Communities of Practice: A Checklist for Success

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Abstract:

Based on ten years of practice, I provide a checklist for success with Communities of Practice. Checklist items, organized into seven stages in CoP development, are based on design and delivery of 16 diverse Communities of Practice at the University of British Columbia as well as ideas from discussions at conferences and with colleagues. The material is intended to provide advice and tips to build a community successfully, be it at a post-secondary institution or elsewhere.

Key Words:

Community of Practice, educational development, teaching and learning, program design.

Introduction

A Community of Practice (CoP) is an informal network of people (which can range in number from 25 or fewer to 500 or more) who share a common interest and work on aspects of it through face-to-face meetings and seminars; blogs, listservs and other online communication tools; and other formats and techniques. Several other definitions of CoPS have been provided by Community Intelligence Labs (2001). Other related terms in the literature include learning teams, teaching scholars, customized groups and faculty or professional learning communities. Cox and Richlin (2004) provide a comprehensive overview of learning communities, focusing on CoPs for faculty members in particular.

Nickols' (2003) overview of CoPs lists possible focal points for CoPs that could apply in any setting or context, such as a profession, work-related function, a recurring problem or an industry.

The CoPs that I draw from in this paper were geared towards career stages (e.g. graduate students or new and junior faculty) or topics in teaching and learning (e.g. problem-based learning or course design). CoPs help to meet expressed needs of those who teach and support students in other ways as well as provide storehouses of resources for exploration by anyone with access to the web.

While working at the Centre for Teaching and Academic Growth (TAG; now the Centre for Teaching, Learning and Technology, CTLT) at the University of British

Columbia (UBC), I initiated and oversaw eight CoPs from 2001-2010. I also coordinated the overall CoP program and designed and led professional development sessions for CoP leaders, involving 16 different CoPs in total.

Our CoPs started in a variety of ways: through a collaborative project with a faculty or unit, as a follow-up to a seminar/workshop or a broader event, and by specific request of a member of the teaching community, as a logical way to communicate efficiently and from ideas brainstormed at staff meetings or through informal conversations.

I am often asked for advice and tips on how to build a community successfully, be it at a post-secondary institution, or elsewhere. I hope the following checklist will be of interest to anyone thinking of starting a Community of Practice, be it in the area of teaching and learning, or beyond.

I started this checklist as a way to document our ongoing explorations and communications at professional development sessions for leaders of CoPs. Additional ideas came up during conference sessions I presented over the years and from conversations with colleagues. I have organized the following checklist to mirror the various stages in CoP development, seven in total, based on these experiences and discussions.

1. Starting out

☐ Carefully consider the language used to describe each CoP, especially if it is designed for people in a particular career stage (e.g. graduate students). Likewise, is your CoP open to people only from your institution, or from anywhere? Explain these important details in your advertising and promotion. For example, because our Institute for the Scholarship of Teaching and Learning (ISoTL) offered many sessions led by guests from around the world, we knew that colleagues from institutions other than UBC would want to attend. Hence, we opened the ISoTL Network to anyone who wanted to join and promoted this on the web. However, the CoP for new and junior faculty members was specific to UBC colleagues in order to best help those new to our University and its specific policies.

☐ Be open to starting a new CoP as a result of a request from someone. And, is there a way to involve the requestor for a while, or in a special capacity? This is exactly how our two CoPs for qualitative data analysis began. I Responded to a phone call from a colleague who asked me if we ever led seminars on Atlas.ti. After first asking what that was, I made a few calls and sent a few emails, discovering that many folks in our teaching and learning community were using this software to analyze data in the form of answers to open-ended questions, narratives, and other text-based information. A networking lunch to discuss challenges and successes with Atlas.ti led to many seminars, an expansion to include NVivo, and a demonstration and hands-on workshop led by the creators of NVivo that drew record numbers in spite of being held on the last day of term.

☐ Think about what 'community' means to you, and the level of commitment that is expected or required. What do people want out of it and why they sign up might be important to know. Some people may want to sign up and 'lurk' only, whether via an

emailed registration list or via a listserv. We learned, through some broad seminars on Communities of Practice held in January 2010, that some colleagues whose schedules never seemed to allow them to participate face-to-face still received a lot of value from the CoP through the online aspects of it.

☐   Think of the kinds of formats you plan for your CoP and note a few in your advertising: listserv, blog, PowerPoint, video, webinars, brown bags, and seminars.. We found that certain kinds of formats were most successful for particular functions, such as the creation of a blog by an undergraduate student as part of our Sustainability in the Curriculum CoP, because it allowed participants to make contributions following seminars and multi-day workshops, something they specifically asked for.

