

Online Communities

Administration guidelines



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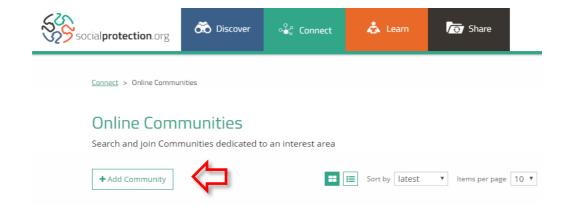


1. Creating an online community

The online community (OC) feature provides socialprotection.org members with the opportunity to create and administer an OC. An OC is a designated online space for knowledge exchange among members who share a common interest about a specific social protection topic. OCs are a great tool to build a lively community that will thrive in generating support for social protection practitioners and enthusiasts on that topic.

Creating an online community is simple, and it only takes a few steps. Begin by creating an account on socialprotection.org. Once you are logged in, click on **Connect**, then select **Online Communities**.

Once you are redirected to the Online Communities page, click on Add
Community.



Alternatively, you can click on **Online Community** on the drop-down menu under **Share**:



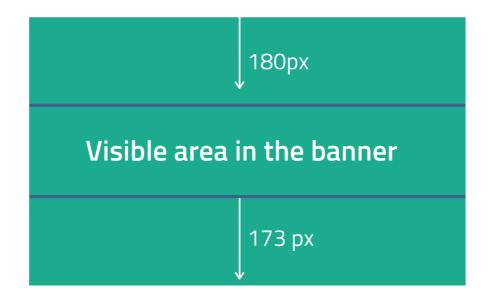


Regardless of which option you select, the following steps are common to both:

• Fill in the **Title** of the community (the title should be short and clear in terms of which topic the OC will be focused on):



 You should also include a community banner – the recommended dimensions are 1140 x 640 pixels. The objects in the image should be centred in the mid-section area of the image to guarantee the image will not appear cut on our pages (object to be between 168 and 467 pixels).





 Note that the images used here will be the same as those on our search pages and on the community page.

Online community search view



Online community main page view



Community Logo

Please upload the logo of the Online Community. You can use an image up to 1140x640 pixels in png, gif, jpg or jpeg format.

• Image examples.

Excellent image example

- Subjects are far from the camera and concentrated in the middle portion.
- The subjects occupy only two thirds of the image.
- There is plenty of visual space available around the subjects.
 It is possible to zoom in to make adaptations.





Good image example

- Subject is far from the camera and there is space for editing.
- The subject occupies two thirds of the image which makes it possible to adjust.
 However, it is important to notice, that if you were to zoom in, a big part of the subject would be cut out.

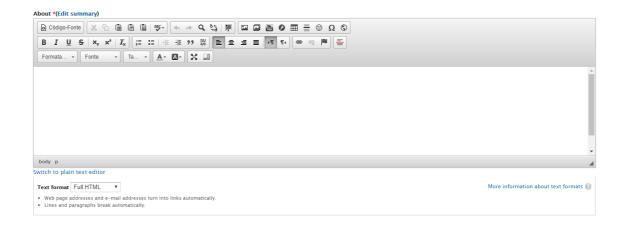


Bad image example

- Subject is too close to the camera.
- Even with all possible adjustments, important parts of the image will be cut.
- Subject occupies all thirds of the image.



• In the **About** section, provide a summary of the content and objectives of the community, such as its outline, main purpose and scope of work.





 Classify the community according to the Social Protection Programmes, Topics and Cross-Cutting Areas it addresses. For detailed information on these categories, please refer to the <u>Theoretical Content</u> Classification Guidelines, also available in French and Spanish.



- Choose the relevant **Organiser(s)** administrating the community.
- Please note, the organiser must already be added as a stakeholder on the platform. If the institution is not included, please <u>add it</u> first and then proceed with creating your community. To learn how to add a stakeholder, check Section C of our <u>Technical Content Inclusion Guidelines</u>.



Choose Related Communities (if any) which already exist on the platform.
 Related communities are the ones which address similar topics.



