



BIOBORD  
PLATFORM

# BIOBORD OPERATING MODEL

## Guide 2: Service Path Guide for Biobord Members

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## 1. Introduction

This guide **provides information on the service design process of Biobord service paths and the roles and responsibilities of the Biobord network members** in developing content on the platform. This guide is for Biobord Network members. The Biobord platform and its joint Operating Model for the network of bioeconomy innovation hubs has **been developed in a user-centred, iterative design process involving piloting with end-users. Feedback on the guide and the platform is welcomed** continuously under the 'Biobord User Support' of the Biobord Forum, in the 'Help Us Develop' topic.

The guide **introduces the quality requirements and content recommendations for news and services** which all Biobord Network members can add to the platform via the **Wagtail Content Management System**. Furthermore, it provides guidance on how to launch, facilitate and activate as well as continuously **improve co-working and interaction on Biobord Forum**. The Biobord Network members have the right to **establish groups and discussion areas (categories) at the Forum** as well as to **open and manage related resource cabinets in the Document Management System**. The rights and responsibilities of the Biobord Network members in relation to the established groups, forum categories and resource cabinets have been stipulated in this guide.

**For more practical information on the technical functionalities** of Biobord, please consult the Biobord manuals published under Biobord User Support:

- Biobord Manual 1: Keycloak Account Management System
- Biobord Manual 2: Wagtail Content Management System
- Biobord Manual 3: Forum
- Biobord Manual 4: Document Management System

## 2. Publishing News

The news items connected to the **'News' catalogue and to the landing page slider are a tool for the hubs to share information on their achievements and new initiatives**. News is **also a tool for the Biobord Network** to announce success stories and network achievements.

All member organisations of the Biobord Network are invited to present their news on the Biobord platform. **News items are added to Biobord via the Wagtail Content Management System** (for technical guidance, see Biobord Manual 2: Wagtail Content Management System). Members are **advised to use general news reporting principles**, such as objectivity, truthfulness and newsworthiness, as well as to maintain relevance to the Biobord Mission Statement.

**The organisations will take responsibility for the definition and management of the news items they have published**. Even though all members will be responsible for their own content, **the Biobord administrators**

will reserve the right to remove news items that do not demonstrate relevance to the Biobord Mission Statement or are not in line with the general guidelines for news writing. In addition, administrators will unpublish any offensive content or content with disruptive visual outlook.

## 2.1. Relevant news topics for Biobord

The relevance of the news can be evaluated based on the connection to the Biobord Mission Statement. In other words, the news should be relevant to the bioeconomy and have a connection with the Biobord Network Members achievements. Furthermore, news stories featuring international cooperation, interregional learning, rural development, bioeconomy innovations, innovation services and infrastructures as well as impacts on sustainable development are recommendable.

## 2.2. General principles for news writing

- **Report truthfully**
- **Begin with the most important facts first.** The intro to every article needs to grab the reader's attention instantly and summarise the story in around 25 to 30 words. The first few sentences need to include "who, what, where, when, why and how". Remember that most people will not read more than 250 words before they start to skim, so you should try to give them all the information they need as quickly as possible
- **Use easily accessible language.** Use the active tense: it is quicker and easier to understand and uses fewer words. Avoid jargon; think about the language you use; keep it clear, concise and to the point. Write out acronyms in full when you first reference them.
- **Communicate what is new or different.** Think about your reader: why would they care about what you have to say? Can you link your story to a wider context or trending issues?
- **Focus on human interest.** If you can put a human face to the story, you will create an emotional connection that will draw readers in and keep them engaged. Use quotes or statements from people you've interviewed. It is powerful to convey important thoughts with someone else's words. However, when you quote others, make sure to get it right.
- **Have someone else proofread your work.** Very few people can spot their own mistakes, so it is wise to have a colleague double-check your work before you publish.

## 2.3. Design of the News Cards

The structure of the news card consists of a top section with a main photo, a headline title of the news card and the publication date. The story content can feature links, pictures and embedded videos along

with the written narrative. Finally, at the bottom, the relevant bioeconomy sector categories are featured. The general guidelines for the design are presented here.

**Main photo:** File type can be .gif, .jpg or .png, but preferably .png. We also suggest that uploaded images have the minimum dimensions of 1000x800 to achieve adequate quality. Check the quality and placement of the photo with a preview and adjust if the photo is of poor quality or the focal area shown on the news card is not ideal. Logos should not be used as a main photo.

