BIOBORD
PLATFORM

BIOBORD OPERATING MODEL

Guide 2: Service Path Guide for Biobord Members

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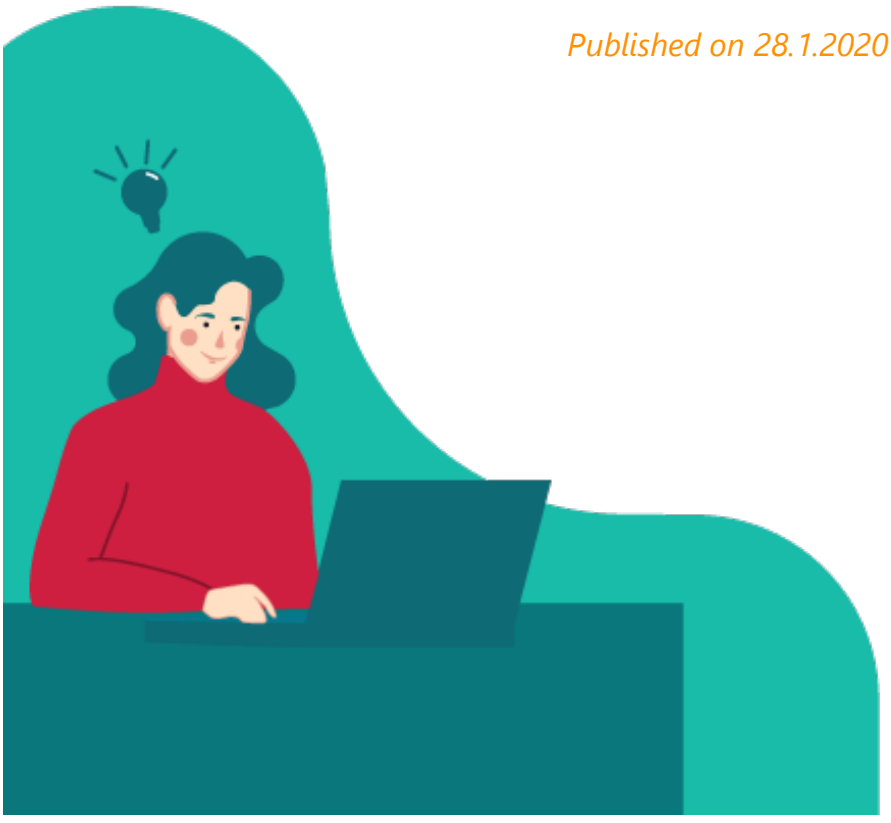

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BIOBORD PLATFORM

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1. Introduction

This guide provides information on designing of service paths on Biobord platform and the roles and responsibilities of the Biobord network members in developing content at the platform. This guide is for the Biobord Network Members, in the piloting phase represented by the RDI2CluB partners, and it should be applied by all members in all piloting activities in 2020.

The guide introduces the quality requirements and content recommendations for news and services which all Biobord network members are able to 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 rights to establish groups and discussion areas (categories) at the Forum as well as to open and manage related resource cabinets at 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.

Biobord platform and its joint operating model for the network of bioeconomy innovation hubs has been developed in a user-centered, iterative design process involving piloting with end-users. This document represents the first version of a joint service path design guide for the Biobord network to be used by the network in the second piloting activities in spring 2020.

The guide will be upgraded based on user feedback to establish a sustainable operating model for the Biobord network and platform for long-term use by the Biobord network. Feedback on the guide is welcomed continuously under the 'Biobord Network Lounge' of the Biobord Forum. In addition, specific feedback on the guide will be collected and analyzed as a part of the Biobord piloting. The sustainable operating model created based on the feedback from piloting will stipulate the rights and responsibilities of the Biobord network members in creation of news and service content, groups, forum categories and resource cabinets to the platform.

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 in 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). The members are advised to use general news reporting principles, such as objectivity, truthfulness and newsworthiness as well as maintain a relevance to the Biobord Mission Statement.

The organisations will take the 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 are not demonstrating relevance to 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 New 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 have relevance to bioeconomy and have a connection with the Biobord network members achievements. Furthermore, news stories featuring international co-operation, inter-regional 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 summarize the story with 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 easy language. Use the active tense; it is faster, easier to understand and uses fewer words. Avoid jargon; think about the language you use; keep it clear, concise, and to the point. Write acronyms out in full in the first reference.

Communicate what is new or different. Think about your reader; why would the reader care about what you have to say. Can you link your story to wider context or trending toppings?

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 e.g. quotes or statements from interviewed persons. 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 Card

The structure of the news card consists of top section with main photo, 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, in the bottom, the relevant bioeconomy sector categories are featured. General guidelines for the design are presented here.