 Determine the Geographic Coverage of the community in terms of its interest areas.



| ▼ GEOGRAPHIC COVERAGE | |
|----------------------------|--|
| Countries | |
| Global | |
| ■ Africa | |
| ■ America | |
| 🖪 🗌 Antarctica Continent | |
| 🖪 🗀 Asia | |
| Europe | |
| 🖪 🗌 Oceania | |
| | |
| Regions | |
| East Asia & Pacific | |
| Europe & Central Asia | |
| Global | |
| Latin America & Caribbean | |
| Middle East & North Africa | |
| South-Asia | |
| Sub-Saharan Africa | |
| | |
| | |

• Provide details of social media accounts (if available) to be linked to the community main page.

| SOCIAL MEDIA | | | |
|-----------------|--|--|--|
| SOCIAL MEDIA | | | |
| Facebook | | | |
| | | | |
| | | | |
| Twitter | | | |
| | | | |
| | | | |
| Youtube channel | | | |
| | | | |
| | | | |
| Flickr | | | |
| FIICKI | | | |
| | | | |
| | | | |

Please note, once you have created an **online community, it will not be immediately accessible, as it will need to be reviewed by socialprotection.org's** Knowledge Management Team before being published.

Once the community is approved by the socialprotection.org team, the community will be hidden until all further requirements asked by our team are met. In this phase, you will be able to make edits to your community, invite members and add content. This is an important moment for the community, as preparing its base will allow future member to feel like they are joining a living environment.



Please remember to **save the link of your unpublished community**, as it will be the only way to access it before it is published.

Please note that once an OC is created, its default privacy settings will be **semi-private**. This means that membership requests need to be approved by community administrators. If you would like to have a different category of OC, please see **section 2.3** to learn the different array of privacy settings and how to manage them.

2. Community administrators

2.1 What are community administrators?

A community administrator is a designated member of a given online community that will be responsible for managing the online community's activities and ensuring its smooth running. The role was created to enable the independent functioning of an OC, with its own members managing and maintaining its activities.

An administrator's role is automatically designated to the person who creates the OC, but other members can also be added as administrators later.

2.2 What are the roles of an administrator?

The administrative role implies that a member of an online community will have concessions to manage membership requests and moderate content and discussions. To approve or deny those requests, you need to be registered or logged in to your social protection.org account.

Additionally, the administrator has the important role of keeping the group alive, by starting discussions, posting materials, and incentivising members to do the same.

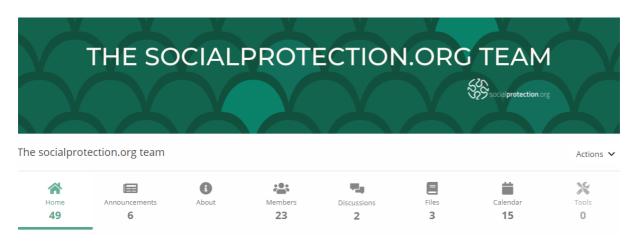


Below, you will find information on how to proceed with the administration of each feature.

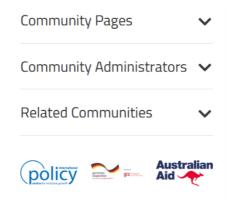
3. How to manage your community

3.1 Manage your community

On the main page of your online community, the menu bar displays all features available in the community: **Announcements**, the **About** section, **Members**, **Discussions**, **Files** and **Calendar**.

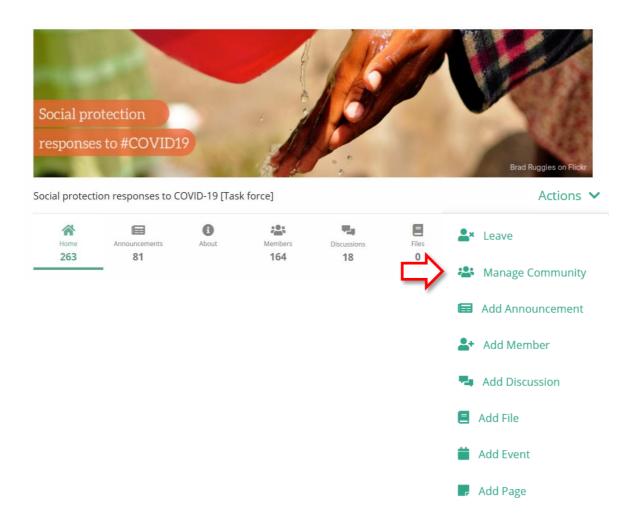


On the left side of the page, you will find community pages that have been created, related communities linked to your communities, the administrators of the community and the institutions who are organisers of this space.





