Communities of practice are groups of people who share a passion for something that they know how to do and who interact regularly to learn how to do it better.

**Why focus on communities of practice?**

- **Short-term value**
  - help with challenges
  - access to expertise
  - confidence
  - fun with colleagues
  - meaningful work
- **Long-term value**
  - personal development
  - reputation
  - professional identity
  - network
  - marketability

**What are some critical success factors?**

- **Community**
  - Domain that energizes a core group
  - Skillful and reputable coordinator
  - Involvement of experts
  - Address details of practice
  - Right rhythm and mix of activities
- **Organization**
  - Strategic relevance of domain
  - Visible management sponsorship, but without micro-management
  - Dance of formal and informal structures
  - Adequate resources
  - Consistent attitude

---

**What elements to develop?**

- **Domain**
  - the definition of the area of shared inquiry and of the key issues
- **Community**
  - the relationships among members and the sense of belonging
- **Practice**
  - the body of knowledge, methods, stories, cases, tools, documents

**Where to start?**

- **Educate**
  - Communities of practice are a familiar experience, but people need to understand how they fit in their work.
  - Conduct workshops to educate management and potential members about the approach.
  - Help people appreciate how communities of practice are inherently self-defined and self-managed.
  - Establish a language to legitimize communities and establish their place in the organization.

- **Support**
  - Communities of practice can use some light-handed guidance and technology infrastructure.
  - Provide some process support, coaching, and logistic assistance.
  - Identify needs and define adequate infrastructure without undue emphasis on fancy technology.

- **Encourage**
  - Practitioners usually see the value of working as a community but may feel the organization is not aligned with their understanding.
  - Find sponsors to encourage participation.
  - Value the work of communities.
  - Publicize successes.

- **Get going**
  - Starting to cultivate communities of practice as early as possible creates early examples that allow people to learn by doing.
  - Have a few pilot communities going as soon as possible.
  - Find communities to start with by identifying areas where there is potential and readiness.
  - Interview some prospective members to understand issues, start discussing a community, and identify potential leaders.

- **Set strategic context**
  - A strategic context lets communities find a legitimate place in the organization.
  - Articulate a strategic value proposition.
  - Identify critical business problems.
  - Articulate need to leverage knowledge.

**Integrate**

- The formal organization must have processes and structure to include these communities while honoring their root in personal passion and engagement.
  - Integrate communities in the way the organization works.
  - Identify and remove obvious barriers.
  - Align key structural and cultural elements.
**Every Moment Counts**
Promoting Mental Health Throughout the Day

Susan Bazyk, PhD, OTR/L, FAOTA
VOTA Annual School Symposium – March 10, 2017
Ohio Department of Education, Office of Exceptional Children
3-Year grant led by occupational therapists (2012-2015)

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**Public Health Approach to MH** – shift from individually focused to school-wide; from deficit driven to strength-based; emphasis on early intervention & prevention

- Tier 3 → Intensive
- Tier 2 → Targeted
- Universal

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**AOTA Resources: Mental Health Promotion, Prevention and Intervention**

- Boren, S. (2000). Building capacity of OTs to apply a public health approach to mental health. Help OTs, school personnel and families contribute to prevention and intervention.

---

**Problem → Knowledge to Practice Gap**

- **Time:** Estimated that is takes more than 17 years to translate evidence to practice (Boren & Boren, 2000)
- **Amount:** Only 14% of new knowledge is believed to enter daily practice (Westfall, Mold & Fagan, 2007)

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**Every Moment Counts → Timeline**