Main photo: File type can be gif, jpeg or png, but preferably use png. It is also suggested that uploaded images have the minimum dimensions of 1000x800 to reach 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 news card is not ideal. Logos should not be used as 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. 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:

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

More than one category can be selected when relevant.

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 visualizing 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 the Biobord Manual 2: Wagtail Content Management System.

All member organisations of the Biobord network are invited to present their services in 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 for 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 to the jointly defined categories.

Each service should also connect to an organization 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 of the possibilities 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 Card

The structure of the service card consists of top section with main photo, 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, in 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, jpeg or png, but preferably use png. It is also suggested that uploaded images have the minimum dimensions of 1000x800 to reach 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 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. 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 chapter 3.2.

3.2 Search Features & Eligible Service Categories

In order 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.
Test-bed	Platform for conducting transparent and replicable testing of scientific theories, practices and processes, tools, and new technologies. The opportunities of 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 in order 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:

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

More than one category can be selected when relevant.

3.3 Quality Assessment Criteria for Biobord Service Cards

All partners 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 - 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 co-operation 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 conducts 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 of over 1500 customers. The recommendations for planning the launch are adapted from the blogs of Discourse Co-founder Jeff Atwood guiding new forum hosts in the development of forum communities (Atwood 2014 & 2018).

All Biobord member organisations are welcomed to start an open community or closed group at the Forum pending 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 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. The facilitators will have a peer learning and co-working group to help information sharing on best practices, joint planning of the forum activation, marketing and communication as well as feedback giving and analysis. This facilitators' discussion area is called **'Biobord Network Lounge'.**

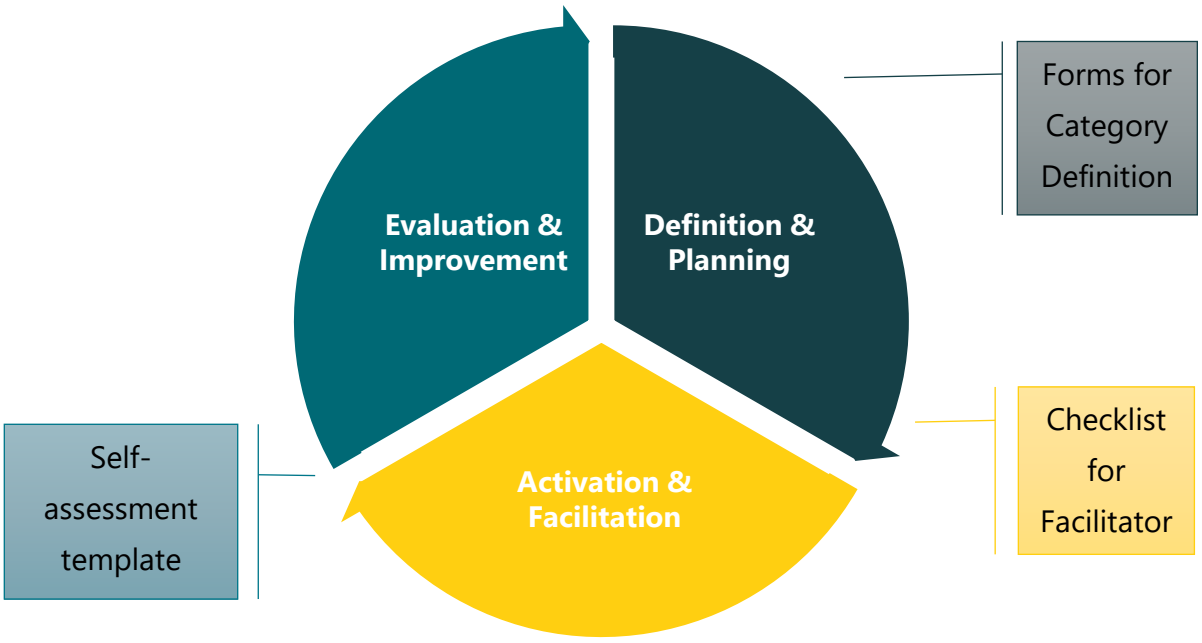

Figure 1. Process of building and managing a forum community (Aalto, 2019)

