill the role of change agents naturally. Additionally, a moderator who took part in the workshop suggested that, to reach the global community, national leaders of the CWA community be added to the change team as they have a more personal connection with the users who will be on The Hood. To do this, a newsletter was sent to national leaders via email, asking for promotion of The Hood to their local CWA community (for this newsletter, see Figure 12). These national leaders and the moderators acting as change agents endorsed The Hood and maintained sponsorship for the new platform.



Cycling Without Age's new online platform, The Hood, is launching on Friday!

The Hood is the central communication tool for CWA affiliates around the world where members of the community can connect, collaborate, and share useful experiences and information with one another.

We would love to have your help in spreading enthusiasm for the new platform, so please encourage the use of The Hood by reaching out to your CWA community and send them an email about the transition! The email address, [thehood@cyclingswithoutage.org](mailto:thehood@cyclingswithoutage.org), can be used to contact The Hood team if there are any questions.

We can't wait to see your contributions to The Hood and how you are able to inspire your affiliates to contribute as well!

### **Figure 12: Newsletter Sent to CWA's National Leaders**

The *definition of the vision* for The Hood, the third step of the Plan, was already determined by the Hub when the new platform was developed. Defining the vision is an important step for Kotter's change management as it is the driving force for the transition to and the future of the new platform. The vision for The Hood emphasized the benefits of the platform: The Hood was intended to be used as a central communication tool between the CWA community to pool resources together and make it easier for users to find information and save time.

To accomplish the fourth step, *effectively communicating this vision* for The Hood, multiple outlets of communication tools were used by The Hood team to reach the entire CWA community. These tools included the monthly newsletters that are sent out to all CWA community members, the CWA Facebook page and Podio. The communication posts on the Facebook page and newsletter took the form of an announcement to inform the community that a change is occurring. The announcements also clearly expressed why the change is needed, as Kotter recommends, and provided an explanation of the purpose of The Hood. When posting announcements on Podio, The Hood team made posts every day for ten business days leading up to the launch so

the community would be aware that Podio would become inactive shortly after The Hood was introduced to the community. Kotter, Brandstrader, and Warming all stressed that announcements are most effective when they are over-communicated, as people typically need to hear announcements multiple times to build a lasting awareness. Since Podio's feed displays the most recently active posts first, making daily announcements was necessary to ensure that the communication posts were always brought to the users' attention.

Based on Brandstrader's suggestion of transparently communicating major decisions, this fourth step also included the need to outline the timeline for the transition and to give reasons and explanations for every decision that impacts the community (for an example of these communications, see Figure 13). To account for any roadblocks, such as potential delays of the launch, this step included contingencies on how The Hood team would clearly communicate all updates related to the roadblock. Updates about the transition were intended to notify the entire community of the progress of the transition, via Podio and email, as well as the efforts being made to resolve any issues. The content of the updates was positive and explicit in nature.

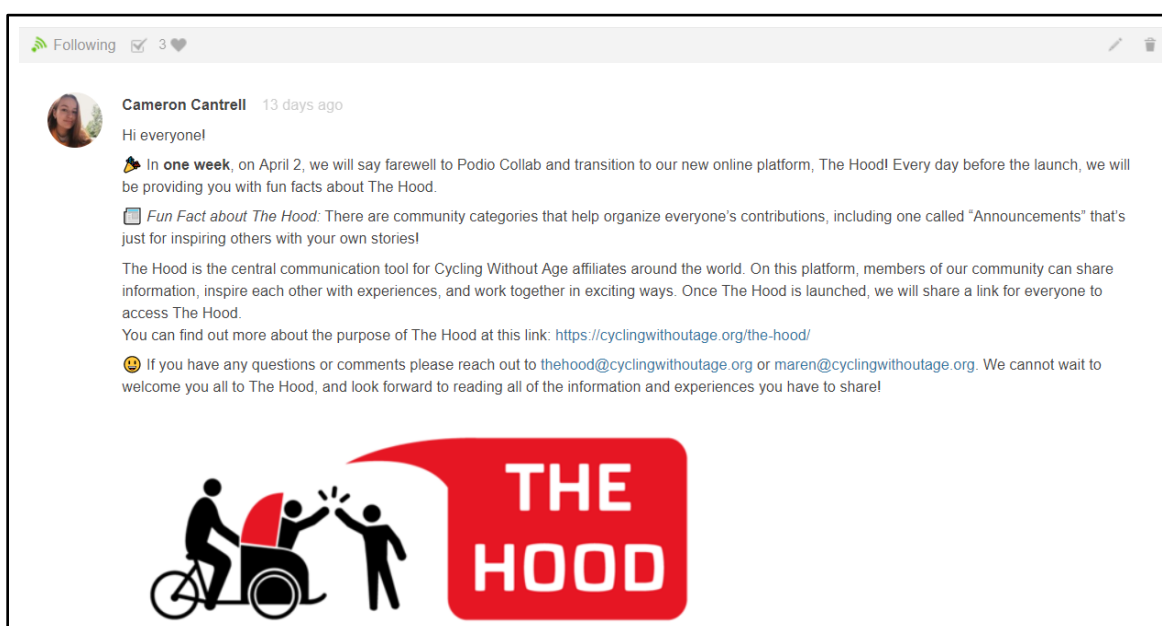


Figure 13: A Communication on Podio Discussing the Transition Timeline

The fifth step was intended to provide users with a sense of confidence on the new platform, thus *empowering users to act in the change*. Users were given the opportunity to create new posts in The Hood, had freedom in the content they shared, and were encouraged to edit any existing posts to add their additional knowledge or contribute with their own experiences. Additionally, new user guides and tutorials were developed to help users have a better understanding of how to operate around the platform and perform basic tasks. The User Tutorial Video was developed as part of this project's effort in defining a governance structure for The Hood and was strongly supported by Warming to be used for empowering users to act in the change. The Video made the transition less daunting for users while removing the obstacle of unfamiliarity with The Hood. Having moderators be change agents in the transition also helped guide resistant users and assist them throughout the transition. Another method of removing obstacles, as recommended by Brandstrader, is by manually emailing an invitation link to everyone in the community for them to create an account on The Hood to eliminate any extra steps for users and confusion during the transition. There is also a badge reward system developed for The Hood, which helps motivate users to continuously perform basic functions such as reading posts, replying to others, and creating new topics.

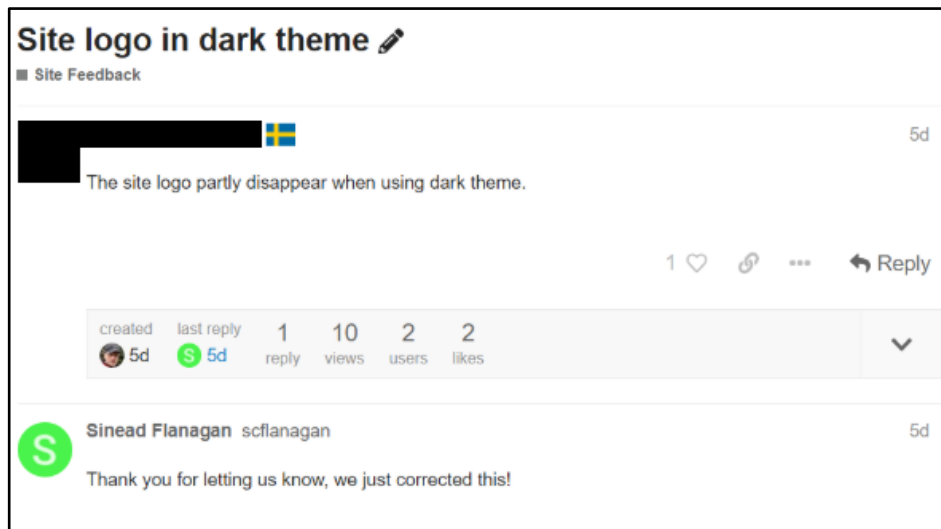
### *5.2.2 Analyses of Interviews with Brandstrader and Warming to Develop Change Management Plan: Three Post-Launch Steps*

The following three steps (six through eight) were planned in anticipation for the launch, with future action items corresponding to each step.

In support of the sixth step, deliberate goals were outlined that would be reached and celebrated in the online community in order to *plan for short-term wins*. These goals correspond to the level of involvement with The Hood by the individuals and the community as a whole, exemplifying and giving recognition to the key contributors. Achieving these milestones is dependent on the launch of The Hood and the user activity. Brandstrader recommended that these small milestones could be when a specific number of users (100, 200, etc.) join The Hood to celebrate the growing population of the platform. By communicating the short-term achievements of the

transition to the entire community, the affiliates who have not yet participated in the transition would be inspired to join.

The seventh step, *making continuous improvements* on the new platform, focused on providing users with two outlets to offer feedback for The Hood and the transition to it. The “Site Feedback” category on The Hood is a place for users to create posts and have a conversation about any changes they would like to see on the platform (for an example of such a conversation, see Figure 14). As suggested by Warming, having members of the change team posting specific questions in the Site Feedback category on a weekly basis would encourage the community to give their input on certain aspects of the platform. To allow for anonymous feedback to be given in a structured format, Brandstrader recommended that an online survey be sent out to the entire CWA community at least two weeks after the launch. From her experience with the WPI online transition, Brandstrader also talked about how the summarized results and any actions being taken by the change team based on the feedback should be released to the community members.



**Figure 14: Example of Feedback being Shared and Addressed in the Site Feedback Category on The Hood**

The eighth and final step, *developing a culture* for using The Hood in the CWA community, requires a long-term effort by the Hub and moderators to encourage people to continuously use the platform. According to Kotter, creating a culture solidifies the

transition and ensures that the change is preserved in the community. When a CWA member is requesting information from the Hub or moderators, Warming proposed they be directed to turn to The Hood as a resource to answer their question. The moderators are the driving force behind the longevity of The Hood platform and are essential in making sure The Hood is self-sustaining. To ensure that there are constantly moderators active on the site, a directory with a list of moderators and their responsibilities was created on The Hood. Moderators can update the directory as needed and users can use it as a resource to connect with moderators if they have any questions or concerns. By communicating the importance to spread the news of the new platform and encouraging people in the CWA community to push others to use the new resource, the use of The Hood will continuously grow within the community.

### **5.3 Interview with Warming to Develop Implementation Tools**

Tools were developed to implement the sixth, seventh, and eighth steps of CWA's change management plan following the launch of The Hood, informed with insight from an interview with Warming. These tools were delivered to The Hood administrators and moderators to assist in continuing a smooth transition after The Hood's launch and in growing The Hood's future operations.

#### *5.3.1 Results of Interview with Warming to Develop Implementation Tools*

On April 12, 2019, Warming was interviewed to formulate how to best carry out the three steps of the Change Management Plan that are dependent on The Hood's launch. In this interview, Warming identified the specific action items in these steps that needed to be further supported (for the full notes taken on this interview, see Appendix 22). There were six main results of this interview:

1. The survey's purpose should be to identify future changes to make in The Hood that will help meet users' needs.
2. The survey questions should include asking the user's preferred learning style.

3. The survey would be most useful if hosted on Google Forms, should include many free-response answer options, and should produce visual results.
4. Short-term wins in The Hood that are meaningful to the community relate to user engagement and should focus more on groups of people rather than individuals.
5. Creating a culture around The Hood depends mostly on framing The Hood as the singular reference tool for the community.
6. All tools to implement the Change Management Plan should include a timeline to carry them out.

## **5.4 Tools to Implement Change Management Plan**

The interview with Warming provided expectations for the structure and content of all tools. Specifically, the interview informed the development of Administrator Protocols to implement the sixth step of the Plan, a Survey and Interpretive Tool to implement the seventh step of the Plan, and Moderator Protocols to implement the eighth step of the Plan.

### *5.4.1 Analyses of Interview with Warming to Develop Implementation Tools: Administrator Protocols*

Administrator Protocols for implementing the sixth step of the Plan, i.e., planning for short-term wins, were developed. This document included:

1. An explanation of the tool's value in planning short-term wins.
2. Protocols for implementing action items related to planning short-term wins.
3. Protocols for identifying future action items related to planning short-term wins.

For a screen shot of the beginning of the Administrator Protocols, see Figure 15. For the full document, see Appendix 12.



**Figure 15: Beginning of Administrator Protocols**

The results from the interview with Warming reflected that any short-term wins should uplift multiple individuals at once, based on their engagement in The Hood. For this reason, the two major protocols involved celebrating moderators' contributions to the platform and user-count milestones focused on the platform's growth. The results from this interview also reflected that the tools should be sustainable and straightforward to implement, so sections were included on how to make future short-term wins successful and how to effectively end the celebration of a short-term win without losing its inspirational qualities.

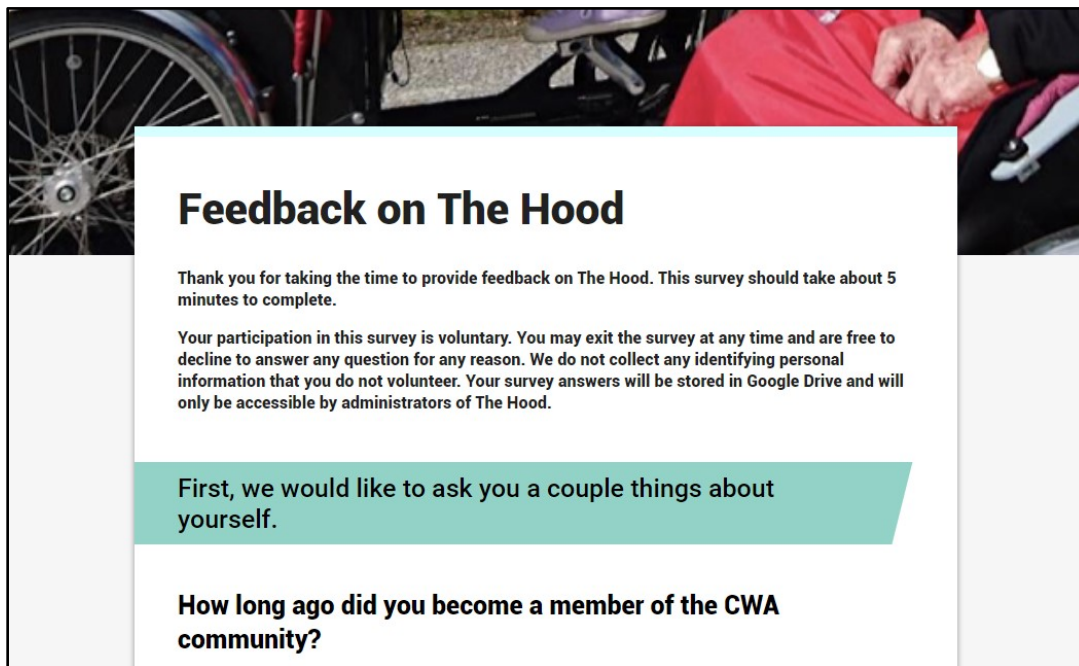
#### *5.4.2 Analyses of Interview with Warming to Develop Implementation Tools: Survey and Interpretive Tool*

A Survey and Interpretive Tool for implementing the seventh step of the plan, i.e., making continuous improvements, were developed. The Survey included questions that asked about:

1. Expectations for The Hood as a community reference tool.
2. Reasons for using The Hood.
3. Opinions on existing guidelines and resources for using The Hood.



For a screen shot of the introduction page to this Survey, see Figure 16. For the Survey's full questions, see Appendix 14.



**Figure 16: Introduction of Survey for Making Continuous Improvements**

The results from the interview with Warming reflected that the Survey should serve to meet users' expectations by identifying future changes to make in The Hood. The Survey included questions that identified the respondent's expectations for the platform and where the respondent thinks these expectations are being met or not being met. The Survey also included questions that identify the respondent's preferences for the presentation of resources for using The Hood, such as guidelines and tutorials. Gaining this feedback ensures that any future tutorials or references, created by The Hood administrators, can cater to the learning styles of the people they serve. The Survey is structured as simple, short, and open-ended to be inviting to the community.

The corresponding Interpretive Tool was developed to increase the value of the results gained from the Survey. After discussing Warming's preferences for gathering and visualizing the Survey responses, it was determined that this Interpretive Tool would be most beneficial if it generates pie charts, as they are simple to comprehend and easy to share with users of The Hood. Additionally, the results from the interview

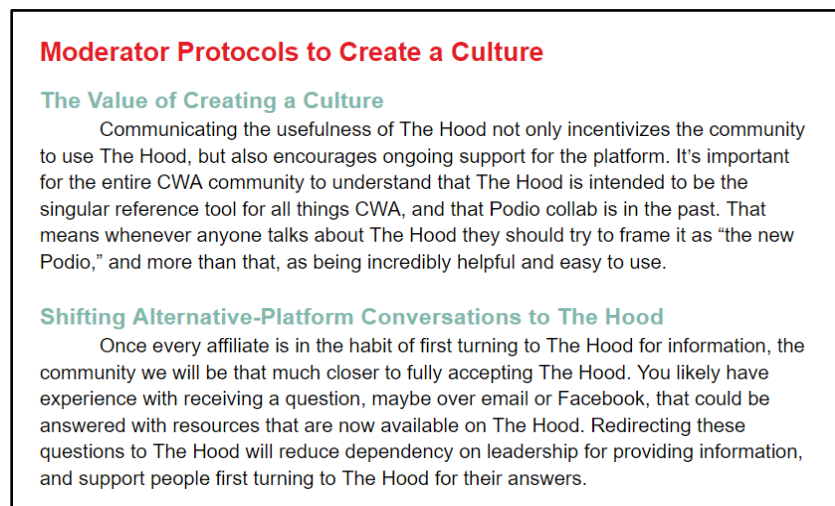
reflected that only certain Survey questions would benefit from this visual feedback style. As such, the Interpretive Tool was constructed to produce pie charts from responses to selected multiple-choice questions (to access the full interpretive tool, see Appendix 15). These pie charts automatically update with any new Survey responses, and sort the answers by the respondent's characteristics, such as how long they have been a member of the CWA community. The Interpretive Tool also automatically highlights any free-response answers that users may have submitted.