<table>
<thead>
<tr>
<th>Model Program &amp; Toolkit Development</th>
<th>Promote Implementation throughout Ohio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 1 (2012-13)</td>
<td>Year 1 (2012-13)</td>
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<tr>
<td><strong>KNOW IT!</strong></td>
<td><strong>KNOW IT!</strong></td>
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<td>Year 2 (2013-14)</td>
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<td><strong>DO IT!</strong></td>
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<td>Year 3 (2014-15)</td>
<td>Year 3 (2014-15)</td>
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<td><strong>SHARE IT!</strong></td>
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<tr>
<td>Building Capacity of OTs to apply a public health approach to mental health</td>
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<td>Central Ohio Cap (8/12-2/13)</td>
<td>Central Ohio Cap (8/12-2/13)</td>
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<tr>
<td>February 2013 → June 2013</td>
<td>February 2013 → June 2013</td>
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<tr>
<td>CoPs Civic, Dayton, NE Ohio</td>
<td>CoPs Civic, Dayton, NE Ohio</td>
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<td>October 2013 – April 2014</td>
<td>October 2013 – April 2014</td>
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<td>Toledo, SE Ohio</td>
<td>Toledo, SE Ohio</td>
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<tr>
<td>Website: ORNIT toolkits, Facebook</td>
<td>Website: ORNIT toolkits, Facebook</td>
</tr>
</tbody>
</table>

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**Project Goals**

1. **Build capacity** of OTs, school personnel and families to promote mental health and contribute to prevention and intervention
2. Develop, implement and evaluate **model programs and embedded strategies** focusing on mental health promotion
3. **Disseminate materials** using website, Pinterest, and Facebook

www.everymomentcounts.org
Changing Practice
Ohio’s Process … Virginia’s Process

Value of new knowledge ….
… only when it is applied leading to change
Goal → Knowledge of a PH approach to children’s mental health applied to practice leading to change and for OTs to clearly articulate and advocate for our distinct value and role.

Knowledge Translation
the “exchange, synthesis, and ethically sound application of knowledge – within a complex system of interactions among researchers and users” in order to apply research to improve health and enhance service provision (Canadian Institute of Health Research [CIHR], 2004, p. 4)

How to promote knowledge translation?
• Dynamic, iterative interaction between researchers and practitioners
  – Researcher’s responsibility to share user-friendly research and resources
• Active learning strategies (reading & online discussion)
• Some face-to-face interaction to share tacit knowledge – or practice knowledge (Barwick et al., 2009)
• Goal: ‘produce research that is relevant to practice and to produce practice that is supported by research findings’ (Korthagen, 2005, p. 595)
• Foster practice reflection - thinking about the relevance and application of new knowledge to practice

Communities of Practice (CoP)
Mechanism for promoting knowledge translation
“Communities of practice are groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly.” (Bimie Wenger)
  – Shared area of interest (e.g. OT’s role in addressing mental health in schools; public health approach)
  – Diverse stakeholders who care about cause
  – Share knowledge, perspectives, & resources
  – Shared leadership and deep collaboration
  – Goal: Lead practice change; develop new ways of ‘doing’
  – CoPs can function at the national, state, local and school levels

**Building Capacity Process**

**Goals:**
1. Enhance knowledge and application of a public health approach to mental health
2. Create OT Change Leaders – practitioners empowered to change practice based on current knowledge and research

**How?**
1. Dynamic, iterative bi-directional relationship between researchers and practitioners
2. Variety of active learning strategies (reading, reflection, face-to-face and online discussions)
3. Interaction within a CoP

---

**Building Capacity of OTs to address the MH needs of children & youth**

**Vision:** OTs will be leaders in mental health promotion

This is not ‘new’ OT ... it reflects ‘original’ OT

**How?** Occupation-based practice

The activities we use to promote positive MH are the very same ones we use to intervene with the presence of mental illness and to prevent mental health challenges – meaningful occupation.

---

**Building Capacity of OTs to Apply a Public Health Approach to Mental Health**

**Ultimate goal:**
Build OT’s knowledge base; build community; change practice

**How we did this?** 6 month process using a combination of:
1. Professional development strategies: Reading, reflection, online discussions
2. Community building strategies: face-to-face sessions and shared learning

We develop regional Communities of Practice (CoPs) –
Provides a framework for bringing together OTs committed to children’s mental health who interact regularly to do shared work in order to bring about needed change (Wenger, McDermott, & Snyder, 2002).

