

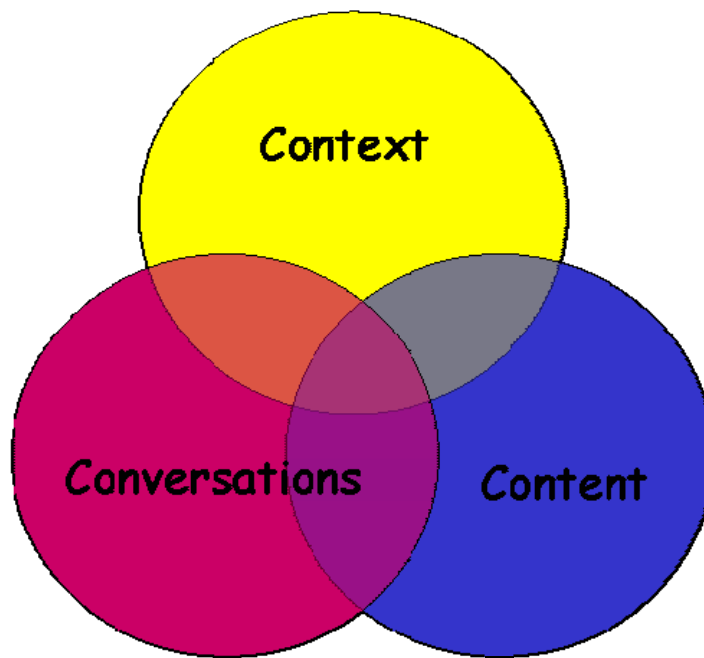
Guide to Communities of Practice

This guide is intended to help establish, support and renew knowledge communities in and across organizations. It is based on experience gleaned from working with hundreds of communities over the last 15 years in the public and private sectors. It addresses the following key areas:

- Purpose
- Description
- Generational Aspects
- Comparing teams and Communities
- How to Establish a Community of practice
- Roles & Participation
- Basic Operations
- Critical Success Factors
- Lifecycle

Purpose

Communities of Practice (CoPs) are one of the most effective organizational forms for sharing and transfer of a wide range of knowledge between people who share a common profession, practice area or domain.



Description

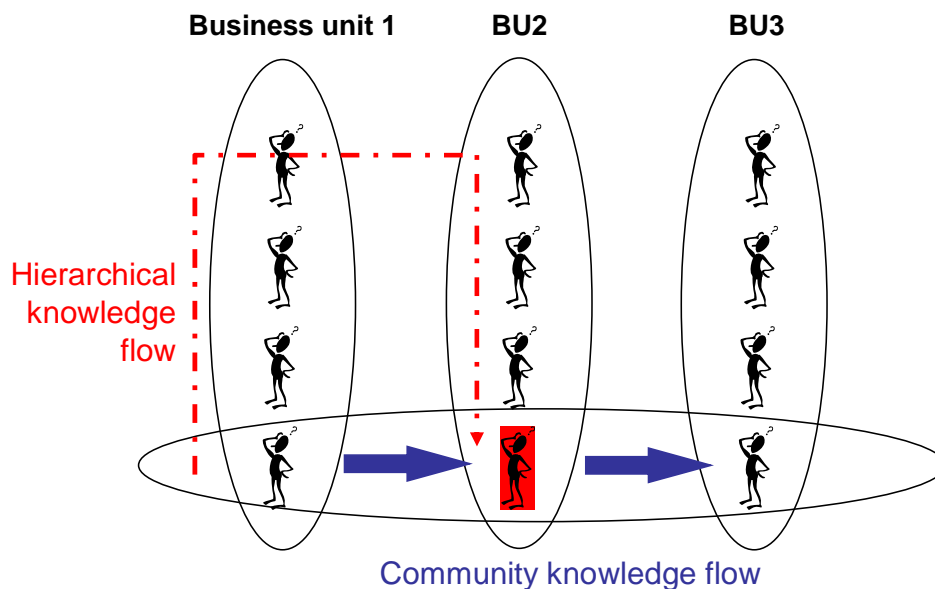
A CoP is a voluntary group of peers, practitioners, and other individuals whose members regularly engage in sharing and learning, based on common interests, to improve their individual performance, the performance of their teams, and the performance of their overall organization. They are typically drawn together by common work products and

processes. The leader (or group of leaders) and members establish a charter and collectively decide which processes, tools, and procedures work best in a given situation.

