Communities of Practice
Toolkit

Purpose

The aim of this toolkit is to provide an overview of the stages involved in developing a Community of Practice (COP). Its purpose is not to be prescriptive, as each COP will be different, but to give general guidance.

We want to continuously improve this toolkit and welcome feedback and examples of resources you have developed or found useful.

Contents

Set-up or renew

Whether you are looking to set up a CoP from scratch or restart/renew your CoP, the first stage is to find the energy.

● Who is interested in the area?

● What specific topics are they interested in?

● What do they wish to gain from the CoP?

And most importantly:

● In what ways do they wish to contribute, notably to the set up/renew processes?

Planning

The process of planning facilitates relationship building and developing a shared understanding around what is achievable and, critically, binds commitment amongst colleagues to deliver.

Whilst CoP aren't managed or hierarchical, they do need an enthusiastic core group who can dedicate their time and resources to ensuring its success. This self-selecting core group works collaboratively and on behalf of its current or future members to co-create a shared purpose, ways of working and priorities.

As part of this process, the core group will also have an initial meeting with their Sponsor, a Director whose area the work of the CoP most links.

Planning normally involves the following processes:

Initiate and build relationships
CoPs need to intentionally create the right conditions that enable inclusion and participation.

Nurture psychological safety and sense of belonging

Model participation and inclusive leadership

Equalise organisational power dynamics

Foster self-organisation

Focus on goals

Co-create shared journey

This TED talk on psychological safety might be helpful.

How to turn a group of strangers into a team (Amy Edmondson/psychological safety)

If we do not purposefully consider how to do this, then our CoPs can inadvertently take on the standard behaviours/structure of the organisation - sometimes this is helpful and other times it is not!

From the outset, consider how to enable members to feel welcome, to feel included, to feel that they have an equal voice to other members regardless of their 'day job' and to feel able to offer a different perspective to others and for it still to be valued. Spend time on introductions to connect and learn about each other and co-create your ground rules.

Roles and responsibilities.

There is a number of key roles that are often found in a successful CoP. These can be held by one or more people and many responsibilities can ultimately be shared throughout the group:

Coordinator	Responsible for steering the group toward an identifiable goal or aim. They develop and encourage the CoP by stimulating interest in the cause or CoP objectives.
Member Support	Ensure that CoP members feel welcomed and comfortable within the group, to foster an atmosphere of trust - without this, interaction and engagement will suffer.
Information Resources	The quality and usefulness of a CoP can be severely affected where resources are not relevant to the groups' needs.
Website or MSTeams Administrator	The functionality and usability of online resources relies on good organisation and maintenance.
Sponsor (normally Director of most linked area)	This role is to tie the CoP to the University's strategic objectives. Advocate acceptance and recognition for the CoP – promote success!

It's helpful for have 2-3 people who have the time and resources to fulfil these roles.

Build consensus around a shared purpose and priorities

Having an idea of outputs and outcomes provides a framework for your CoP. These can be arrived at through discussion, awareness of current trends and initiatives within your chosen interest area, and by consultation with a CoP's core group and members.

To begin with, exploring why colleagues have volunteered for the core group can be really helpful in highlighting what unites the group - where is there consensus and divergence. Be curious around different motivations, recognising the strength that arises from diversity. Enable space for equal contribution to this discussion, which is really about identifying 'Why' this is important.

> **Questions you might consider:**
>
> Where is there alignment between the core group and the members?
>
> What are the opportunities?
>
> What are the challenges?

Explore how members will work together

Co-creating the ground rules provide a basis of shared values that are important to foster and distil into all aspects of the CoP – wherever possible, there needs to be total alignment to words and actions.

Inevitably this discussion will, slip into the 'What' and be sure to keep a note! Keeping focused on this conversation is important, as colleagues need to be able to get into sufficient detail (and possible implications) of what they are willing to 'give' to the CoP. This is especially pertinent for new CoPs, where a lot of work has to be led by members of the core group.

Identify what is possible and achievable

Each of the steps are overlapping, and iterations of discussions will build clarity around the purpose, how members will work together, and which priorities to take forward. When the discussion reaches a focus on the priorities that colleagues want to progress, it is important to consider if objectives/actions are possible i.e. what is realistic, achievable and within the time, skillset and/or network/reach of the members of the core group.