---

**OT Change Leaders of Cleveland, Fall 2011**

First CoP in Cleveland

Carol Conway, MS, OTR/L – Hudson Schools
Louise Demjan, MA, OTR/L – Private OT Consultant
Teri LaGuardia, MOT, OTR/L – Northeast Therapy
Fran Horvath, OTR/L – Constellation Schools (charter school)
Karen Thompson-Repas, MBA, OTR/L – Kaleidoscope Therapy
Leslie Fahl Kinder, OTR/L – Willoughby-Eastlake City School District
David Weiss, OTR/L – Positive Education Programs (PEP)
Paula Michaud, MED, OTR/L – Cuyahoga County Board of DD
Robin Kirschenbaum, OTD, OTR/L – Cleveland Municipal School District
Jordye Joyce, MS, OTR/L – Woodridge Schools
Rebecca Mohler, MOT, OTR/L – Senders Therapy
Lisa O’Halloran, MS, OTR/L – Cleveland Municipal School District
Eileen Dixon, MS, OTR/L – Cleveland Municipal School District

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**Building Capacity of OTs to address the MH needs of children & youth**

We believe that change is a **process** involving:
1. Reflection; identifying a need
2. Commitment to change
3. Reading and learning → Use resources and Every Moment Counts website
4. Conscious planning
5. Flexibility – being open to opportunities and that the change will ‘look different’ for everyone
6. Creativity
Mixed Methods Study of Outcomes
Building OT Change Leaders in Ohio

- (Survey) Statistically significant improvements in knowledge, beliefs and action related to addressing mental health
- (Qualitative data) The experience was meaningful and enjoyable
  - Change in THINKING → leads to a change in DOING
    - Re-framed ‘mental health’ as a positive state of functioning; able to use the PH framework to articulate OT’s role
    - Energized; gained renewed commitment to MH
    - Felt reconnected to OT’s MH roots
    - Became more confident in knowledge and skills → empowered to articulate, advocate for and implement practice changes related to mental health

Cleveland Clinic Children’s Hospital

Sue,
Emily and I are in the process of putting some one page informational sheets together to have for staff, families, etc at all of our settings. We are hoping to present a brief in-service to the staff in the next few months and plan activities for MH day. We decided to incorporate MH day into OT week to make things a bit easier and more streamlined for us. I’m excited!! We can send you the info sheets if you like, they are still in process.

Mary Lou Kennedy, OTR/L

David Weiss, OTR/L
Special Olympics at PEP

Participating and the work/discussion about extracurricular activity directly led to me facilitating our school becoming an accredited Special Olympics site and doing our first Special Olympic event last June with our students living with severe developmental challenges; over 40 students participated and it was great…..I had multiple staff tell me “that was the coolest thing you’ve ever done with the kids”…..also I’ve been constantly trying to spread the message that mental health is thriving not just absence of mental illness.
Building Capacity of OTs to address the MH needs of children & youth

Avoid getting ‘bogged’ down with excessive meetings and paperwork.
- Make it fun and feasible
- Start small — small moments make big differences
- Look for ‘open doors’ and new opportunities
- Try not to become paralyzed by trying to make BIG changes
- Do what works for you in your setting(s)

Important message — Embedded Strategies

- **Embed** (verb) to place or set (something) firmly in something else
- placing interactions and activities aimed at promoting positive mental health firmly into all aspects of the day


VA Building Capacity Planning

Gearing Up To Start (~3 mos)
- Leadership team
- Develop timeline
- Financing the process
- Conference call line for communication
- Research study?
- Online discussion platform
- CEUs
- Recruit participants
- Plan for ‘kick off’ event

Discussion

- What will the ‘building capacity’ process look like for you in your setting
- Review building capacity planning document

Building Capacity Process and CoP (~6 mos)
- Kick-off meeting (3 hrs)
- 6 Online Discussions
- Meeting #2
- Final Meeting #3, Celebration, reflections and future planning

Pledge to Reclaim OT’s Mental Health Roots
“*I address the mental health needs of the people I serve by ________________.*”

I can. I will. End of story.
REVIEW THE WEBSITE!
www.everymomentcounts.org

Every Moment Counts
Promoting Mental Health Throughout the Day

Questions?
www.everymomentcounts.org

Contact: Susan Bazyk (s.bazyk@csuohio.edu)
Videographer: David Blakeslee
Graphic designer: Audrey Bazyk