**Headline title:** Maximum recommended length of the title is 50 characters.

**Content:** This field may include text, lists, images, links, documents and embedded videos. The content can be edited with standard text editing tools provided by the Wagtail CMS. The recommended length of the story is no longer than 2000 characters. Short chapters are recommended to help the reader.

**Categories and search features:** The news items are categorised and can be searched based on three features: publication date, hub that published the news and the bioeconomy sector categories. The bioeconomy sectors can be selected from the following categories (more than one category can be selected when relevant):

- Agriculture and food
- Forest-based bioeconomy
- Circular bioeconomy
- Renewable energy
- Natural resource management
- Nature-based services

### 3. Service Card Design

The service cards connected to the service catalogue and network map are **a tool for the hubs to share information and promote their expertise and services to the bioeconomy developers and bridge builders internationally**. The map also provides a **tool for visualising and analysing the Biobord Network**.

All member organisations of the **Biobord Network** are invited to **present their innovation services** in the Biobord platform. **The organisations will take the responsibility for the definition and management of the service presented at the service catalogue and network map**. The technical implementation is explained in detail in **Biobord Manual 2: Wagtail Content Management System**.

All member organisations of the Biobord Network are invited to present their services on the Biobord platform. **Service cards are added to Biobord via the Wagtail Content Management System** (for technical guidance, see Biobord Manual 2: Wagtail Content Management System). **The members are advised to create service cards only on the jointly-defined service and thematic categories**.

**Detailed quality criteria and service categories have been jointly agreed** for the service cards shown on Biobord. **Biobord Staff will assess the quality of service cards** periodically and give feedback to the members on upgrading the quality or keeping in line with the established categories. **Poor quality service cards may be removed by administration** if feedback notifications on severe quality issues are not addressed. Based on the assessment of the Biobord Staff, the Biobord administrators can also unpublish service cards that are in violation of the jointly-defined categories.

**Each service should also connect to an organisation and an innovation hub that is a member of the Biobord Network. The members are responsible for maintaining an accurate description of the innovation hubs and organisations.** These descriptions are shown on the Biobord network map when at least one service card has been published by the organisations connected in the innovation hub.

The member organisations are advised to implement these **steps to manage their service cards**:

1. Design an attractive service card with clear information on the ways to utilise the service. Use embedded videos, photos and links to enhance the information provided.
2. Make sure the information and contact details are up to date in the service card. Appoint a person responsible for the promotion and communication in Biobord.
3. Promote the service in the discussions of the Forum when relevant needs arise. You can also start a topic on 'Open Biobord Forum' to introduce your service in more detail. This topic can be shared in social media for wider exposure.
4. Share the success stories from the beneficiaries of your service via the Biobord news.

### 3.1. Design of the Service Cards

**The structure of the service card consists of a top section with a main photo, a headline title of the service card and the related organisation and hub.** The service description content can feature links, pictures and embedded videos along with the written narrative. Finally, at the bottom, the relevant bioeconomy sector and service type categories are featured along with the contact details. **General guidelines for the design are presented here.**

**Main photo:** File type can be .gif, .jpg or .png, but preferably .png. We also suggest that uploaded images have the minimum dimensions of 1000x800 to achieve adequate quality. Check the quality and placement of the photo with preview and adjust if the photo is of poor quality or the focal area shown in the service card is not ideal. Logos should not be used as a main photo.

**Headline title:** The maximum recommended length of the title is 50 characters.

**Content:** This field may include text, lists, images, links, documents and embedded videos. The content can be edited with standard text editing tools provided by the Wagtail CMS. The recommended length of the description is no longer than 2000 characters. Short chapters are recommended to help the reader.

**Categories and search features:** The service items are categorised and can be searched based on three features: service type, hub that published the service and the bioeconomy sector categories. The categories are explained in detail in section 3.2.

## 3.2. Search features and eligible service categories

To enable the search features of the service catalogue and network map, the member organisations are **requested to use appropriate category tags for the services**. The tags include the service type (Table 1.) and bioeconomy sector.