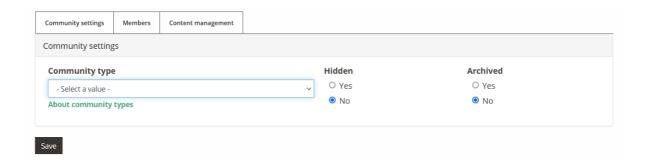
By clicking on the 'Action' button, you can access the administrator's features of the community, as well as directly adding content to your community. Click on **Manage Community** to go to the OC's administrative page.



In this section, community administrators can change community settings, approve or deny membership requests and publish or unpublish posts or content shared within the community (Announcements, Discussions, Files, or entries in the Calendar).

3.1.1 Community settings





This section allows community administrators to define the community privacy settings and select whether the OC should be hidden.

Community privacy settings:

Online communities can be configured to tailor to different needs. There are four possible settings for OCs:

Open

This setting allows any member or non-member of socialprotection.org to access and navigate through your community. However, to create posts and share any content, they are still required to be a registered member of the platform and become a member of the community.

Public

If you choose to create a public OC, members will be able to join it without administrative approval. They will simply need to click on the 'Join' button to be added. The community contents will only be displayed and available to its members.

Semi-private

To join semi-private OCs, members of the platform need to have their membership request approved by the community administrator. This means that community content will only be available to members you wish to approve.



Private

In private communities, members can only join the OC by invitation. Therefore, the OC will not display a 'Join' button on its main page. The community's content will be available to members only.

Hidden

Hidden communities will not appear to users who were not previously added as community members on the online community's list. This privacy setting is usually recommended for internal working groups dealing with sensitive information.

On the table below, you can check which content is available for members, non-members, and administrators according to our OC types:

| | Public OC | | | Semi-Private OC | | | Private OC | | | Repository OC | | |
|---|-----------|--------------|--------------|-----------------|--------------|--------------|------------|--------------------|--------------|---------------|--------------|--------------|
| | Anonymous | SP Member | OC Member | Anonymous | SP Member | OC Member | Anonymous | SP Member | OC Member | Anonymous | SP Member | OC Member |
| Join button (Join an OC) | Yes | Yes | | Yes | Yes | | No | No | | Yes | Yes | |
| Join upon administrative approval | No | No | | Yes | Yes | | | Only by invitation | | No | No | |
| About session | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Documents | No | No | Yes | No | No | Yes | No | No | Yes | Yes | Yes | Yes |
| Announcements | No | No | Yes | No | No | Yes | No | No | Yes | Yes | Yes | Yes |
| Discussions | No | No | Yes | No | No | Yes | No | No | Yes | No | No | Yes |
| News | No | No | Yes | No | No | Yes | No | No | Yes | Yes | Yes | Yes |
| Calendar | No | No | Yes | No | No | Yes | No | No | Yes | Yes | Yes | Yes |
| Members | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Timeline | No | No | Yes | No | No | Yes | No | No | Yes | Yes | Yes | Yes |

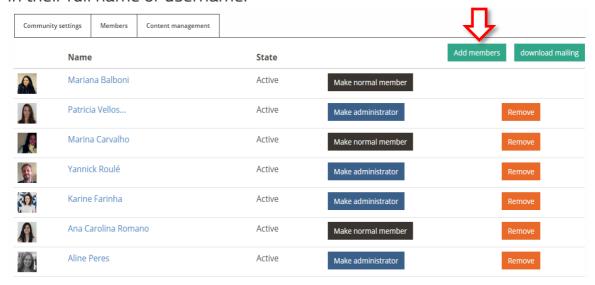
3.1.2 Membership requests

This section allows community administrators to manage memberships, assign roles, download a mailing list and invite registered social protection.org members to join the community.

Aside from assigning the administrative role to members, or removing members from your community, this section allows you to invite users to join your community.



To '**Add members**' to your community click on the green button on the top right of the screen. You will be redirected to a page to add members by filling in their full name or username:

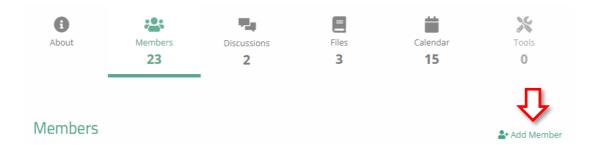


This process also allows you to set members as administrators by ticking the option **administrator member**. Once you have filled out the required fields, click on **Add users**.