Ohio Department of Education, Office of Exceptional Children
3-Year grant led by occupational therapists (2012-2015)
Community of Practice Design Guide
A Step-by-Step Guide for Designing & Cultivating Communities of Practice in Higher Education

Acknowledgments
This guide was developed based on the shared experiences of several organizations working together in ways that embody the spirit of collaboration. These included the National Learning Infrastructure Initiative at EDUCAUSE (http://www.educause.edu/nlii) and a community it sponsored, the Bridging VCOP; the American Association for Higher Education (http://www.aahe.org); and iCohere (http://www.icohere.com). We would also like to specifically acknowledge the NLII VCOP Facilitators Team and four generations of NLII Fellows for their ongoing contribution to and successful demonstration of many of the processes and tools presented in this guide.

Why Are Communities Important?
Today, organizations, workgroups, teams, and individuals must work together in new ways. Inter-organizational collaboration is increasingly important. Communities of practice provide a new model for connecting people in the spirit of learning, knowledge sharing, and collaboration as well as individual, group, and organizational development.

Communities of practice are important because they:
- Connect people 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.
- Stimulate learning by serving as a vehicle for authentic communication, mentoring, coaching, and self-reflection.
- Capture and diffuse existing knowledge to help people improve their practice by providing a forum to identify solutions to common problems and a process to collect and evaluate best practices.
- Introduce collaborative processes to groups and organizations as well as between organizations to encourage the free flow of ideas and exchange of information.
- Help people organize around purposeful actions that deliver tangible results.
- Generate new knowledge to help people transform their practice to accommodate changes in needs and technologies.

How to Use This Community Design Guide
This guide provides a practical approach to creating communities of practice (CoPs) based on experiences working with corporations, nonprofits, 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. The first three pages of the guide are designed for those who are considering the strategic use of CoPs to facilitate collaboration, learning, or knowledge generation and want to know more. The subsequent pages of the guide are designed to help CoP designers and facilitators understand the questions, issues, and options involved in planning and cultivating communities.

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 fulfill both individual and group goals. CoPs often focus on sharing best practices and creating new knowledge to advance a domain of professional practice. Interaction on an ongoing basis is an important part of this. A community’s specific purpose and goals inform the appropriate activities and technologies that should support it. Many virtual communities of practice rely on face-to-face meetings as well as Web-based collaborative environments to communicate, connect, and conduct community activities.

How Do You Build CoPs?
Communities of practice are dynamic social structures that require “cultivation” so that they can emerge and grow. Organizations can 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.

©2005 Darren Cambridge, Soren Kaplan, and Vicki Suter
How Do Communities Grow?
Communities have lifecycles—they emerge, they grow, and they have life spans. 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. The following model outlines the lifecycle phases of communities.

![Lifecycle Phases of Communities](adapted from McDermott, 2002)

The lifecycle phases include:

- **Inquire**: Through a process of exploration and inquiry, identify the audience, purpose, goals, and vision for the community.
- **Design**: Define the activities, technologies, group processes, and roles that will support the community’s goals.
- **Prototype**: Pilot the community with a select group of key stakeholders to gain commitment, test assumptions, refine the strategy, and establish a success story.
- **Launch**: Roll out the community to a broader audience over a period of time in ways that engage newcomers and deliver immediate benefits.
- **Grow**: Engage 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**: Cultivate and assess 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.

How Do Online Communities Become Places?
Facilitating community is not a static, one-time event related to “turning on” a software platform or technology. While technology—the technical architecture—can assist greatly in providing a platform for communication and collaboration, even more important is the social architecture of the community. The technical architecture supports the community, while the social architecture enlivens it. The roles, processes, and approaches that engage people—whether face-to-face or online—are essential in relationship building, collaborative learning, knowledge sharing, and action. Together, technical and social architectures create the container for the community.