Meet the Sponsor

When there is sufficient clarity in the emerging purpose, ways of working together and priorities, it is helpful to connect to the Sponsor. Critically the Sponsor should respect the autonomy of the CoP, so does not direct its work but helps to foster opportunities for strategic alignment and insight. They also play a critical role in championing the CoP and celebrating its success. At this early stage the Sponsor can provide important reflections on scope, alignment, opportunities and support; they also play an important role at the launch (see later in toolkit).

At the meeting

- Invite initial feedback/reflections from the Sponsor

- Invite Sponsor to identify any ideas/opportunities arising for alignment to Enabling Plans, Strategy 2030

- Clarify the anticipated flow of activity/timeline anticipated in the CoP

- Identify timeliness of communications and touchpoints with the Sponsor – for input before any related actions and/or participation in events

Develop a charter

Using the above, develop and publish a charter. This will help maintain focus, quickly describes your CoP's purpose and aims, and provides a useful reference for review and evaluation.

As part of this establish future review dates for the CoP. The existence of a charter means that the CoP can look back to original goals and consider their next steps. A CoP charter could be available for download in the files of your CoP MS Teams.

Launch

People are the CoP, so it is important to involve as many as possible. From the outset, members must be made to feel welcome. Without this, the CoP will struggle to achieve any level of real engagement, particularly if the main contact is online.

As well as using traditional routes such as events, word of mouth, relevant newsletters and flyers, you could consider liaising with other CoPs already working in similar fields and work together to create links between your CoPs.

Launch event

Holding a launch event provides space for contribution and feedback on ideas for priorities for progress with strategic framing from the Sponsor. As such, the event sets the tone and reinforces the values of the CoP, including the importance of equal voice, inclusion and active participation.

A Launch event will usually meet the following objectives:

- Revisit the premise of a CoP (active participation) and share the 'journey/story' so far
- Set out the 'Why members should participate' and 'What's in it for me' (including Sponsor/strategic alignment, sharing of Charter)
- Share emerging ideas generated by Core group and 'why'
- Seek feedback on ideas, providing sufficient time for every member to contribute; for example, in small break-out groups
- Provide clarity around next steps (including what action has been taken from feedback) and timeline
- Deliver a clear, tangible call to action around active participation
- Capture data to understand 'who's in the room' and initial appetite for participation

Ongoing promotion and support

Actively engaging with your members and external stakeholders throughout the life of your CoP will encourage commitment. This means continuing to welcome new members, providing prompt support when members encounter a problem, regularly asking for feedback, and engaging your members with the ongoing development of your CoP.

Mobilise Core Group

As the Core group mobilises to deliver the Launch event, it is likely the members will take on different roles. It is important to take time to clarify those roles and confirm responsibilities and capacity moving forward, in the context of the feedback/actions arising from the Launch.

In line with the purpose, the core group will need to reflect on what's realistic and achievable and create an action plan; you could use Trello or a similar tool for this. Other core groups have found it useful to diarise the plan into their Outlook calendars, including core group check-ins (and monthly coffee catch-ups as appropriate). These meetings then provide a venue to enable accountability and momentum, vital to progress and ultimately deliver on actions.

It is also helpful to update your Sponsor, seeking further feedback or opportunities for alignment (as appropriate) and diarise a subsequent catch-up, in line with a key deliverable in your plan. And finally, to initiate your communications plan with an update to CoP members on next steps and a call to action.

Establish mechanisms to measure success

Establishing mechanisms to collate data will help in the long run, for example:

● Set up an Excel spreadsheet to log participation at events, and to record quarterly web analytics data

● Identify and record measures that will help understand the impact

● Identify 1-2 points to survey members to understand their experiences of participation of learning events, for example using Forms

● Seek regular feedback from the Sponsor and/or those colleagues working on projects to understand broader impact on the 'domain' or University

See the **Review and evaluation** section to find out more.

Tools and delivering learning activities

The aim at this point is to increase knowledge sharing. This can be from external and internal resources and knowledge from experience.

Information and resources

To support the work of the CoP, it is important to have easy access to useful information and resources.

To help gain a better idea of what members would like to see included, you could hold workshops, discussion areas, or provide surveys. Good places to start:

● Think about hot topics of interest to a number of members

● Think about shared areas of practice.

● Think about shared areas of expertise.

Once you have an idea of what kind of information the CoP needs and wants, you will need to think about where to find reliable resources and how to store that information. Linkedin Learning could be a good source of information.