#### *5.4.3 Analyses of Interview with Warming to Develop Implementation Tools: Moderator Protocols*

Moderator Protocols for implementing the eighth step of the Plan, i.e., creating a culture, were developed. This document included:

1. An explanation of the tool's value in creating a culture.
2. Protocols for implementing action items related to creating a culture.
3. A decision tree to assist affiliates in determining when they should utilize The Hood versus other community platforms.

For a screen shot of the beginning of the Moderator Protocols, see Figure 17. For the full document, see Appendix 13.



**Figure 17: Beginning of Moderator Protocols**

The results from the interview with Warming reflected that the culture around The Hood should emphasize The Hood's purpose as the singular community reference tool. As such, the two major protocols included shifting conversations from other community platforms to The Hood and explaining to affiliates when to use The Hood. A section of the protocol included a decision tree that helps the reader input what type of content they would like to share and identify which platform is best suited to their needs, allowing for a better understanding of the purpose of The Hood. These protocols support The Hood's purpose as a reference tool without diminishing other types of community engagement.

## **6 Conclusions and Recommendations**

This chapter presents and discusses the extent to which this study achieved its objectives, as well as additional recommendations suggested by this study. To reiterate, this project set out to assist Cycling Without Age to effectively introduce and plan for the sustainable operation of their global digital community of practice, The Hood, by improving its governance and encouraging its use in the CWA community. Two objectives were set to achieve this goal:

1. Define The Hood's governance practices to establish the community members' roles on The Hood.
2. Develop a change management plan to smoothly transition Podio users to The Hood as well as tools to implement this plan.

The following conclusions were drawn from the results obtained and subsequent analyses conducted, using the research methodology, to meet these objectives. The recommendations offered for the future were intended to assist Cycling Without Age in continuously improving The Hood after this project has ended.

### **6.1 Evidence of The Hood's Effective Introduction**

To transition the CWA community to The Hood, the following deliverables were developed: a Moderator Guidebook, a Moderator Welcome Video, a User Tutorial Video, Training Session Materials, an eight-step Change Management Plan, Administrator Protocols for Planning Short-term Wins, a Survey and Interpretive Tool for Making Continuous Improvements, and Moderator Protocols for Creating a Culture. Each of these deliverables supported the effective introduction of The Hood to the CWA community, as their development was informed with insight from The Hood's head administrator and platform moderators.

### *6.1.1 Definition of Moderator Guidelines: Creation of Moderator Guidebook and Welcome Video*

A Welcome Video for Moderators of The Hood was created to explain the purpose of the platform and their role as moderators. To further describe the responsibilities and protocol of being a moderator, a detailed Moderator Guidebook was assembled and distributed to all moderators. Moderators were invited to join The Hood the following day after receiving the Guidebook.

Moderators were not present in Podio, and thus the role was new to the community in The Hood. A clear definition of this role therefore supported not only the community members who hold the role, but also the rest of the community who can benefit from these moderators but may experience confusion from the role's unfamiliarity. Moderators who later participated in the workshop to develop user guidelines discussed their thoughts and opinions on their moderator guidelines. They agreed that they felt supported by both the Moderator Welcome Video and the Guidebook. One participant believed that the Guidebook was "very nicely done" and said it "answered all the questions" they had (for the notes these quotes were taken from, see Appendix 19).

### *6.1.2 Definition of User Guidelines: User Tutorial Video and Training Session Materials*

Moderators were given time to make an account and explore The Hood, as well as the option to participate in this study's online workshops. The moderators who participated in the workshops provided insight on the necessary components of a new user tutorial, which was then analyzed and used to develop the User Tutorial Video and Training Session Materials. This Video was made accessible to all new users who joined The Hood to guide them through the layout and functions of the platform.

As previously mentioned, the lack of outlined user guidelines in Podio was a key downfall of its success. The definition of informed, helpful user guidelines and training sessions therefore addressed this problem by advising all users of how The Hood is intended to be used by the community.

### *6.1.3 Development of a Change Management Plan and Implementation Tools*

After the governance structure for The Hood was defined, the transition to the new platform continued to move forward. To this end, Kotter's eight-step change management plan was studied in attempts to create a change management plan unique to Cycling Without Age. Interviews with Veronica Brandstrader and Maren Warming assisted in contextualizing the development of this Change Management Plan and the three implementation tools to the CWA transition.

Feedback on the Change Plan shows evidence that the Plan supported the introduction of The Hood for the CWA community. Moderators who participated in the workshop to develop user guidelines felt supported in their role as moderators by steps of the Change Plan. One participant particularly liked the post in The Hood detailing who held which roles within the platform, which was completed for step two of the Change Plan (building a powerful change team) and step five (empowering others to act). Another participant enjoyed the "quick" responses from The Hood team, as well as the overall quantity of communications, both completed for step four (effectively communicating the change vision). A third participant found The Hood very "user-friendly" and "definitely better" as a community platform than Podio based on the results of actions items completed for step three (defining the change vision) and step eight (creating a culture) (for the notes these quotes were taken from, see Appendix 18 and Appendix 19).

As evidence that obstacles to engagement were sufficiently removed as the result of action items completed for step five (empowering others to act), 119 individuals watched the User Tutorial Video on YouTube in the first two weeks following The Hood's launch. Additionally, when the launch date of The Hood was delayed unexpectedly for a few days due to a technical administration issue, communications about The Hood with the CWA community remained transparent, enthusiastic, and supportive in regard to this delay. This helped users understand the reasons for the delay and know about information they could spend this extra time reviewing in preparation of joining The Hood and was completed for step four (effectively communicating the change vision) and step five (empowering others to act).

As the first five steps of the Change Plan were carried out throughout the transition, the implementation tools were developed to complete the last three steps of the Change Plan and enable the sustainable operation of The Hood upon the conclusion of this study. The action items developed to plan for short-term wins were analyzed to create step-by-step Administrator Protocols, based on types of short-term wins identified to be worth celebrating in The Hood. The action items developed to make continuous improvements were analyzed to develop a Survey and corresponding Interpretive Tool, based on types of feedback determined to be useful in improving The Hood. This Survey and Interpretive Tool focused on measuring expectations for The Hood as a community reference tool. Finally, the action items developed to create a culture were analyzed to develop step-by-step Moderator Protocols, based on ideas that were significant enough to be incorporated into the culture around The Hood.

The development of a flexible, effective eight-step Change Management Plan and tools to implement the three steps dependent on The Hood's launch therefore addressed obstacles inherent to platform transitions by enabling The Hood team to support the introduction of The Hood as well as The Hood's future growth.

## **6.2 Planning for The Hood's Sustainable Operation through Deliverables and Future Recommendations**

The aforementioned materials primed the CWA community for the operation of The Hood, so that the platform requires minimal contributions or maintenance from the Hub moving forward. This project also provided recommendations for administrators of The Hood to plan for The Hood's sustainable operation.

### *6.2.1 Review Governance and Tutorial Materials*

The Welcome Video, Moderator Guidebook, User Tutorial Video, and Training Session Materials were created to be applicable to all new moderators or users of The Hood, regardless of how far in the future they are utilized. To plan for the case that

updates need to be made, editable versions of the deliverables were provided to administrators of The Hood.

*Recommendation 1:* To periodically review the introductory guiding materials for The Hood and adjust them as necessary.

The materials for the online training sessions were developed so that any administrator of The Hood could host a session. These training sessions are important in making sure that all new users of The Hood are comfortable and confident in joining the platform and be an active member.

*Recommendation 2:* To offer online training sessions to all users to explain the functionalities and organization of the platform on a monthly basis or as needed.

### *6.2.2 Utilize Change Management Plan Implementation Tools*

The Administrator Protocols, Survey and Interpretive tool, and Moderator Protocols were created to support The Hood's sustainability by enabling the implementation of action steps dependent on The Hood's launch. Utilizing these tools helps smoothly continue The Hood's operations and assists its future growth.

The Administrator Protocols for Planning Short-term Wins make it easier for administrators of The Hood to keep pace with The Hood's growth and announce any achievements to the community.

*Recommendation 3:* To implement the suggested protocols for short-term wins, and periodically review these protocols to add new short-term wins.



The Survey and Interpretive Tool for Making Continuous Improvements to The Hood increase the efficiency with which The Hood team can gather feedback on the platform.

*Recommendation 4:* To release the Survey to all users by making the link to the Survey highly visible on Podio, The Hood, and the CWA listserv, and to periodically remind possible respondents of the opportunity to provide feedback on The Hood.

*Recommendation 5:* To communicate the results of the Survey to everyone on The Hood so that users are aware how the overall community feels, and to explain any action items that will be completed based on the Survey results, as well as any feedback from the Survey that cannot be addressed for some reason.

This Survey can be used to continuously gather community opinions on the platform in the future. The Site Feedback category of The Hood is a useful tool for easily collecting users' opinions and suggestions.

*Recommendation 6:* To encourage and directly address feedback from users on The Hood by utilizing the Site Feedback category.

The moderator role was defined to include serving as a change agent for The Hood, and therefore change agents will always be present on the platform. Moderators are fundamental to The Hood as a result of their responsibility to be a positive resource for users, as well as to maintain structure and organization on the platform. To encourage moderators to actively engage in their role in The Hood, they were given the opportunity to choose an area of focus to specialize in and monitor in The Hood. These

crucial functions of the moderator role require support and encouragement moving forward.

*Recommendation 7:* To develop a plan for encouraging and assessing moderator activity in order to keep moderators motivated and present on The Hood.

The Moderator Protocols for Creating a Culture enable moderators to align their communications with users with The Hood team's vision for The Hood.

*Recommendation 8:* To implement the suggested protocols for creating a culture, and periodically review these protocols to add new cultural components.

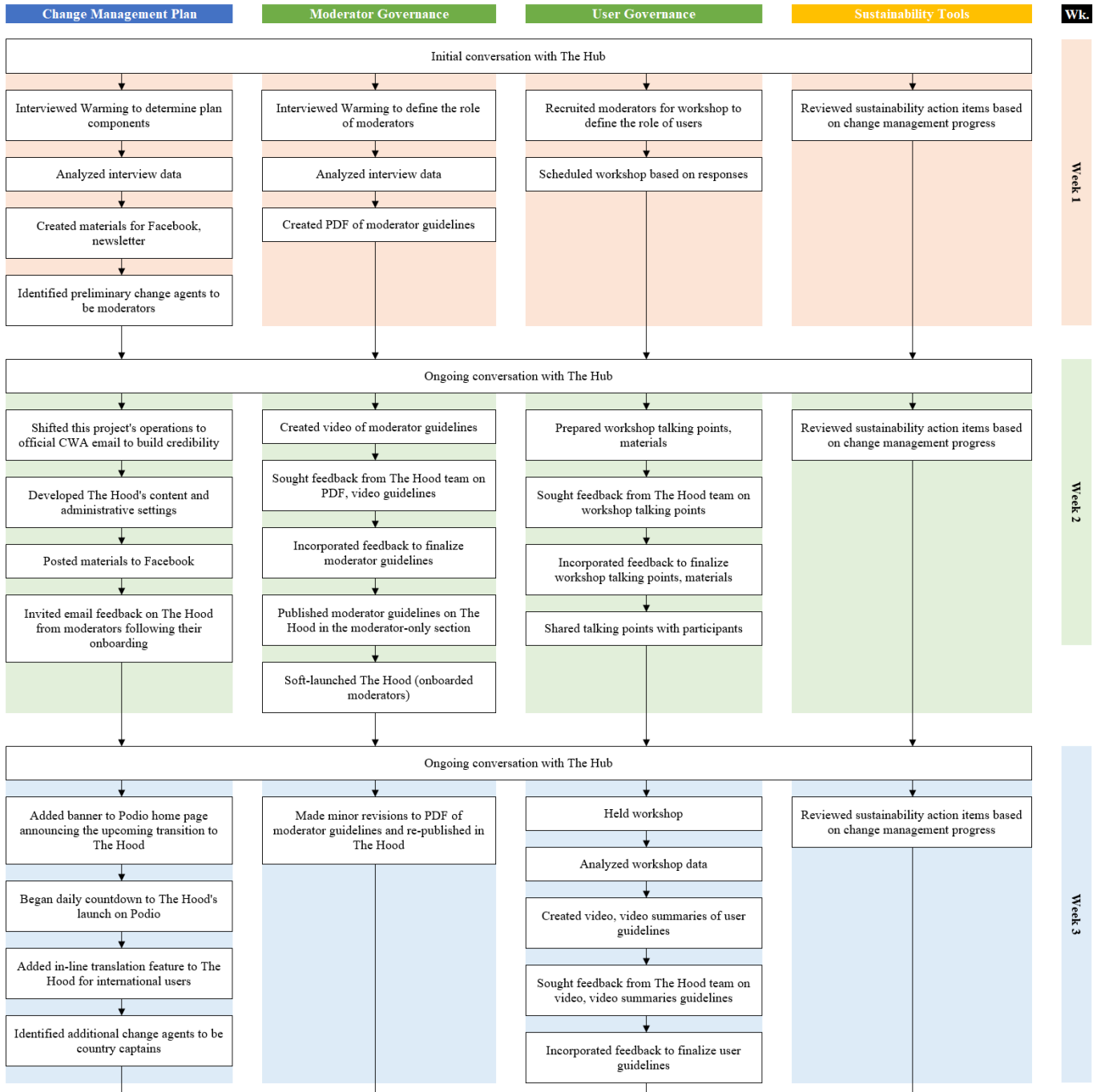
The goal of this project was to assist Cycling Without Age in introducing and planning for the sustainable operation of their new digital community of practice. Through the use of The Hood's newly implemented governance practices and effective Change Management Plan, The Hood was successfully welcomed into the CWA community. Therefore, this project's mission was accomplished. With the administrator's utilization of the deliverables and completion of the suggested recommendations, The Hood will flourish as a sustainable resource for all CWA affiliates and will continue to grow as an online collaborative community.

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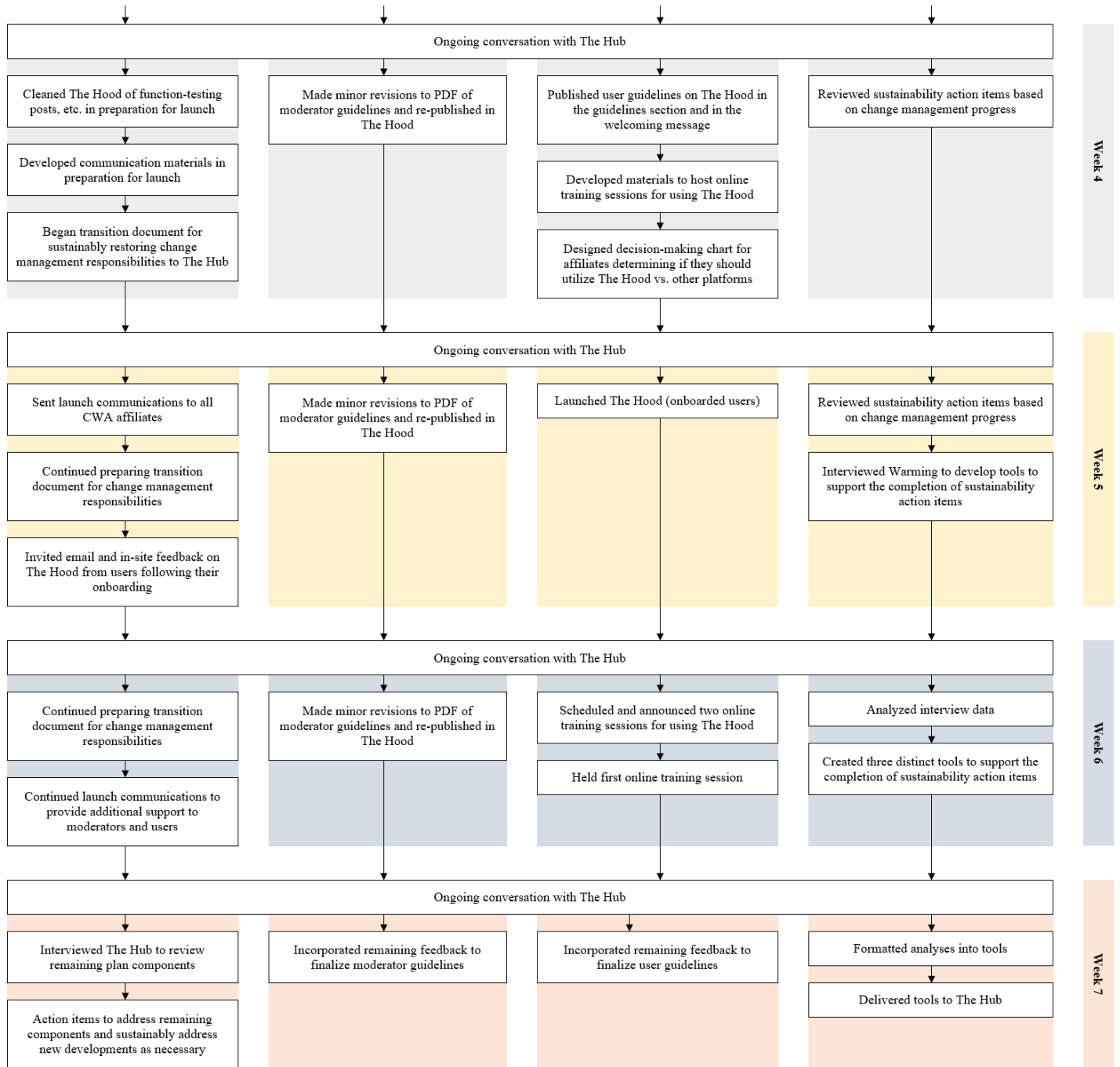
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# Appendix 1: Methodology Flowchart



(Continued on next page)

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## Appendix 2: Questions for Guidelines Interview with Warming

We began this workshop by reading our consenting statement:

Thank you for taking the time to participate in this workshop on creating guidelines to use The Hood. We are a team of university students from Worcester Polytechnic Institute in the United States, working with Cycling Without Age for the next two months in Copenhagen. We intend to help introduce and sustain The Hood as a global, digital community of practice.