An effective approach to community facilitation involves creating a predictable “rhythm” that sets an expectation around how and when to participate in the community. A “sense of place” is created in the minds of community members through an integrated, thoughtful combination of face-to-face meetings, live online events, and collaboration over time within a persistent Web environment.

Purpose Is Paramount
While almost every community evolves along a lifecycle, every community is indeed unique, with distinct goals, member characteristics and needs, and purpose. All design choices (for technical or social architecture) must be driven by purpose, so community purpose is paramount. Successful and sustainable communities have focused, well-defined purposes that are directly tied to the sponsoring organization’s mission. Purposes should be defined in terms of the benefits to the community’s stakeholders and the specific needs that the community will be organized to meet. Purposes can be categorized into the following four areas of activity:

- **Purpose Is Paramount**
- **Develop relationships**
- **Learn and develop practice**
- **Create new knowledge**
- **Carry out tasks and projects**
Culture of Inquiry and Evidence and Community Activities

Once purpose has been defined, the next important planning activity is to frame the assessment infrastructure and the language of inquiry and evidence that the community and its stakeholders will use to understand and document success in achieving the purpose, meeting organization goals, responding to needs, and making decisions about future actions. Rubrics for assessment of the effectiveness of community activities have not yet been fully developed; however, the following are general questions to explore in assessing the quality of community design, development, and support in relation to community activities.

### 1. Foundation: Build Relationships

**Develop relationships of trust, mutual respect, reciprocity, and commitment necessary for strong communities.**

Interaction with and development of a wider network of peers is sufficient reason to belong to a community for some. Even if the community purpose is broader, other community activities are dependent on an environment of mutual respect and trust, which "encourages a willingness to share ideas, expose one’s ignorance, ask difficult questions, and listen carefully." For virtual communities of practice especially, relationships are fostered by frequent synchronous and asynchronous interaction, and this sense of presence of other community members is important to keep members engaged with the community.

**Key Questions:** How regularly are members interacting? To what extent do interactions have continuity and depth? Are members “opportunistic” about chances to interact in other settings (conferences, etc.)? Are members taking on new leadership roles? How much and what kind of reciprocity is occurring? To what extent is a shared understanding of the community’s domain and approach to practice beginning to emerge?

### 2. Learn and Develop the Practice

**Learn and develop a shared practice, based on an existing body of knowledge.**

Practice evolves with the community as a collective product, becomes integrated into members’ work, and organizes knowledge in a way that reflects practitioners’ perspectives. Successful practice development depends on a balance between “the production of ‘things’ like documents or tools” and deep learning experiences for community members.

**Key Questions:** How rich and accessible are the community’s knowledge representations for existing practice? To what extent does community design support deeper learning for community members?

### 3. Take Action as a Community

**Take purposeful action to carry out tasks and projects**

Small group projects, sponsored by the community, help members create personal relationships and also provide a way to produce the resources for developing the practice: cases, effective practices, tools, methods, articles, lessons learned, databases, heuristics, models, Web sites.

**Key Questions:** Are collaborative efforts beginning to emerge naturally? Are there community structures to support volunteering for projects and working with others? Are members recognized and rewarded for their contributions?

### 4. Create Knowledge in the Domain

**Generate and discover new knowledge.**

Members go beyond current practice to explore the cutting edge of the domain, to innovate. Community may redefine its boundaries and membership and foster boundary-crossing, possibly working with people from other communities to explore emerging technologies, practices, and ideas.

**Key Questions:** How open is the community to new ideas and leadership? To what extent is the community influential in its domain? Are community members being invited, as community members, to present on leading-edge ideas?
The next two sections outline specific issues related to defining the appropriate “social and technical architectures” for a given community. By 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. In addition to these key questions, a number of prescriptive activities are described that lead to specific work products. These include documents and presentations that can be used for communication, planning, and the facilitation of the community itself.