**Table 1. Service type categories in use at Biobord**

SERVICE TYPE	DEFINITION
Laboratory	Facility that provides controlled conditions in which scientific or technological research, experiments and measurement are performed. The standardised testing possibilities should be described in detail in the service card.
Testbed	Platform for conducting transparent and replicable testing of scientific theories, practices and processes, tools and new technologies. The opportunities for SMEs and partners to utilise the testbed should be defined in the service card.
Pilot	A pilot study, pilot project, pilot test or pilot experiment is a small-scale trial conducted to evaluate feasibility, time, cost, adverse events and improve upon the design prior to performance of full-scale implementation. The pilot can showcase special expertise of the organisation and hub.
Living Lab	User-centred open innovation system, integrating concurrent research and innovation processes within a public-private-people partnership. The opportunities of SMEs and partners to utilise the Living Lab should be defined in the service card.
Incubator	Services, support and facilities for start-ups.
Idea Generation	Processes, services and models for solving challenges or creating new business ideas or product and service concepts.

**The bioeconomy sectors can be selected from the following categories** (More than one category can be selected when relevant) :



- Agriculture and food
- Forest-based bioeconomy
- Circular bioeconomy
- Renewable energy
- Natural resource management
- Nature-based services

### 3.3. Quality assessment criteria for Biobord Service Cards

All network members designing service cards are advised to study and follow the set quality assessment criteria. The quality criteria are **established by the Biobord Staff** and they **will also monitor the quality and guide their regional connections in making the service cards**, when needed. **Biobord administrators are available for technical support** in case of arising problems with Wagtail Content Management System.

#### Mandatory features:

- Contact person
- Categories are selected logically and based on join descriptions
- Service cards depicts one separate service

Scope of service is clear – the reader can easily assess the relevance of the service:

- Geographical scope
- Target group (who can use the service)
- Timelines (when available)
- Terms of using the service (e.g. is there a fee for using the service?)

#### Visual features:

- Picture quality is clear
- Picture alignment is suitable
- Picture theme is suitable (thematic real-life photos preferred over logos or illustrations)
- Text formatting is easy to read
- Text length is suitable (not a lot of scrolling)

#### Use of added value features:



- Linking a website for more information
- Linking a video
- Presenting or linking reference stories
- Sharing cooperation ideas and possibilities

## 4. Building and Managing a Closed Group or Open Community at the Biobord Forum

The process of building and managing a forum community has been outlined as a three-step process that will aim for continuous improvement with an iterative approach. The recommended conduct for the management of the forum category have been **defined based on the experiences and identified best practices of Discourse**, a forum-hosting company with experience with over 1500 customers. The recommendations for planning the launch are adapted from the blogs of Discourse's co-founder Jeff Atwood, which guide new forum hosts in the development of forum communities (Atwood 2014 & 2018).

All Biobord member organisations are welcome to start an open community or closed group in the Forum, provided that they follow the established joint process for definition, facilitation and activation as well as evaluation and improvement of the forum activities. The members will name a facilitator or group of facilitators for the established closed group or open community. The facilitator will **define the forum category** and **potential related tags, resource cabinets and closed groups**. The information is provided for the Biobord administrators, preferably via the helpdesk ticketing system.

When operational, the **facilitator has the responsibility to activate, manage and monitor the activities** of the open community or closed group. They are also requested to aim for **continuous improvement with a process of self-assessment and evaluation of key indicators**.

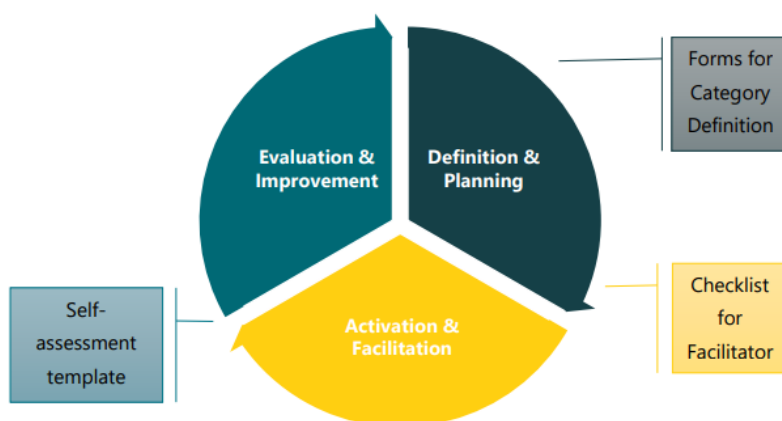


FIGURE 1: Process of building and managing a forum community (Aalto, 2019).