The next four checklist items, though fairly common sense, help keep people feeling like they really are part of a community, from the time they first join and see all the resources and services available to them through the web, through to their time in the CoP, where they are able to sift through what might be many emails each day and see the messages you most want them to open:
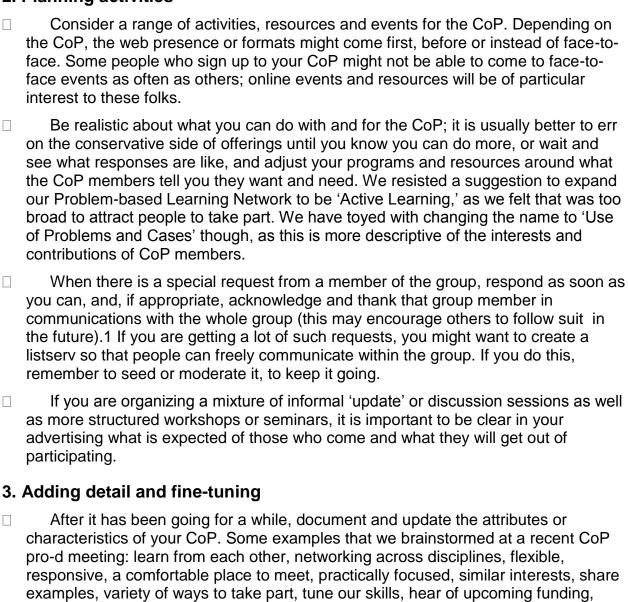
☐   As people join, have an automatic email welcome sent to them, including links to a web site.

☐   Send a regular (once every one or two months) email to your CoP. Write clear subject headings (name of the CoP at start and something else specific to the particular email).

☐   Maintain a balance of 'useful' but not too much email. Once a month or every two months is plenty.

☐   Get the word out about your CoP and always be thinking of how to encourage people to join and participate. Members of our advisory team really liked the idea of CoPs when we first started them, but warned that they could end up being a bit like cliques that had limited participation by 'people in the know.' As inclusivity was our goal, we made sure to say "All are welcome" for those CoPs (the majority) that were open to anyone. The Community Service-Learning (CSL) CoP benefitted greatly by involvement from people who taught in the K-12 school system, while the Undergraduate Research Implementation Team (URIT) encouraged, by its very focus, participation by undergraduate students. We also hired an undergraduate student to help coordinate this CoP. We sent notices, wrote short articles, talked to colleagues and found as many web links as we could to make sure that those we encouraged to join knew about each COP.

☐   Keeping track of the people who come to various events of your CoP or related sessions, can be useful to show its success, and to maintain contact with members later... Consider whether to 'automatically' sign them up or invite them to join the CoP, but be clear in your advertising and regular emails if you are doing this, and have an easy way that you explain in every email you send out, and/or in your online advertising for people to remove themselves from the CoP. After designing and leading two different workshops on formative peer review over several years, we

began a CoP on this topic by first inviting everyone who had taken one of the workshops, or helped coordinate them within their Faculty.
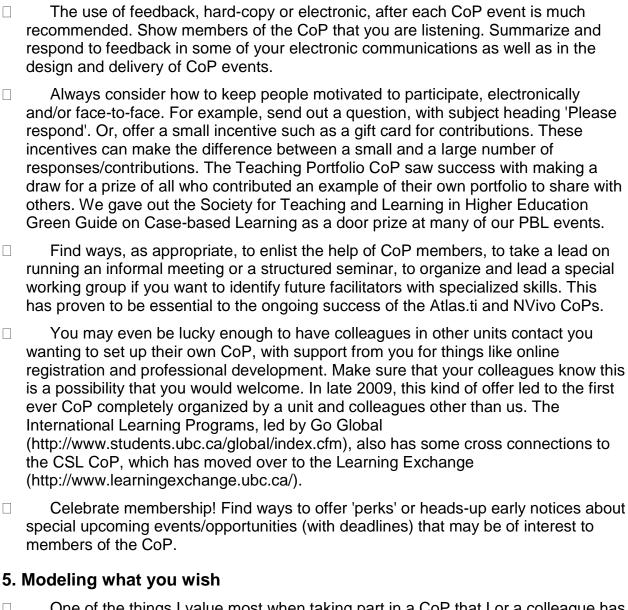
2. Planning activities

☐   Consider a range of activities, resources and events for the CoP. Depending on the CoP, the web presence or formats might come first, before or instead of face-to-face. Some people who sign up to your CoP might not be able to come to face-to-face events as often as others; online events and resources will be of particular interest to these folks.