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 a potential for raising a committed community of followers and participant for the category. Furthermore, the establishing the basic rules and conducts of the interaction at 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 conducts 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 requested to fill a ticket in the Helpdesk of Biobord to submit the category request to the administrator staff. The data in the format is needed to enable the technical development, to have adequate information for users on the rules and conducts 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 Open Community at the Forum	• Category name • Placement (parent category, if relevant) • Launch date • 'About the Category' topic • Responsible member	• Colours (Hex Code #RRGGBB) and images used in visual outlook of the category • Enabling of events, calendar and map in the category • Establishing a group connected to open community • Tags used in the category • Resource cabinet in Document Management System • IPR management approach defined as part of the 'About the category'
Category information for technical development of Closed group at the Forum	• Category name • Placement (parent category, if relevant) • Launch date • 'About the Category' topic • List of members to the closed group	• Colours (Hex Code #RRGGBB) and images used in visual outlook of the category • Enabling of events, calendar and map in the category • Tags used in the category • Resource cabinet in Document Management System • IPR management approach defined as part of the 'About the category'

4.1.1 Helpdesk Ticket

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 consider also the optional information (Table 2).

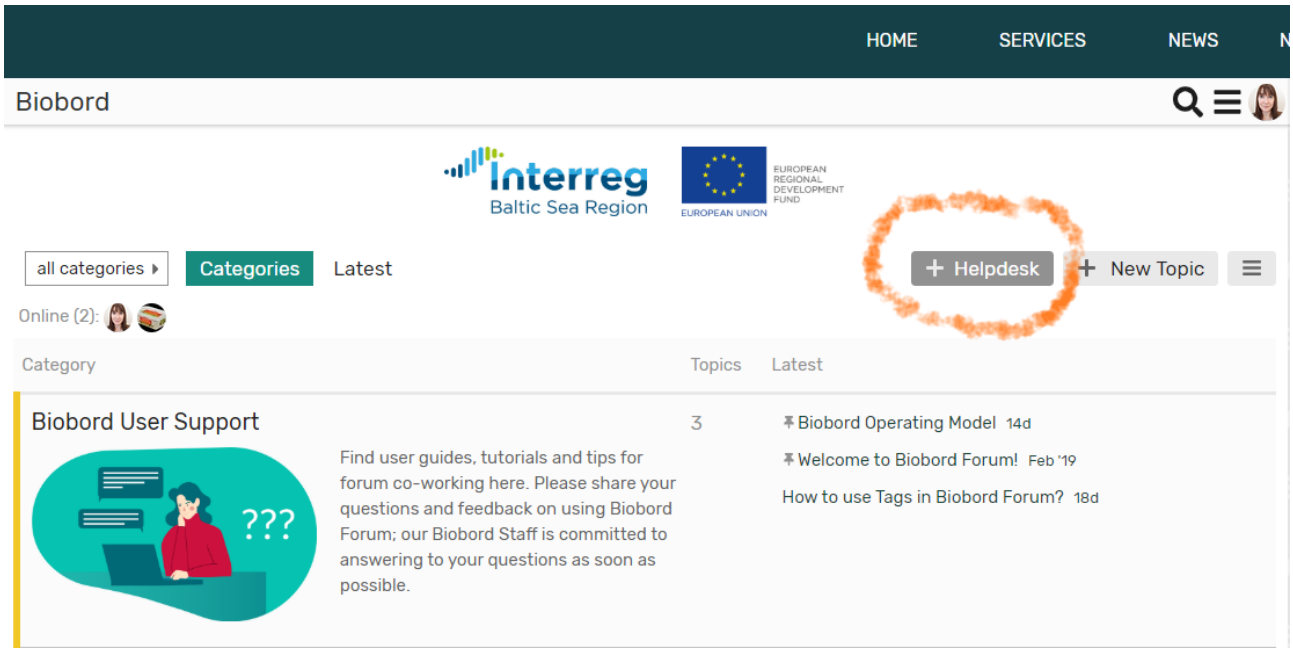

Figure 2. Helpdesk access

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 as an introduction to the category. It should answer the questions:

- What is the purpose of this category?
- What is happening at this category? What can I do here?
- Who is this category meant for? Who are in the user group or target group?
- Who is facilitating or organizing 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?'. The "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 at 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 a part of defining the rules and conducts, 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 are 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 licenses require that others who use your work in any way must give you credit 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.
ShareAlike (sa)	You let others copy, distribute, display, perform, and modify your work, as long as 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.
NonCommercial (nc)	You let others copy, distribute, display, perform, and (unless you have chosen NoDerivatives) modify and use your work for any purpose other than commercially unless they get your permission first.
NoDerivatives (nd)	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 e.g. linked to your website with an access link to the forum category.

Where relevant, you can also create sub-categories under your main category. These categories should also have their description as a 'About this category' topic pinned to the sub-category. However, do not create too many initial categories, as you can overwhelm your audience. You can always add more

categories, and easily categorize topics later. It is better to figure out the organization 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 pins 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 getting to know you topics for people to share about themselves, and some topics that are open ended and encourage replying with opinions, stories, or pictures.
- Recruit friends, recruit colleagues, recruit power users, do whatever it takes to build out 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! What type of content 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, each day, 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 organizations 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, blog…
- 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.