Your participation in this workshop is voluntary. You may stop participating at any time and are free to decline to participate in any component of the workshop for any reason.

We do not collect any identifying personal information that you do not volunteer. Your workshop products will be stored in Google Drive and will only be accessible by our student team.

If you have any questions at any time about our work with CWA, you may contact our team by emailing [thehood@cyclingswithoutage.org](mailto:thehood@cyclingswithoutage.org).

General moderator role:

- What are the responsibilities of the moderators?
  - Could you give us a walkthrough on The Hood that shows the expected role of a moderator?
- What do the moderators already have knowledge of regarding their responsibilities?
- Which responsibilities for the moderators are most important?

The Hood experience

- What areas on The Hood are moderators specifically supposed to interact with?
  - What main content areas are they in charge of creating (ex. Regional area, editing knowledge base etc.)?
  - What areas are they in charge of monitoring / changing / regulating
    - How much control over content will be given to the moderators?
  - How much power does a moderator have over an average user?

Specific content management:

- Before the launch: how will the moderators be contributing to content migration (if they want to use information that they found helpful in Podio, how can they make that a part of the knowledge base?)
- What specific protocol should moderators take when relocating information from a conversation thread in The Hood to a static knowledge page?

Handling behavioral problems with the users:

- What patterns from users in the past have caused problems that the moderators should be focused on?
  - How should moderators handle members who do not follow the outlined roles?
- In what cases should moderators consult with admins / the Hub?

Presentation of guidelines:

- How should the moderators be informed of their guidelines? For example, using training videos, manuals or terms of use.
  - Are there different sections of The Hood that may warrant a specific method for presenting guidelines?
- How many different guidelines must be made for the moderators? (Overall, by section, etc.)
- How do you think the welcome wizard can be most useful to the average user?



## **Appendix 3: Moderator Welcome Video Link and Script**

Link to view the Moderator Welcome Video: [https://youtu.be/zFJvv5e8\\_xE](https://youtu.be/zFJvv5e8_xE)

### **Slide 1**

Hello moderators! We are The Hood team at Cycling Without Age, here to welcome you to The Hood and begin to explain your role as moderators. We will be providing you with this informational video, and a detailed “Moderator Guidebook,” to ensure that you have all of the resources you need to be great moderators.

### **Slide 2**

Thank you for being an active member of the Cycling Without Age online community and participating in The Hood as a moderator! Your work is greatly beneficial to the entire CWA community and adds value to The Hood. We are excited to see all of your expertise and experiences that you are able to contribute!

### **Slide 3**

We understand that as an active member of the CWA community, you have held significant responsibilities, including addressing members’ concerns and making sure that all chapter volunteers are updated with new information. As this can be overwhelming for everyone involved, The Hood has been created to improve the quality, effectiveness, and ease of sharing knowledge by streamlining information. Community members will be able to find all of the information they need on their own through accessing The Hood. We hope that this presentation can help you begin your journey in guiding users on how to benefit from The Hood.

### **Slide 4**

As moderators, you are role models in The Hood. You are inspiring to others and can be the resource they look to when becoming active and educated members of their community. By creating useful posts, replying to informative content, and encouraging kind interactions, you are improving the entire CWA community.

### **Slide 5**

As a moderator there are some general responsibilities we hope that you can participate in to ensure The Hood runs smoothly. These include:

- Encouraging appropriate use by fostering a positive, constructive environment for the CWA community to interact
- Allowing for global community growth by encouraging conversations between all affiliates across the world
- Creating an accessible and organized knowledge space by identifying and filling

- gaps in the information on The Hood
- Answer user questions by resolving questions yourself or directing them to the answer
- Keeping up with your area of focus to make sure the content is correct and relevant

### **Slide 6**

More specific responsibilities for the moderator can include:

- Making new users feel welcome
- Answering user questions
- Making helpful topics/posts in different categories of The Hood
- Editing and moving information as you see fit
- And monitoring an area of focus of your choosing

You can find more detail for these responsibilities in the “Moderator Guidebook,” which we will explain more later.

### **Slide 7**

As a supportive moderator, it is important that you are understanding of all users on The Hood, as our community has diverse members with many points of views. Make sure that you maintain a positive attitude and always share your knowledge and experiences on The Hood to encourage others to do the same. Overall, please continue to be supportive of users to help grow our community and spread a positive perception of The Hood!

### **Slide 8**

We understand that as a moderator you may not have the answers to every question a user may ask. In that case please encourage them to first look for the answer in an existing page on The Hood by redirecting them to the link where the information can be found. If there is little or no information already on The Hood that can help the user, connect them with another user or moderator who can help answer their question.

### **Slide 9**

If you have any questions or concerns that are not clearly answered through the Moderator Guidebook on The Hood, please feel free to reach out to The Hood team or The Hood administrator, Maren Warming.

### **Slide 10**

Thank you for taking the time to listen to this presentation about how to become a valuable moderator of The Hood. For more information, please read the “Moderator

Guidebook,” where you will find details on the role of moderators, specific step-by-step protocols on how to perform certain functions in The Hood, and the different areas of focus. This guidebook can be found on The Hood in the Moderator Hub category.

## Appendix 4: Moderator Guidebook

# Moderator Guidebook



Cycling Without Age  
[thehood@cyclingswithoutage.org](mailto:thehood@cyclingswithoutage.org)  
[cyclingswithoutage.org](http://cyclingswithoutage.org)

## Welcome Moderators!

Welcome to The Hood! We are extremely excited for you to begin your new role in working closely with the platform to ensure its success throughout CWA.

As an active member of our community, you have shared significant responsibilities with the rest of the community, including addressing members' concerns and making sure that all chapter volunteers are updated with new information. With your help as moderators, The Hood has the potential to make contributing to CWA's community easy and straightforward by pooling everyone's resources on one accessible online platform for community members.

Podio collab and Facebook Workplace users can now easily turn to The Hood, one place filled with all necessary and organized information, to learn all they need to know to be amazing volunteers.

We value and appreciate all of you and we are so thankful for the work you put in. The Hood is meant to improve the quality, effectiveness, and ease of sharing information within our community. We are excited to see the expertise and experiences you are able to contribute, and the ways in which you will inspire other community members to take part in The Hood.

The intention of this guidebook, created in collaboration with Discourse, is to help advise you on your responsibilities as you moderate The Hood and answer any questions that may come up along the way. Please review these guides before beginning your journey as a moderator and refer back to it to help along the way. We also encourage you to re-watch the user tutorial video to The Hood, to give you an overview on the capabilities of the platform. You can find this post in the *Knowledge Base* subcategory, *Guides and Tutorials for The Hood*. We are always looking to support you and our wider community, so please feel free to share any questions or comments you may have with a member of our team.

Thank you,

The Hood team at Cycling Without Age

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# What is The Hood?



The Hood is the central communication tool for Cycling Without Age affiliates around the world where members of the community can connect, collaborate, and share experiences and information with one another. Every one of these individuals has knowledge and experience that can help others make CWA a success in their areas. The Hood is the perfect place to immerse yourself in the community, launch your next CWA project, or get feedback from fellow volunteers all over the world in an easy, structured way.

The Hood is broken down into community categories and some additional subcategories which are visible to all users. These are predefined by The Hood administrators, and users can add to them by creating a new topic in the relevant category. The topic is the subject title of the page where all content and replies within a topic are considered posts. There are also areas only accessible by moderators and administrators. Understanding how to interact with each of these community categories, subcategories, and topics can help you collaborate and connect with the overall community.

The screenshot displays the 'The Hood' interface. On the left is a navigation menu with the following items:

- Announcements** (4 items, 3 new): Organization wide announcements.
- Knowledge Base** (31 items): This category is for curating communal knowledge about everything involving CWA. Although there may be tidbits of information all around the forum, these posts should be comprehensive and maintained to reflect current best practices and state for the community. Subcategories include: Bikes, Administration, Finance, Guides and tutorials, Marketing, Research, Drop Zone, and Getting Started.
- Questions** (10 items): Questions about anything CWA. Make sure you check out the [Frequently Asked Questions](#) first!

On the right is a topic page titled **Getting a Bike**. Red arrows indicate the following elements:

- Category:** Points to the 'Knowledge Base' label in the navigation menu.
- Topic:** Points to the title 'Getting a Bike'.
- Post:** Points to the first post by 'Caleigh Waskowicz'.

The post content includes:

- A description: "One of the exciting tasks you will get to experience once you have raised the appropriate funds is: **How do I get a trishaw (bike)?** There are many things to consider when purchasing a bike but we have several resources here to help!"
- A section titled **Types of Bikes Available for Purchase:** with a list: The Triobike: aka "The Couch on Wheels", The Nihola aka "The Agile Trishaw", and The Christiana aka "The Classic".
- A section titled **Dealers Authorized by Cycling Without Age:** listing Copenhagen Cycles, Cargocycles, and Triobike.

## Community Categories

There are five community categories on The Hood that are accessible to all members of the community.

**Announcements:** The *#announcements* category is where you, as moderators, can post announcements (including updates from the Hub, information about global opportunities, and inspiring content) meant for the entire community.

### Guidelines:

- Affiliates will reach out to moderators with announcements that they want to share. Moderators should approve content that is relevant to the whole community.
- Only posts that users wish to share with community as a whole.
  - If users want to announce something only to the people in their region, they should instead post in the *Regional* category.
  - If the content would benefit the *Knowledge Base*, the user should instead post it there.

**Knowledge Base:** The *#kb* category is meant to be the main place to collaborate, share and combine information. Anyone in the community can add their knowledge and experiences in the forms of “wikis”, a collaborative type of topic/post that all users are able to edit.

### Guidelines:

- Only posts that users wish to be collaborated upon or they think could benefit the entire CWA community.
- Since the posts are wikis, users are able to edit posts directly without moderator support.
- Moderators are encouraged to add and edit content as they see fit, with the purpose of sharing knowledge and experiences.

**Questions:** The *#questions* category is meant to be a place for users to ask questions that the community could contribute to or benefit from. Here users can ask, answer, or learn from other people’s questions.

### Guidelines:

- Only posts about questions that users want answered.
- Users from all chapters are encouraged to add content, even if they think their questions or answers are not widely applicable.
- The FAQ topic already in this section contains answers to some of the most commonly asked questions in the CWA community.



**Regional:** The *#regional* category is the place to find and ask for information specific to an individual region. For instance, if users are hosting an event exclusive to people in their region, or if they want to ask a question meant only for the people in their area, they should post here.

Guidelines:

- Before users make a post here, they should consider if it is something that the global CWA community might find valuable or might add value to. If it is, they should post it in the *Questions* or *Announcement* categories.
- If you see content here that could benefit the wider CWA community, please move it to a new location.

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

Guidelines:

- Only posts that pertain to The Hood platform.

## Account Types

There are three main types of account permissions within The Hood: administrators, moderators, and users. Each role has different capabilities within The Hood and contributes to our online community in different ways.

**Users:** Users have minimal editing powers but can create new topics and posts within categories. All CWA affiliates are users, and active users may be granted moderator status by an administrator.

**Moderators:** Moderators have the same capabilities as users in addition to being able to edit posts. The general responsibilities of moderators are explained in detail in the next section of this guidebook. Only a small proportion of CWA community members are moderators, however The Hood team is always looking for more moderator volunteers!

**Administrators:** Administrators have freedom in all “back-end” technical functions and can make site-wide changes to The Hood’s structure. Administrators may also influence the titles and permissions of moderator and user accounts. Only very few CWA community members are administrators.

## Moderators: General Responsibilities

Moderators are individuals who are passionate about helping their fellow CWA community members by ensuring that The Hood is used appropriately, supports global community growth, and presents community knowledge in an organized way.

### Appropriate Use

The CWA community has always hosted positive and constructive discussions. Moderators are responsible for ensuring that individuals continue to foster this comfortable environment to promote helpful community interaction.

### Global Community Growth

The Hood supports affiliates' learning from nearby chapters as well as from chapters based in different regions across the world. Moderators are responsible for encouraging this type of exchange, and for encouraging use of The Hood as a resource worldwide.

### Accessible and Organized Knowledge

The Hood will be most successful when any community member can find information they want, exactly where it is supposed to be. Moderators are responsible for identifying and filling gaps in the *Knowledge Base* and moving content to the appropriate category as necessary. Moderators are also responsible for encouraging users to ask questions in the *Questions* category that could contain content to eventually be added to the *Knowledge Base*.

### Monitoring an Area of Focus

All moderators serve the community in the same way by organizing, editing and adding information. However, each moderator can also have a special area of focus that correlates to a category or subcategory in The Hood, where it is their responsibility to make sure content is correct and relevant. Before explaining the details regarding the areas of focus, let's go over the protocols for the general responsibilities of moderators.

## Moderators: Protocol for Specific Responsibilities

### 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, we invite you to 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. Encourage other users to welcome new community members with open arms as well!

If a member appears confused or frustrated with the site or another community member, be sure to communicate with them and try to help them the best way you can.

### Users Asking Questions

As a community moderator, there is a chance that other users will ask you a variety of questions. While you can answer them directly, it is recommended that you utilize the *Knowledge Base* category by sending a link of the appropriate topic to the asker and redirecting them. This will help in encouraging users to look for information themselves before asking for help.

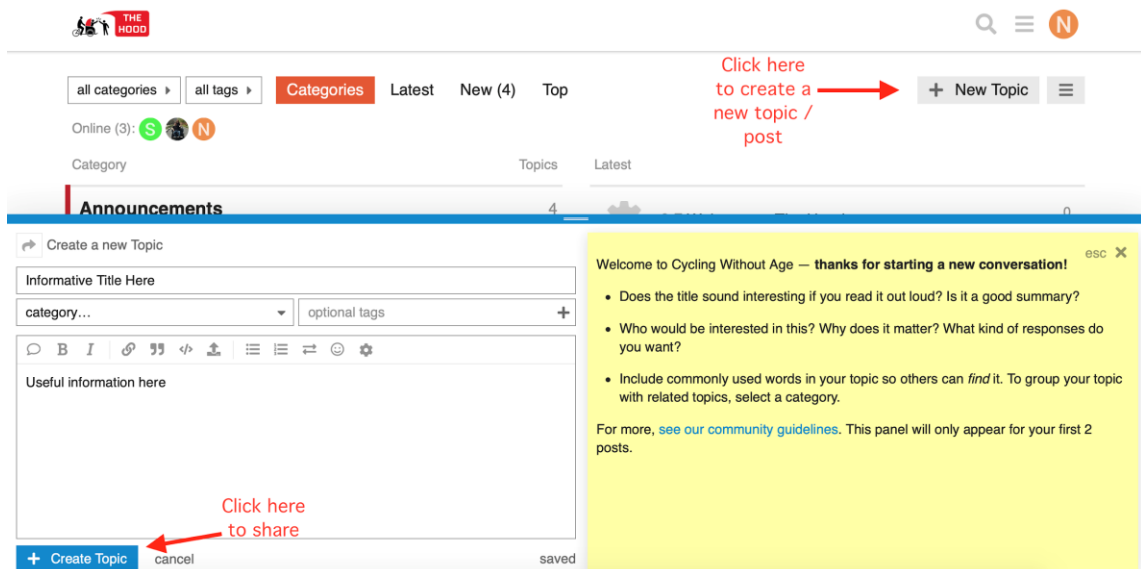
Although the two categories might not necessarily contain the information needed at first, you can always add and collaborate with other users to document missing information and make it easier for anyone to find. If any individuals present conflicting factual information, moderators are responsible for determining which factual information is correct depending on the situation.

### Making Topics/Posts and Wikis

Topics and posts are useful ways to share information in The Hood. Please use this space to share any knowledge that you find helpful or to address common questions in order to continue to grow the community and encourage communication.

To make a new topic/post:

1. Go to the homepage of The Hood. Click on “New Topic” in the top, right hand corner.
2. Create the informative title that will explain your topic.
3. Under the “category” drop-down menu, choose which category you want your post to be located in and then select the relevant subcategory, if applicable.
4. You have the option of choosing certain “tags” to attach to your post. We are pre-determining what tags posts should have based on data analytics of what terms users search for the most. So, while you can add your own tags freely, make sure they are either based in these analytics or they are broadly relevant.
5. Finally, create the post by typing all relevant information in the large box. Please make sure to proofread your post.
6. Click “create topic” to share.



