

Communities of Practice Start Guide – Course Summary

<https://www.udemy.com/course/communities-of-practice-start-guide/>

This course is a practical guide about how to design and start Communities of Practice that achieve their full potential of increasing the performance of the organisation. Communities of practice are a unique organisational structure that can help business organisations to benefit from shared knowledge for coping with the VUCA¹ world.

The PLIED approach presented in this course expands your business management skills by offering a best practice model and practical guide for the development of communities of practice; I developed the PLIED process model based on real-life cases and on Etienne Wenger's ground-breaking work [Wenger 1998; Wenger et al. 2002; Wenger et al. 2009] and applied it to several projects over the course of my professional career.

The course is divided into 5 sections:

1. **Introduction** (lessons 1-4). After some general information about how the course is organised, there follows an introduction to what is meant by “community of practice”, why it is a unique organisational structure, what it is useful for and how to develop it.
2. **Community Project Management** (lessons 5-7). This section presents a practical model for guiding the development of a community of practice: the PLIED process. After an overview of the 8 steps of the model, the focus shifts to how project management applies to community development.
3. **Community Development Process** (lessons 8-10). In section 3, we dive deeper into the 3 main steps of the development process: starting, evaluating and sustaining the community.
4. **Quick-Start Toolkit** (lessons 11-15). How do you *apply* the previous knowledge to a real-life community project? Section 4 provides an answer to this question. It presents a toolkit of 20 practical tools which will help guide the initiation, planning and execution of a community project.
5. **Summary & Other Resources**. The 5th section, besides this summary of the course content and a literature list of the sources, also includes other resources: a list of tools in the toolkit, a glossary of terms, a collection of examples and a list of recommended articles, books, videos and websites.

SECTION 1. Introduction (lessons 1-4)

For a community to be a community of practice, it must share a basic structure comprising 3 elements:

- A **domain** of knowledge
- A **community** of people who care about the domain
- A shared **practice** for being effective in the domain

To this original structure proposed by Wenger, I suggest adding a fourth element:

- A **sense of community** in each individual member

It is the combination of these elements that constitutes a community of practice. And it is by equally developing these elements that such a community grows and becomes successful. In a business context, the “community” element is the most unusual: members participate not **only for their own needs** but also to **serve the needs of others**: they help each other, learn from each other, care about each other. Thanks to this **mutual engagement**, relationships among members become deeper than in other conventional structures and the community becomes an organic, **living thing**. Because of this, designing communities of practice is more a matter of facilitating the emergence of the community's own internal character, direction and energy. It is a “*design for aliveness and evolution*” (main design principle).

Communities of practice enable practitioners to take collective responsibility for **managing knowledge**; because their members are also in teams and business units, communities of practice create a **direct link between learning and performance** (applying knowledge). Last but not least, communities of practice provide the interactions that are needed for **sharing tacit knowledge**, a type of knowledge which is often the most valuable knowledge of a company but which is difficult to share in a conventional organisational structure.

¹ Volatility, Uncertainty, Complexity, Ambiguity

Communities of Practice Start Guide – Course Summary

There *are three essential aspects* that a project for developing a community of practice needs to integrate as complementary units in order to be successful²:

- Aspect 1 (P): a structured project management approach
- Aspect 2 (Li): the community's lifecycle
- Aspect 3 (E): the community's elements (domain, community, practice & sense of community)

Aspect 1 ensures that both the community development and the community itself will be well integrated within the company. Aspects 2 and 3 help to understand the *nature of communities* and in doing so, determine the key issues, process stages, key roles, challenges, goals and activities of a community development process.

SECTION 2. Community Project Management (lessons 5-7)

The PLIED process is structured into 8 main steps grouped into 3 phases: A) Initiation; B) Planning and C) Execution & Monitoring. Phase A and B have a focus on project management while phase C focuses on community elements and lifecycle.

A) Initiation: This phase can be divided into two steps leading from a rather unstructured to a somewhat structured view of the problem:

1. *Problematisation*: from a sense of discomfort with the current situation to the emergence of more or less vague ideas for a solution.
2. *Structuring*: summarising the initial ideas about the project (project profile).

B) Planning. This phase can also be divided into two steps:

3. *Project Proposal*.
4. *Contract* and final project charter.

During the planning phase, the client will meet the selected consultant with the goal of obtaining and agreeing on a project proposal. During these meetings and the work in-between (before and after the meetings), the idea of establishing a community of practice will emerge clearly. Discussions should lead to a preliminary community design which includes its domain, potential members of the community as well as ideas about its knowledge needs and its purpose. A typical Project Proposal will include: 1. Project Summary, 2. Project Objectives, 3. Project Strategy, 4. Project Workplan, 5. Project Schedule and 6. Project Resources (personnel and budget).

