USAID Online Collaboration Guidance and Questionnaire

A community requires a significant commitment of time and resources so it is important to clarify what you want to achieve, how you plan to run the community and how you plan to win and sustain support for it. This guidance and questionnaire will help you to shape and guide your plans, and it will give the Knowledge Management (KM) team the input needed to set up and support your community.

Starting a community is an experiment. Moreover, communities evolve, changing to meet new circumstances. That said, it is important to be as specific as possible in answering the following "start-up" questions. Your chances for success are much better if you know who you want to reach, what you want to do for them (and vice versa), how you will measure success, and how you and colleagues will manage the effort.

Experience also shows that it is important early on to secure executive buy-in for your effort. Your supervisors need to understand and support your efforts and accept the goals of increased information-sharing. If not, it's more likely the community cannot be sustained.

Section One below briefly discusses important considerations about the community. Section Two contains the questionnaire) itself. Please type your responses directly into the questionnaire and return it to the Knowledge Management Team (address below).

For further information about the guidance, questionnaire, or USAID communities, or to submit a completed questionnaire, e-mail Sarah Tricha, Information Architect, M/CIO/KM, at stricha@usaid.gov.

SECTION 1: STRATEGIC ISSUES

GOALS: What do you want your community to achieve? Please be specific: for example, instead of "Sharing information," you might put "To provide a forum for Program Officers to share solutions to problems." If there are multiple purposes, please list all of them. The greater the sense that your community is making a difference to its participants and having an impact in the organization, the greater the chances for success (and the more beneficial it will be to participate). The following suggestions are illustrative:

- Publish information
- Generate discussions about issues or events
- Provide a place for colleagues to make and answer requests for help
- Develop “best practice” solutions
- Develop a network of interested and knowledgeable people

DURATION: How long will your community last? Will it run for a fixed period and then be retired and archived; run for a trial period and then be extended if successful; or run indefinitely?

PARTICIPANTS: Who should participate in the community? You should try to identify a primary group whom you wish to participate actively in the community by providing content and commentary. Then think of additional target audiences. You should also consider any audiences you may wish to exclude from visiting or participating in the community. The answers to these questions will affect your outreach activities and may determine which of several networks should host your community.

MARKETING: How will you publicize your community? Some suggestions: advertising on listservs; posting links on Web sites you control, or asking for links on other sites; including its address in your office’s e-mail signatures; e-mailing people privately; Department Notices.

DEFINING SUCCESS: How will you know you're succeeding? The measures below are illustrative. You should develop relevant, clearly defined, specific and measurable goals for your specific community.

- Grow to XX visits per month by the end of six months.
- Regularly engage at least XX people from key audiences/organizations in discussion groups by the end of six months.
- Provide expert response to all requests for help within 24 hours.
- Based on queries and discussions, propose three new "best practices" every year.
- Use comments and discussions to develop ideas for at least one in-depth report or analysis each quarter.
- Survey community members once a year.
- Candidates for assignments cite participation in/management of the community as a factor in their bidding.

EXECUTIVE SUPPORT: How do you plan to achieve and show your supervisors' support? You will need your leaders' support for your work on and goals for the community. Before you and the KM Team commit the time and resources fully to develop the community site, you should discuss the project with your supervisors, ensure that they are comfortable with the time you will spend on it, with the overall goals, and with the practical aspects of a community that is open to a potentially large and general Department or interagency audience.

NETWORK: How will you reach your audience? A variety of collaboration networks are available to USAID. Which network will work best for your project depends on your audience. Examples of appropriate collaboration platforms for USAID and interagency information-sharing are provided in the following chart.

	USAID-sponsored		**Interagency**	
	Intranet	**Extranet** www.usaidallnet.gov	**Intelink-U** https://intelink.gov	**OMB** https://max.omb.gov/
Best Utilized When	Sharing information that is of primary relevance and benefit to USAID staff.	Sharing information with partners outside the AID network.	Collaborating with USG partners in Diplomacy and Defense.	Collaborating with OMB or working on management, budget, policy issues across the USG.