They are all about knowledge sharing and transfer. Within their shared context, the most effective communities use content to prompt and provoke conversation. Through conversation, electronic or otherwise, members often discover a timely knowledge need that helps knowledge flow and move from those that have it to those that need it.

Communities that focus within an organization may evolve to become the ‘guardians’ of competence in that practice within a company. In support of this role, they will often seek to codify their collective know-how in a form that can be re-used and adapted by their fellow practitioners. They help each other develop the competence to contribute individually within their business teams and sometimes beyond their company boundaries.

CoP & Dual Citizenship: *The conduit for cross-organizational knowledge flow*



Generational Aspects of Communities

By their nature, CoPs cut across multiple generations. Many encourage membership of practitioners past, present and future, which means the age of the members can vary quite widely. They are likely to include a higher proportion of novices and experts that get to know each other more quickly than you would normally find in a typical group within an organization. As a result, they are a natural market for mentorship and provide a safe environment for mentees to ask for help. A suggested action is to include mentoring in the charter or terms of reference for a CoP

Here are some generational adaptations to consider when establishing and growing a knowledge community that involves multiple generations:

- Offer a choice of social media tools with guidance in their application to support interactions and knowledge exchange preferences of multiple generations;
- Support sub-setting of CoPs to facilitate conversation among generational peers, but ensure relevant insights, new practices and issues are passed to the broader CoP membership;
- Provide an experienced CoP facilitator to observe, coach & promote cross-generational interactions.

Comparing CoPs and Teams

Comparing the differences between CoPs and Teams often helps to build understanding on the basic aspects of communities:

	Community of Practice	Team
Goals	Emerge from the professional interests of the community	Concrete task or project-oriented goals
Membership	Purely voluntary; social pressure may encourage people to join or leave the community	Defined when team is formed; may change based on task or project requirements
Motivation to participate	Based on individual member's desire for personal learning, for social interaction, and need to establish and maintain professional and/or personal identity	Organizational rewards predominate
Structure & Leadership	Fluid; leadership and membership in a core group (if it exists) are based on an individual's actions as a community member	Team leader role either is determined when the team is formed or is dependent on hierarchical status in the organization; some teams are self-organizing; some teams operate without identified leaders
Facilitation	Facilitators often external, but can eventually emerge from the members of the community	Team members take on facilitation roles as necessary
Influence processes	Based on informational factors and thus more deeply internalized. "Informational" refers to the kind of feedback provided by a group when it comments on an individual's behavior and interpersonal relationships.	Based principally on normative factors and therefore less likely to have impact when the individual is not "in" the group
Work processes	Informal; undocumented	Externally determined or are developed according to the norms of the organization
Work products	Generally unstructured; may be tacit	Explicit; structured
Reporting on results	Wholly internal; frequently informal	Required; usually structured
Interaction format	Mainly virtual; face-to-face to launch if at all possible and to renew relationships periodically	Typically face-to-face, but more and more can be virtual
Duration	Indeterminate	Fixed or indeterminate

How to Establish a Community of Practice

There are five basic phases to establishing a successful community: **Engage, Plan & Form, Launch and Sustain**. The diagram below provides a high-level guide for development, including the goal, key tasks and deliverables for each phase:

CoP Development Program (CDP)