## 4.1. Defining a forum category

**Why?** The definition of a category is important **for ensuring that the category is build based on a need and that there is potential** for developing a committed community of followers and participants for the category, as well as establishing **the basic rules and conducts** of the interaction with the category.

*A Forum category needs to be active to function, so the best approach is to build the categories based on need. Start a category when you have a targeted user group in mind with a need for active dialogue or team working.*

**Who?** A facilitator is named for each forum category as **a responsible person for establishing the rules and conduct** for the activities in the category and an animator and coordinator of the activities. The facilitator **can come from any member organisation of the Biobord Network.**

**How?** The facilitator is asked **to fill in a ticket at the Helpdesk** of Biobord to submit the category request to the administrative staff. The data is needed to enable the technical development, to have adequate information for users on the rules and conduct, as well as to create a framework for the evaluation. The content of the ticket is presented here in Table 2.

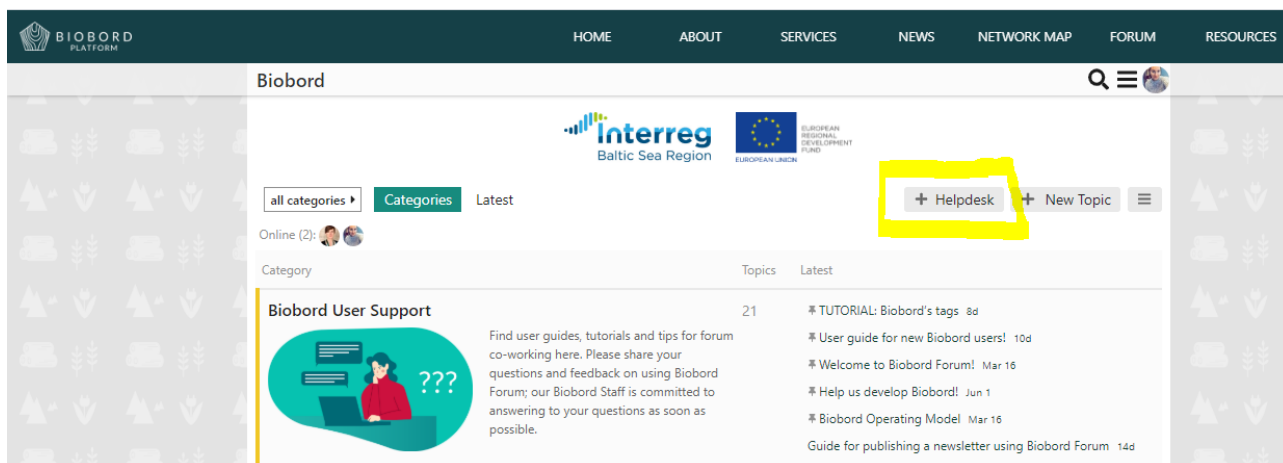
**Table 2: Required information for forum category definition**

	MANDATORY INFORMATION	OPTIONAL INFORMATION
Category information for technical development of the Open Community in the Forum	<ul style="list-style-type: none"> <li>• Category name</li> <li>• Placement (parent category, if relevant)</li> <li>• Launch date</li> <li>• 'About the Category' topic</li> <li>• Responsible member</li> </ul>	<ul style="list-style-type: none"> <li>• Colours (Hex Code #RRGGBB) and images used in visual outlook of the category</li> <li>• Enabling of events, calendar and map in the category</li> <li>• Establishing a group connected to open community</li> <li>• Tags used in the category</li> <li>• Resource cabinet in Document Management System</li> <li>• IPR management approach defined as part of the 'About the category'</li> </ul>
Category information for technical development of Closed group in the Forum	<ul style="list-style-type: none"> <li>• Category name</li> </ul>	<ul style="list-style-type: none"> <li>• Colours (Hex Code #RRGGBB) and images</li> </ul>

	<ul style="list-style-type: none"> <li>• Placement (parent category, if relevant)</li> <li>• Launch date</li> <li>• 'About the Category' topic</li> <li>• List of members to the closed group</li> </ul>	<p>used in visual outlook of the category</p> <ul style="list-style-type: none"> <li>• Enabling of events, calendar and map in the category</li> <li>• Tags used in the category</li> <li>• Resource cabinet in Document Management System</li> <li>• IPR management approach defined as part of the 'About the category'</li> </ul>
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#### 4.1.1. Helpdesk tickets

The helpdesk contains **two ticket options** relevant for building an open community or closed group at the Forum. First option is '**request a new category**' and second option is '**request a change in category**'. For a request of a new category, please fill in all mandatory information carefully and also consider the optional information (Table 2).