- a. If you make a topic/post in the *Knowledge Base* category, it will automatically become a wiki.

**Tip:** To keep your post clean and easy to follow, there is a feature that can be used when creating the post to “hide details” which can be expanded to show more information. In the post they will appear as sideways triangles that can be clicked on to expand.

All posts should keep a clear format. Use this example below if you need any help:

**Organize Pilots**

■ Knowledge Base ■ Administration

Jane Hu [jwilliamshu](#) Canadian 25 22d

There is a lot of great material for pilots:

- ▶ Training Checklist
- ▼ Online Videos

There is a collection of videos on [The Pilot](#) page of the main website.

- ▶ Age of Pilots
- ▶ Screening
- ▶ Accidents

Please keep sharing good tips and tricks for pilots, they are critical to ensuring our passengers get an amazing adventure every time.

**Region Specific Practices**

To get a sense of volunteer screening in your country please see:

- ▶ Canada

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## Editing and Moving Information

As a moderator, you can move important information from one area to another as needed. For example, a user may create a new topic in the wrong category that would actually be better suited somewhere else or they may make a reply to a topic that you feel would be useful as its own topic. A user may also unnecessarily digress within a topic or they may duplicate information. In these cases, you as a moderator can help to maintain organization throughout The Hood. Here are some tips for moving information:

1. Constantly stay up to date with the “Latest” and “New” sections on the homepage of The Hood to see new topics. Make sure to explore all areas of The Hood to see different users’ topics and posts.

Let's get this discussion started! There are currently **10 / 30** posts. New visitors need some conversations to read and respond to.

all categories ▶ all tags ▶ **Categories** Latest New (4) Top

Online (5):

Category	Topics	Latest
<b>Announcements</b> Organization wide announcements.	4 3 new	Welcome to The Hood
<b>Knowledge Base</b>	32	Hilly Communities •

2. Visit these topics or posts and review all of the information shared. Look out for an informative title, accurate and helpful information, and relevant tags.

If you need to edit any part of the post:

- a. Review the edit history of the post to see if any edits have been made or if the post has been moved previously. This way, you can see if other moderators have reviewed the post and understand the reason for any previous edits. It is especially important to understand the edit history of a wiki, as users, not just moderators, are able to edit wikis.
- b. Begin editing the topic or post by clicking on the pencil symbol in the corner (or in the three dots under the post) and choosing “Edit Post”.
- c. Add in your own knowledge from past experiences, or contact a moderator who is a leader in that topic to ask them for assistance in how the post can be more helpful (check the *Site Feedback* category of The Hood to see which moderators are responsible for each focus).
- d. You can delete the topic or post if it is negative or harmful to the community. Reach out to the user if there is concern with their behavior on the site and tell them why you felt it was necessary to delete their post. This can be done by clicking on the wrench symbol on the right and choosing “Delete Topic”.

### Understanding the costs of getting a trishaw

■ Knowledge Base ■ Bikes



Maren Warming Maren Leader

1  14d

When you want to order a trishaw or when you are looking for funds it is important to know exactly how much the trishaw will cost.

Prices are updated the 1st of March 2019.

Possible costs:

- ▶ EUR
- ▶ USD
- ▶ CAD
- ▶ DKK

When buying your bike through Copenhagen Cycles you might have to pay Danish VAT of 25% if you are not a company with a valid VAT number or if you are living outside of the EU. But then you will have to pay your local VAT/GST or similar. Please check with your own authorities.

- ▶ Local taxes

If you have any additional information. Please add as a comment and we will update this article.



Click here (or the pencil below) to edit a post

Click here for the option to delete a post

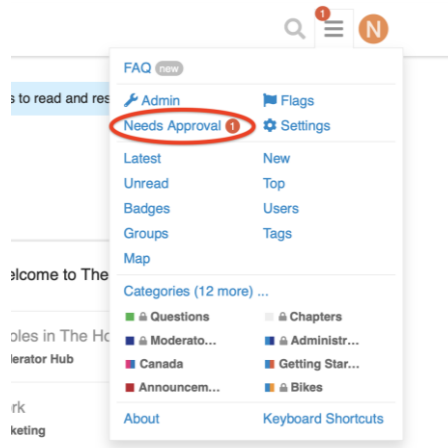
3. We want to keep the discussion around topics organized and factual. We love to see all the comments from affiliates contributing, however it is easier for everyone else to find information when it is in the original wiki instead of having to read through all of the comments. If you see a comment with useful information, encourage the user to incorporate their content into the original wiki:

- a. Create a reply to the comment to:
  - i. Thank the user for their information.
  - ii. Let them know that they have the ability to edit the wiki on their own! Suggest that they put the helpful parts of their comment into the original wiki by editing the original post.
  - iii. Make sure to mention the user who wrote it by typing “@” and then their username so that the user knows to reply to you!
  - iv. If the discussion stream gets to be too cluttered, you can move the content to the original wiki yourself so that it is more accessible to other users. If information makes more sense as a conversation then it can stay where it is.
4. If the post has accurate information but it needs to be moved to a different category:
  - a. Create a reply to the original topic or post to:
    - i. Thank the user for their information.
    - ii. Inform the user what you plan to do with their shared information and why you are moving it to a more suitable category.
    - iii. Make sure to mention the user who wrote it by typing “@” and then their username so that the user knows to reply to you!
  - b. To move the post, select “Edit Post” and choose its new category from the drop-down menu.

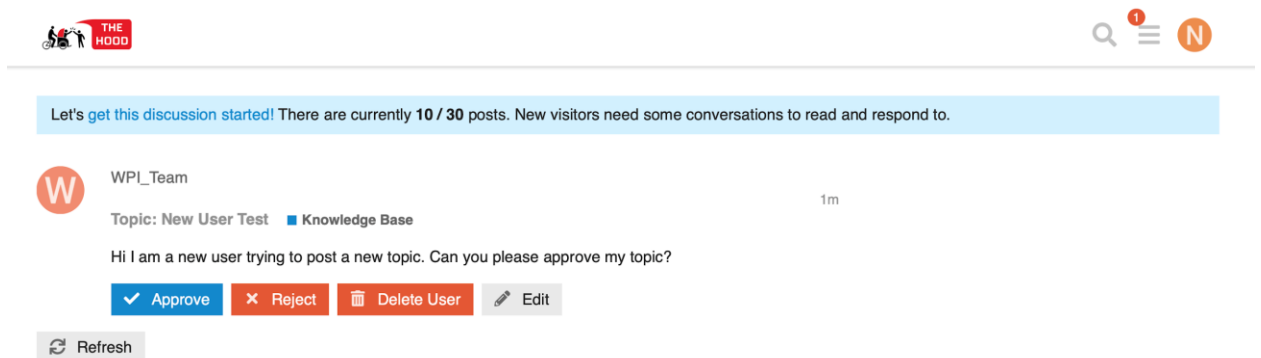
## Approving Posts and Unsilencing Users

When The Hood detects users who are potential spammers trying to make new wikis or topics/posts, it will not allow them to submit their post without moderator approval. It is important that moderators try to stay updated with posts needing approval as they may contain useful information that can be shared with the community. To approve posts:

1. In the top, right hand corner select the menu button (represented by three, short horizontal lines) and choose “Needs Approval”. This menu should have a small notification symbol to let you know if something needs approval.



2. When you are directed to the new page of unapproved posts, go through each post and scan for a useful title, information, and whether or not it is in the appropriate location. Determine whether or not the post should be shared.
3. If the post should be shared, choose “Approve”. If the post should not be shared, choose “Reject”.



4. If you choose to reject the post, the user will become “Silenced”.
  - a. If the user is a bot or a spammer, leave them as silenced.
  - b. If the user is clearly a member of the Cycling Without Age community, you should unsilence them. To do this:
    - i. Select the menu button and choose “Admin”.
    - ii. Choose “Users” at the top.
    - iii. Then click on “Silenced”.



- iv. Choose the user that needs to be unsilenced. Scroll down to “Silenced?”, and unsilence them.

Let's [get this discussion started!](#) There are currently **10 / 30** posts. New visitors need some conversations to read and respond to.

Dashboard Settings **Users** Badges Emails Flags Logs Customize API Backups Plugins Wizards Layouts Tickets

Active New Staff Suspended **Silenced** Suspect Staged Groups Send Invites Export

### Silenced Users Show Emails

username, email or IP address

Username	Email	Last Emailed	Seen	Topics Viewed	Posts Read	Read Time	Created
WPI_Team		20m	< 1m	5	5	3m	20m

## Moderators: Specialties and Focuses

Typically, moderators will sign-up for the area of focus they are interested in and have the most background in. Moderators are encouraged to participate in other areas of focus but are primarily responsible for fulfilling their duties in their chosen area. There is a post in the *Site Feedback* category listing all moderators' names and areas of focus, where moderators can edit as they choose their areas.

These categories will evolve and change as more categories can be created over time. Please choose an area of focus that you are confident in. If you have your own idea on how to distribute the areas of focus or are interested in a topic not on the list, reach out to The Hood team - we are open to suggestions!

**Here are a few special areas of focus to choose from:**

### Announcements

The posts in announcements should be inspiring or relevant to the global CWA community. Users will reach out to moderators with announcements they want to share and you should either post it if they are appropriate or communicate to the user that they should post it in a different category.

### Knowledge Base

There are moderators for each subcategory within the knowledge base to keep an eye on all of these topics that come up on The Hood.

*Bikes:* All things trishaws.

*Administration:* Information relating to running a chapter, logistics, and scheduling rides.

*Finance:* How to fundraise for trishaws, apply for grants, and all things money.

*Marketing:* All things about making your chapter stand out and using marketing strategies.

*Research:* Information on any studies that relate to CWA and our mission.

*Getting started:* Information to help chapters with first starting up.

**Drop Zone:** Any topics users are unable to find an appropriate home for. The moderator for this area should move the topic to the appropriate category.

**Events:** Information relating to Events, such as presentations and images from Summits.

## Questions

Users will post questions here that they feel have not already been answered in another area of the site. Try to answer their question the best you can or direct them to another moderator who knows that topic well. If the topic of the question is worthy of a new wiki in the Knowledge Base that could benefit everyone, add it!

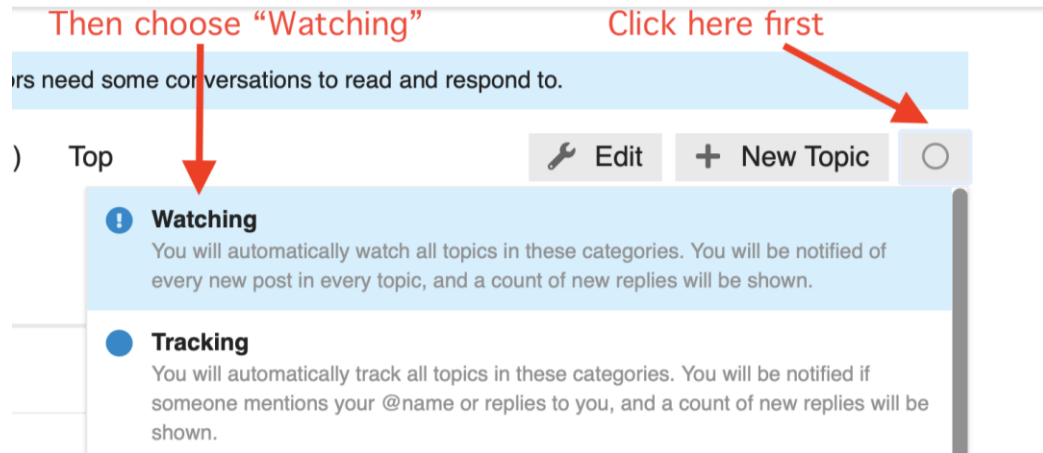
## Regional

Post about topics relevant to your regional area and discuss any information that is specific to the region. If you see content here that could benefit the wider community, move it to another category. If your region is not listed, please reach out to an administrator so they can create it as a new subcategory.

## Site Feedback

All moderators should keep an eye on Site Feedback as it is a place for users to suggest any changes to the platform or information to improve the site. Share any necessary feedback with the admins of The Hood.

Once you have your focus, it is a great idea to turn on “Watching” under that category or subcategory. This feature allows The Hood to notify you when a new topic or post is created to help you stay updated with your category. In order to turn this feature on click on your category or subcategory, select the open circle next to “New Topic” and choose “Watching”.



By having a strong background in your area of focus on The Hood, you can assist in answering general questions related to that focus or pointing people in the appropriate direction when unsure of the answer. You should also read over wikis and topics/posts related to your focus that are located anywhere on The Hood to ensure that the information is accurate and in the correct location.

## Thank You!

We hope you found our guides useful and are excited to explore The Hood. Please reach out to our team at [thehood@cyclingswithoutage.org](mailto:thehood@cyclingswithoutage.org) if you ever need help or have any questions.

If there are other members of your community who you feel would be great at being a moderator, have them reach out to Maren Warming at [maren@cyklingudenalder.dk](mailto:maren@cyklingudenalder.dk)

We can't wait to see how you contribute to the success of the community. Thank you for helping The Hood flourish!

## Appendix 5: Email Sent to Workshop with Moderator Participants

Hello Moderators!

We hope you've been able to sign in to The Hood and become familiar with the organization and structure of the new platform.

We're eager to hear your feedback so any chance you have to gain experience with The Hood will be beneficial to our conversation. Thank you again for volunteering to participate in our workshop on [\[time\]](#).

For our conversation, we are hoping to cover:

- Walkthrough of The Hood to address any questions you may have and learn about your experience as a new user
- Feedback on The Hood
- Clarity of The Hood and ease of use
- What do you wish you knew when you first signed on?
- Best ways to communicate with the CWA community about The Hood's launch

For this video conference call, we will be using Google Hangouts. Please note that Google Hangouts only works with Google Chrome and Firefox browsers. You can use this link to join the call on [\[time\]](#): [\[link\]](#)

We just sent you an invite to your email, so you can use this to access the meeting on the day of the call as well. Please click on this invite and choose the link under "Joining Info". This should prompt you to join our meeting.

We look forward to speaking with you! Feel free to email us if you have any questions.

The Hood team

## Appendix 6: Questions for Workshop with Moderators

We began this workshop by reading our consenting statement:

Thank you for taking the time to participate in this workshop on creating guidelines to use The Hood. We are a team of university students from Worcester Polytechnic Institute in the United States, working with Cycling Without Age for the next two months in Copenhagen. We intend to help introduce and sustain The Hood as a global, digital community of practice.

Your participation in this workshop is voluntary. You may stop participating at any time and are free to decline to participate in any component of the workshop for any reason.

We do not collect any identifying personal information that you do not volunteer. Your workshop products will be stored in Google Drive and will only be accessible by our student team.

If you have any questions at any time about our work with CWA, you may contact our team by emailing [thehood@cyclingswithoutage.org](mailto:thehood@cyclingswithoutage.org).

General feedback:

- How has your experience on The Hood been so far?
- Which parts of The Hood do you like the most?
- Do you like the shift into having these main categories?
  - Are the categories self-explanatory?
- Which parts of The Hood would you like more clarification with?
- Is there anything we can do to clarify your role as a moderator?

Category-specific user rules:

- In Announcements, The Hood team decided to have users reach out to moderators for posts they want in announcements, as this category is meant for very unique, global updates. Moderators can decide if the announcement will be posted or if it belongs in a different category.
  - What are your opinions on this?
  - Should we use stay the same or allow users to post on their own?
- In Knowledge Base, The Hood team decided to allow all users freedom to post to emphasize how much we value their experiences and knowledge, rather than making them need approval.
  - What are your opinions on this decision?
- Drop zone is for posts of knowledge (not questions) that a user simply doesn't know where it should go in knowledge base.
  - Do you think this is clear?
  - How do we communicate that to the users?

- Should it be moved out of Knowledge Base category to mitigate confusion?

Transition:

- How well have we been communicating the idea of The Hood to the community so far?
- How can we improve communications, specifically to excite the wider CWA community?
- What should we focus on when communicating this change to the users?

Guides:

- What do you wish you knew about The Hood when you first joined?
- What important information needs to be highlighted in the user guidelines?
- How should the users be informed of the guidelines? For example, using training videos, manuals or terms of use, or options for them to chat with moderators.



## Appendix 7: User Tutorial Video Link and Summary

Link to view the User Tutorial Video: <https://www.youtube.com/watch?v=Nhs2conG40>

### Welcome/purpose

This section covers key points of The Hood's purpose, user types, and structure.

#### Purpose

- The Hood is the central communication tool for CWA affiliates around the world.
- Use it to connect, collaborate, and share experiences and information.
- Immerse yourself in the community, find information you may need, and get feedback from fellow volunteers.

#### User types

- There are three kinds of accounts on The Hood: users, moderators, and admins.
  - Everyone is a user. Users can make topics and posts in all categories except. Announcements, and can always like and reply to other people's posts.
  - Moderators are users who regulate content on The Hood. They help ensure that content is relevant and organized.
  - Admins are users who build The Hood and can change back-end features.

#### Structure

- The homepage of The Hood is divided into community categories and some additional subcategories. These are predefined by administrators.
- Users can add content by creating a new topic or post in the relevant category. The topic is the subject title of the page, and all content and replies within a topic are considered posts.

### Using the menu

This section covers key points of The Hood's menu feature.