Phase	Engage	Plan	Form	Launch	Sustain
Goal	Ensure viability of desired CoPs	Agree expectations and tailor approach	Develop core group & focus for each CoP	Formal start-up of CoPs & delivery of quick wins	Ensure continuity and grow value
Key Tasks & Deliverables	<ul style="list-style-type: none"> •Identify potential CoPs •Identify & engage key stakeholders, potential sponsors & core group members •Clarify business imperatives •Identify enablers and barriers, including technology tools 	<ul style="list-style-type: none"> •Tailor CDP to fit culture, business strategy & processes •Agree CoPs, sponsors & core group members for each CoP •Identify potential CoP members •Work with IT and vendors to define and develop CoP tools •Develop tracking and measurement processes 	<ul style="list-style-type: none"> •Train and coach core group for each CoP •Hold CoP Pre-Launch Workshops •Identify quick wins •Validate focus areas with core groups & sponsors •Engage potential CoP members •Test & implement CoP technology enablers •Finalize CoP measures 	<ul style="list-style-type: none"> •Launch each CoP •Agree Knowledge / best practice transfer priorities •Implement quick wins •Facilitate learning sessions to accelerate performance •Initiate tracking and measurement 	<ul style="list-style-type: none"> •Coach core group to support and grow member participation •Hold monthly CoP exchanges via teleconference •Grow transfer of better practices •Track and communicate progress & value •Facilitate quarterly learning and performance reviews



Key questions to consider for each phase are:

Engagement Questions:

- Is the proposed CoP viable and valuable?
- What is the scope in terms of organization and context?

Planning Questions:

- What is the business case for the CoP?
- What is the level of support?

Forming Questions:

- Who might lead the group?
- Is the scope clear?
- How will the core team function?

Launching Questions:

- What are this group’s critical issues and needs?
- What will best serve their interests?

Sustaining Questions:

- What tasks and activities does the Core team need to support and maintain the CoP?
- Are the members participating and getting value from their involvement?

Roles & Participation in CoPs

Two of the most important, but often misunderstood, elements in a CoP are ‘who does what’ and managing expectations of participation.

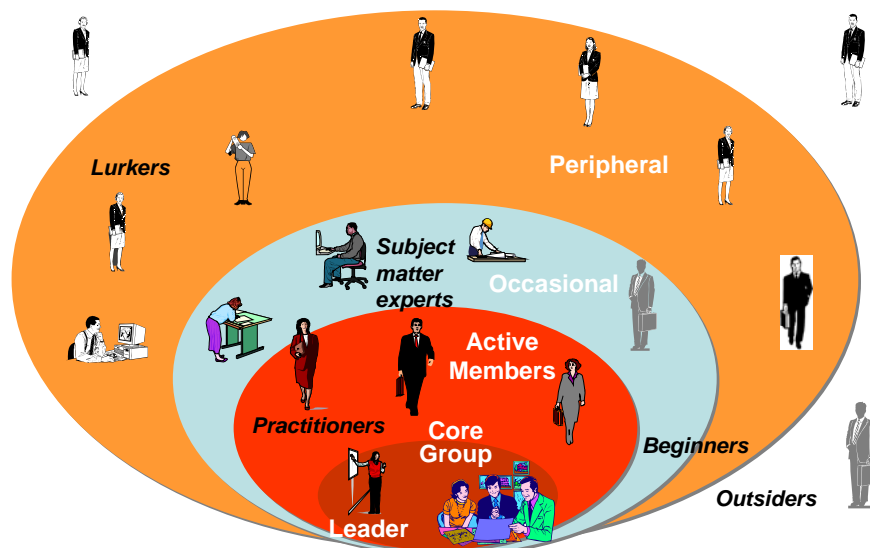
Every community needs to have a leader, members and a facilitator. If the CoP decides to create and manage content to promote sharing and transfer of their explicit knowledge, practices and learning, then they also need someone who can help capture and publish in a digital form on their CoP website. The facilitator role may be performed by the leader if he or she is trained in CoP facilitation. Otherwise, and is often the case, the facilitation role is provided by another person who is typically not a practitioner in the specific CoP subject area but is experienced as a CoP facilitator with background and competency in Knowledge Management practices. The diagram below shows the relationships between the core roles in a typical CoP:

CoP Governance & Roles



Early on in the life of a CoP, many organizations have found it important to manage the expectations of participation of the members. The diagram below is intended to provide participants with an understanding of how much they should expect different types of members to participate. The bottom line is you get out of a community what you put in.