Consider your digital tools to store information and communicate

The useability of, and easy access to, MSTeams makes it a great tool to use at Queen Mary. However, there are some other tools you may consider (use the links to find out more):

● QMPlus Hub – useful for collation of resources and discussion threads

● Twitter – useful in cultivating a CoP with members nationally and internationally

● Facebook – useful for including external members and is a tool that most people are familiar with

● LinkedIn – useful for including sector-focused participants

● Slack – useful for very local or activity/subject focused CoP

Agreement on the appropriate tool(s) should initially be reached by the CoP, but as the CoP develops it may be necessary for different tools to be used.

Members may need some support using the chosen tools and learning how to get the best out of the wealth of resources that are available. Practical support can be provided through a training session or by pointing members to written/video instructions and information points. You could set up a mini survey or discussion to

find out how confident members are, and identify any skills they feel they need to become an active participant.

Knowledge from experience

Technology provides important tools for supporting CoP however, it cannot be relied upon to achieve the key aims of a CoP - sharing and building knowledge, developing expertise, and solving problems. People 'thinking together' are the CoP.

Consider how members can interact in an informal way to build connections and sense of community, which in turn enables new insight and knowledge. You could run monthly coffee catch-ups to hear about what's happening, contribute ideas, and remind people of the shared purpose and benefits of actively participating.

Consider the type of information and the format of the information required to help meet the aims of the CoP. Examples of tools/processes to use:

- Finding people
- Sharing experience
- Discussion forums
- Gathering information about experience and subject interests
- Blogs
- Social networking/social search engines/social bookmarking
- Case studies

Agree any quality checks required.

Encouraging member engagement

The key to creating a healthy CoP is encouraging high levels of member engagement. Much of your CoP may be online; this can be a little impersonal, so in addition to contacting members as they join, you should try to maintain contact with the group throughout its life.

- Ensure that your CoP is easy to use and well organised: this will go a long way to encouraging use.
- Make sure that the members know how and where they can interact with each other and how to contribute to your CoP.
- Remember to highlight successes and thank members of the group for work they have done.
- Encourage members to take ownership of their CoP: this helps develop a sense of shared responsibility and pride in what you are contributing to your field.

Regular communications

These communications will provide an update on progress, promote up and coming events and activities, flag up opportunities to get involved, and reaffirm a call to action for new ideas. Wherever possible, these communications will help to **reinforce the values**, demonstrate broad participation in progressing actions which **empowers and shares ownership**, and value contributions which **reward and recognise participation.**

It can be helpful to consider the timeliness of communications, alongside the cadence established through core group check-ins and monthly coffee catch-ups (as appropriate). These forums require 'similar content' so co-creating and aligning key messages can reduce duplicated effort.

Running an event

Consider the 6Ps; for encouraging engagement with online meetings, this Harvard Business Review article might help.

Purpose	**People**	**Presentation**	**Participation**
Know what you want to achieve from the event	Identify who to involve	Consider the best method to present info (e.g. pre-reading, video)	Set up room to encourage discussion
Identify a specific outcome: at the end of the workshop we want people to do, feel, think...	Introduce the people and the aims	Consider logical order	Clarify expected behaviour
Consider how long it will need to be	Consider how people will interact	Be flexible in times	Consider range of activities
		End with summary	

Place	**Preparation**
Virtual or office	Communicate the purpose/aims of the session.
Consider what you need from the (physical or virtual) room	Consider the timing: identify busy periods.
Consider kit (pens, whiteboards, etc.)	Create a schedule for the workshop with the more important topics earlier, in case things overrun

Encouraging external influence

It is important that the work you do as a CoP is recognised by people outside of the group and perhaps even shared with them. The content and ideas that you generate can also be used externally; research topics, new practices, raising awareness, and induction training materials are all areas that could be impacted by the work your CoP does.

Review and evaluation

Review and evaluation are important for sustaining individual and collective motivation, especially given that members are volunteers, often making time to contribute on top of their 'day job'. Making time to take stock and reflect on what has been achieved is a key component of learning and development. This should be an ongoing process and should take place at regular intervals.

As such, it is also important to be able to answer key questions:

● Why should the University support this CoP?

● Why should I support my staff in participating in this CoP?

● Why should I give up my time to participate in this CoP, ultimately - 'What's in it for me?'

Measuring success

There are various ways to measure success:

- If you compiled a CoP charter, with review dates and aims, you can use these to measure your progress.

