

# BLAST Community of Practice Guide

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## Background to BLAST

The BLAST partnership is funded by: *European Union Erasmus+ KA2 Strategic Partnerships Programme* and has been set up to interweave three key concepts and respective sets of practices that have mostly evolved independently from each other in the past decades: Blended Learning (BL), Transformative Learning (TL) and Socio-Ecological Transition (SET).

There are three key outputs from this project: this Community of Practice (CoP) guide; a catalyst toolkit and a competency framework. Before we explore the CoP guide in detail - here is an outline of other two outputs.

### Catalyst Toolkit

A toolkit of shared tools and methods has been established by the BLAST project, to be used in conjunction with this guide. In the context of the socio-ecological transition we focus on transformative communities of practice in blended learning environment which includes the following tools:

- **Communication tools** e.g. Slack, Discord etc to enable synchronous and asynchronous communications
- **Collaborative working tools** e.g. Nuclino, Cyrtptpad, OnlyOffice; Google drive; etc to enable shared documents, including for multiple users working in a document in parallel
- **Equity, Diversity & Inclusion tools, processes or approaches** to understanding how social, economic and cultural systems and practices that benefit/privilege or otherwise centre some groups, and oppress, discriminate or create barriers for others - show up or get replicated in CoPs and can be actively acknowledged and transformed for the benefit of everyone.
- **Transformative learning tools**; e.g. tools, methods and processes that enable transformative learning outcomes in both online and in-person contexts
- **Community of Practice tools** e.g. CoP Maturity Model self-assessment checklist
- **Assessment tools** e.g. assessment frameworks and tools for planning, understanding competency and monitoring learning pathways
- **Socio-ecological transition tools** e.g. templates for community climate action plans, permaculture design frameworks and new economy canvases.

### Competency Framework

A Competency Framework for Blended Transformative Learning for the Socio-Ecological Transition has been created to be used alongside both this CoP Guide and the BLAST Toolkit, specifically to enhance the transformative potential of any CoP that is operating in this area.

Competencies are needed within individuals, groups and the CoP as a whole, to both initiate the CoP and to develop and enrich it over time. Alongside the traditional dimensions of

knowledge and skills, are the essential dimensions of attitudes, motivations and inclinations that impact on both the experience and outcomes of learning, and on the application and ripple effects that arise from that learning. Our competency framework therefore considers:

- **intrapersonal (or being) competencies** such as developing self-awareness and personal reflection practices;
- **interpersonal (or relating) competencies** such as appropriate communication skills and awareness of group dynamics;
- **cognitive (or knowing) competencies** such as knowledge of digital collaboration tools and of what represents good practice in a CoP; and
- **action (or doing) skills**, such as good time management, and the ability to manage and navigate between multiple digital tools and resources.

The competency framework has been designed to help educators and facilitators within the socio-ecological transition field develop a deeper understanding of:

- what needs to be learnt;
- how this learning can be acquired;
- how to identify competency gaps or weaknesses, and;
- how to enrich key competencies over time.

## BLAST Contributors and Partners

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	<ul style="list-style-type: none"> <li>• <i>ECOLISE</i></li> <li>• <i>Col·lectiu Eco-Actiu</i></li> <li>• <i>Asociatia Romania in Tranzitie</i></li> <li>• <i>Gaia Education</i></li> <li>• <i>Global Ecovillage Network</i></li> <li>• <i>Croatian Permaculture</i></li> <li>• <i>Institute for Global Integral Competence</i></li> <li>• <i>Permaculture Association (Britain)</i></li> <li>• <i>Sustainable Ireland Co-operative Society</i></li> <li>• <i>Visionautik</i></li> </ul>
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## What does this guide cover?

**In section A:** we provide a summary of what CoPs are including the domains, functions and typical lifecycles.

If you already know about CoPs skip this section and go to section B.

**In section B:** we provide an overview of what is different about this guide from others: i.e. the blended and transformative approaches to learning which are key to a socio-ecological transition.

**In section C:** we provide support and advice on building, maintaining and managing a transformative CoP - exploring each phase of CoPs life cycle in depth and addressing:

- how to create blended learning environments that combine virtual and face to face interaction
- how to build equitable, diverse and inclusive CoPs
- how to support transformative learning to take place

## Who is this guide for?

*“CoPs enable people doing related work or facing similar challenges to share their knowledge and solutions and as a result achieve the greatest good for the greatest number.”* Wheatley & Frieze, 2007

This guide has been designed to make it easier for facilitators, trainers, community catalysts and adult educators working in civil society organisations and networks<sup>1</sup>, to build and nurture well-functioning peer learning communities that intentionally support and foster transformation.

Beyond tangible outputs like innovative tools, methods, products, improved processes, a transformative CoP also has the potential to widen perspectives, change behavior and mindsets on an individual and collective level and can thus be considered as system shifting.

In socio-ecological transition movements - such as permaculture, transition networks and eco-villages - CoPs have the potential to become systems and spaces that have real power and influence. Pioneering efforts that have hovered at the periphery can become the norm and practices developed by courageous communities can become the accepted standard. When people have safe environments in which they can learn and explore with ease and curiosity, they are more able and likely to adopt new approaches and methods.

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<sup>1</sup> Erasmus Plus project partner teams very often function as a CoP and/or are catalysers of CoPs and so this guide is also aimed to support current and future Erasmus Plus projects.

## And why now?

Communities of Practice are occurring in many different situations and organisational contexts. Our interest goes deeper than making 'business' more effective and is focussed on responding to the profound challenges faced by humanity in the twenty-first century.