- The menu is in the top right corner, represented by three horizontal lines.
- The menu will tell you if you have any notifications. You can also click the *Latest*, *New*, *Unread* and *Top* options to see posts that you may not have opened yet.
- You can also see the Badges that you have earned based on your activity on The Hood, and click on users to see all other accounts on the platform.

### Categories

This section covers key points of The Hood's different community categories.

- The purpose of the categories is to organize all information that is posted on The Hood.

- The Knowledge Base category is meant to be the main place to collaborate, share and combine information. It has many subcategories to help organize your posts.
- The Questions category is meant to be a place for users to ask questions that the community could contribute to or benefit from.
- The Announcements category is a special place for stories or updates that can inspire the entire CWA community. This category is regulated by moderators and admins of The Hood, so if you have an announcement you would like posted please reach out to them!
- The Regional category is the place to find and ask for information specific to an individual region.
  - If you don't see your region but have regional information you would like to share, please reach out to an admin so they can add it!
- The Site Feedback category is the space for everyone to discuss The Hood's functionalities and organization. Here is also where you can find a topic called "CWA roles in The Hood" [link] that lists out all of The Hood's admins and moderators.

### **Making topic/post, replying**

This section covers key points of how to make your own topics and posts and reply to posts on The Hood.

Making a new topic/post

1. Go to the homepage of The Hood. Click on "New Topic" in the top right-hand corner.
2. Create an informative title to explain your topic.
3. Click the "Category" drop-down menu, then choose the relevant category or subcategory to place your post in.
4. Create the post by typing all relevant information in the large text box.
5. Proofread your post, and add emojis, links, or formatting if you would like.
6. Click "Create Topic" to share.

Replying to posts

- Reply to posts when you would like to add more information that you feel would benefit the conversation. There are two types of replies.
  1. To reply to a post, go to the post you would like to reply to and click "Reply" at the bottom of that post.
  2. To reply to another reply, go to the post in the topic's feed you would like to reply to and click "Reply" at the bottom of that post.
- There are also ways you can make your reply more effective.
  - You can directly mention another user by typing "@" and then their username.

- You can “quote” a post so that the quoted content appears in your reply. To do this, highlight the text you want to quote then click “quote”.
- You can reference posts in other subcategories by including links to those posts.
- If you want to show your support for a post but don’t have information to add, click the heart next to the post to “like” that post.

### **Access your profile and personal messaging**

This section covers key points of how to access your profile and send personal messages.

Your profile

- To access your profile, click on the circle in the top right corner.
- In your profile, you are able to see your Summary, Activity, Notifications, Messages, Badges, and Preferences.
- Preferences allows you to edit your username or email, or reset your password.
- In Notifications, you can edit when and how you receive notifications.

Personal messages

- In Messages, you can read your past conversations or create a new message.
- To create a new personal message, choose “Messages” in your profile then “New Message”. You can also message people by clicking on their username anywhere throughout The Hood.

### **Asking questions and how to find info (search bar/FAQ)**

This section covers key points of the best ways to the find information you’re looking for on The Hood.

- Start by browsing the Knowledge Base to find information in different categories.
- Try checking the Frequently Asked Questions post [link] in the Questions category!
- The search tool, accessed by clicking the magnifying glass next to the menu, can also be used to search the entire site for specific words and using different filters such as relevance, latest, or most liked.
- If you are still unsuccessful at finding the information you would like, you can make a new post in the Questions category and if someone has the answer they will help you out!

## Appendix 8: Training Session Materials

# Training Session Materials



Cycling Without Age  
[thehood@cyclingswithoutage.org](mailto:thehood@cyclingswithoutage.org)  
[cyclingswithoutage.org](http://cyclingswithoutage.org)

## Preparation Action Items

1. Steps to set up the meeting
2. Create a Google Hangouts Meet session by making a new event in your CWA Gmail calendar and select “Add Conferencing”
  - a. Copy the link to the video call and share with The Hood community so they can join at the designated time
3. Shortly before the session, open The Hood homepage on the hosting computer
  - a. Login to TheHood\_User (or any **user** account) on The Hood
  - b. Password: thehood\_user
4. Open any assisting documents, such as the below script
5. Turn off the hosting computer’s desktop notifications
6. Test the quality of the hosting computer’s microphone until satisfactory
7. Join the conference call for the session so that you can allow waiting participants to join
8. Below is the potential script that can be used during the training sessions. The different colors mean different things throughout the script:
  - a. Words in black: things to say
  - b. **\*\*Words in red\*\***: actions to perform on The Hood

## Outline of the Script

1. Introduction
2. Walkthrough
  - a. Screen share the homepage of The Hood, and give the purpose of The Hood, features of the homepage (can see categories, access menu and profile)
  - b. Types of users (users, moderators, admins)
  - c. Search tool
  - d. Make an example topic and include:
    - i. Bold or italics
    - ii. Bullets
    - iii. Upload
    - iv. Hide details
  - e. Go through each category in more depth
    - i. Knowledge Base - main place to find and collaborate knowledge
      1. Highlight Drop Zone: it's purpose and how to use it
    - ii. Questions - questions to be answered by the entire community
      1. Emphasize that affiliates should first look for the information they need before asking in the Questions category
    - iii. Announcements - posts to update and inspire the entire CWA community
      1. Mention that affiliates need to reach out to admin/moderators to have things posted
    - iv. Regional - posts specific to a certain region
      1. Show an example region (likely Canada) so people can see what is expected for the subcategories
    - v. Site Feedback - providing feedback on The Hood
      1. Show the Contact List post
3. Question & Answer time
4. Wrap-up
  - a. Thank participants for coming
  - b. Provide contact email

-----begin potential script that can be used during the training session-----

## Introduction

Hello everyone!

We are members of The Hood team at Cycling Without Age.

We are planning to walk you through the platform and answer any questions you may have along the way.

This workshop will last for about [*insert estimated time*] but you can come and go as you need to -- we understand if you have other engagements!

At any point throughout our conversation, please feel free to ask questions verbally or by using the chat feature. To improve the sound quality for everyone, please mute your microphones for now and unmute whenever you would like to speak.

The chat option can be seen as a speech bubble symbol in the top right corner. Make sure to close the chat if you need to see the slideshow!

We will frequently take breaks to answer any questions, but again, you're welcome to stop us at any point!

## The Walkthrough

To start, we're going to give a walkthrough of the structure and different functions of The Hood. Please stop us if you have any questions along the way!

**\*\*screen share The Hood's homepage\*\***

---

First, there are three different accounts on The Hood:

- Every affiliate on The Hood is a **user**, meaning they can make topics and posts, add additional content to a wiki by editing it, and can also like and reply to other people's posts.
  - **Moderators** are certain users who regulate the content on The Hood to ensure that it is relevant and help to maintain site organization.
  - **Admins** are the builders of The Hood who can access and change back-end features, create new categories, and invite new affiliates.
  - Feel free to reach out to moderators or admins if you ever have any questions.
- 

The **homepage** of The Hood can show you the six categories, the "latest" and "unread" posts that you might not have seen yet, and ways to access the menu and your profile.

**\*\*click menu to reveal options\*\***

Here is the menu - you can use it to navigate to latest, new, users, badges, and other sections.

You can also use the circle next to the menu to access your profile.

**\*\*choose the circle\*\***

Here you can select your username to set your notification preferences, send messages, and update your information.

---

The Hood is a great tool to **search** for any CWA resources you may need or any questions you may want answered.



You can search through posts in Knowledge Base by using the organized subcategories, or you can use the search tool.

**\*\*click search tool to reveal text box\*\***

You can type in any phrase that can help you find your answer.

**\*\*search for a certain phrase\*\***

You can also sort your searches by filters such as latest or most viewed, or the “Advanced Search”

**\*display these two features\*\***

**\*\*reminder: check if anyone has any questions\*\***

---

The Hood is built off of affiliates posting new **topics**. If you ever have new information you want to share, this is how you spread it to the community! Topics are the subject title, and posts are all of the content.

To make a new topic, choose the “New Topic” button on the right...

**\*\*Go through the process of making a new topic, such as choosing the appropriate category, having an informative title, containing useful information, etc. Click on new topic and start making a post\*\***

You can use organizational features such as:

**\*\*Show these\*\***

- Bold or italics
- Bullets
- Upload
- Hide details

**\*\*reminder: check if anyone has any questions\*\***

**\*\*Quit the example topic and go back to the homepage of The Hood\*\***

---

To dive deeper into the structure of The Hood, there are six **categories** that organize The Hood: Announcements, Knowledge Base, Questions, Regional, and Site Feedback.

---

**\*\*click to Knowledge Base category\*\***

The Knowledge Base is the main place to collaborate, share and combine information.

- The Knowledge Base contains posts that are called “wikis.” These are intended to be setup like Wikipedia pages, where *all users* are encouraged to edit the main post with additional or updated information.
- Please use this space to make new topics, edit existing wikis and like and reply to one another’s helpful information!

**\*\*open a post in Knowledge Base\*\***

To edit a post, open the post you want to add information to and choose “Edit” in the bottom right.

**\*\*go through an example of how to edit a post\*\***

Knowledge Base is made up of many subcategories to maintain organization. These include:

- Guides and Tutorials for The Hood
- Getting Started
- Bikes
- Administration
- Marketing
- Finance
- Research
- Events
- Drop Zone

We would like to specifically highlight Drop Zone.

**\*\*open Drop Zone subcategory\*\***

Make your post in Drop Zone if you believe that your information belongs somewhere in Knowledge Base, but you’re not exactly sure where.

Moderators and admins of The Hood will keep a close eye on the Drop Zone to help move any posts to their relevant subcategory.

**\*\*reminder: check if anyone has any questions\*\***

**\*\*return to the homepage\*\***

---

**\*\*in Questions category\*\***

The Questions category is meant to be a place for users to ask specific questions that the community could contribute to or benefit from.

**\*\*use this time to emphasize that affiliates need to change their behavior and not ask a question immediately but rather try to find their answer first\*\***

However, make sure to first search for the information you need in the Knowledge Base or by using the search bar!

The FAQ is also useful in common questions that might help get your chapter started.

**\*\*reminder: check if anyone has any questions\*\***

---

**\*\*in Announcements category\*\***

The Announcements category is meant for announcements that will inspire and inform the *entire* CWA community. It is intended to be used sparingly, unlike something like a Facebook feed.

- Examples of announcements: getting a grant, NOT getting a new bike
- Moderators and admins regulate the Announcements category. You can reach out to moderators via email or personal message with the announcement you want published.
- If the post is not suitable for announcements, we welcome you to still post it in another category!

**\*\*reminder: check if anyone has any questions\*\***

---

**\*\*in Regional category\*\***

Regional subcategories is where you can find and ask for information specific to an individual region. Feel free to post in your region with any news or events, or explore other regions to see how CWA works around the world.

However if the post will be beneficial to the entire community, we encourage you to share it in Knowledge Base or announcements.

If you don't see your region and would like to have it added, reach out to an admin! We will ask that you begin to populate it with information that could be helpful to others in your region.

*\*\*reminder: check if anyone has any questions\*\**

---

*\*\*in Site Feedback category\*\**

Site Feedback is a space for everyone to discuss The Hood's functionalities and organization. Our admins will consistently check back here to see new ways to improve The Hood.

*\*\*show CWA Contact List post\*\**

Here you will also find the names and contacts for all admins and moderators of The Hood.

*\*\*reminder: check if anyone has any questions\*\**

## Final Q&A

Do you have any questions? Is there anything you would like us to clarify?

### *[Probes]*

- The organization of The Hood
- Finding information
- Posting content
- Contacting people (affiliates, moderators, admins)
- Asking for help

## Wrap-up

Thank you for joining us! As always, please email us at [thehood@cyclingswithoutage.org](mailto:thehood@cyclingswithoutage.org) if you ever have any questions or encounter any problems.

We always appreciate your feedback on The Hood and your thoughts on the functionality of the platform.

Thank you!

## Appendix 9: Questions for Change Management Interview with Brandstrader

We began by reading our consenting statement:

Your participation in this interview is voluntary. You may stop participating at any time and are free to decline to answer any question for any reason. We do not collect any identifying personal information that you do not volunteer. Any notes we take during this interview will be stored in Google Drive and will only be accessible by our student team. If you have any questions at any time about our work with CWA, you may contact our team by emailing [gr-cyclingwithoutage@wpi.edu](mailto:gr-cyclingwithoutage@wpi.edu).

Discuss each of Kotter's (2007) eight steps for change management

- Can you explain each of these steps based on your own experiences working in the Change Management Office of WPI?
- Are there any projects you have worked on for online communication platforms?
  - Our biggest concern with The Hood is that the platform's use is optional for the CWA community
- What key steps are necessary in preparing for the launch of a new platform?
  - Probes:
    - Best ways to communicate the launch
    - How to handle the previous platform
    - How to encourage people to want to transition
- How do you express the importance of switching to a new platform to a global community?
- What is the best way to establish the sense of urgency when users are strictly volunteers?
- What are some specific examples campaign strategies that can be utilized?
  - What techniques did you use when moving from Bannerweb to Workday?
  - How can these examples be applied to a global nonprofit?
- How do you best incorporate user feedback from a survey into the actual change?
  - How can you best measure the success of the change?

## Appendix 10: Questions for Change Management Interview with Warming

We began by reading our consenting statement:

Thank you for taking the time to talk with us so that we can develop a change management plan for transitioning to The Hood. We are a team of university students from Worcester Polytechnic Institute in the United States, working with Cycling Without Age for the next two months in Copenhagen. We intend to help introduce and sustain The Hood as a global, digital community of practice.

Your participation in this interview is voluntary. You may stop participating at any time and are free to decline to answer any question for any reason. We do not collect any identifying personal information that you do not volunteer. Any notes we take during this interview will be stored in Google Drive and will only be accessible by our student team. If you have any questions at any time about our work with CWA, you may contact our team by emailing [gr-cyclingwithoutage@wpi.edu](mailto:gr-cyclingwithoutage@wpi.edu).

Based on the literature, these are the following techniques of change management:

- Building a powerful change team, establishing a sense of urgency, defining a change vision, effectively communicating the vision, empowering people and removing resistance, planning for short-term wins, making continuous improvements, and building momentum

Step one: Establishing a sense of urgency

- Is it okay to use shutting down Podio to establish a sense of urgency?
  - Are there other places where we can post why the transition is important and people should be interested?
  - Is there a time frame would aim to shut Podio down to inform and encourage people about the transition?

Step two: Building a powerful change team

- Who do you see as the change team for the online platform?
  - The Hood team/ moderators?
- How should the moderators be used to help with the change?
  - How should they be encouraged to help others with the transition?

Step three: Defining the change vision

- How would you like The Hood to be perceived and the change vision be communicated?

#### Step four: Effectively communicating the vision

- How can we communicate a farewell to Podio?
- Can it include a series of posts to put on Podio that repeats the change vision?
- If Podio isn't being completely shut down, are there other ways we can the website or log in to minimize future use?
- Is there any reason we shouldn't invite all users on Podio to The Hood?

#### Step five: Empowering others

- Are there other ways besides user guidelines we can assist users in learning about The Hood?
- What can be used to "reward" users for utilizing The Hood?
- Is there a reason we can't allow users to post what and where they want on The Hood to encourage use?
- Does The Hood have aspects that will enable users and invoke empowerment to them?
  - What is done to recognize and reward achievements?
  - If limited, collaboratively determine appropriate ways to exceed this.

#### Step six: Planning for short-term wins

- Can we post announcements to encourage how many users have joined?
- How should moderators be given acknowledgement for putting in work?

#### Step seven: Making continuous improvements

- Are there other ways besides the site feedback category and survey that we should reach out for improvements?
- Is it okay to ask moderators for improvement on back end of the platform?

#### Step eight: Creating a culture

- Is it okay to brand The Hood as "the new Podio" to get people's attention?
- What do you feel the culture is you want The Hood to have to make it last into the future?
- How should we develop this culture?

#### Initial follow-up questions:

- How do you feel these steps relate to how CWA plans to manage the transition?
  - How do they differ?
- Are there any issues/barriers you foresee that you would like to start with?



Questions specifically for administrators of The Hood:

- What are feasible actions that CWA can take to communicate the vision of The Hood?
- Have you taken any action on Podio to campaign for The Hood?
  - If not, when do you plan to make users aware of the change?
  - If use of newsletters, what information will these contain and how many times do you plan to send these out?
  - How the website be reformatted to address specifications (dates) on The Hood?
  - How will the emphasis on appreciation for Podio be presented?
- How can it be expressed why the change is necessary/beneficial for the users?
- Will the CWA website more prominently promote use of The Hood?
- Who has been previously most active with their platform?
  - How can they be used to promote a stronger influence surrounding the transition?
- How can The Hood become embedded into the user's everyday live?
  - Will it be linked to their phone or email?

Questions on post launch:

- Are there other methods you suggest for gauging user feelings towards The Hood, apart from our survey?

## Appendix 11: Questions for Implementation Tools Interview with Warming

We began by reading our consenting statement:

Thank you for taking the time to talk with us so that we can develop tools to implement a change management plan for transitioning to The Hood. We are a team of university students from Worcester Polytechnic Institute in the United States, working with Cycling Without Age for the next two months in Copenhagen. We intend to help introduce and sustain The Hood as a global, digital community of practice.

Your participation in this interview is voluntary. You may stop participating at any time and are free to decline to answer any question for any reason. We do not collect any identifying personal information that you do not volunteer. Any notes we take during this interview will be stored in Google Drive and will only be accessible by our student team. If you have any questions at any time about our work with CWA, you may contact our team by emailing [gr-cyclingwithoutage@wpi.edu](mailto:gr-cyclingwithoutage@wpi.edu).