☐   Be realistic about what you can do with and for the CoP; it is usually better to err on the conservative side of offerings until you know you can do more, or wait and see what responses are like, and adjust your programs and resources around what the CoP members tell you they want and need. We resisted a suggestion to expand our Problem-based Learning Network to be 'Active Learning,' as we felt that was too broad to attract people to take part. We have toyed with changing the name to 'Use of Problems and Cases' though, as this is more descriptive of the interests and contributions of CoP members.

☐   When there is a special request from a member of the group, respond as soon as you can, and, if appropriate, acknowledge and thank that group member in communications with the whole group (this may encourage others to follow suit in the future).1 If you are getting a lot of such requests, you might want to create a listserv so that people can freely communicate within the group. If you do this, remember to seed or moderate it, to keep it going.

☐   If you are organizing a mixture of informal 'update' or discussion sessions as well as more structured workshops or seminars, it is important to be clear in your advertising what is expected of those who come and what they will get out of participating.

3. Adding detail and fine-tuning

☐   After it has been going for a while, document and update the attributes or characteristics of your CoP. Some examples that we brainstormed at a recent CoP pro-d meeting: learn from each other, networking across disciplines, flexible, responsive, a comfortable place to meet, practically focused, similar interests, share examples, variety of ways to take part, tune our skills, hear of upcoming funding, conferences and events.

☐   For either a new or an existing group, how might you find 'like-minded colleagues' within your institution? Share ideas about this important question with your advisory and other relevant committees, CoP members and others. Your CoP may be specific to people at a particular career stage, only for those at your institution, for specific roles or job titles, or open to anyone who would like to take part; be clear about this. And the CoP might change over time, so make sure your description and promotion still matches the reality of each CoP.

☐   Be sure to highlight what people can get out of being a member of the CoP even if they cannot attend any or many face-to-face events; be sure to identify the CoP in your email communications, as it helps people know that they are still a member and that is why they are receiving your email. Early on, some CoPs that were not explicit in this regard received emails or phone calls from a few individuals asking why they kept getting emails!

☐   Is there a key reference you can include (web link, article, book) in every email you send to the CoP? This will help your CoP members know how useful the emails are to them.

☐   Be creative in the way you promote your CoP; for ads, examples include: write inside 'thought bubbles': what people say about being in your CoP; consider the use of metaphors, analogies. We recently created a set of media cards, post-card sized, front and back, with a dynamic mixture of text, images and colour, to describe each CoP. The set had a unified style, to show that if you knew or were in one CoP, it also made it clear that there might be others you would want to join.

☐   Word of mouth can be very effective to spread the word about your CoP. Enlist the help of CoP members. Might some of them help promote a CoP in their faculty, staff or graduate student meetings, or in their classes, or through other appropriate group or individual communications? If you lead other workshops, how about a one-slide addition at the end to promote one or more CoPs? Or, build three minutes into a lesson plan for a related CoP?

☐   Keep lines of communication open with your CoP; make it clear how this is an active, functional group

☐   Show people the relationship between the level of commitment in relation to what they 'get out of' the CoP. Use a mixture of resources you provide to the group and things you invite them to contribute.

☐   Resources such as summaries of CoP-related meetings or workshops (discussions, flipcharts, PowerPoints, handouts), summaries of approaches used in various faculties (done as an electronic survey), links to related conferences or grants, or print and online references are of great value to those who join your CoP. You might want to send some of these out via email (or short notes about them), but keep all of the material organized on your web pages so that new members can benefit from it.

4. Keeping your CoP active and fresh

☐   You might have a CoP that has been around for a while. You may want to ask how the activities or main goal changed as a result of discussions/contributions/expressed needs of the group, and then build these into your promotional material.

☐   Keep exploring new and improved ways to communicate and share ideas, experiences, resources, e.g. the use of a Wiki or Blog, social software tools such as ELGG, BaseCamp, Twitter or Facebook and online survey tools such as Zoomerang or Survey Monkey.

☐   The use of feedback, hard-copy or electronic, after each CoP event is much recommended. Show members of the CoP that you are listening. Summarize and respond to feedback in some of your electronic communications as well as in the design and delivery of CoP events.