Have some special launch fanfare when your community opens. This will drive an initial rush of new community members, some of whom will stick around and seed early growth. Consider offering small rewards or benefits for people who sign up and become active users.

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 the forum management. A checklist for forum facilitator can work as a tool for the facilitators to plan, operate and evaluate their activities as facilitators.

4.2.1 Good Practices of Facilitation

Group facilitation is an important factor determining the success of the 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 outcome/s 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 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, background photo and introduce yourself.
- Post your topics as **first person accounts**. Tell the 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 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 Forum Facilitator

The checklist for forum facilitator is planned 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 notably 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 Chapter 4.2.3, 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 were needed.

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

Inviting the user group to join

- ☐ Engaging (potential) user group directly with personal invitation
- ☐ Engaging (potential) user group directly with a face-to-face event to support 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, background photo and introduce yourself.
- ☐ Post your topics as first person accounts. Tell the 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 post 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

- ☐ Making 3-5 topics weekly
- ☐ Making a new topic at least weekly

Monitoring the discussion

- ☐ Informing Forum Staff of the 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 minimizing use of email in favour of Biobord
- ☐ Replacing or minimizing the use of internal communication platforms in favour of Biobord
- ☐ Replacing or minimizing the use of external communication platforms in favour of Biobord

Planning and implementing a team building approach for the forum community

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

Communication and promotion of the Forum community

- ☐ Linking the Forum category via our organization's website landing page (preferably icon, banner or main navigation)
- ☐ Linking the Forum category via our organization's newsletters, blogs etc.
- ☐ Linking the Forum category via our organization's email signature
- ☐ Linking the Forum category via our Twitter, Facebook, and other social media
- ☐ Linking via our partner's communication channels
- ☐ Organizing a social media campaign to support the launch
- ☐ Organizing a reward system for active users, or newcomers
- ☐ Organizing promotional events or training workshops for potential user groups

Involvement of 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 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 Facilitators' commitments presented here is the Biobord Staff commitments applied in the second round of piloting Biobord in spring 2020. The international team of nine facilitators called the 'Biobord Staff' will operate based on the listed commitments to facilitate and activate the 'Open Biobord Forum', 'Biobord On Stage' and 'Biobord Network Actions' forum categories.

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 'Open Biobord Forum', 'Biobord On Stage' and 'Biobord Network Actions'.

☒ 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 of 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, the Biobord staff members will translate the relevant tutorials to regional languages and share them in 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 Forum staff introduces topic.

☒ Biobord staff members update their profile with profile picture and 'About me' description.

☒ Biobord staff members react to posts from users posted on 'Open Biobord Forum', 'Biobord On Stage' and 'Biobord Network Actions'. Staff will connect the topics to relevant experts from their network.

☒ Biobord staff members encourage discussion and interaction in the forum with 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 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 collect feedback from regional forum categories and user cases for the evaluation of the Biobord piloting.

☒ Biobord staff members plan and implement marketing and activation activities to encourage enterprises and other stakeholders from their regions to join the piloting.

☒ Biobord staff members share the practices and marketing approaches used for activating people on use of Biobord with other staff members via 'Biobord Network Lounge'.

☒ Biobord staff members collect and report user stories for social media campaign based on success cases.

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 e.g. with a direct poll to the community of user or with the use of key performance indicators. 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 3).

Table 4. Key Performance Indicators relevant for category focus

FOCUS	Key performance indicators

Team-work /Project Management	• Posts (new posts created) • Daily engaged users (number of users that have liked or posted during a day) • Average time for first response to new topics (hours)
Network management	• Topics (new topics created) • User visits • Forum pull (DAU/MAU = daily users/monthly users, indicates the commitment level. Preference is over 30 per cent.)
Capacity building	• Posts (new posts created) • User visits • Average time for first response to new topics (hours)
Matchmaking	• Topics (new topics created) • User visits • Average time for first response to new topics (hours)
Innovation support	• Topics (new topics created) • User visits • New contributors (new people that made posts)

After a determined period, the forum staff can provide the facilitators an update of the key performance indicators. This information along with the potential polls to the community of users should be used as a 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 would be quite short (2-3 months) in the beginning of the forum community building. At a more established stage, the evaluation cycle can grow longer up to 6-12 months.

Step 1: Analyse the results with 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 with the following questions.

- Did we manage to fulfil all our commitments? Which ones could we improve on?
- If you have not met all commitments, what have been 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.