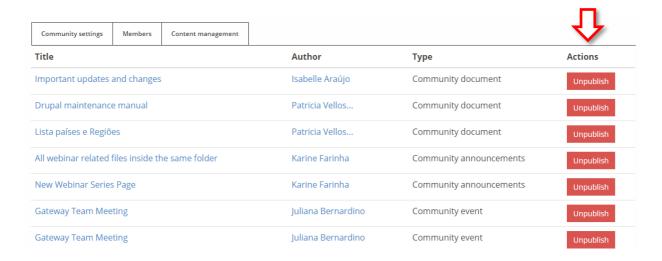
Alternatively, you can add new members by clicking on the **Members** feature on the online community's main page and then on the **Add Member** button.





3.1.3 Content management

In this section, administrators can approve or deny any resources uploaded to the community. To publish or unpublish a piece of content, simply click on the respective button under the 'Actions' column.



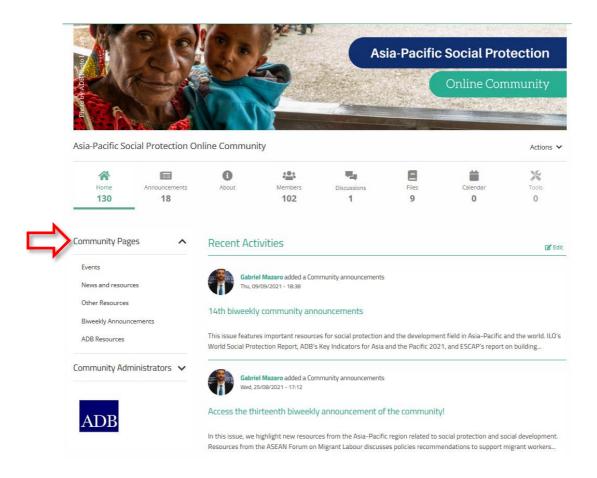
We highly encourage administrators to keep a close eye on this section, checking it weekly to ensure no pending content is left behind.

4. Adding and managing content in your online community

4.1 Create community pages



Community pages are linked on the main page of the online community on the navigation panel. These serve as a blank canvas to organise content in libraries, create institutional pages, compile webinars and more. They contain important content as well as provide further insight into the purpose and mission of the online community and a way to organise materials and initiatives within the community.

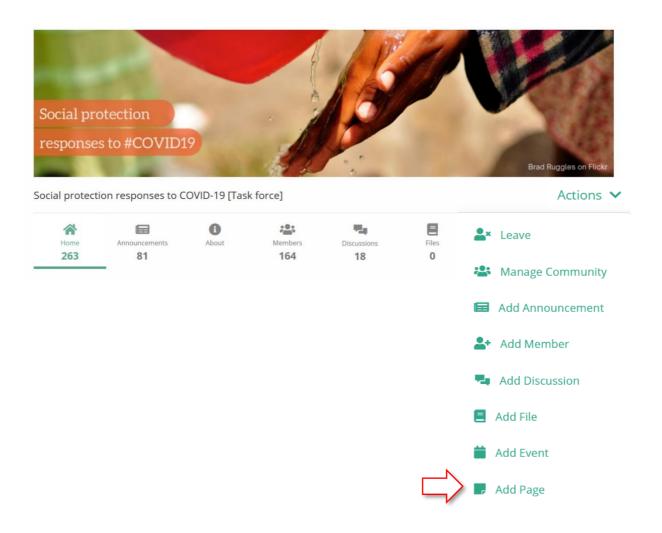


Please note that only community administrators are able to create a community page. This can be changed if needed. Simply message us at contact@socialprotection.org with your request.

You can create as many community pages as necessary and decide on the title and content of each page. To do so:

Click on Actions and then select Add Page on the community main page.





 You will be redirected to the Create Community Page form. Please be reminded that the body of the page allows for hyperlinks, videos, and diverse text formatting, but it does not allow file uploads (as uploads use the space called 'Documents' on the OC's main page).



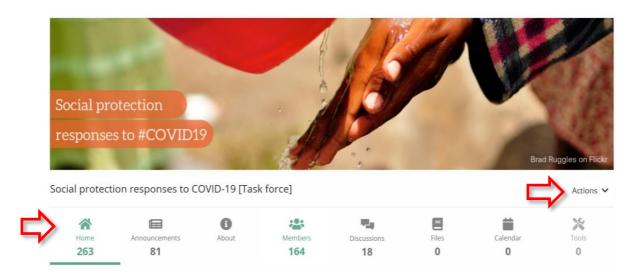
After filling in the page click on Save or Preview.