### Preface

- We realized that as part of our change management plan, three of the steps rely a lot on The Hood being live
- Since we won't be here for as long as we thought after The Hood's launch, we are making tools (like the survey we discussed before) that members of the Hub or Hood Team could easily use in our absence
- These tools correspond to the steps of the change management

### Survey, Interpretive Tool (corresponds to making continuous improvements)

- Brandstrader + other scholarship recommends that a survey be used to gather feedback from the community
- We are making the survey and a way to really easily see the feedback from the survey
- How should this survey be hosted?
  - Probe: Google Forms, Qualtrics
- What topics should these questions cover?
  - ATC survey covers probed topics
  - Would demographic data be useful?
    - Probe: age bracket, length of involvement in community, level of leadership in community, country of residence
  - What types of items would feedback be useful for?
    - Probe: Clear communications, feelings of being "heard", feelings of support/empowerment, tutorials/guidebooks/videos/other materials, frequency of use of different functions, frequency of visiting the

website, feelings of disappointment/approval re: different functions, why they use the website

- What tone/style of address should these questions be in?
  - Probe: Place of leadership, place of support, place of friendship
- Are there any areas/insecurities that you anticipate getting more feedback on, that we could potentially dedicate a greater proportion of the survey to?
- Tool to interpret results
  - Do you prefer visual results or text-heavy results?
  - Which styles of visual/text results do you think would be the most useful to you or others? (Bar charts, pie charts, summaries, bullets, etc.)

Tool for Step 6 (corresponds to planning for short-term wins)

- Intention: Inspire community to participate in the transition by illustrating the transitional success so far
- Action steps that we developed
  - Outline specific goals that community wants to reach
    - Brandstrader: Specific number of users join The Hood (100, 200, etc.)
    - What other types of goals or milestones do you think would merit celebrating, or working towards?
  - Announce and celebrate when goals are reached
    - Would such announcements/celebrations take place in The Hood, e.g., in the Announcements category? Anywhere else?
    - What type/level of celebration is appropriate for each goal identified in the previous question?
  - Emphasis on how involved every individual + the community is with The Hood, recognizing key contributors
    - Is it more in-tone with the rest of the CWA community to recognize individuals, or to recognize groups of people?
    - What do you think makes members of the CWA community feel appreciated?
      - Probe: Recognition, being able to see their impact

Tool for Step 8 (corresponds to creating a culture)

- Intention: Encouraging every level of the community to support use of The Hood
- Action steps that we developed:
  - Support continuous use of the platform
    - What is the desirable level of activity, e.g., daily average users/monthly average users, that you would like to see in The Hood?

- Direct community members to The Hood for information
  - If a moderator is asked for information that is on The Hood, should they simply direct the asker to The Hood, or should they also provide the answer in the original communication as well?
    - Probe: The first option may come across as rude, but the second option would mean the asker remains dependent on the moderator since they know they'll get an answer
- Maintain list of moderators and their responsibilities on The Hood
  - How often do you think that this list should be reviewed, or updated?

## Appendix 12: Administrator Protocols for Planning Short-term Wins

### Administrator Protocols for Planning Short-Term Wins

#### The Value of Short-term Wins

Recognizing and celebrating small wins helps maintain the momentum that has been built in growing The Hood. Short-term wins in particular are easy to reach, as there are more potential wins to choose from. The announcements and celebrations around them can inspire the CWA community to contribute to growing The Hood, and uplift the community's spirit by recognizing the progress that's been made.

#### Current Short-term Wins to Plan for

##### *Monthly Moderator Spotlight*

Moderators take on significant responsibilities in the offline CWA community and on The Hood. We value and appreciate them and their work, and we want to assure them that their contributions are recognized! Additionally, we want moderators to appreciate each other's contributions, to show them that they are not alone in their efforts. As such, their work is worth celebrating, specifically in the Moderator Hub.

**Planning** for this type of short-term win:

1. Determine how you want to select moderators to recognize. This shouldn't be merit-based, as it is more important to uplift all moderators equally rather than uplift some moderators disproportionately. Decide if it should be alphabetically, by region, or some other method.
2. Once a month, select at least two moderators to recognize.
  - a. It's worth recognizing more than one moderator at a time, or else some may have to wait a long time to be recognized! However, it's also important to find a balance here, as recognizing too many at once may become cluttered or diminish the personal impact of the recognition.

### **Announcing** this type of short-term win:

1. Navigate to the post titled “Monthly Moderator Spotlight” in the Moderator Hub on The Hood.
2. Edit the post to include the moderators you’re recognizing and a short bio about them and their work on The Hood and in the greater CWA community.
  - a. This short bio could include things like how long they’ve been a moderator, where their CWA chapter is located, or what their area of focus is in The Hood.
  - b. If you want help finding out a little about the moderators, consider sending a Google Form to all the moderators asking them to describe themselves, for a more personal touch! Then when you make your post about them, you can pull information from here.
3. Place the previous month’s recognized moderators in a drop-down (“hide details”) menu, titled “[Month, Year] Moderator Spotlight: [First names of the moderators]”.
  - a. The rest of the recognition should be in the details of the drop-down.
4. Make sure to save your edits!

### ***User Count Milestones***

Reaching new milestones related to the size of The Hood community is very exciting! Not only does it demonstrate the growth of the platform and the commitment the CWA community has to collaboration, it also lets users say, “I was part of the first 200 users!” or “I was part of the first 300 users!”. As such, these milestones are short-term wins worth celebrating, specifically in Announcements.

### **Planning** for this type of short-term win:

1. Determine which numbers are worth celebrating. This could be 200 users, 500 users, etc. Create multiple milestones so that you can continue celebrating!
  - a. It is also okay to identify what the last number you want to celebrate is, i.e., the overall goal. This could be 800 users, 1000 users, etc.
2. At least twice a month, check the user count in The Hood, found here: <http://thehood.cyclingwithoutage.org/u>

- a. The number of users can be found in the top right corner of this page, under the search bar.
- b. You might not check on the day you hit your next milestone. That's okay; still announce that it was reached!

**Announcing** this type of short-term win:

1. Navigate to the post titled "Website Growth Milestones" in Announcements on The Hood.
2. Edit the post to include the user count you reached, and the calendar day or month this happened.
  - a. If this milestone is your final goal, thank the community for their participation and excite them about the website's future.

## Guidelines for Planning and Announcing Potential Short-term Wins

There are many other potential short-term wins worth celebrating in the community on The Hood. By no means are you limited to the two established here! It is important to note that any short-term wins you identify should incorporate these four principles:

1. The short-term win should motivate users.
2. The short-term win should celebrate group-level efforts within the community (e.g., regional-level, chapter-level, relating to moderators or users as groups of people).
3. The timeline for planning and/or announcing the short-term win should be explicitly described.
4. Before a plan for a new short-term win is established, it should be determined that it can be maintained, so that announcements related to it are upkept.

**Announcing** a generic short-term win:

1. Navigate to the post titled "[Short-term win title]" in [Announcements/Moderator Hub, depending on the type of win].
2. Edit the post to include the short-term win, as well as the date/month it happened if relevant.

3. If each instance/milestone of the short-term win is relatively text-heavy, i.e., contains more than a couple sentences, place the last instance's short-term win in a drop down titled "[Summary of milestone with date if relevant]".
  - a. The rest of the instance/milestone should be in the details of the drop-down.
4. If this milestone is your final goal, thank the community for their participation and excite them about the website's future.
  - a. Place the final instance's short-term win in a drop down titled "[Summary of milestone with date if relevant]", rather than in the general body of the announcement.
  - b. The rest of the last instance/milestone should be in the details of the drop-down.

#### *Note about Maintaining Short-term Wins*

If you choose to stop announcing a short-term win for any reason, it will lose its inspirational qualities if its maintenance stops without closure. For example, if you decide that the moderator spotlight posts will no longer be happening and don't make an announcement stating that decision, moderators may become frustrated that their work is no longer being explicitly appreciated. As such, it is especially important that short-term wins are announced in a consistent, timely manner, or that you announce that the short-term win will no longer be celebrated.



## Appendix 13: Moderator Protocols for Creating a Culture

### Moderator Protocols for Creating a Culture

#### The Value of Creating a Culture

Communicating the usefulness of The Hood not only incentivizes the community to use The Hood, but also encourages ongoing support for the platform. It's important for the entire CWA community to understand that The Hood is intended to be the singular reference tool for all things CWA, and that Podio collab is in the past. That means whenever anyone talks about The Hood they should try to frame it as "the new Podio," and more than that, as being incredibly helpful and easy to use.

#### Shifting Alternative-Platform Conversations to The Hood

Once every affiliate is in the habit of first turning to The Hood for information, the community we will be that much closer to fully accepting The Hood. You likely have experience with receiving a question, maybe over email or Facebook, that could be answered with resources that are now available on The Hood. Redirecting these questions to The Hood will reduce dependency on leadership for providing information, and support people first turning to The Hood for their answers.

**Shifting** any inquiries you receive to The Hood:

1. Go to The Hood and attempt to help them find the information they are looking for.
  - a. If you can't find the information, check the Contact List to see which moderator is responsible for the category or subcategory you believe that information would be found in, found here:  
<https://thehood.cyclingwithoutage.org/t/contact-list/409>
  - b. If you can't identify which moderator this would be, locate an administrator's contact information.
2. Reply to the person, including these in your message:

- a. Thank the person for their interest in the material and their proactiveness in reaching out.
  - b. Refer them to the link you found containing the information in The Hood by saying “You can find the answer to your question here: [link]”, OR
  - c. Refer them to ask the moderator you identified in the Contact List by saying “I couldn’t locate the answer to your question, but this person may be more helpful: [contact information]”, OR
  - d. Refer them to an administrator by saying “I couldn’t locate the answer to your question, but this person may be more helpful: [contact information]”
  - e. If you refer the person to The Hood, check if they are able to access the information by saying “If you do not already have an account on The Hood, I can invite you to make an account.”
3. If the information they are looking for is helpful but could not be found on The Hood, encourage the person to make a new post in The Hood with the answer they have found by saying “I encourage you to make a new post in [appropriate category/subcategory] to help people with the same question as you!”.

## Explaining to Affiliates When to Use The Hood

Just as its important for the community to learn to turn to The Hood when seeking knowledge relevant to CWA, it is equally important for the community to learn when not to use The Hood, and instead utilize other platforms. This will support The Hood’s main purpose as a centralized, informational resource by redirecting “cluttering” activity, such as casual conversations, to platforms that are better suited to those activities. As affiliates get used to The Hood, you may receive questions about whether the content a person wants to share is Hood-appropriate, or if it is “clutter” that would be more useful on other platforms.

**Explaining** when to use The Hood:

1. Reference the “decision tree,” included on the next page, to refresh yourself on what is Hood-appropriate and what is not.

2. Identify the type of content the person wants to share and the platform options they have to share it.
3. Communicate these options to the person, referencing the “decision tree.”
  - a. This way, they can clearly understand your recommendation and make this type of decision autonomously in the future.

### *Decision Tree*

- Announcements to inform or update the affiliate community *in your region*
  - The Hood (Regional)
- Announcements to inform, update, or inspire the entire affiliate community
  - The Hood (Announcements)
- Collaboration on one document/project
  - Google Drive files
- Content to share with non-affiliates
  - CWA website, CWA Facebook page, Instagram, Twitter
- Coordinating physical meetings/events
  - Slack
  - Facebook Workspace
- Crowdfunding campaigns
  - Crowdfunder (UK)
  - GoFundMe
- Discussion feeds
  - Slack
  - Facebook Workspace
  - Personal email
- Images/videos of trips
  - CWA Stories Facebook
  - YouTube
  - Vimeo
  - Instagram
  - Flickr
- Internal chapter page for affiliates from your chapter or other chapters
  - The Hood (Regional)
- Knowledge/experiences that the affiliate community *in your region* should know
  - The Hood (Regional)
- Knowledge/experiences that the *global* affiliate community should know
  - The Hood (Knowledge Base)

- Large-scale document storage for chapters
  - Slack
  - Google Drive files
- Managing chapters
  - Podio
- Obtaining a CWA email
  - Email [christian@cyklingudenalder.dk](mailto:christian@cyklingudenalder.dk)
- Personal messaging/file sharing with groups
  - The Hood (personal messages)
  - Google Drive files
- Personal messaging/file sharing with individuals
  - The Hood (personal messages)
  - Google Drive files
  - Personal email
- Questions on specific topics
  - The Hood (Questions)
- Read the CWA brand book
  - The Hood (Knowledge Base)
  - CWA website
- Stories of trips
  - CWA Stories Facebook
- Submitting orders for trishaws
  - <http://copenhagencycles.com>

## Appendix 14: Survey and Interpretive Tool for Making Continuous Improvements

### Survey Questions

Thank you for taking the time to provide feedback on The Hood. This survey should take about 5 minutes to complete.

Your participation in this survey is voluntary. You may exit the survey at any time and are free to decline to answer any question for any reason. We do not collect any identifying personal information that you do not volunteer. Your survey answers will be stored in Google Drive and will only be accessible by administrators of The Hood.

---

First, we would like to ask you a couple things about yourself.

How long ago did you become a member of the CWA community?

- Less than 1 month
- 1-6 months
- 6 months – 2 years
- Over 2 years

How would you describe your role in the CWA community? (you may check multiple options)

- Pilot
- Chapter Captain
- Organizational leader (e.g., Country Captain, member of The Hub)

---

Next, we would like to ask you about your experience using The Hood.

Why do you use The Hood? Please pick the top three options for why you use The Hood. If you don't see a reason why you use The Hood already listed, please pick "Other" and then describe that reason in the free-response question below.

- To provide information
- To find information or how-tos (for example, reading the brand book, or how to fundraise)
- To get help (asking questions, using the contact list in Site Feedback)
- To find inspiration

- To use the Regional category
- Other (describe below)

Please indicate, overall, how useful The Hood is in meeting your needs.

- Very useful
- Slightly useful
- Neutral
- Slightly useless
- Very useless

Please share any categories or subcategories in The Hood you think are missing here: (FR)

In your view, where does The Hood meet your expectations, or not meet them, in serving as CWA's community platform? (FR)

---

Finally, we would like to ask you about your experience with the resources for using The Hood.

If you have watched the User Tutorial video, how useful did you find it in answering your questions?

- Very useful
- Slightly useful
- Neutral
- Slightly useless
- Very useless

Please share any suggestions for the User Tutorial or its text summary here: (FR)

Please indicate your preferred medium for supporting materials for The Hood (this often corresponds to your learning style) (you may check multiple options):

- Visual
- Text
- Audio

Please share any categories or subcategories in The Hood you would like a clearer understanding of here: (FR)

Please share any additional thoughts, comments, or feedback on how we can help The Hood benefit you as a CWA community member here: (FR)

---

Thank you for your time, we sincerely appreciate your feedback!

## Appendix 15: List of Deliverables and E-Files

These deliverables are listed in the order they are referenced in this report.

<u>Deliverable</u>	<u>Description</u>	<u>Location</u>
Moderator Welcome Video, Link and Script	A video that details how The Hood benefits moderators as CWA volunteers, expected soft-skills of the moderator role, and the purpose and structure of The Hood as it relates to the moderator role.	Appendix 3
Moderator Guidebook	A guidebook that explains how to carry out moderator responsibilities and choosing/monitoring an area of focus.	Appendix 4
User Tutorial Video, Link and Script	A video that explains how to complete all tasks in The Hood a user may be interested in.	Appendix 7
Training Session Materials	A script to follow during training sessions that details the same content as the User Tutorial Video and incorporates dedicated times to answer questions.	Appendix 8
Eight-step Change Management Plan	An eight-step plan comprised of action items to transition the CWA community to The Hood and support The Hood's acceptance.	Section 5.2
Administrator Protocols for Planning Short-term Wins	A document that includes a value statement for planning short-term wins, protocols for implementing short-term wins, and protocols for identifying future short-term wins.	Appendix 12

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<b><u>Deliverable</u></b>	<b><u>Description</u></b>	<b><u>Location</u></b>
Survey for Making Continuous Improvements	A survey that asks questions about expectations for The Hood as a community reference tool, reasons for using The Hood, and opinions on existing guidelines and resources for using The Hood.	Appendix 14
Corresponding Interpretive Tool	A programmed spreadsheet that produces pie charts from responses to selected multiple-choice questions in the Survey.	An e-file available by accessing this project through this link: <a href="http://digitalcommons.wpi.edu/iqp-all/">http://digitalcommons.wpi.edu/iqp-all/</a>
Moderator Protocols for Creating a Culture	A document that includes a value statement for creating a culture and protocols for implementing action items for creating a culture.	Appendix 13

## Appendix 16: Notes from Guidelines Interview with Warming

12 March 2019, 14-16 CET  
E-HUB, Copenhagen, Denmark

Information structure on The Hood

- Categories > sub-categories > topics > posts

Responsibilities of each user level

- Administrator
  - All capabilities
- Moderator capabilities
  - Approve posts that regular users make
  - Each has a focus in certain area(s) but helps out generally
    - Is it possible for people to get notifications about specific subjects/topics?
    - Person should answer questions about this topic or suggest places to find answers
    - Person should contribute to editing around this topic
    - Titles: “specialists” for subjects, “editors” to add content to wikis, “helpers” to answer questions
      - Need guides for each of these titles
  - Edit existing posts
  - Move posts between categories/sub-categories
  - Can’t change backend settings and structural categories
  - Three types right now: editors, moderators for areas, testing The Hood
  - Encourage users to ask questions in discussion instead of making items in Knowledge Base
- Regular user
  - No editing powers
  - Can post anything they want within topics
  - New topics created by users must be approved by a moderator
    - If the topic is rejected the user account is temporarily suspended

Technical items

- Edit > Security > Edit permission
- Lock = some restriction on that topic (who can post/public to only users/types of users)
- No intention to use “trust levels” to create tiers of users beyond admin, moderator, and regular user
- Future: Make only certain topics open to the public and that you need an account to view the rest

Moderator knowledge so far

- Created KB topics by going through Podio and synthesizing content
- Hub wants moderators to help being editors

- Expectation that moderators help test out The Hood
- No moderators on Podio
- Category in moderator topic of The Hood has a page that presents CWA's roles so that people can verify credibility + direct questions
  - Future: Move this so it can be viewed by anyone

#### High-visibility and significant things

- Very important things (included in opening wizard)
  - Finding different useful areas of information within The Hood
  - Basic functionalities of the website
  - Emphasizing that moderators should pick the roles they would like but then stick to those roles
- Things to detail but not wave in a new user's face:
  - Jurisdiction of each topic
  - Responsibilities and abilities of each user level
    - Include specific jobs moderators hold (their responsibilities and focus), as well as the CWA roles page mentioned previously
  - Creating new wikis following a certain structure
  - How to act: if you see this, then you do that
- Future:
  - Is it possible to make a different wizard for moderators? (this would be more specific)
  - Is it possible to find a bot that will automatically message the detailed guides to moderators when they become that level of user?