- Engagement can be measured through noting numbers of: members, resources shared, people at events, discussion threads, etc.

- Members can, and should, be consulted through survey tools such as Microsoft Forms, with a focus on how people have used CoP knowledge to enhance their work.

- Seek feedback from Sponsors and other key stakeholders.

The most important thing to remember during your review stages is to maintain communication with your members and retain an open atmosphere. Remember to celebrate!

Evolving your CoP

CoPs evolve as they progress and both CoP members and administrators will need to consider at defined intervals whether the group is fulfilling its original purpose and delivering the defined outputs and outcomes.

It may well be the case that your CoP has achieved everything it set out do. If this is the case, it may be appropriate to consider closing the CoP. However, many CoPs can evolve into something new.
Before you decide to close your CoP:

- Think about how the aims of your CoP might be changed.

- Respond to these changing aims by steering the CoP in a new direction.

- Consider the possibility of expanding your CoP to encompass different sub-groups.

- Consider the option of merging or joining with another CoP.

Closing your CoP

If the CoP feels, after review, that it has achieved everything that it set out to do and that there is no possibility of evolving its aims toward something new, then the CoP might wish to consider closing.

When closing a CoP, it is important to:
- Maintain good communication with your members, preferably consulting them and providing them with an appropriate closing date.
- Consider how the learning and resources your group generated can be shared and archived so that your achievements are not forgotten.
- Celebrate your successes.

The process for closing a CoP could involve:
- Publication of a 'Lessons Learned' report in areas of similar interest which could help other CoPs learn from the experience.
- Outputs from the CoP in the form of reports and other publications which can then be shared with other interested CoPs.
- Publication of findings and/or a case study.
- The dissemination of information to members and the wider CoP.

Further Reading and Resources

Books

Wenger E, McDermott RA, Snyder, W. Cultivating communities of practice: A guide to managing knowledge (2002)

Hildreth PM. Going virtual: Distributed communities of practice (2004)

Hildreth PM, Kimble C. Knowledge networks: Innovation through communities of practice (2004). Excerpt offering an overview of knowledge networks and communities of practice today.

Wenger, E. (1998a). Communities of Practice: Learning, meaning and identity. Cambridge, UK: Cambridge University Press.

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Wenger, Etienne, McDermott, Richard, & Snyder, William M. (2002). Cultivating Communities of Practice. Boston, Massachusetts: Harvard Business School Press.

Systematic reviews

Li L C, Grimshaw J M, Nielsen C, Judd M, Coyte PC Use of communities of practice in business and health care sectors: A systematic review. Implementation Science 2009, 4:27

Articles

Ho K, Jarvis-Selinger S, Norman CD, Li LC et al (2010) Electronic communities of practice: guidelines from a project. The Journal Of Continuing Education In The Health Professions 30 (2):139-43.

Kislov, Harvey, Walshe. (2011) Collaborations for leadership in applied health research and care: lessons from the theory of communities of practice. Implementation Science, 6 (64).

McDermott, Richard. (2000) Knowing in Community: 10 Critical Success Factors in Building Communities of Practice. International Association for Human Resource Management, March 2000.

Pyrko I, Dörfler V, Eden C. (2017) Thinking together: What makes Communities of Practice work? Human Relations, 70 (4), pp. 389 - 409.

Thomson L, Schneider J, Wright N (2013) Developing communities of practice to support the implementation of research into clinical practice. Leadership in Health Services, 26 (1): 20 – 33

Wellbeing our way. Enabling change through communities of practice (2017). National Voices.

Wenger-Trayner, Beverly, & Wenger-Trayner, Etienne. (2012). Leadership groups. Distributed leadership in social learning. Retrieved from www.wenger-trayner.com website.

Wenger-Trayner, Beverly, & Wenger-Trayner, Etienne. (2015). Introduction to communities of practice. Retrieved from www.wenger-trayner.com website.

Jarche, H., Personal Knowledge Mastery retrieved from www.jarche.com/pkm/

Reports

The Health Foundation. Effective networks for improvement Developing and managing effective networks to support quality improvement in healthcare March 2014

Henley Forum for Organisational Learning and Knowledge Strategies (2015) Evaluating communities of practice: adopting learning-oriented approaches. Knowledge in Action - Issue 31

'What works in CoPs': Two projects (UofG and ODHE)