Both the administrators and members of your online community can add content to the community, including **Discussions**, **Files**, events to the **Calendar** and **Announcements**. Members are also able to view the profiles of fellow members.

As an online community administrator, it is your responsibility to keep content up to date to stimulate exchange and dialogue among members. You can also invite other individuals to administrate the online community.

To add content, access the main page of the online community. There you will see the menu bar to direct you to the various content pages. Likewise, you can also use the **Actions** drop-down menu on the top right to directly create a piece of content.



4.2 Create community announcements

Announcements are messages that are sent out to all OC members. This tool is usually used to advertise new content or to communicate or notify members about activities in the community.

 Click the **Announcements** icon on the online community main page and then click on **Add announcements**.





• You will be directed to the Create Community Announcement page. Fill in the fields, noting the required fields (marked by an asterisk).





Then Save or Preview the content.

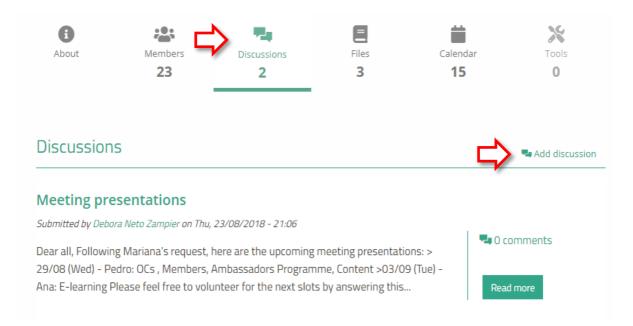


4.3 Create a community discussion

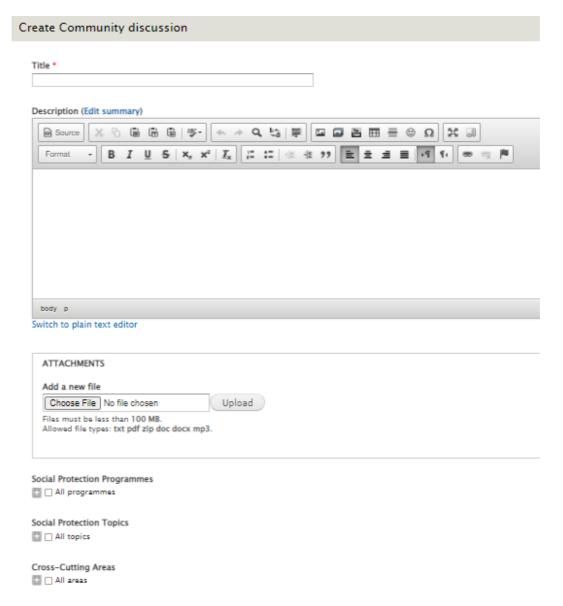
Discussions are listed in the **Discussions** section under their respective titles. Discussions facilitate private or public knowledge exchange and productive debate on topics relevant to the community.

• Click on the **Discussions** icon on the online community's main page and then click on **Add discussion**.





 You will be directed to the Create Community Discussion page. Fill in the fields, noting the required fields (marked with an asterisk).

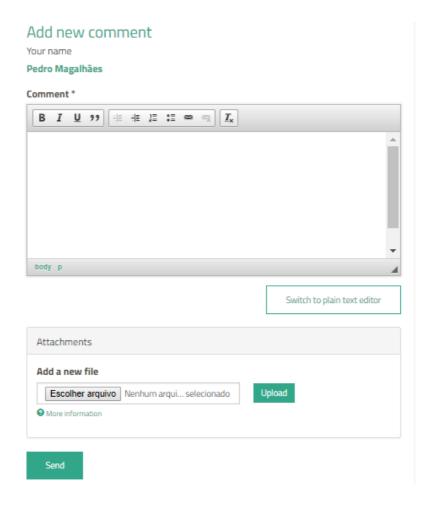




Then Save or Preview the content.



 To comment on a discussion, access the discussion topic and scroll down to Add new comment. You also have the option of attaching multiple files to your discussion or comment. Simply click on Choose File, elect the file for upload and click Upload. Once complete, click Send. Your comment and attachments will immediately appear on the discussion page.