#### Content migration and creation

- Data migration from Podio is mostly complete
  - Moderators shouldn't have to do very much of this
  - Need to determine which Facebook Workplaces are being decommissioned so that data can be migrated as well
  - If information is missing following migration, community will notice and populate it
- Protocol for relocating information from conversation thread in The Hood to static knowledge page
  - Fact-based and more objective discussion posts
    - Moderator thanks posters for information and informs them that when they have moved the information to a specified static knowledge page, that post will be deleted (say where you can find the new static page)
    - Poster needs to see this moderator comment before post can be deleted; once user has acknowledged it or so long has passed, moderator can delete post
    - Determine which information is relevant by considering all perspectives
    - Keep track of who originally provided each piece of information you are compiling

- Information in comments on KB can be moved into KB wiki following same steps
- Allow opinion-based and more subjective discussion posts to stay up

#### Handling past/future problems:

- Relatively common problem: volunteers get angry they aren't being answered
  - Response: be polite, help them or direct them to where they can find help
- Emphasize that the Hub is a small team and not a service center, so volunteers should look through The Hood first
  - The Hub should be contacted if other options have been exhausted or if there is obviously conflicting information
- Behavioral rules should be cut and dry, without assuming anything negative about user behavior

#### Other

- Long-term goal: The Hood as a sustainable goal/process so that once WPI team is gone, we've educated moderators to help other moderators and users as we did
  - Educate and motivate moderators to last past us
- Possibly make a communication about how people should go to The Hood to answer questions before emailing the Hub: see if they can find and answer through the moderators or the platform
  - Also for the guides: how to be change agents
  - Main goal: make them experts of The Hood

## Appendix 17: Word Frequency Data from Workshop with Moderators

<u>Word</u>	<u>Rel. freq.</u>	<u>Abs. freq.</u>	<u>Word</u>	<u>Rel. freq.</u>	<u>Abs. freq.</u>	<u>Word</u>	<u>Rel. freq.</u>	<u>Abs. freq.</u>
Hood	3.93%	20	insurance	0.39%	2	inside	0.20%	1
person/ people	2.36%	12	late/r	0.39%	2	instance	0.20%	1
Podio	2.36%	12	leaders	0.39%	2	intimidating	0.20%	1
question(s)	2.36%	12	Maren	0.39%	2	keeps	0.20%	1
post(s)/ posting	2.16%	11	messages	0.39%	2	Knowledge Base	0.20%	1
thing(s)	1.96%	10	methods	0.39%	2	last	0.20%	1
know	1.77%	9	migrated/ migration	0.39%	2	launch	0.20%	1
website	1.77%	9	nice/ly	0.39%	2	limits	0.20%	1
guide/ guideline/ guidebook	1.57%	8	organize(d)	0.39%	2	links	0.20%	1
information	1.57%	8	other	0.39%	2	listen	0.20%	1
moderator(s)	1.57%	8	page(s)	0.39%	2	live	0.20%	1
make	.38%	7	problem	0.39%	2	local	0.20%	1
need(s)	.38%	7	report	0.39%	2	love	0.20%	1
affiliate(s)	.18%	6	search	0.39%	2	map	0.20%	1
chapter(s)	.18%	6	share	0.39%	2	met	0.20%	1
find	1.18%	6	something	0.39%	2	Names	0.20%	1
interested/ interesting	1.18%	6	sources	0.39%	2	never	0.20%	1
video(s)	1.18%	6	step(s)	0.39%	2	newer	0.20%	1

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<u>Word</u>	<u>Rel. freq.</u>	<u>Abs. freq.</u>	<u>Word</u>	<u>Rel. freq.</u>	<u>Abs. freq.</u>	<u>Word</u>	<u>Rel. freq.</u>	<u>Abs. freq.</u>
clear/ly	0.98%	5	topic(s)	0.39%	2	nursing	0.20%	1
conjugations of "make"	0.98%	5	trishaw(s)	0.39%	2	older	0.20%	1
conjugations of "see"	0.98%	5	want	0.39%	2	Ole Kassow	0.20%	1
good	0.98%	5	access	0.20%	1	ongoing	0.20%	1
user(s)	0.98%	5	accurate	0.20%	1	online	0.20%	1
add	0.79%	4	afraid	0.20%	1	option	0.20%	1
conjugations of "read"	0.79%	4	allow	0.20%	1	otherwise	0.20%	1
CWA	0.79%	4	already	0.20%	1	part	0.20%	1
email(s)	0.79%	4	always	0.20%	1	pause	0.20%	1
everyone	0.79%	4	another	0.20%	1	perfect	0.20%	1
explaining	0.79%	4	anticipating	0.20%	1	phrase	0.20%	1
Facebook Workspace	0.79%	4	apply	0.20%	1	place	0.20%	1
purpose	0.79%	4	approval	0.20%	1	play	0.20%	1
relationship(s)	0.79%	4	areas	0.20%	1	prefer	0.20%	1
send	0.79%	4	Austria	0.20%	1	qualified	0.20%	1
time(s)	0.79%	4	automatic	0.20%	1	questionable	0.20%	1
works	0.79%	4	away	0.20%	1	quick	0.20%	1
benefit	0.59%	3	bad	0.20%	1	reassure	0.20%	1
category/ies	0.59%	3	bike	0.20%	1	recruit	0.20%	1
communicate/ communication(s)	0.59%	3	bottom	0.20%	1	regional	0.20%	1
community	0.59%	3	build	0.20%	1	related	0.20%	1

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<u>Word</u>	<u>Rel. freq.</u>	<u>Abs. freq.</u>	<u>Word</u>	<u>Rel. freq.</u>	<u>Abs. freq.</u>	<u>Word</u>	<u>Rel. freq.</u>	<u>Abs. freq.</u>
conjugations of "let"	0.59%	3	calculated	0.20%	1	replace	0.20%	1
conjugations of "look"	0.59%	3	case	0.20%	1	responses	0.20%	1
conjugations of "say"	0.59%	3	chain	0.20%	1	responsible	0.20%	1
depends	0.59%	3	clicks	0.20%	1	scale	0.20%	1
easy	0.59%	3	consider	0.20%	1	scene	0.20%	1
emphasize	0.59%	3	content	0.20%	1	select	0.20%	1
general	0.59%	3	Copenhagen	0.20%	1	September	0.20%	1
global/ly	0.59%	3	cycle	0.20%	1	session	0.20%	1
international	0.59%	3	database	0.20%	1	set	0.20%	1
language(s)	0.59%	3	date	0.20%	1	shifting	0.20%	1
overview	0.59%	3	deal	0.20%	1	signed	0.20%	1
personal	0.59%	3	decent	0.20%	1	simple	0.20%	1
reach/reaching	0.59%	3	definitely	0.20%	1	someone	0.20%	1
seems	0.59%	3	difference	0.20%	1	somewhere	0.20%	1
short	0.59%	3	discovered	0.20%	1	speak	0.20%	1
should	0.59%	3	either	0.20%	1	spend	0.20%	1
tool	0.59%	3	engaged	0.20%	1	sprockets	0.20%	1
translate/ translation	0.59%	3	English	0.20%	1	still	0.20%	1
useful	0.59%	3	events	0.20%	1	subcategories	0.20%	1
value	0.59%	3	everything	0.20%	1	suggestion	0.20%	1
able	0.39%	2	feel	0.20%	1	take	0.20%	1

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<u>Word</u>	<u>Rel. freq.</u>	<u>Abs. freq.</u>	<u>Word</u>	<u>Rel. freq.</u>	<u>Abs. freq.</u>	<u>Word</u>	<u>Rel. freq.</u>	<u>Abs. freq.</u>
all	0.39%	2	function	0.20%	1	talking	0.20%	1
answers	0.39%	2	further	0.20%	1	think	0.20%	1
big	0.39%	2	future	0.20%	1	top	0.20%	1
call	0.39%	2	gearing	0.20%	1	track	0.20%	1
checked	0.39%	2	Google	0.20%	1	training	0.20%	1
conjugations of "answer"	0.39%	2	grew	0.20%	1	use	0.20%	1
conjugations of "write"	0.39%	2	groups	0.20%	1	user-friendly	0.20%	1
connected	0.39%	2	guess	0.20%	1	volunteers	0.20%	1
create	0.39%	2	happen	0.20%	1	week	0.20%	1
day	0.39%	2	held	0.20%	1	wondering	0.20%	1
directly	0.39%	2	hilly	0.20%	1	word	0.20%	1
example	0.39%	2	home	0.20%	1	worse	0.20%	1
FAQ	0.39%	2	human	0.20%	1	YouTube	0.20%	1
far	0.39%	2	incorrect	0.20%	1			
fundraising	0.39%	2	indicates	0.20%	1			

**Total: 509**



## Appendix 18: Notes from March 26 Online Workshop with Moderators

Leads: Natalie and Sinead; Scribe: Cameron; Technical Help: Joseph

26 March 2019, 10-11 CET

Google Hangouts

### Beginning

1. Introductions by Natalie, Sinead, and participants
2. Recording and consent statements
3. All participants have been able to log into The Hood

### Screen-shared walk-through of The Hood

1. Announcements
  - In announcements, affiliates must go through a moderator because announcements should be community-wide
    - This is not the case in other categories - usually we want to emphasize how crowdsourced our information and experiences are so this is why users have freedom
  - Announcements are INSPIRING, not just updates!
  - The Hood team is very open to what can be important, so don't consider this very strict or gatekept!
  - Participant A: Are users, affiliates?
    - Yes
2. Knowledge Base (KB)
  - Affiliates are allowed to post in any area, we'd like moderators to keep information accurate and up-to-date
  - Participant A: If people can post directly to The Hood, it may not all be accurate - or not always apply to everyone - so how do we deal with that?
    - For regional things, moderators can hopefully monitor their own regions and verify those things personally.
  - You start by writing things in general that can be applied to everyone in the whole world, then further down in the post, if you have something specific to someone in a country/region you can write a few lines about those specifics. This is like a funnel approach to information so you don't have to jump around the post for information useful to you! You will know where to find general information (top of the post) and specific information (bottom of the post)

### 3. Drop Zone

- Users will post things here if they don't know where to put it - moderators should move things out of here
- How should The Hood team best communicate the purpose of the drop zone?
  - Participant A: Call it FAQ or something that more clearly indicates its purpose. Names of categories, sub-categories, etc. should really clearly communicate its purpose

### 4. Questions

- Last resort! Encourage users to look in KB, Regional, FAQ before asking a question
- FAQ contains frequently asked questions AND important things to know
- No comments from participants

### 5. Regional

- If you don't see your region here, please let us know so an administrator can add it! The Hood team would love for you to add information you think is significant to know in your region.
- Information that is truly specific to your region
- No comments from participants

### 6. Moderator Hub

- This is only visible to moderators so it is not really relevant to users. This is a good touch point if you need help in your role.
- No comments from participants

## Thoughts on The Hood's categories overall

- Content replaces Podio collab
  - The Hood team has migrated all the big-picture information from Podio to The Hood so that the website is equally useful
  - We welcome you to add any information to "fill the gaps"
- Participant A: Will The Hood replace Workplace?
  - A few chapters work really well in their Workplace, but many groups don't have that much in Workplace and it's better for them to move to The Hood. The Hood team encourages you to try The Hood out and see how it works for you and your chapter. If you have any information in Workplace you think would be useful for the rest of the community, we'd really like you to share it in The Hood
- Participant A: Can moderators play with it until it goes live, as moderators?

- Yes! The Hood team encourages any amount of interaction with it, especially actually using it! That way, when everyone else joins it's already in the best shape possible
- Participant B: Is there an option to translate The Hood into other languages?
  - Yes, The Hood team is in the process of updating the software now so that it features inline translation. This should hopefully happen before the big launch.
- Participant B: Can we also create local groups within The Hood?
  - There's a Chapter category under construction, where specific chapters will be able to communicate with each other within the website. The Hood team hopes to get this up and running very soon. This will also include a map to find chapters in different areas.
- Participant B: Is the Podio affiliate approval shifting to The Hood?
  - No, only Podio collab, as in the discussion space, is shutting down. You will still approve affiliates in Podio.

### **Other questions**

1. Which parts of The Hood do you like the most?
  - Participant A: I find it quite user-friendly. It's definitely better than Podio. I never grew to love Podio.
2. Which parts of The Hood would you like more clarification with?
  - Participant A: Have you calculated how much time it's going to take as a moderator?
    - It's entirely up to you as moderators. The Hood team doesn't have any kind of expectations. The team would just love for you to be as active as you can be, posting new content, answering affiliate questions, and checking that posts are up-to-date. Any amount of time you can put into The Hood is greatly appreciated. The Hood team also hopes that working on The Hood will make your job as community leaders easier, so that you can direct affiliates to The Hood instead of helping them personally and ease your job strain.
  - Participant A: If I have a question as a moderator, and I email Copenhagen/Maren/whomever answers those questions, are you anticipating that question should go through The Hood in the future or should we still go directly to Maren/etc.?
    - We recommend for now that you go directly to Maren/etc. But you can still ask questions in the Moderator Hub! If you have specific questions that only Maren or Ole can answer, please feel free to

contact them directly. If Maren or Ole has information they think would benefit everyone, they would share it on The Hood, but they also won't be active every day. For this reason, it makes more sense to email them directly.

3. Is there anything The Hood team can do to clarify your role as a moderator?
  - Participant A: Can we be held responsible as moderators? What if we say something incorrect?
    - People in the community will help each other out. We all talk to each other nicely, and The Hood team expects people to share the knowledge they have. If there are subjects where people have different opinions or are in doubt if the information is correct or not, the community will discuss the matter until we reach a conclusion. It is not someone's fault for not having the correct information because The Hood team expects them to have the right intention. It's not that you have to be 100% sure, The Hood team knows that you are all volunteers, so the team appreciates everything that you want to share with the rest of the world, and we'll take it from there.
4. How can The Hood team improve communications, specifically to excite wider CWA community?
  - Participant A: It would be more useful to reach out to chapter leaders, who will then reach out to their affiliates. People feel worse reaching out to someone further away who they don't know as well. With all communications, you are talking to a person. You need to come to the communication in a human way, and reassure people. If they're posting questions onto The Hood, I think people don't really know where their question is going or who's reading it. I think you need to build those relationships. Affiliates won't have that with The Hood, but they have that with their leaders.
  - Participant B: Make sure the translation tool is up-and-running before the big launch, otherwise it is far too intimidating.
  - Participant C: In Austria, the problem is the language.
5. What do you wish you knew about The Hood when you first join?
  - Participant B: Its purpose
    - We could make sure to really communicate its purpose whenever we're reaching out to someone unfamiliar with it instead of broadly and generally, such as when The Hood team reaches out to chapter leaders
    - Participant A: Phrase its purpose as The Hood is the place you can find the answers you need to about Cycling Without Age

- Participant B: Its difference to Facebook Workspace, Podio etc.
    - We should be really clear about where The Hood team sees Workspace, Podio going in the future
6. What important information needs to be highlighted in user guidelines?
- Participant B: It needs to be very easy to find information, emphasize the value that they don't have the add information to benefit from it. Make a video explaining how this website works: a general overview. Make this a personal relationship with the user and not just a guideline.
7. How should the users be informed of the guidelines?
- Participant A: You want to make things visual! Pernille did a very short video of just operating the bike, and it was very short but very simple. This is how you turn it on, this is how this works, etc. There should be a space for really basic information like that, information that people take for granted. They won't use The Hood if they can't see an immediate, visual purpose.
    - Participant C agrees
    - Participant B agrees
  - Participant B: Create short Q&A videos related to insurance, how to recruit volunteers, how to get the nursing home engaged, etc.
  - Visuals are a big takeaway here - the community is very visual!

