



Community of Practice Design Guide

A Step-by-Step Guide for Creating Collaborative Communities of Practice

This guide provides a practical approach to creating communities of practice (CoPs) based on experiences working with corporations, non-profits, associations, government organizations and educational institutions. While it is important to recognize that every organization and community is different, this guide provides a structure to help clarify the most important design elements that go into defining, designing, launching and growing CoPs – both online and face-to-face.

What is a community of practice?

A community of practice is a group of people who share a common concern, a set of problems, or interest in a topic, and who come together to fulfil both individual and group goals. CoPs often focus on sharing best practices and creating new knowledge to advance a domain of professional practice. A community's specific purpose and goals inform the appropriate activities and technologies that should support it.

Why are communities important?

Today, organizations, workgroups, teams and individuals must work together in new ways. Communities of practice provide a new model for connecting people together in the spirit of learning, knowledge sharing, collaboration and individual, group and organizational development.

Communities of practice are important because they:

- ▶ **Connect people together** who might not otherwise have the opportunity to interact, either as frequently, or at all;
- ▶ **Provide a shared context** for people to communicate and share information, stories, and personal experiences in a way that builds understanding and insight;

- ▶ **Enable dialogue** between people who come together to explore new possibilities, solve challenging problems, and create new mutually-beneficial opportunities;
- ▶ **Introduce collaborative processes** to groups and organizations where existing structures and constraints inhibit the free flow of ideas and exchange of information;
- ▶ **Stimulate learning** through serving as a vehicle for authentic communication, mentoring, coaching and self-reflection;
- ▶ **Capture and diffuse new knowledge** that expands awareness of a larger system of possibilities and advances the agenda of an individual, group, organization and/or industry;
- ▶ **Help people organize** around purposeful actions that deliver tangible results.

How do you “build” CoPs?

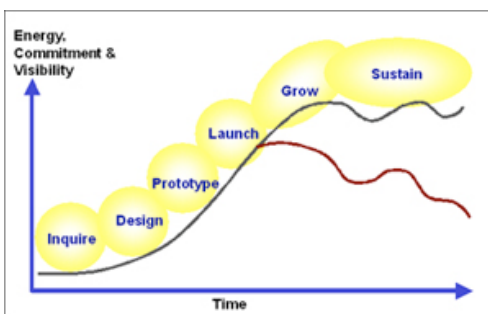
Communities of practice are not “built” per se. They are dynamic social structures that require “cultivation” so they can emerge and grow. Organizations can, however, sponsor CoPs, and through a series of steps, individuals can design a community environment, foster the formalization of the community, and plan activities to help grow and sustain the community. But ultimately, the members of the community will define and sustain it over time.

How do you “facilitate” community?

Like many things, communities have lifecycles – they emerge, they grow and they have life spans. The following model outlines the lifecycle phases of communities.

For each lifecycle phase, specific design, facilitation and support strategies exist that help achieve the goals of the community and lead it into its next stage of development. If the community is successful, over

time the energy, commitment to and visibility of the community will grow until the community becomes institutionalized as a core value-added capability of the sponsoring organization.



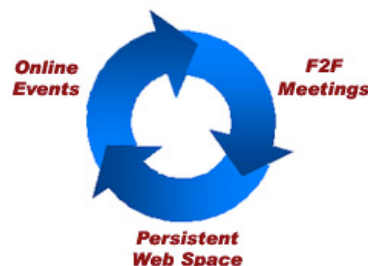
(adapted from McDermott, 2002)

The lifecycle phases include:

- ▶ **Inquire:** identifying the audience, purpose, goals and vision for the community
- ▶ **Design:** defining the activities, technologies, group processes and roles that will support the community's goals
- ▶ **Prototype:** piloting the community with a select group of key stakeholders to gain commitment, test assumptions, refine the strategy and establish a success story
- ▶ **Launch:** rolling out the community to a broader audience over a period of time in ways that engage newcomers and deliver immediate benefits
- ▶ **Grow:** engaging members in collaborative learning and knowledge sharing activities, group projects, and networking events that meet individual, group, and organizational goals while creating an increasing cycle of participation and contribution
- ▶ **Sustain:** cultivating and assessing the knowledge and “products” created by the community to inform new strategies, goals, activities, roles, technologies, and “business models” for the future.