**FIGURE 2: Helpdesk access**

#### 4.1.2. Recommendations for forum facilitators before launching

Before launching, be sure to:

- Clearly define your community's purpose.
- Seed the discussion with interesting topics.
- Commit to visiting and participating regularly.
- Link your community everywhere and promote it so people can find it.

#### Clearly define your community's purpose

Every category has an initial '**About this category**' topic as an **open description to function as an introduction to the category**. It should answer the following questions:

- What is the purpose of this category?
- What is happening in this category? What can I do here?
- Who is this category meant for? Who is in the user group or target group?
- Who is facilitating or organising the activities at the category?
- Where can I ask for more information?

**This is the topic where the forum facilitator should provide a simple answer to the question 'what is this place?'** 'About this category' is **pinned to the top of the category**, and the description provided there will guide the users on what to expect and how to conduct themselves in the category. **If the users are not sure of the purpose of the discussion area, they are most likely not going to participate.** The facilitator needs to make sure to give your new category a good, clear description, so people understand what belongs there. Keep the description simple; easy to approach and understand. Make sure your audience feels welcome to join in.

As part of defining the rules and conduct, **the facilitator is also encouraged to define the approach to intellectual property rights** in case the category involves sharing or collaborative development of materials and resources. The use of Creative Commons approaches is recommended for the open categories and is applicable for many closed groups (Table 3). However, the closed groups can also require a stricter IPR contract, which can be defined by the facilitator as needed.

**Table 3. Intellectual Property Management (IPR) approach based on Creative Commons (Creative Commons 2019).**

CREATIVE COMMONS LICENCE	DESCRIPTION
Attribution (by)	All CC licences require that other people who use your work in any way must give you credit in the way you request, but not in a way that suggests you endorse them or their use. If they want to use



	your work without giving you credit or for endorsement purposes, they must get your permission first.
<b>ShareAlike (sa)</b>	You let others copy, distribute, display, perform and modify your work if they distribute any modified work on the same terms. If they want to distribute modified works under other terms, they must get your permission first.
<b>NonCommercial (nc)</b>	You let others copy, distribute, display, perform and (unless you have chosen No Derivatives) modify and use your work for any purpose other than commercially unless they get your permission first.
<b>NoDerivatives (nd)</b>	You let others copy, distribute, display and perform only original copies of your work. If they want to modify your work, they must get your permission first.

With the 'About this category' description and clear examples, you can guide the user in the use of the discussion area. Use the definition given in 'About this category' consistently in your communication about the category. The message can be linked to your website with an access link to the forum category, for example.

Where relevant, **you can also create subcategories under your main category. These categories should also have their description** as a 'About this category' topic pinned to the subcategory. However, do not create too many initial categories, as you may overwhelm your audience. You can always add more categories, and easily categorise topics later. **It is better to figure out the organisation as you go rather than assuming you will get it all right from the beginning.**

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

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

## Seed the discussion with interesting topics

Your next order of business is to seed your site with interesting topics and replies. **The worst thing you can do is open with a blank site.**

The initial topics are critical:

- To further explain what your community is. The topics you see on the front page right now. These are the kinds of conversations that happen here. This is what we tend to generally talk about. This is what our community is.
- To provide examples of the sort of content you want. To let everyone know that yes: topics like these are welcome on our site. Create more discussions like these!
- To invite participation. Have some get to know your topics, get people to share about themselves, and introduce some topics that are open-ended and encourage replying with opinions, stories or pictures.
- Recruit friends, colleagues, power users: do whatever it takes to build an initial solid base of content. Send out invites! You cannot launch your community without it.

### Initiate conversation!

- Have some open-ended 'getting to know you' topics for people to share their opinions, experiences, stories or pictures. An 'introduce yourself' topic is always fun, and you should go first!
- Generously like any and every post you enjoy! The type of content that gets liked is a major part of your community's culture. Set an example by frequently liking posts. Seeing liked posts also encourages people to reciprocate in kind and come back for more.
- Are there common themes that tend to come up again and again with a specific group? Try moving those discussions out of private email silos into your public (or private) discussion area.
- If you find an interesting article on the web you want to discuss, quickly start a new topic by pasting a link into the topic title. Try it!
- Where have you seen interesting, thoughtful discussions recently? Can you bring the spirit of those discussions to your site? Set an example and act how you wish the others would act on the forum.
- Invite friends or co-workers to post example topics and reply to them so visitors can browse the existing conversations to discover what your community is about.