4.3.1 Administering online community discussions

The socialprotection.org team is readily available to assist the community administrator in the technical aspects of creating and managing a community. However, the administration of internal discussions and the responsibility for maintaining an updated community lies with the administrator.



It is strongly recommended that the administrator mediates each discussion. If needed, the administrator can grant the administrator role to others to help moderate the discussions (see 2.1 Manage your community). The moderator should be responsible for nurturing debates in the 'Discussions' section of the community, motivating member input and participation.

Administering and moderating discussions involves several potential challenges. Below you can find recommendations for two hypothetical occurrences:

The discussion does not take off or stagnates.

- Action:
 - a) Consult with the moderator and experts involved in the discussion on how to stimulate the debate. Equipping the discussions with publications related to the theme and including thought-inducing questions are good practices to enhance member participation.
 - b) Engage users directly you may use the **Announcements** tool to emphasise the need for interaction in the discussions, inviting members to join the debate. Alternatively, you may also access members' profiles and send them a direct message by clicking on **Send message** under the member's name, which will send a notification to their email.
 - c) Give a sample response when creating a new discussion, it is important to demonstrate participation from the start. If the discussion was posted by the administrator, the moderator may kick off the debate with a response, and vice versa.
 - d) Upload a new document or a new question or topic for discussion.

A member posts a new discussion.

- Action:
 - a) Review the discussion.



- b) If irrelevant to the community, delete it and inform the member.
- c) If the discussion requires editing, edit it and inform the member.
- d) Discussion content must conform to socialprotection.org's Terms of Use: spam or foul language is not tolerated.
- e) If a member demonstrates inappropriate behaviour, consult with the moderator and determine whether to warn the member, informing them of the Terms of Use. You can block the member from the community if the behaviour persists.

4.4 Add a community file

You may add documents to your online community. Documents must be specifically related to the online community and intended to support knowledge exchange and community dialogue. Documents must be appropriate for online community viewing. Added files must be less than 10 MB in TXT, PDF, DOC, DOCX, XLS or XLSX format.

Important

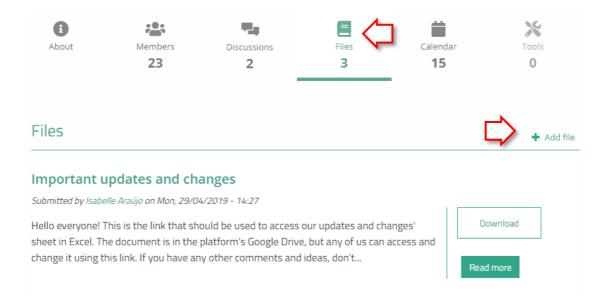
In case the document included is relevant to the field of social protection, kindly share it on the socialprotection.org main database first – this can be easily done by clicking on **Share** and selecting **Publication**. Once the publication has been reviewed by our Knowledge Management Team, please use the published document's link in the online community.

If the document is private and is meant only for internal usage, please feel free to share it directly in your community. These instructions mainly apply for occasions in which you are going to share a link in the **Files** or **Community Resources** area.

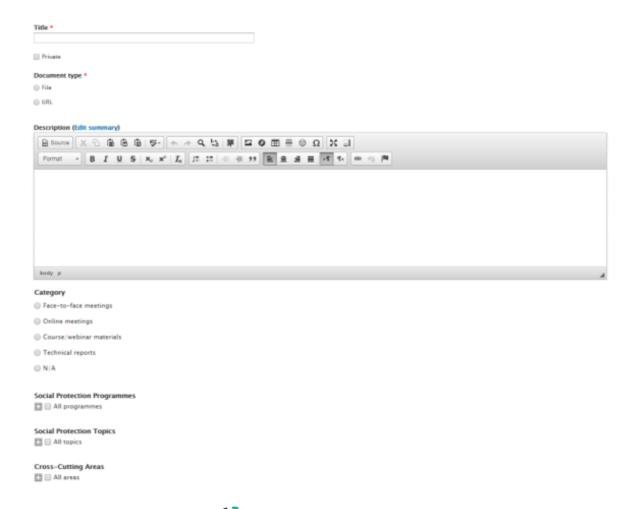
To add a new document in the OC:

Click on the Files icon on the online community's main page. Then, click on
 Add File.