CoP Participation*



* From the work of Etienne Wenger

Basic Operations of CoP

The following are minimum operating requirements of a CoP:

- Meet face-to-face periodically (at least once per year) to socialize and build/renew relationships and trust; if the membership is large, this can be accomplished over time by meetings with subsets of the overall membership, or by holding virtual meetings where socialization is effectively managed and facilitated as a major objective of the virtual events
- Promote staying connected by holding monthly, one hour teleconferences
- An easy to use website accessible and highly visible that contains:
 - A list of members, their areas of expertise, and how to contact them
 - An on-line discussion forum where members can raise issues, make requests for information or ask for help in problem solving
 - A repository for documents and other artifacts for re-use by the members, *and to prompt and provoke conversation!*

Critical Success Factors for CoPs

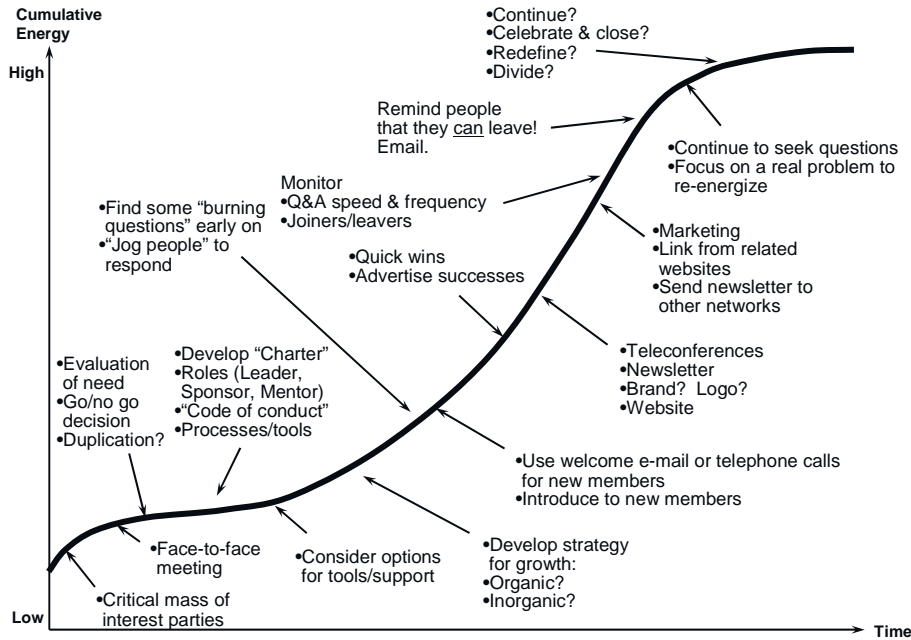
All thriving CoPs exhibit the following success factors:

- They are *highly intentional* groups dedicated to sharing knowledge among practitioners
- The members share a common and *specific* sense of purpose
- The knowledge they share and transfer is *highly relevant* to the members current and future business, mission or personal needs
- They operate through trust, *reciprocity & recognition*
- The leader (s) are respected, *passionate & trained*
- Knowledge sharing is *facilitated* by someone trained and experienced in KM methods such as Peer Assists, conversation as a learning process, and in particular, how to enable and drive sharing of knowledge among a collective group. Most communities, even those initiated from the bottom-up by passionate practitioners, struggle for months or years to get knowledge in form of insights, experience, lessons learned and good practices to flow among the best-intentioned participants. Almost all CoPs require significant support and facilitation for anywhere from a few months to one year to optimize participation from the majority of members.
- There is an easy to use, *virtual* connection place on the web
- The members meet *face-to-face* once in a while, or meet more frequently in a virtual session where socialization is effectively facilitated

Lifecycle of a Community of Practice

No one should expect communities to live forever. However, if they form around a sustainable need or profession there's no reason for them not to last as long as there are members who want to learn and support each other. The chart from Learning to Fly (see references) below maps the lifecycle of a successful community. Understanding the effort and activities involved can help you know what to expect and also where attention is required to help the community renew its energy to stay effective for its members.

Lifecycle of a Community / Network



This guide is based on the work of Kent Greenes (www.greenesconsulting.com), the KM Teams at British Petroleum and SAIC from 1995 to 2006, and work with Nancy Dixon in 2008.

References

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