### 1. Inquire
**Identify the audience, purpose, goals, and vision for the community.**

<table>
<thead>
<tr>
<th>Key Questions to Explore</th>
<th>Supporting Activities</th>
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</thead>
<tbody>
<tr>
<td><strong>Audience:</strong> who is this community for? Who are the community’s important stakeholders?</td>
<td>1. Conduct a needs assessment through informal discussions, formal interviews, surveys, and/or focus groups.</td>
</tr>
<tr>
<td><strong>Domain:</strong> Given the intended audience, what are the key issues and the nature of the learning, knowledge, and tasks that the community will steward?</td>
<td>2. Define the benefits of the community for all stakeholders, including individual sponsors, individual community members, defined subgroups, the community as a whole, and the sponsoring organization.</td>
</tr>
<tr>
<td><strong>Purpose, Goals, and Outcomes:</strong> 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?</td>
<td>3. Create a mission and vision statement for the community, tying these into the sponsoring organization’s mission and vision if appropriate.</td>
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<tr>
<td></td>
<td>4. Identify the major topic areas for community content and exploration.</td>
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<tr>
<td></td>
<td>5. Create an estimate of the cost for community technology, special technical development, facilitation, and support.</td>
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<tr>
<td></td>
<td>6. Begin the recruitment of a core team of individuals who represent the community audience.</td>
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### 2. Design
**Define the activities, technologies, group processes, and roles that will support the community’s goals.**

<table>
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</thead>
<tbody>
<tr>
<td><strong>Activities:</strong> What kinds of activities will generate energy and support the emergence of community presence? What will the community’s rhythm be?</td>
<td>1. Identify tasks that community members are likely to want to carry out in the community.</td>
</tr>
<tr>
<td><strong>Communication:</strong> How will members communicate on an ongoing basis to accomplish the community’s primary purpose?</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Interaction:</strong> What kinds of interactions (with each other and with the content of the community) will generate energy and engagement?</td>
<td>3. Identify any face-to-face meeting opportunities for community members and define how these will be incorporated into the community experience (conferences, etc.).</td>
</tr>
<tr>
<td><strong>Learning:</strong> What are the learning goals of the community, and how can collaborative learning be supported?</td>
<td>4. Lay out a tentative schedule for the community (weekly, monthly, quarterly, and/or annually).</td>
</tr>
<tr>
<td><strong>Knowledge Sharing:</strong> What are the external resources (people, publications, reports, etc.) that will support the community during its initial development? How will members share these resources and gain access to them?</td>
<td>5. Create a timeline for the community’s development.</td>
</tr>
<tr>
<td><strong>Collaboration:</strong> How will community members collaborate with each other to achieve shared goals?</td>
<td>6. Create a directory or folder structure for organizing discussions, documents, and resources.</td>
</tr>
<tr>
<td><strong>Roles and Social Structures:</strong> How will community roles be defined (individuals, groups, group leaders, community administrators, etc.) and who will take them on?</td>
<td>7. Determine facilitator roles and recruit the first community facilitator(s).</td>
</tr>
</tbody>
</table>
3. Prototype

**Pilot the community with a select group of key stakeholders to gain commitment, test assumptions, refine the strategy, and establish a success story.**

<table>
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</thead>
<tbody>
<tr>
<td>▶ What short-term pilot goals will help establish the community as a viable and valuable entity?</td>
<td>1. Select the most appropriate community-oriented technology features to support the goals of the pilot.</td>
</tr>
<tr>
<td>▶ What community-oriented technologies will be used to support the pilot community’s social structures and core activities?</td>
<td>2. Design the community environment and have a group test the functionality through case scenarios.</td>
</tr>
<tr>
<td>▶ What sort of brand image does the community want to project, given its audience, domain, purpose, and mode of operation?</td>
<td>3. Decide on the community metaphor and how it will be represented in the community’s organization and appearance.</td>
</tr>
<tr>
<td>▶ What are the meaningful metaphors to use with the community’s audience?</td>
<td>4. Implement the community prototype and give access to the core team and pilot audience.</td>
</tr>
<tr>
<td>▶ What is the tone of interactions and activities that facilitators want to model?</td>
<td>5. Seed the community with content.</td>
</tr>
<tr>
<td>▶ How will community identity be formed and shared?</td>
<td>6. Facilitate events and activities to exercise the prototype, focusing on achieving short-term value-added goals.</td>
</tr>
<tr>
<td>▶ How will success be measured and communicated to the broader stakeholder groups?</td>
<td>7. Ensure that roles are clear and that support structures are in place.</td>
</tr>
<tr>
<td>▶ 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 and social structures)? What will the community’s “rhythm” be?</td>
<td>8. Measure success and report on the results of the prototype to sponsors and stakeholders.</td>
</tr>
</tbody>
</table>