- You will be directed to the Create Community document page. You can choose to upload a document or to insert a URL.
- Fill in all mandatory fields (marked by an asterisk) you also have the
 option of categorising your documents in pre-defined categories. These will
 appear as a specific filter that can be applied in the community's document
 search.





Then Save or Preview the content.



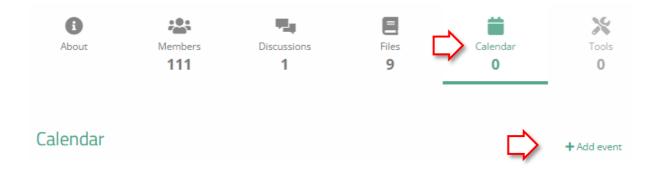
 Added documents will then be available for download to fellow community members under the **Documents** tab.



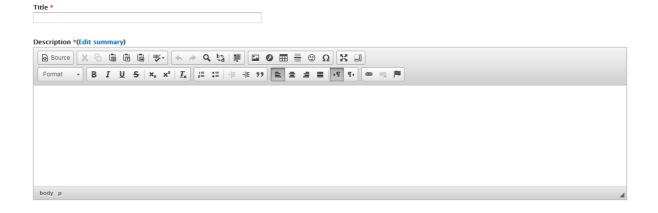
4.5 Create a community event on the calendar

You can add events to the calendar of the online community. Events must be specifically related to the online community and its interest area.

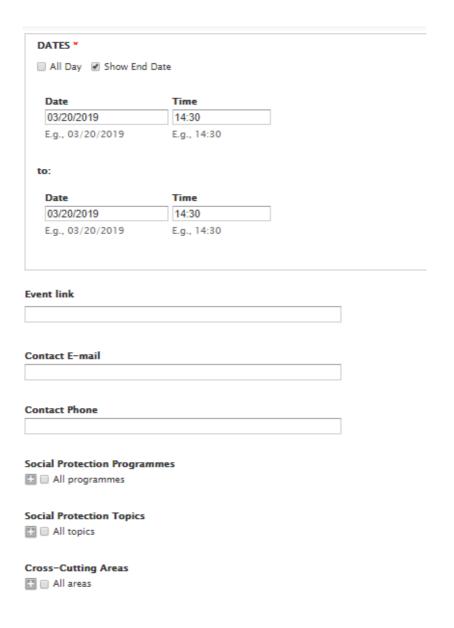
 Click the Calendar icon on the online community's main page and then click on Add event.



 You will be directed to the Create Community Event page. Fill in the fields, noting the required fields (marked by an asterisk).







Then Save or Preview the content.



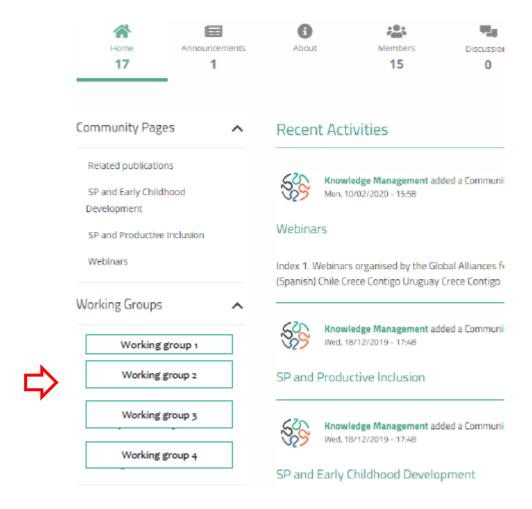
• Saved events will then appear on the online community's calendar.

5. Creating and managing working Groups

5.1 Adding working groups to your community.



Working groups allows for communities that are working with interrelated topics or working areas to better organize their group. Through this functionality, different working groups can be created and linked to a 'main community'. The working group can have its own members and privacy settings. Although they have the same layout and features as a common OC, they are only accessible through the main community.



To add a working group to your community. You need to create a new OC. To do that, hover over the 'Share' button on socialprotection.org's home page and select 'Online Community'. Fill in the required information and save the form. Reach out to us at *contact@socialprotection.org* letting us know about the name and purpose of the working group and to what community it should be linked to.

5.2 Managing your working group



5.2.1 Privacy Settings

Working groups can have their own privacy settings (e.g. private, semi-private, public), even if it differs from the main community. You can edit the group's privacy setting under the 'Action' menu in the group main page.