### Start with yourself

Leadership comes from the top. The presence of staff speaks volumes about whether your community is alive and thriving. Do not just say you believe in this community; demonstrate that through your personal participation and enthusiasm. **Lead by example.** Reply to questions people have, help your community learn the ropes, gently guide, and shape the community as you go.

Half of any community is showing up regularly. There is no substitute for simply **being there, every day.** **Welcome and respond to new users as they arrive. Listen to their feedback. Encourage everyone else to**

do the same over a period of months and soon you will have a core of regulars that form the heart of your community – maybe even a few members so engaged they could eventually become community moderators.

Be patient. Building communities is hard. **It takes months, if not years.** No software alone can guarantee the success of a community. However, you can! **Integrate your community into your organisations and hubs daily activities** – and your community will be off to a solid start.

## Link your community everywhere and promote it

Start by linking the Forum everywhere:

- From your website in your main navigation
- In newsletters, email, blogs...
- On Twitter, Facebook and other social media

Think where you can place links to your community so that people (and web search engines) **will naturally discover it.**

**Send personal invitations to your staff, power users or friends, to log in early and reply to your initial topics to generate activity. Send one-click email invites** via your Discourse invite page (it is on your user profile page). You can also send bulk invites to many email addresses at once.

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

- The Invite button at the bottom of the topic
- The Invite area on your profile page
- The invite area on your profile page also includes advanced staff methods of sending bulk invites and inviting users into groups

## 4.2. Facilitation of a Forum Community or Group

The facilitators play a key role in the success of the forum category both in open community building and in co-working in closed groups. The facilitation is at best a team effort, and as such, it is important to establish a joint code of conduct for the activation, facilitation and communication of the forum activities. Even if you are managing the forum category alone, it is still important to set yourself targets and plan for forum management. **A checklist for a forum facilitator can work as a tool for the facilitators to plan, operate and evaluate their activities as facilitators.**



#### 4.2.1. Good practice for facilitation

Group facilitation is an important factor determining the success of co-working in the forum. **Good facilitation can help a team achieve their goals in the most effective and constructive manner.** The facilitation of co-working **should address at least the following aspects to create fruitful co-working premises for the team:**

- Ensure the expected outcomes or objectives are clear
- Establish what the expectations of the participants are concerning the working methods and results
- Energise and manage participation with suitable group working methods and roles for participants
- Recognise and reinforce supportive behaviours and responses. Establish and build trust with an honest and transparent communication culture as well as team-building exercises
- Evaluate success either by using individual or group feedback, to review and draw out responsibility for the action points

#### Five simple ways to strengthen trust and interaction in forum co-working

- **Update your user profile.** Use a photo, a background photo, and introduce yourself.
- **Post your topics as first-person accounts.** Share information from your personal perspective and include your personal reflections. Emoticons, videos and photos can help as well.
- **Do not simply attach a document. Try to summarise the main points** and the needed actions as text, so that the reader can react to your topic without opening the attachment.
- **Involve an action to a message** in your topic. Ask for a specific feedback or include a question, poll or vote.
- **Respond and react** to the topics posted by others. If nothing else, like the topic and let them know you read their text.

#### 4.2.2. Checklist for a Forum facilitator

The checklist for a forum facilitator is designed as a **tool for the facilitator to plan the management and community building activities for the Forum category that they are facilitating.** By making a checklist, the facilitator will receive a short commitment statement that **will guide the facilitator in the management of the community.**

As every forum category and group has different focus and scope, the **commitments can vary significantly from one group to another.** An open forum will have to pay more attention to marketing and welcoming of new community members, while a closed group should establish clear co-working principles and communication responsibilities to guide the activities. In this guide, we provide one example of the commitments to demonstrate how the checklist can be applied to a practical case and adjusted flexibly.