Sample content	Human resources information, USAID internal blogging, policy-procedures updates, Developedia, Agency-specific wiki.	Collaboration spaces dedicated to specific topics and used to share problems and best practices.	Unclassified version of classified and secret interagency networks. Includes an unclassified interagency wiki and blogs. Topics cover joint defense/development/diplomacy issues. Hosts majority of Communities @ State.	Used for collaborative document creation (ex. budget briefing books). OMB hosted USAID transition team collaboration website.
Contributors	USAID staff	Varies by individual community.	USG – especially Defense, Diplomacy.	Started by OMB but grew to include other federal agencies. Communities include acquisitions, planning, homeland security, management, human capital, grants, e-gov, IT infrastructure, performance, and small agency.
Access	Connection to AIDNET	Any web browser. Doesn't require network access.	Access to DNI network or remote access login. Lots of access options and the network is designed to be open to diverse community. Easy to sponsor in non-gov partners.	Web browser. Registration limited to federal employees with .gov email address.
Sponsors	USAID, M/CIO	USAID, M/CIO/KM	DNI, ICES	OMB
Pros	Single sign-on.	Granular control over audience which is developed at the discretion of the individual community managers. Good for developing small communities of specialized interest especially those that involve actors outside USAID or the USG.	Wide range of collaborative tools available. Excellent platform for collaborating with other USG partners, many of which already have access to and experience with intelink-U. Good place to post information on interagency conference and collaboration opportunities.	Specialized community for USG management and budget issues.
Cons	Limited to AIDNet users only.	Limited outreach beyond initial community.	Access rules are set by DNI and could potentially change at their discretion.	Registration is **ONLY** available to Federal government personnel with a valid .gov, .mil, or .fed.us email address.

CONTENT ISSUES

NAME: What do you want to call your community? You can use a formal name, or you can use a catchy name that people will remember. The KM Team will review the suggested name to ensure that it appropriately projects the scope and purpose of the community, facilitates design and operation of the community site, and is compatible with other initiatives and programs.

ORGANIZING CONTENT: What topics will you use to organize your content? By default, communities are organized by tools (wiki, image gallery, blog, forum, elibrary, etc.). However, you can organize you community by topics by tagging your content with keywords. The KM team can help you set-up default "tags" for your site if you'd like to organize content by predefined working groups or topic areas (training, FAQs, updates, etc). Or, you can enable content contributors to freely tag posts with keywords that are meaningful to them.

COMMUNITIY FEATURES: What tools will be available on your community? USAID offers a range of feature options for online collaboration. Each tool is appropriate for a certain communication goal or management style. The selection of tools in your community will affect how users are able participate as well as the role of the community manager.

- **Blogs** are an easy way to publish articles or notes to a website. Blogs are generally informal, frequently updated, and are similar to information shared through a group mailing list. Usually community members can leave comments on blogs. Blogs are usually organized in reverse chronological order with the most recent post listed first.
- **Forums** are a place to post a question and get an answer. They take a different format than blogs as they are arranged in a tabular format and tend to be active in response to a specific question.
- **Wikis** are a means of allowing multiple users to collaborate on a web-based document. Wiki have tabs for tracking contributor and versions of a document and allow for rolling-back to a previous version.
- **Elibrary** is a tool for uploading documents to a website. A wide range of document types can be uploaded, including .zip, .doc, .ppt, .pdf.
- **Task-Tracker** is a tool that allows you to define and assign a task to a member of the community.

- **Calendar** allows communities to post to and review a calendar of events.
- **Related Links** to online resources can be displayed and updated by community members.
- **Image Gallery** allows you to upload images to the community and organize them into photo galleries.

If there are other functions or tools you would like to have in your community that are not listed above, please notify the KM Team.

MANAGEMENT ISSUES

Most communities have at least two basic categories of participants. *Administrators* can approve members and configure the site. *Users* can add or delete content and leave comments. Both require a password to log in. As *administrator*, you always retain ultimate control over (and responsibility for) your site. Some communities may require more user categories to manage content access and security. The choices you make on user categories depend on the degree of access you are willing to grant others to encourage participation and access to information. The KM Team can help you think through they type of user roles that are appropriate for your community.

WHO WILL RUN IT? Who is the primary community administrator? Community administrators are expected to review content once a day. See Department of State's Foreign Affairs Manual (FAM 5 777 Online Collaboration) for details on managing communities online: http://www.state.gov/documents/organization/85754.pdf. How much time are you willing to spend per week administering the community? At a minimum we suggest a 2-4 hours a week to review content postings, encourage participation through marketing and manage community members.