5.2.2 Members

You can also define if members of the main community will be able to join the working group, or if only specific people will be invited to it – this definition is also related to the privacy settings. This allows for greater collaboration among a group of people who are interested in interacting or focusing their work on a specific topic.

5.2.3 Adding and Managing Content

As mentioned, working groups have the same layout and features of the online community. This means that the process of editing and adding content is the same of a regular community. For detailed information on how to manage and add content to your community/working group, visit sections 3 and 4 of this guidelines.

6. Notifications and community newsletter

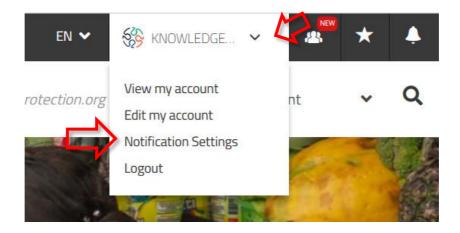
6.1 Notification system

Socialprotection.org has a notification system. This system allows you to receive automatic emails about any interactions and uploads made in the online community. Also, all the notifications of the OCs you join will appear under the bell button on the upper-right corner of the page.





To set your personalised notification settings, hover over your profile on the upper-right corner of the page, then select **Notification Settings**.



Currently, the online community notification system is inactive for improvements. This means that the updates in the OCs, which include the launch of announcements and inclusion of materials, will not be automatically notified to members by email.

6.2 Community newsletters

To keep OCs' members updated about ongoing discussions and recent materials added to the communities, the socialprotection.org team offers OC administrators the possibility of sharing these updates through an OCs' newsletter, which is sent by our team through our organisation's email address (info@socialprotection.org). Please note, this piece is sent exclusively to your OC's members.

Layout

All newsletter templates are produced by the socialprotection.org team. We personalise them according to the OC's visual identity. The image used in the newsletter's header is the same used in the community's banner, and the colour pallet of the image will be reflected on the newsletter's template.

While the template itself is produced and sent to community members by our team, the selection of its content is the administrator's responsibility. When



selecting the content, administrators should know that within the template, we usually have the same categories as in the online community, e.g. events, documents, discussions.

Administrators can also provide a personalised message/announcement to open the newsletter. While there are no restrictions about the text, it is important to keep it short, since this will facilitate reading and engagement.

It is also possible to suggest materials to be featured separately in the highlight category if you wish.

See the template mock-up for more details: https://us11.campaign-archive.com/?u=b498450933cbd79af8fc3e40b&id=5d1ef3feae

Content format

To guarantee that all templates are produced and sent within a one-week period, we ask administrators to submit the content to be disseminated at least 7 days in advance, by following the structure below:

For events or webinars:

- Event | Name of event + hyperlink | Date (DD/MM/YYYY) | Organiser(s)
- Webinar | Name of webinar + hyperlink | Date (DD/MM/YYYY) |
 Organiser(s)

For publications, news, and blogs:

- Publications | Title hyperlinked | Date (DD/MM/YYYY or MM/YYYY) |
 Institution or author
- News | Title hyperlinked | Date (DD/MM/YYYY or MM/YYYY) | Institution or author
- Blog | Title hyperlinked | Date (DD/MM/YYYY) | Institution or author

For discussions:

Discussion title + link



For other links:

- Type of material | title+link
 - Website | <u>socialprotection.org</u>

Frequency

Ideally, announcements should be sent every two weeks (15 days apart) or once a month.

Size

The size of the newsletter varies according to the frequency of sending. While there is no minimum number of content pieces, there is a maximum stipulated for each.

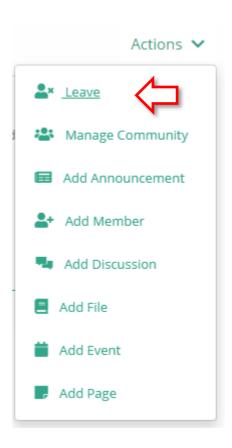
- Maximum of 20 pieces for fortnightly announcements.
- Maximum of 40 pieces for monthly announcements.

If you are interested about this possibility, contact our team through the following email: contact@socialprotection.org.

7. Leaving a community

If you would like to unsubscribe from an OC that you are currently a member of, access the community main page, click on the **Actions** button on the upperright bar and then select **Leave**. You will no longer be a member of the online community.





If you have any doubts or face any difficulties, feel free to message us at contact@socialprotection.org.