The checklist presented here offers different level of commitments for planning the interaction with the community of the forum category. It also provides choices for planning the ways to initiate and encourage discussion in the forum, examples for planning the marketing and communication actions. **Make a commitment statement before starting to guide you and your team in conducting the activities at your Forum category. Adjust the list and add your own commitments where needed.**

*Our organisation or team will commit to the following practices to build trust and interaction in the Forum community.*

### Inviting the user group to join

- ☐ Engaging a (potential) user group directly with personal invitation
- ☐ Engaging a (potential) user group directly with a face-to-face event to support their launch
- ☐ Directing a user group from another communication channel or platform to Biobord

### Welcoming newcomers

- ☐ Send a greeting message to all new registered users from our region
- ☐ Send a greeting message to all new registered users discussing in our category
- ☐ Like all posts from new users and reply to them to welcome newcomers to join the discussion

### Initiating discussion

- ☐ Starting discussion with open-ended 'getting to know you' topics for people to share their opinions, experiences, stories or pictures, e.g. an 'introduce yourself' topic.
- ☐ Moving discussions from private email silos to the forum area.
- ☐ Share interesting articles or videos from the web as new topics to start discussions.
- ☐ Seeding the discussion with interesting topics before and during the launch of the category

### Building trust and interaction

- ☐ Update your user profile. Use a photo, a background photo and introduce yourself.
- ☐ Post your topics as first-person accounts. Share information from your personal perspective and include your personal reflections.
- ☐ Do not simply attach a document or a link, but summarise the content for the reader.
- ☐ Involve an action message in your topics (what you would like the reader to do).
- ☐ Respond and react to the topics posted by others. If nothing else, like the topic and let them know you read their text.



### **Having a quick response time**

- ☐ Responding to any posts in my category within 1 working day
- ☐ Responding to any posts in my category within 3 working days
- ☐ Responding to any posts in my category within 5 working days

### **Leading the discussion**

- ☐ Creating 3–5 topics weekly
- ☐ Creating a new topic at least weekly

### **Monitoring the discussion**

- ☐ Informing Forum staff of any inappropriate or suspicious posts and replies
- ☐ Moderating the posts with direct messages to the users exhibiting inappropriate behaviour

### **Replacing other communication channels in communication related to the category purpose**

- ☐ Replacing or minimising use of email in favour of Biobord
- ☐ Replacing or minimising the use of internal communication platforms in favour of Biobord
- ☐ Replacing or minimising the use of external communication platforms in favour of Biobord

### **Planning and implementing a teambuilding approach for the forum community**

- ☐ Keeping the description of the category updated ('About the category' text)
- ☐ Identifying and utilising a strategy for team building in online meetings
- ☐ Identifying and utilising supporting programmes and tools where needed
- ☐ Identifying and utilising an IPR management approach and communicating it clearly to users

### **Communication and promotion of the Forum community**

- ☐ Linking the Forum category via our organisation's website landing page (preferably icon, banner or main navigation)
- ☐ Linking the Forum category via our organisation's newsletters, blogs, etc.
- ☐ Linking the Forum category via our organisation's email signature
- ☐ Linking the Forum category via our Twitter, Facebook and other social media
- ☐ Linking via our partner's communication channels



- ☐ Organising a social media campaign to support the launch
- ☐ Organising a reward system for active users or newcomers
- ☐ Organising promotional events or training workshops for potential user groups

#### **Involvement of the organisation**

- ☐ All our members will register as users, as Biobord will be an official communication platform.
- ☐ All members are encouraged to register as users to engage with external stakeholders and target groups.
- ☐ Only a specific team will be using the Biobord platform to carry out the activities related to management and facilitation of the forum category.

### **4.2.3. Example of facilitators' commitments**

The example of the facilitators' commitments presented here were created by Biobord staff and forum facilitators. The international team of nine facilitators called 'Biobord staff' will operate based on the listed commitments to facilitate and activate the 'Biobord User Support', 'Open Biobord Forum' and 'Biobord On Stage'.

## **BIOBORD STAFF'S COMMITMENT**

### **Welcoming newcomers and assisting users**

- ☒ Biobord staff members respond to any messages from the users to help them use the Forum and provide guidance for the use of 'Biobord User Support', 'Open Biobord Forum' and 'Biobord On Stage'.
- ☒ Biobord staff members contact new users from regional networks to help them get familiar with different features and services of the Biobord platform based on their interests.
- ☒ Biobord staff members set an example for users with active use of the forum and by applying different functionalities properly (tags, text editing, document management system, etc.).
- ☒ Biobord staff members contribute to creating user tutorial topics under the 'Biobord User Support' by sharing information on needed topics and giving feedback on the usability of the tutorials.
- ☒ If needed for regional users, Biobord staff members will translate the relevant tutorials into regional languages and share them on the forum.
- ☒ Biobord staff members actively share user tutorial topics under the 'Biobord User Support'.