Successfully facilitating a CoP involves understanding these lifecycle phases and ensuring that the expectations, plans, communications, collaborative activities, technologies and measures of success map to the current phase of the community's development. Without conscious facilitation, momentum may be lost during the Launch phase and the CoP may not achieve the critical mass needed to evolve into a sustainable entity.

Facilitating community is not a static, one-time event related to “turning on” a software platform or technology. While technology, or the **technical architecture** can assist greatly in providing a platform for communication and collaboration, even more important is the **social architecture** of the community. While the technical architecture *supports* the community, the social architecture *enlivens* it: the roles, processes and approaches that engage people together – whether face-to-face or online – in relationship building, collaborative learning, knowledge sharing and action.



An effective approach to community facilitation involves creating a predictable “rhythm” that sets a precedent around how and when to participate in the community. By engaging the community in a thoughtful combination of **face-to-face meetings**, **live online events** and collaboration over time within a **persistent web environment**, participants learn the norms, roles and expectations of the community and the community achieves a “sense of place” in the minds and on the “web browsers” of those involved.

How to use this community design guide

While most every community evolves along a lifecycle, every community is indeed unique, with distinct goals, member needs, appropriate supporting processes, etc. This guide was created to help CoP facilitators understand the questions, issues and options involved in designing and cultivating communities.

The next two sections outline specific issues related to defining the appropriate “social and technical architectures” for a given community. Through providing questions that need to be answered at the beginning of each lifecycle stage, community facilitators can apply best practices in community development to their own CoPs and organizations. In addition to these key questions, a number of prescriptive activities are described that lead to specific work products that include documents and presentations that can be used for communication, planning and the facilitation of the community itself.

Finally, four areas of focus for CoPs are described – *relationship building, learning and development, knowledge sharing and building, and project collaboration* – and are compared with respect to the technical features that can enable these essential activities. Use this comparison as a guide for selecting the appropriate technical features to enable your community to successfully progress along its lifecycle and achieve its goals.

Inquire:

Identifying the audience, purpose, goals and vision for the community

Key Questions to Explore	Supporting Activities
<ul style="list-style-type: none"> ▶ Audience: who is this community for? Who are the community's important stakeholders? ▶ Domain: Given the intended audience, what are the key issues & the nature of the learning, knowledge and tasks that the community will steward? ▶ Purpose, Goals & Outcomes: Given the audience and domain, what is this community's primary purpose? What are the benefits to the stakeholders? What specific needs will the community be organized to meet? 	<ol style="list-style-type: none"> 1. Conduct a needs assessment through informal discussions, formal interviews, surveys and/or focus groups. 2. Define the benefits of the community for all stakeholders, including: individual sponsors, individual community members, defined sub-groups, the community as a whole, and for the sponsoring organization. 3. Create a mission and vision statement for the community, tying these into the sponsoring organization's mission and vision if appropriate. 4. Identify the major topic areas for community content and exploration 5. Create an estimate of the cost for community technology, special technical development, facilitation and support 6. Begin the recruitment of a core team of individuals who represent the community audience.

Design:

Defining the activities, technologies, group processes and roles that will support the community's goals

Key Questions to Explore	Supporting Activities
<ul style="list-style-type: none"> ▶ Activities: What kinds of activities will generate energy and support the emergence of community presence? What will the community's rhythm be? ▶ Communication: How will members communicate on an ongoing basis to accomplish the community's primary purpose? ▶ Interaction: What kinds of interactions (with each other and with the content of the community) will generate energy and engagement? ▶ Learning: What are the learning goals of the community and how can collaborative learning be supported? ▶ Knowledge Sharing: What are the external resources (people, publications, reports, etc.) that will support the community during its initial development, and how will members share these resources and gain access to them? ▶ Collaboration: How will community members collaborate with each other to achieve shared goals? ▶ Roles & Social Structures: How will community roles be defined (individuals, groups, group leaders, community administrators, etc.) and who will take them on? 	<ol style="list-style-type: none"> 1. Identify tasks that community members are likely to want to carry out in the community. 2. Develop a series of scenarios that describe various synchronous and asynchronous experiences of the different personas (identified in the first phase), that would be necessary to carry out the tasks, and that demonstrate the potential benefits defined in the first phase. 3. Identify any face-to-face meeting opportunities for community members, and define how these will be incorporated into the community experience (conferences, etc.) 4. Layout a tentative schedule for the community (weekly, monthly, quarterly and/or annually) 5. Create timeline for the community's development 6. Create "folder structure" for organizing discussions, documents and resources. 7. Determine facilitator roles and needs, and recruit the first community facilitator(s) (from staff/core team)