C) Execution & Monitoring: During the execution phase, the client and consultant work together within the project team to start and sustain the community of practice according to the planning specified in the previous phase. This phase can be divided into 4 main steps: step 5 is explained in section 2 whereas step 6, 7 and 8 are explained in the following section 3.

5. *Manage the project execution.*

This step (main task) includes all tasks that ensure a clear and up-to-date description of the project at any time during the project execution (needs, objectives, roles, action plan, etc.), guide it, keep it on track and disseminate its achievements within the company. Work during this step can be divided into 3 sub-tasks:

- 5.1 Refine the project definition and workplan (initially from the project proposal)
- 5.2 Coordinate the work & monitor the project's progress
- 5.3 Communication & dissemination

² The acronym PLIED is taken from the abbreviations for these aspects plus D (for Development).

Communities of Practice Start Guide – Course Summary

Subtask 5.1, which deals with project definition & workplan, is strongly interlinked with *community planning* (see 6.1), which involves the participation of some properly selected community members.

SECTION 3 - Community Development Process (lessons 8-10)

In section 3, we shift the focus to the community itself and dive deeper into the 3 main steps of the development process: 6. *starting*, 7. *evaluating* and 8. *sustaining* the community.

6. *Starting the community*: This is the core of the PLiED process; it enables the early stage of community development which includes:
 - 6.1 *Planning the community*. This task begins with a *kick-off meeting* where the project leader and the consultant present the project to representatives of the other project partners, in particular to representatives of potential community members (existing loose network). The main part of this task is *Develop Community Components*, a task which involves creating ideas and models of the community and of how it might work, starting a core group as well as preparing the organisational and technical infrastructure.
 - 6.2 *Launching the community*. The most effective approach to officially start the community is by means of an official face-to-face meeting; a big launch event where the entire community comes together. This task prepares and performs such an event.
 - 6.3 *Nurturing the community*. After the launch event, a community begins the second stage of development: “coalescing”. During this period, a community is particularly fragile. Building trust, exploring the domain and discovering the kind of ideas, methods, and mutual support that are really helpful takes time: it is an incubation period. The *key challenge* in this phase is to balance the need to incubate against the early need to demonstrate the value of the community.
7. *Evaluate the community*: This task distinguishes between formal and informal as well as between formative and summative assessments. The formative assessment (formal or informal) is a regular channel for feedback that is evaluated constantly, both during the early stage as well as later during its maturity. A formal, summative assessment is instead a major checkpoint where the community stops to evaluate its progress (health) and value.
8. *Sustaining the community*: This task enables the *maturation* stage of community development which includes:
 - 8.1 *Implementing the recommendations*. This sub-task begins with a report on the project effort to date, including an outline of recommendations (from task 6). The recommendations are evaluated, the most appropriate selected and then finally implemented.
 - 8.2 *Integrating with the organisation*. A maturing community begins to act more collectively; it gains more influence in the organisation but also triggers more expectations and requests from other departments and divisions. As a consequence, the community needs to clarify its role and its boundaries, strengthen networking, refine the value proposition and measure its value.
 - 8.3 *Managing the community’s knowledge*. As the community matures, it needs to organise its knowledge more systematically, particularly the processes of identifying, developing and storing knowledge.

SECTION 4 - Quick-Start Toolkit (lessons 11-15)

The previous sections 2 and 3 have discussed the PLiED process for the development of communities of practice in detail. But how do you *apply* this knowledge to a real-life community project? Section 4 is an answer to this question. It is a toolkit of 20 tools which will help guide the initiation, planning and execution of a community project. The toolkit is organised in 4 sets of tools.

- *Set A: Project Definition*. Six tools that are primarily useful in project management tasks during the initiation and planning of the project (steps 1 to 4 in the PLiED process) as well as at the beginning of the project execution phase (step 5).

Communities of Practice Start Guide – Course Summary

- *Set B: Participative Community Design.* Five tools that contribute to step 6.1, planning the community: clarifying its purpose, understanding its main elements, designing the cultivation activities with a participatory approach and customising the community platform.
- *Set C: Community Roles & Responsibilities.* Five community planning tools that are strongly people-centred: it clarifies the main responsibilities required, shows how they are organised into roles and explains participation issues. It also contains a tool for assessing whether an organisation is prepared to start and sustain a community initiative.
- *Set D: Community Events & Assessment.* Four tools that are useful when the community is born and begins to take its first steps, like launching the community (step 6.2), initiating events and spaces on the platform, building connections among members, finding ideas and practices that are worth sharing (step 6.3) and regularly assessing its health.

This course has presented an introduction to quickly starting, evaluating and sustaining communities of practice. An advanced course on the same topic will follow, providing a deeper explanation and broader application of the PLIED approach. I look forward to welcoming you to this and other courses that I would like to publish soon.

Literature

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