### Building trust and interaction in the forum community

- ☒ Biobord staff members introduce themselves in the 'Open Biobord Forum' under the 'Meet the Staff of Biobord' topic.
- ☒ Biobord staff members update their profile with a profile picture and an 'About me' description.
- ☒ Biobord staff members react to posts from users posted on 'Biobord User Support', 'Open Biobord Forum' and 'Biobord On Stage'. Staff will connect the topics to relevant experts from their network.
- ☒ Biobord staff members encourage discussion and interaction in the forum by seeding the discussion with topics that provide a 'call to action'. In other words, the staff members create topics that contain a message that other users can respond to, such as a call for partners/solutions/ideas/expertise, a poll or a question that the other users can respond to.

### Participation in the forum development

- ☒ Biobord staff members help their regional networks in the facilitation and building of forum categories for regional pilot cases by submitting 'request for category' or 'request changes to category' tickets via the helpdesk to the Biobord administration, as well as guiding the facilitators on the forum community building in line with the Biobord Operating Model.
- ☒ Biobord staff members plan and implement marketing and activation activities to encourage enterprises and other stakeholders from their regions to join the piloting.

### Monitoring the use of the forum

- ☒ Biobord staff members address inappropriate or suspicious posts and replies with private message.
- ☒ Biobord staff members advise users on the correct placement of their topics when needed.

## 4.3. Continuous improvement

### 4.3.1. Key performance indicators

The success of a forum category can be evaluated by using a direct poll to the community of users or with the use of key performance indicators, for example. **The success of a forum category can be followed with several indicators.** Based on the purpose of your category, **we propose three key performance indicators for each category (Table 4).**

**Table 4. Key performance indicators relevant for category focus**

FOCUS	KEY PERFORMANCE INDICATORS
Teamwork/project management	<ul style="list-style-type: none"> <li>• Posts (new posts created)</li> <li>• Daily engaged users (number of users that have liked or posted during a day)</li> <li>• Average time for first response to new topics (hours)</li> </ul>
Network management	<ul style="list-style-type: none"> <li>• Topics (new topics created)</li> <li>• User visits</li> <li>• Forum pull (DAU/MAU = daily users/monthly users, indicates the commitment level. Preference is over 30 per cent.)</li> </ul>
Capacity building	<ul style="list-style-type: none"> <li>• Posts (new posts created)</li> <li>• User visits</li> <li>• Average time for first response to new topics (hours)</li> </ul>
Matchmaking	<ul style="list-style-type: none"> <li>• Topics (new topics created)</li> <li>• User visits</li> <li>• Average time for first response to new topics (hours)</li> </ul>
Innovation support	<ul style="list-style-type: none"> <li>• Topics (new topics created)</li> <li>• User visits</li> <li>• New contributors (new people that made posts)</li> </ul>

After a set period, **the forum staff can provide the facilitators with an update on the key performance indicators**. This information, along with the potential polls of the community of users, should be used as data for analysing the results and planning steps **to improve the facilitation and management approach**.

### 4.3.2. Self-assessment process

The process for self-evaluation of the community building and management is outlined as a **three-step process**. The aim of the process is to **encourage continuous improvement**. It is recommended that the **evaluation cycle is kept quite short (2–3 months)** at the beginning of the forum community building process. At a more established stage, the evaluation cycle **can grow longer – up to 6–12 months**.

### Step 1: Analyse the results by asking the following questions:

- Do the performance results meet our expectations?
- What was surprising?
- Are we happy with the results?
- Is there some performance indicator that we hope to improve?
- Name one indicator that would be the most essential one to improve, if relevant.

### Step 2: Review facilitators' commitment

Based on the checklist for building the community, **review the performance in relation to the commitments made as facilitator**. Analyse the results by asking the following questions:

- Did we manage to fulfil all of our commitments? Which ones could we improve on?
- If you have not met all commitments, what were the reasons behind that?
- If you have not met all commitments, what do you think has been the effect on the community?
- Name two areas where you should upgrade your commitments or improve their execution.

### Step 3: Renewed commitment

Name three new commitments you will concentrate on improving in the next phase.