☐   Always consider how to keep people motivated to participate, electronically and/or face-to-face. For example, send out a question, with subject heading 'Please respond'. Or, offer a small incentive such as a gift card for contributions. These incentives can make the difference between a small and a large number of responses/contributions. The Teaching Portfolio CoP saw success with making a draw for a prize of all who contributed an example of their own portfolio to share with others. We gave out the Society for Teaching and Learning in Higher Education Green Guide on Case-based Learning as a door prize at many of our PBL events.

☐   Find ways, as appropriate, to enlist the help of CoP members, to take a lead on running an informal meeting or a structured seminar, to organize and lead a special working group if you want to identify future facilitators with specialized skills. This has proven to be essential to the ongoing success of the Atlas.ti and NVivo CoPs.

☐   You may even be lucky enough to have colleagues in other units contact you wanting to set up their own CoP, with support from you for things like online registration and professional development. Make sure that your colleagues know this is a possibility that you would welcome. In late 2009, this kind of offer led to the first ever CoP completely organized by a unit and colleagues other than us. The International Learning Programs, led by Go Global (http://www.students.ubc.ca/global/index.cfm), also has some cross connections to the CSL CoP, which has moved over to the Learning Exchange (http://www.learningexchange.ubc.ca/).

☐   Celebrate membership! Find ways to offer 'perks' or heads-up early notices about special upcoming events/opportunities (with deadlines) that may be of interest to members of the CoP.

5. Modeling what you wish

☐   One of the things I value most when taking part in a CoP that I or a colleague has organized is the opportunities to learn from the group. Especially in the early stages of CoP formation, it is so important to listen to what people say they want and need, and how best they might get that from a CoP. Be open to all ideas and do your best to make them work. We started at least two CoPs, one on Course Design and one on Teaching Portfolios through structured discussion and brainstorming in the inaugural meetings to find out what people wanted and needed and how they suggested the CoP be most useful to them.

Sometimes this involves asking for volunteers in the group to help, creating yet more chances to network, co-create, and learn from each other. Our Teaching and Learning for the Heart and Mind CoP actually started this way, after seeing so many people attending a related event, then phoning to ask if they would help facilitate a session. Likewise, the Problem-based Learning Network, the longest-running CoP and, at last count, the largest, not only depends on guest speakers and facilitators from within the

CoP, but also is co-coordinated by a 'Revolving Co-chair' from within a Faculty. This post was held, in 2-year stints, by colleagues in four different Faculties.

I have been impressed with the wealth of knowledge and interest within each of our CoPs and how very much there is to learn from colleagues when you take the opportunity.

6. Changing or ending

☐   Many aspects of CoPs can change over time. Interest, expressed by email communications, or attendance at events, can be very high at times of the year, and lower at other times. Groups may even merge or divide. They don't have to be in existence 'forever.' If a CoP was started to meet specific needs of a specific group of people, these can and do change over time, and change might mean the CoP is coming to an end. In all, we have had a total of 16 different CoPs, but with some CoPs starting, ending or dividing, we offered a maximum of 14 CoPs at any given time (see http://ctlt.ubc.ca/programs/communities-of-practice/ for the current list)

The people who run a CoP might no longer have time to do so, with no obvious replacements in view. If you close a CoP, it is important to let all members of the CoP know what is happening and why. In the three examples where we closed a CoP, we were sure to let members know of equivalent resources and services available to them related to that stage or topic. One of these, the Facilitation CoP, really lent itself to letting members know the many organizations and associations that currently exist to help them in this area.

You may find that another unit's activities are equally or better suited to work with than a CoP you created. That is okay. Work with them to pass along what you have done; contact your members to explain what is happening, and sit back and think of the legacy you created. This happened with our URIT CoP and our CSL CoP.

7. Thinking scholarly!

☐   Write about how your CoP works, what it has achieved, and what members do as a result of being involved. Consider publications at your institution, or in journals, be they within the related discipline, or about teaching and learning, educational development, scholarship of teaching and learning. Start a blog; invite CoP members to contribute too. Members of the Global Citizenship CoP co-wrote and published a booklet, Road to Global Citizenship: An Educators' Toolbook (see http://wiki.ubc.ca/Documentation:CTLT_programs/Global_Citizenship)

☐   Share your work at conferences; involve colleagues to brainstorm for more ideas about CoPs. Collaborate with colleagues from within and outside your institution.

Conclusion

This checklist, organized around seven stages in CoP development, represents the collective experiences and ideas of a great many people, both at UBC and elsewhere. It is meant to be a living document that can be added to as new insights and successes come to light.

More contributions to this checklist are invited! Contact <alicecas@telus.net> with subject heading Community of Practice.

Acknowledgements

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