Prototype: Piloting the community with a select group of key stakeholders to gain commitment, test assumptions, refine the strategy and establish a success story	
Key Questions to Explore	Supporting Activities
<ul style="list-style-type: none"> ▶ What short-term “pilot goals” will help establish the community as a viable and valuable entity? ▶ What community-oriented technologies will be used to support the pilot community’s social structures and core activities? ▶ What sort of “brand image” does the community want to project, given its audience, domain, purpose, and mode of operation? ▶ What are the meaningful metaphors to use with the community’s audience? ▶ What is the tone of interactions and activities that facilitators want to model? ▶ How will community identity be formed and shared? ▶ How will success be measure and communicated to the broader stakeholder groups? 	<ol style="list-style-type: none"> 1. Select the most appropriate community-oriented technology features to support the goals of the pilot. 2. Design community environment and have a group test the functionality through “use case scenarios”. 3. Decide on the community metaphor, and how it will be represented in the community’s organization and appearance. 4. Implement community prototype and give access to core team and pilot audience. 5. “Seed” the community with content. 6. Facilitate events and activities to exercise the prototype – focus on achieving “real” value-added goals. 7. Ensure that roles are clear and that support structures are in place 8. Measure success and report on the results of the prototype.

Launch: Rolling out the community to a broader audience over a period of time in ways that engage new members and deliver immediate benefits	
Key Questions to Explore	Supporting Activities
<ul style="list-style-type: none"> ▶ Why should someone join the community (what are the benefits)? ▶ What is the “business model” behind the community? ▶ How do new members learn about the community? ▶ What are the community’s norms for behavior? ▶ How do new members become oriented to the community environment? ▶ Based on insights from the pilot, what kinds of community activities will generate energy and engagement and support the emergence of community “presence” (activities, communication, interaction, learning, knowledge sharing, collaboration, roles & social structures)? What will the community’s “rhythm” be? ▶ Based on insights from the pilot, how will roles and community social structures be defined and supported over time? 	<ol style="list-style-type: none"> 1. Using experience and results from the prototype, design and implement the community environment (include graphics that support the community metaphor, pre-defined content from a variety of sources, pre-populated online discussions, links, databases with best practices and other information, online meeting spaces, etc.). 2. Establish community charter (which includes an articulation of the mission, vision, goals and member norms and agreements) 3. Define various roles that are available for community members, depending on their desired level of participation, goals, and previous experience. 4. Implement communication and marketing plan. 5. Determine member profile/directory structure. 6. Recruit new members. 7. Set up new member accounts or enable self-joining membership and group affiliations. 8. Provide synchronous welcome to new members when they first login. 9. Provide orientation to new members. 10. Finalize and publicize community calendar of events. 11. Design and deliver synchronous and asynchronous events and activities. 12. Set up communication channels (news, announcements, newsletters, integration with face-to-face meetings, etc.).

Grow:

Engaging members in collaborative learning and knowledge sharing activities, group projects, and networking events that meet individual, group, and organizational goals while creating an increasing cycle of participation and contribution

