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# TRANSCRIPT

## SUMMARY KEYWORDS

policies, community, governance, important, managers, thought, user license agreements, talk, executives, unwritten, stakeholders, work, report, playbook, melissa, share, role, professionals, people, staffing models

## SPEAKERS

Melissa Westervelt, Anne Mbugua

**Anne Mbugua** 00:00

Hi. I'm Melissa, we can tell us a little bit about yourself and what you do.

**Melissa Westervelt** 00:14

Hi, my name is Melissa Westervelt. And I'm the community manager at Cambridge associates. So basically, my role is within it. So I'm actually a product manager with an engagement focus, which is a little bit of a different view on a lot of our community topics.

**Anne Mbugua** 00:31

Right. So we want to talk about the SOCM 2022. So if you can tell us how you're thinking about policies and governance, and how that affects your community work?

**Melissa Westervelt** 00:43

Sure. So at Cambridge, we are a financial services firm. So we love to talk about governance and policies all of the time. So it's really important to us that we have a lot of fully structured sort of community structures in place that tie people back to our code of ethics, and our compliance restrictions. And then our challenge as community managers is to balance that with the day to day sort of unwritten policies that our group uses to actually sort of engage and interact with people and how they communicate and collaborate in their daily work.

**Anne Mbugua** 01:16

It sounds like really exciting work. So what jumped out to you in the policies and governance data from the state of community management research?

**Melissa Westervelt** 01:29

Well, my first surprise was the the overall numbers. So a lot of the reporting institutions didn't have formalized policies and governance. And I thought that was pretty surprising, because in our culture, that's where we start. So we have end user license agreements that people agree to write, when they log on, we have all kinds of forums that we're having people sign on to on our internal community, and

even more so in our external communities. So I would have expected that number to be a lot higher. So we were sort of postulating whether that was because of sort of the age of different communities or just different cultures at different institutions.

**Anne Mbugua** 02:11

What advice do you have for community professionals, we're starting to dig into policies and governments at their organizations?

**Melissa Westervelt** 02:20

Sure, so there's a lot of different ways that you can take that I think that I don't know that people give themselves enough credit for the policies and governance that they already have. I think a lot of our role as community managers isn't defined, we do a we do B, we do see, we just gets so used to doing it that we don't realize it's become our policy. So I would encourage sort of new or new professionals or really anyone to look at what are the default practices that you're doing all of the time? So as an example, I had a meeting with one of our users the other day, and we talked about, okay, well, can we change the navigation? So we don't have a specific governance policy around our navigation, but I can really easily articulate to them why they couldn't move the link they wanted to the place they wanted to show up, right. So like, you know, and that's policies and governance. And so a lot of times these sort of casual rules that we have, it's important to take the time to stop and say, Why am I giving that answer? What is it based on? And sort of? Is that something that's worth clarifying?

**Anne Mbugua** 03:36

Right, right, right. Okay. How have you used the state of community management research in your community work?

**Melissa Westervelt** 03:44

We'd love to go over this report with our stakeholders. So when we fill out the survey itself, we have actually found it to be a really useful tool to sort of gather our primary sort of executives and leadership and to say, here are the questions that we think are important within our industry. And this is where our community measures up within that. So even just leading into the report, we find that to be a really valuable tool. And then once the report does come out, we like to share that with our stakeholders and executive leaders to just say, here's where the industry is, as a whole. Right here are the specific bullet points that we think are important within our culture. And I think that's an opportunity to take what we're doing in corporate community and tie it to the outcomes that those executives and stakeholders have.

**Anne Mbugua** 04:34

What else are you excited about? In the report itself?

**Melissa Westervelt** 04:40

I'm always excited to get the report. Maybe I'm just a little bit nerdy like that, but like, the ability to sort of see, here's our strategies, and here's our goals, and where does that connect with what other people are doing and how their communities are growing. It's a great touchpoint to be able to evaluate like, are we moving in the right direction? Are there things we haven't thought of? Are there different sort of staffing models or ways to look at the overarching sort of policies of our program that we should revisit?

**Anne Mbugua** 05:14

All right. Well, thank you so much, Melissa, for answering these questions. I really appreciate it. And I'm going to stop the recording now.

**Melissa Westervelt** 05:21

And before you stop the recording, Shannon, I had had a specific conversation about policies. And I'm wondering if I even got on your list because of this. But we had had a conversation where she had asked me, What's the difference between policies and governance? Uh huh. Okay. And one of the things that I shared with her is that when we were developing our external community, we really broke it down to say that the policies are the things that you can do to get kicked out of the community. And governance policy is how we're going to do that. And I think that the more generous way of saying that is to say that like the policies, or the framework in which we're asking people to act, and governance is the way that we're going to move them through that responsibility. And that that responsibility is a two way street, because it's not just about sort of membership and asking people to be responsible members, but it's also a governance policy to have us as community managers be responsible and how we are stewarding that information and that experience.

**Anne Mbugua** 06:25

So it's good actually, to have that distinction rate. Because I think maybe that might not be as clear for some communities, and even some community managers thinking about policies and governance, what really does that mean? I'm glad that you actually brought that up. Yeah, it's a good way of looking at it. Are there any other? I would say, tips or thoughts on policies and governance?

**Melissa Westervelt** 06:49

Well, I don't know, I thought that that was an important distinction, because I think a lot of times people go what's the difference between policies and governance, and I think that is important to call out. I think the other piece here that I would want to more generally mentioned is just to say that when you look at policies and governments, when you look at policies and governance, a lot of it is unwritten, okay, which we talked about a little earlier. But the unwritten pieces are just as important as the written pieces, and maybe the part that you're leaning on even more, and that one way to sort of take yourself from that unwritten policy through to more formal procedures is often your playbook. Right. And so not to discount sort of your playbook and the way that you're using it within your team if you have one or within your community as a whole.

**Anne Mbugua** 07:39

Thank you. I appreciate it. I actually didn't realize the two distinctions until you mentioned it that that's something to really think about.

07:48

Thanks for listening to another episode of community conversations with the Community Roundtable. We'll see you next time.