### **Wrap-up**

1. We want to keep open communication with moderators if you have any questions or comments in the future.
  - You are free to play with The Hood and use it when you find time.
  - If you haven't chosen an area of focus, please feel free to pick one that you think you are equipped to have a moderating focus on!
2. Thank you/goodbyes, call ended

## **Appendix 19: Notes from March 28 Online Workshop with Moderators**

Leads: Natalie and Sinead; Scribe: Cameron; Technical help: Joseph

28 March 2019, 13-14 CET

Google Hangouts

### **Beginning**

1. Natalie and Sinead introduced themselves
2. Participants introduced themselves
3. Recording and consent disclaimer

### **Screen-shared walk-through of The Hood**

1. Brief troubleshooting on viewing the screen-share feature
2. Reiterated The Hood's purpose: collect and share information, collaborate on future work
3. Reviewed the overall structure of the website, and the purpose of each category
4. The only instance where users need approval for their posts is in Announcements - otherwise, we encourage extensive knowledge sharing!
5. If you ever feel like there should be an additional category or subcategory, please bring it up with an administrator so they can work with you to determine if it will benefit the community

### **Thoughts on The Hood's categories overall**

1. Participant M: In Podio, is there anything that limits users? I haven't seen anything in there that is questionable or seems bad. If it works in Podio, then it seems like a decent thing to do in The Hood as well.
2. Participant N: Do we have to write in English in the Knowledge Base? The translation is automatic, like Google, so that's good. I saw that in the regional post, you can speak your own language.
  - We are in the process of updating the translation tool. We will announce when this tool is active. Of course, please post in your own language in your own region.
3. Participant O: Is there a search function that lets us search say, "insurance" without several clicks?
  - Yes, the magnifying glass lets you use this.
  - Sinead demonstrated this example with "insurance".

4. Participant O: Is there a way to send messages globally, for example we want to do a query about fundraising in all chapters so people can report sources and methods to share with everyone else. Is there a way to do that?
  - Participant N also wants to know this
  - There are a few options to do this. You could post this in announcements, asking for replies, especially since this is a global effort. If you are just casually interested, you can post in questions to get some discussion on it. Finally, you could create a poll in the Fundraising topic > Finance > KB.
  
5. Participant M: I have a question about the content that was migrated from Podio. It seems like there was only one migration date, in late September.
  - The Hood team decided to only migrate the most referenced information. We encourage everyone to fill the gaps in knowledge that they want to share.
  
6. Reviewed protocol for Announcements category
  - Participant O: How do we know if or who the moderator for each of the categories is?
    - When we sent out the guidebook and the Welcome Video for moderators, we attached a spreadsheet that has different areas of focus that moderators could sign up for. There is a post called “CWA Roles in The Hood” in Site Feedback that explains all roles in The Hood.
  - Participant N: That post is good.
  
7. What are your thoughts on this approval process for announcements?
  - Participant M: I guess I don’t know how often it’s going to happen. Is it going to be a once a day thing, or a several times a day thing?
    - We’re basing it on how much affiliates have to post, as well as what type of content it is. For example, an affiliate wouldn’t need to post in announcements that they got their bike.
  - Participant O: Do we know how many Podio users are in The Hood?
    - Moderators and admins are now. Everyone else is being migrated next week.
  
8. Reviewed other categories; are there any comments from participants?
  - Participant N: I looked through The Hood last week, the guidebook is very nicely done and it is perfect. The Hood is very clear. The questions category is useful.
  - Participant M: I think I’ll have questions later, when I go in and look around. But the guidebook might answer those things.

## Other questions

- How has your experience been so far on The Hood?
  - Participant N: The only thing I have done was read the guide, and I was wondering about some questions that it was already online, so everything was really nice for me. I haven't had time to post anything.
  - Participant M: I signed in and made a post about some ongoing topic about the gearing and sprockets on the trishaws to allow you to cycle in hilly areas, so I was able to find that and make a post myself.
- Is there anything we can do to clarify your role as moderator?
  - Participant M: One thing we need to do is select topics that we are either qualified or interested in to be a moderator for. Is that true?
    - Yes, that would be great if you could choose an area of focus. Once you choose it, we would really appreciate if you could keep an eye on that area, answer any questions, keep the discussion on-topic and easy to follow.
  - Participant M: That said, do you have The Hood set up so that you can get emails on posts that you're interested in?
    - Yes, you can activate a setting called "watching". Sinead screen-shared to demonstrate the way to activate this for a sub-category. You'll get an email anytime someone replies or creates a new topic in this subcategory.
- How has the communication about The Hood been so far, and how can we improve it to excite the community?
  - Participant M: What I've got so far with emails has been good. I've been able to get onto the website and responses have been quick.
  - Participant N: The problem is that I discovered the international community is not very connected with each other. As I am not often connected with them, I didn't know there was an international community on Podio, for instance. I only use Podio inside my chapter. Until I met Ole Kassow, I didn't know there was a lot more of a global scene. Do all the affiliates know there is a big, international scale and access to The Hood or Podio? That is where I would spend my time.
- What do you wish you knew about The Hood when you first joined?
  - Participant N: The guide was enough. I just checked the CWA website page on The Hood and read the guide. It answered all the questions I had. I was not afraid after this. It is very well-organized and really clear for me.
  - Participant M: I haven't checked, but do you have any links to The Hood on the CWA website yet?





## Appendix 20: Notes from Change Management Interview with Brandstrader

Lead: Sinead, Scribe: Joseph

14 February 2019, 2-3pm EST

WPI, Worcester, MA, USA

### Podio/FB

- “Thank” the platform for providing so much to them for many years but it is now time to move on
- Some people will be very attached to Podio, make sure we don’t speak badly of Podio but rather lift up The Hood instead
- In trying to make The Hood more central to everyone, frame that this is a more central community, better for sharing and better security

### The Hood

- Give specifics on the timeline and reasons for every decision
- Be very detailed on the transition itself (Podio will stay open for X days because...)
- Set expectations for the transition early
- Emphasize things The Hood does that is an improvement from Podio
- Give people the option to save/download any useful information from Podio that they might not want to lose, give them the heads up
- Frame barriers: you have to make an account, but you will get xyz out of it
- Identify the vision: This is current state. What is the ideal state?
- Feedback thread (like as another section)
  - Have the first thing be the survey (including posting the survey everywhere else)
- How to reinforce The Hood
  - Newsletters
  - Weekly highlights on what’s going on with The Hood
- Tips and tricks!
  - Try to set up one of those walk-through tutorials when people first log on
  - Interactive instead of them just reading an essay
  - Use graphics, videos, a flow diagram/visual of how The hood is set up
  - People don’t read things
    - Typically need to communicate something like 6 times

- Be clear about the intention of the email with the subject line, is people know this already they can skip
- The sections
  - Possibly give actual examples of what discussion should look like in each section, copy and paste from Podio to show instead of tell
  - Build them out more

### Survey

- Allowing for comments is crucial
- Communicate the results from the survey
  - Send out an email of the results we found
    - What we can change, what we can't change, what our plans are for the future, etc.
- Show that someone who used to be resistant is now on board with the transition
- Continuously reassess the platform

### Change agents

- Moderators could act as change agents
- Use to guide those who are resistant to the change to help with the rough patches in the transition
- Make sure they know how to handle negativity they come across, who to direct them to so that their concerns are heard
- If possible, identify the potential resisters and personally reach out to them

## Appendix 21: Notes from Change Management Interview with Warming

Lead: Sinead, Scribes: Natalie, Joseph

14 March 2019, 2-3pm EST

WPI, Worcester, MA, USA

### Introduction

- We are already in the change management process
- We are hoping to follow Kotter's eight steps for change management
  - Warming is familiar with Kotter

### Step one: Establishing a sense of urgency

- Is it okay to use shutting down Podio to establish a sense of urgency?
  - Are there other places where we can post why the transition is important and people should be interested?
  - Is there a time frame would aim to shut Podio down to inform and encourage people about the transition?
- We plan on using shutting down Podio as our sense of urgency
- Warming thinks it is not that urgent - it is not that Podio is shutting down and "what do we do!"
  - We just have this new platform and everyone should be interested in
- Warming talks of a "burning platform" similar to our sense of urgency
  - Say "we're shutting down Podio you need to move now"
  - Create fear
- But there is also a motivational way - this is what the Hub has been trying to do
  - Take a calmer approach
  - They don't want to force people, they want to encourage people
- We think that "urgency" isn't the right word
- We should try to use motivation first, then later inform people that Podio will be shut down so they need to move
  - One approach might work for some people, while the other works for others

### Step two: Building a powerful change team

- Who do you see as the change team for the online platform?
  - The Hood team/moderators?
- How should the moderators be used to help with the change?

- How should they be encouraged to help others with the transition?
- The Hood team has been brought in to manage the transition
- Use the moderators to act as change agents and help transition the users
- Through our workshop, we can learn what the moderators are missing so we can better prepare the users
- Moderators can help with resistance or confusion amongst users
- Warming thinks the moderators are good motivators
  - As a user she would be more willing to get on if she knew someone already there - try to get moderators from all regions so users are likely to know a moderator

#### Step three: Defining the change vision

- How would you like The Hood to be perceived and the change vision be communicated?
- Communicating that The Hood is a great tool to remove burden and save time
- Communication through CWA website

#### Step four: Effectively communicating the vision

- Where and what would you like to campaign to build enthusiasm?
- Can we create a farewell Podio for a part of the campaign?
- Can it including a series of posts to put on Podio that repeats the change vision?
- If Podio isn't being completely shut down, are there other ways we can the website or log in to minimize future use?
- Is there any reason we shouldn't invite all users on Podio to The Hood?
- Campaign on CWA website, Facebook, Podio newsletter to build enthusiasm
- Farewell Podio post - give Podio recognition
  - Post on Podio and the website
  - Say we are taking the great aspects of Podio and making it better with The Hood
- Create some kind of banner or notice at the top of Podio
  - Warming has already posted our first switching to The Hood announcement on Podio
  - In the "Welcome" box on Podio, Warming mentioned that we are moving to The Hood but it is a little unclear
    - Maybe we should change the "Welcome" title
    - Warming is willing to hear any changes we suggest
- It is not possible to create a redirecting feature when users try to access Podio
  - People have lots of different spaces in Podio, so redirecting people and completely shutting down the website is not a good idea

- Maybe have the Collab be just one post (or the “Welcome” box) that says “this space is no longer active. Please visit The Hood at this link\_\_”
- We can delete all people’s accounts on Podio so they cannot use them anymore
- Constantly be posting on Podio to remind people it’s leaving
  - Make a countdown for Podio - maybe post every day for a week
- Warming likes the idea of sending invites to all users so it’s in their mailbox

#### Step five: Empowering others

- Are there other ways besides user guidelines we can assist users in learning about The Hood?
- What can be used to “reward” users for utilizing The Hood?
- Is there a reason we can’t allow users to post what and where they want on The Hood to encourage use?
- Give users resources to learn about The Hood - some sort of guidelines for users
- Breaking down obstacles for the resistant users by manually sending a personal invite
- Use Discourse badge system to reward users for utilizing The Hood
- Empower them by allowing them to post where they want (except for announcements)

#### Step six: Planning for short-term wins

- Can we post announcements to encourage how many users have joined?
- How should moderators be given acknowledgement for putting in work?
- Should moderators be asked if there are any categories/subcategories that they feel are missing?
- Communicate “100 new users have joined!” to highlight successes and encourage others to join The Hood
  - Do this on Facebook, newsletter, website
- Constantly give updates on the transition and on The Hood
- Congratulate / thank moderators have been putting in a lot of work
- We are not really “creating” short-term wins, we are “recognizing” short-term wins
- Warming wants us to ask moderators if they want new categories or subcategories, or new information
  - We want to make sure they are the examples for posting and contributing to The Hood
- We really want moderators to use The Hood as a resource and post knowledge

#### Step seven: Making continuous improvements

- Are there other ways besides the site feedback category and survey that we should reach out for improvements?

- Is it okay to ask moderators for improvement on back end of the platform?
- Site feedback and survey to ask for improvements
- Keeping open conversation with users of The Hood to constantly help them
  - Especially the Hub and moderators about actually fixing the changes
- Warming thinks we should make a post in the site feedback once in a while to check in and ask questions like:
  - Do you have any feedback?
  - Do you have any good ideas?
  - Have we missed any information/functionality/category?

#### Step eight: Creating a culture

- Is it okay to brand The Hood as “the new Podio” to get people’s attention?
- What do you feel the culture is you want The Hood to have to make it last into the future?
- Who should we use to develop this culture?
- We want to develop The Hood as “the new Podio”
- We should use the moderators as the backbone of The Hood
- Kotter says to “institutionalize the change”
  - We want The Hood to be the first thing people think to go to
  - How do we engrain it in the community?
- Warming thinks that by the Hub using it and constantly referencing it the users will get used to using it
  - New posts on Facebook, like “if you’re looking for info about bikes, go to The Hood!”
  - Warming thinks that it takes users to have a need to really get used to The Hood - when they go to a leader with a question that person should guide them to The Hood
    - Encourage moderators to only answer questions through The Hood
    - Remind them that The Hood can save them time

#### Other

- We went over our moderator workshop presentation to get Warming’s feedback
  - Warming thinks there needs to be more screenshots of The Hood to make sure everyone has seen it and is on the same page
  - She doubts that people have spent that long on The Hood so they will not be able to help us that much
    - We really need to motivate them to get on and look for things in order to answer our questions
    - They cannot really address specifics like if we need more categories

- She thinks the moderators need more of a presentation or tutorial
- We should still ask them what they wish they knew when they first got on
  - They can help us imagine how a new user would feel
- We have to give lots of explanations of the setup before asking the questions, in case they have not gone through it all themselves
- Warming thinks it would be helpful to have us ask moderators for their opinion on user freedom



## Appendix 22: Notes from Implementation Tools Interview with Warming

Lead: Cameron, Scribe: Joseph

12 April 2019, 10-11 CET

E-Hub, Copenhagen, Denmark

Read through the preface notes:

- We realized that as part of our change management plan, three of the steps rely a lot on The Hood being live
- Since we won't be here for as long as we thought after The Hood's launch, we are making tools (like the survey we discussed before) that members of the Hub or Hood Team could easily use in our absence
- These tools correspond to the steps of the change management

Survey, Interpretive Tool (corresponds to making continuous improvements)

- Brandstrader + other scholarship recommends that a survey be used to gather feedback from the community
- We are making the survey and a way to really easily see the feedback from the survey
  - Maren really likes the idea of not interpreting the data herself - make the interpretive tool very straightforward
- Survey host/structure
  - Preference: Google Forms
  - Won't be utilized often but we still want it to be simple and short
  - Include multiple places for free-response answers
- Survey purpose
  - Targeted at future changes
  - The process of transitioning has already received a lot of feedback from direct communications
  - Really general in concept, definite purpose is not clear right now
- Survey topics
  - Demographic questions are not as useful
  - Ask some information about social groups, like if they are a moderator/community leader
  - Respondents will probably answer demographic questions that are asked
  - Which resources (guides, videos) have you used? Have they been useful, would you change them at all?

- Useful for future projects
  - Useful for learning styles: text PDF, video, etc.
  - Do people not like certain formats? Do people use them at all?
    - How often people use them will change over time, so this question is tricky
  - Is there anything missing from The Hood? Categories, sub-categories?
  - Why do you use The Hood? Is it serving your personal needs?
    - Are there any guides that are missing, or areas you want a better understanding of?
  - Do you feel like you are supported when using The Hood?
    - How helpful are the moderators when you have tried to get their help?
    - Related to use/quality of these resources
- Survey tone/style of address
  - No such thing as too nice
- Areas of emphasis
  - Less about transition
  - More about helping users' needs in the future
- Tool to interpret results
  - Bar charts and pie charts are great!
  - Include a summary/small conclusion about the big-picture of the visuals, sort by social group/demographic questions if it's useful

Tool for Step 6 (corresponds to planning for short-term wins)

- Celebrating goals, milestones
  - Number of users on The Hood
    - Shows we want to continue growing
    - Lets users say, "I was part of the first 100 users!"
  - Level of engagement from certain countries (like 50 users from Germany?)
  - Number of regional categories
  - Create a topic in Announcements to celebrate these for high-visibility with all users
    - Post contains summary of milestones
  - In Moderator Hub, have a topic with moderator spotlight or a post for them to introduce themselves to each other, or both
  - Any goal/milestone that encourages and celebrates collaboration is good
    - Maybe do more productive monthly meeting to try to motivate moderators

### Tool for Step 8 (corresponds to creating a culture)

- In this tool, include a list of transition items that we've done for the moderators in this step; plans for an active moderator, etc.
- Desirable level of community-wide engagement with The Hood
  - No idea - these are shot-in-the-dark estimates
  - 20 people daily, 50% of user base monthly
  - This statistic is weird because as long as people are going to The Hood when they need information, then we are at a good level of engagement
  - Moderator engagement should be higher - moderators should be active at least once a week when possible
- Framing The Hood as \*the\* community tool
  - If I'm asked for information in a platform that's not The Hood (like in an email), I should give the asker a link to where the information is in The Hood or even just a search term to find that information in The Hood, without answering the question in-email
    - This will be really effective in creating the culture
    - Lessens dependency on leadership for providing information
- Maintaining CWA roles in The Hood
  - Admins check for organization/accuracy every few months
  - Add to this post: If you no longer want to be responsible for a certain area, please find another moderator to take that responsibility from you
    - Supports sustainability
- Note: In all tools, include what timeline these actions should take place on