Each community should have at least one alternate administrator. We encourage you to have even more, to share the workload of managing the community, to ensure adequate community site supervision and to increase participation. However, please name only those people will actually manage the community.

USER CATEGORIES: What type of user categories will your community have? Will you need specialized user roles beyond *administrator* and *user*? Please be specific about the type of user categories your site will need (for example, user category called "budget" where users can login to see procurement-sensitive information).

MANAGING CONTENT: How often do you plan to post new content? Generally, it is better to post your content as short items more frequently, rather than long or many items less frequently. If you are only able to post content periodically, this should be explained on the community site.

MANAGING EXCHANGES: How do you plan to manage comments, questions and discussions? A major distinction between a community website and a regular website is the community's capability to serve as a forum for comments, questions, and threaded discussions. Be prepared to provide clear expectations for user participation. Will users be able to rate posts? Will users be able to flag content as inappropriate? If so, what will be the guidelines for judging the appropriateness of content? If comments will be moderated, that is reviewed before posting, how will the appropriateness of comments be evaluated? Are there certain subject areas that are off-limits? Be as specific as possible.

SECTION 2: QUESTIONNAIRE

Strategic Issues

1. **GOALS:** What do you want your community to achieve?

2. **DURATION:** How long will your community last?

3. **PARTICIPANTS:** Who are the primary community participants and, if appropriate, additional audiences you want to engage in the community? Is there any particular group or audience you need to exclude from your community?

4. **MARKETING:** How will you publicize your community?

5. **DEFINING SUCCESS:** How will you know you're succeeding?

6. **EXECUTIVE SUPPORT:** Does your supervisor support this initiative?

7. **LAUNCH DATE:** When do you want to announce your community to your audience? Do you have a fixed deadline?

8. **NETWORK:** Considering your intended audience, choose one of the three networks on which to host your community.

   - ☐ **USAID Intranet (communities.usaid.gov) –** a shared information environment accessible via the USAID Intranet to promote collaboration within USAID. Limited to users with an AIDNet account (USAID and some State). Does not require additional log-in.
   - ☐ **USAID AllNet (https://www.usaidallnet.gov)** – a shared information environment accessible via the Internet. Membership managed by community administrators providing the ability to collaborate with a range of partners. Requires additional log-in.
   - ☐ **Intelink (https://www.intelink.gov)** Interagency information sharing network for defense, diplomacy, and intelligence communities. AIDNet users should have pass-through access to content on intelink (no login required). Users with a .gov email account can request remote login. Contractors, researchers, academics, and foreign service nationals can be sponsored into the system by a USG direct hire. Contributors need to register for an account to contribute content.
   - ☐ **MAX Federal community (www.max.omb.gov).** OMB-sponsored interagency information sharing environment. Must have a .gov email address to register. Registration is limited to federal employees.

Content Issues

9. **NAME:** What do you want to call your community?

10. **ORGANIZING CONTENT:** How will you organize content on your community site?

- Do you want users to be able to freely tag content contributions with keywords?

- Do you want to organize content by predetermined subjects or groups?

- Is there any content on the site that should only be viewable to a select set of community members and not visible to the entire community?

11. COMMUNITY FEATURES: What features or tools do you want to use in your community?

- ☐ **Blog**
- ☐ **Wiki**
- ☐ **Forum**
- ☐ **Elibrary**
- ☐ **Related Links**
- ☐ **Task Tracker**
- ☐ **Image Gallery**
- ☐ **Calendar**
- ☐ **Other** (be specific)

Management Issues

12. WHO WILL RUN THE COMMUNITY?

- Who is the primary community administrator (include name and email address)? How much time per week are they available to administer the community?

- Who is/are the secondary community administrator(s) (include name and email address)? How much time per week are they available to administer the community?

13. USER CATEGORIES: Do you need custom user categories beyond the default *administrator* and *user* roles? If so, please describe each custom user category you need as well as the content each category can or cannot have access to, both in terms of contributing and reading content. Please contact the KM Team if you need assistance defining user categories.

14. MANAGING CONTENT: How often do you plan to post new content?

15. MANAGING EXCHANGES: How do you plan to manage comments, questions and discussions?

a. Will you moderate comments?
b. Will you allow users to rate content?
c. Will you allow users to flag content as inappropriate?