4. Launch

**Roll out the community to a broader audience over a period of time in ways that engage new members and deliver immediate benefits.**

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>▶ Why should someone join the community? What are the benefits?</td>
<td>1. Using experience and results from the prototype, design and implement the community environment (include graphics that support the community metaphor, predefined content from a variety of sources, prepopulated online discussions, links, databases with best practices and other information, online meeting spaces, etc.).</td>
</tr>
<tr>
<td>▶ What is the business model behind the community?</td>
<td>2. Establish the community charter, which includes an articulation of the mission, vision, goals, and member norms and agreements.</td>
</tr>
<tr>
<td>▶ How do new members learn about the community?</td>
<td>3. Define various roles available for community members, depending on their desired level of participation, goals, and previous experience.</td>
</tr>
<tr>
<td>▶ What are the community’s norms for behavior?</td>
<td>4. Implement communications and marketing plans.</td>
</tr>
<tr>
<td>▶ How do new members become oriented to the community environment?</td>
<td>5. Determine the member profile/directory structure.</td>
</tr>
<tr>
<td>▶ Based on insights from the pilot, how will roles and community social structures be defined and supported over time?</td>
<td>6. Recruit new members.</td>
</tr>
<tr>
<td>▶ How will success be measured?</td>
<td>7. Set up new member accounts or enable self-joining membership and group affiliations.</td>
</tr>
</tbody>
</table>

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*Step-by-Step Guide for Designing and Cultivating Communities of Practice*
5. Grow

Engage 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.

<table>
<thead>
<tr>
<th>Key Questions to Explore</th>
<th>Supporting Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ What are the emerging benefits of the community for members, subgroups, the community as a whole, the community's sponsors, and other key stakeholders?</td>
<td>1. Continue implementation, including facilitation and communication.</td>
</tr>
<tr>
<td>▶ What are the emerging roles that one could play within the community? What are the different groups to which one could belong?</td>
<td>2. Create and share stories of individual and community successes (e.g., digital stories) to capture best practices and create excitement and momentum.</td>
</tr>
<tr>
<td>▶ How do members get recognized and rewarded for their contributions?</td>
<td>3. Identify emerging community roles and recruit members to fill them.</td>
</tr>
<tr>
<td>▶ How do members create their own community identity and presence?</td>
<td>4. Create and assign members to subgroups to support emerging group activities.</td>
</tr>
<tr>
<td>▶ What work products can members contribute to support individual and community goals?</td>
<td>5. Conduct a resource inventory (freshness, relevance, usefulness, use) then identify and upload additional content to meet the community’s needs.</td>
</tr>
<tr>
<td>▶ 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?</td>
<td>6. Create opportunities for sponsored projects (projects with defined work products that may or may not require additional commitments from community members and sponsors).</td>
</tr>
<tr>
<td>▶ What are the emerging technical needs of the community environment (e.g., the community-oriented technology/platform and the &quot;place&quot; that it creates) to support the evolving purpose, processes, and community culture?</td>
<td>7. Design activities with recognition and awards attached to encourage desired behavior and participation.</td>
</tr>
<tr>
<td></td>
<td>8. Conduct focus groups, interviews, surveys, and other data collection activities to assess and measure the success of the community.</td>
</tr>
<tr>
<td></td>
<td>9. Facilitate discussions about the community itself, including the community culture, processes and practices, technology, and individual motivations for participating in the community.</td>
</tr>
</tbody>
</table>
6. Sustain
Cultivate and assess the learning, knowledge, and products created by the community to inform new strategies, goals, activities, roles, technologies, and business models for the future.