Key Questions to Explore	Supporting Activities
<ul style="list-style-type: none"> ▶ What are the additional emerging benefits of the community for members, sub groups, the community as a whole, the community's sponsors and other key stakeholders? ▶ What are the emerging roles that one could play within the community? What are the different groups to which one could belong? ▶ How do members get recognized and rewarded for their contributions? ▶ How do members create their own community identity and presence? ▶ What work products can members contribute to support individual and community goals? ▶ What are the most important elements of "community culture" that are emerging that should be recognized and represented in the online environment, as well as in formal policies and procedures? ▶ What are emerging technical needs of the community environment (e.g., the community-oriented technology/platform and the "place" that it creates) to support the evolving purpose, processes, and community culture? 	<ol style="list-style-type: none"> 1. Continue implementation including facilitation and communication. 2. Create and share stories of individual and community successes (e.g., digital stories) to capture best practices and create excitement and momentum. 3. Identify emerging community roles and recruit members to fill them. 4. Create and assign members to sub-groups to support emerging group activities. 5. Conduct a resource inventory (freshness, relevance, usefulness, use) and identify and upload additional content to meet the community's needs. 6. Create opportunities for sponsored projects (projects with defined work products that may or may not require additional commitments from community members and sponsors). 7. Design activities with recognition and awards attached to reward desired behavior and participation. 8. Conduct focus groups, interviews, surveys and other data collection activities to assess and measure the success of the community. 9. Facilitate meta-community discussions (discussions about the community itself, including the community culture, processes and practices, technology, and individual motivations for participating in the community).

Sustain:

Cultivating and assessing the learning, knowledge and “products” created by the community to inform new strategies, goals, activities, roles, technologies, and business models for the future

Key Questions to Explore	Supporting Activities
<ul style="list-style-type: none"> ▶ What are the ongoing community processes and practices that will contribute to the liveliness and dynamism of the community, and keep members engaged? ▶ How does the community support members across a wide range of roles? ▶ How are new potential community leaders (official and unofficial) going to be identified, chosen, developed, and supported by the community? ▶ How is persistent community “presence” maintained in the minds of the community members? ▶ To what extent is the community serving its intended audience and accomplishing its stated purpose and goals? How might it do a better job? ▶ How does the community demonstrate return on investment (ROI) for its sponsor(s)? ▶ From the perspective of each individual community member, and from the perspective of the community as a whole, what is the perceived “return on participation”? ▶ How should the knowledge and products created by the community be shared beyond the community? 	<ol style="list-style-type: none"> 1. Provide opportunities in the community for members to play new roles, experiment with new community activities and examine new technology features. 2. Develop a support infrastructure including documentation, mentoring, and development and recognition programs for different roles. 3. Ensure that procedures, practices and the technology support structured data sharing. 4. Identify opportunities for capturing new knowledge including establishing new roles related to harvesting and creating best practices (e.g., gardeners, summarizers, synthesizers). 5. Develop policies and processes for harvesting and sharing knowledge outside of the community. 6. Encourage publication of articles about the community and its projects. 7. Test for “persistence of presence” by evaluating member and group activity reports as well as member focus groups and surveys. 8. Review community audience, purpose, goals and domain, and watch for shifts in expectations and needs.

Emphasizing the right technical features

The following table summarizes the core technical features found across the four primary areas of activity of most CoPs. Most communities possess a mix of these features as a way to support an integrated approach to relationship building, learning, knowledge sharing, and actionable projects. Consider the table below as a menu – identify the appropriate combination of features to support your own community’s specific goals. In addition, also consider how certain features may be “core” at one phase of your community’s lifecycle and how other features may be introduced as your community evolves. For example, in the Prototype and Grow phases, relationship building and learning may be core while in the Sustain phase, knowledge sharing and project management may become more central.

	Relationship Building	Learning	Knowledge Creation	Project Collaboration
Core Technical Features	<ul style="list-style-type: none"> ▪ Member networking profiles ▪ Member directory with “relationship-focused” data fields ▪ Sub groups that are defined by administrators or that allow members to self-join ▪ Online meetings ▪ Online discussions 	<ul style="list-style-type: none"> ▪ Recorded PowerPoint presentations ▪ E-learning tools ▪ Assessments ▪ Web conferencing ▪ Online meetings ▪ Online discussions ▪ Website Links 	<ul style="list-style-type: none"> ▪ Structured databases ▪ “Digital stories” ▪ Idea banks ▪ Web conferencing ▪ Online meetings ▪ Online discussions ▪ Expert database and search tools ▪ Announcements ▪ Website Links 	<ul style="list-style-type: none"> ▪ Project management ▪ Task management ▪ Document collaboration ▪ File version tracking ▪ File check-in and check-out ▪ Instant messaging ▪ Web conferencing ▪ Online meetings ▪ Online discussions ▪ Individual and group calendaring

Acknowledgements

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For more information

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