<table>
<thead>
<tr>
<th>Key Questions to Explore</th>
<th>Supporting Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ What are the ongoing community processes and practices that will contribute to the liveliness and dynamism of the community and keep members engaged?</td>
<td>1. Provide opportunities in the community for members to play new roles, experiment with new community activities, and examine new technology features.</td>
</tr>
<tr>
<td>▶ How does the community support members across a wide range of roles?</td>
<td>2. Develop a support infrastructure including documentation, mentoring, and development as well as recognition programs for different roles.</td>
</tr>
<tr>
<td>▶ How are new potential community leaders (official and unofficial) going to be identified, chosen, developed, and supported by the community?</td>
<td>3. Ensure that procedures, practices, and the technology support structured data sharing.</td>
</tr>
<tr>
<td>▶ How is persistent community “presence” maintained in the minds of the community members?</td>
<td>4. Identify opportunities for capturing new knowledge, including establishing new roles related to harvesting and creating best practices (e.g., “gardeners,” summarizers, synthesizers).</td>
</tr>
<tr>
<td>▶ To what extent is the community serving its intended audience and accomplishing its stated purpose and goals? How might it do a better job?</td>
<td>5. Develop policies and processes for harvesting and sharing knowledge outside the community.</td>
</tr>
<tr>
<td>▶ How does the community demonstrate return on investment (ROI) for its sponsor(s)?</td>
<td>6. Encourage publication of articles about the community and its projects.</td>
</tr>
<tr>
<td>▶ From the perspective of each individual community member and from that of the community as a whole, what is the perceived return on participation?</td>
<td>7. Test for “persistence of presence” by evaluating member and group activity reports as well as member focus groups and surveys.</td>
</tr>
<tr>
<td>▶ How should the knowledge and products created by the community be shared beyond the community?</td>
<td>8. Review community audience, purpose, goals, and domain; watch for shifts in expectations and needs.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Core Technical Features</th>
<th>Relationships</th>
<th>Learning</th>
<th>Action</th>
<th>Knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distributed account management</td>
<td>Narrated PowerPoint presentations</td>
<td>Project management</td>
<td>Keyword and full-text searches (site-wide and by section)</td>
<td></td>
</tr>
<tr>
<td>Member networking profiles</td>
<td>E-learning tools</td>
<td>Task management</td>
<td>Structured databases and database tools</td>
<td></td>
</tr>
<tr>
<td>Member directory with relationship-focused data fields</td>
<td>Assessments</td>
<td>Document collaboration</td>
<td>Digital stories</td>
<td></td>
</tr>
<tr>
<td>Subgroups that are defined by administrators or that allow members to self-join</td>
<td>Web conferencing and webcasts</td>
<td>File version tracking</td>
<td>Idea banks</td>
<td></td>
</tr>
<tr>
<td>Online meetings/chat</td>
<td>Online meetings</td>
<td>File check-in and check-out</td>
<td>Web conferencing</td>
<td></td>
</tr>
<tr>
<td>Online discussions</td>
<td>Online discussions</td>
<td>Instant messaging</td>
<td>Online discussions</td>
<td></td>
</tr>
<tr>
<td>User-controlled delivery modes for notifications and information</td>
<td>Web-site links</td>
<td>Web conferencing and online meetings</td>
<td>Announcements</td>
<td></td>
</tr>
<tr>
<td>Community activity reports</td>
<td>Interactive multimedia</td>
<td>Online discussions</td>
<td>Web-site links</td>
<td></td>
</tr>
</tbody>
</table>

For a detailed set of draft functional requirements for use in evaluating community-oriented technologies, see [http://www.educause.edu/nlii/VirtualCommunities/944](http://www.educause.edu/nlii/VirtualCommunities/944).

For more information

For more information about the NLII and the Virtual Communities of Practice Initiative, please see [http://www.educause.edu/VirtualCommunities/576](http://www.educause.edu/VirtualCommunities/576). For information about VCOP resources, see [http://www.educause.edu/VirtualCommunities/944](http://www.educause.edu/VirtualCommunities/944).

2 Wenger et al
3 Adapted from McDermott, 2002
4 Wenger, et al, p. 28
5 Wenger, et al, p. 39