### Escalating climate disruption and the continued destruction of ecosystems

The scale of change required to respond effectively to the intertwined challenges of climate disruption and assaults on biodiversity is nothing short of revolutionary. Many communities in the global south have already been feeling the impacts for many decades. To step up to the challenge, we need super effective action, and in order for that to happen, we need super effective learning. CoPs create a context within which we can become super effective and compassionate action-learners, and where we can share and learn that practice with others.

*"Communities of practice are of vital importance because through them, people grow the necessary capabilities and structures that enable a new system to emerge—not as a social movement taking over institutions by force, but by growing into a System of Influence and thus becoming the new mainstream, making old structures obsolete."* George Pór

### Social Injustice

CoPs are subject to the same historical, cultural and social influences around how power and rank between organisations, groups and group members are distributed and upheld. To not replicate oppressive systems, CoPs need to build this intention into visioning, value setting and ongoing practice. In fact, CoPs can be one of the ways that these systems are dismantled - as spaces of recognising our interconnectivity and how our liberation is wrapped up in each other.

Often this type of reflection comes after a community of practice has already formed its vision, values, cultures, systems, structures and norms, and after key relationships and networks have been established. This makes it challenging for any diversity of views, experiences, needs and values to be taken into consideration in the formation of the group. In this guide we show how this work can be incorporated into the CoP from the beginning.

*"Once individuals link together they become something different. . . . Relationships change us, reveal us, evoke more from us. Only when we join with others do our gifts become visible, even to ourselves."* Margaret Wheatley and Myron Kellner-Rogers<sup>2</sup>

### Technological advancements and changes in the way people are organising

The fundamental nature of work is changing. Organisations have to become more networked, not just with information technology, but in how workers create, use, and share knowledge. Continuous learning is a critical part of working in a creative economy. We will have to create new work and learning models to help us deal with the transition in the next phase in human civilization where influence and respect replace command and control.

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<sup>2</sup> A Simpler Way – by Margaret J. Wheatley and Myron Kellner-Rogers  
*BLAST Community of Practice Guide*

CoPs are part of a range of complementary approaches for driving system transitions, including community-led initiatives, action research projects, social innovation/future labs, action networks/cross-sector partnerships, and sustainability-oriented ecologies of learning. CoPs offer peer-based, decentralized, self-organised spaces that support transformative learning through social interactions. For many, they are the "container" or "designed space" for all the approaches to unfold..

## Covid 19

The global pandemic has led to a surge of skills and engagement with the online sphere and many people who can are now 'working online' for jobs that were previously in an office. Many people are more familiar with corporate apps like Zoom, Google Docs and open source alternatives and feel more confident to go further and connect with people in new ways. With these new skills and experiences, opportunities have opened up to connect new people into virtual or blended communities of practice, especially where geography was previously felt to be a barrier. However, Covid 19 has also highlighted the disparity between those who have access to reliable technology and support and training to use it - and those who do not. Accessibility is a key consideration in deciding whether and how to shape any CoP with an online element.

## A. An Introduction to Communities of Practice

### The Concept

'Communities of Practice' was first introduced as a concept by Jean Lave and Etienne Wenger (1991), who referred to a group of people sharing knowledge, problems, solutions, information and news about a specific issue, and who extend group learning through reciprocal interaction (Wenger et al., 2002). Originally CoP participants were from the same business, organisation or academic departments who would meet regularly face to face. Nowadays CoPs are taking shape both within organisations and between organisations as well as within and across disciplines and sectors.

### Core dimensions

A community of practice defines itself along three dimensions, that mutually influence each other and should be kept in balance.

#### Domain

This is the area of shared interest, topic or issue that the community cares about. The domain needs to be negotiated with the stakeholders of the CoP and evolves alongside the context and community.

#### Community



This is a group of people who build personal relationships and learn together through discussions, activities and regular interactions. Enough common ground and diversity makes for richer learning, more interesting relationships and increased creativity. Community members can take on different roles to maintain and nurture the CoP, all communities change in structure as they grow.

In a community of practice, the focus extends beyond the needs of the group. There is an intentional commitment to advance the field of practice, and to share those discoveries with a wider audience. A CoP often makes their resources and knowledge widely available especially to those doing related work.

## Practice

This is the body of knowledge, methods, skills, stories and tools being developed. The practice covers frameworks, and documentation of ideas, experiences, lessons learned.

*Communities develop their practice through a variety of methods, including: problem solving, requests for information, seeking the experiences of others, reusing assets, coordination and synergy, discussing developments, visiting other members, mapping knowledge and identifying gaps.*<sup>3</sup>

Successful practice building goes hand in hand with community building.

Together these three elements form an ideal knowledge structure as a social structure which can take on the responsibility for stewarding specific domains of learning and expertise.

## The Functions of CoPs

*"You know you are in a community of practice when it changes your practice."* Harold Jarche

Communities of Practice are multi-functional entities which can be designed and adapted to suit the context, the community and areas of interest of the community. The functions of a CoP may be any one or more of the following<sup>4</sup>:

- Connect people who might not otherwise have the opportunity to interact, either as frequently or at all.
- Provide a shared context for people - particularly peers - 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.

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<sup>3</sup> <https://www.learning-theories.com/communities-of-practice-lave-and-wenger.html>

<sup>4</sup> <https://library.educause.edu/-/media/files/library/2005/1/nli0531-pdf.pdf>



- Capture and share 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 organisations as well as between organisations to encourage the free flow of ideas and exchange of information.
- Provide a space for experimentation that can be self-organised and decentralised.
- Help people organise around purposeful actions that deliver tangible results.
- Generate new knowledge to help people transform their practice to accommodate changes in needs and technologies.
- Break down silos and create shared value.

## Learning and Communities of Practice

Learning communities and communities of practice are sometimes considered as if they were different entities. However, Wenger (1998) generally follows this principle:

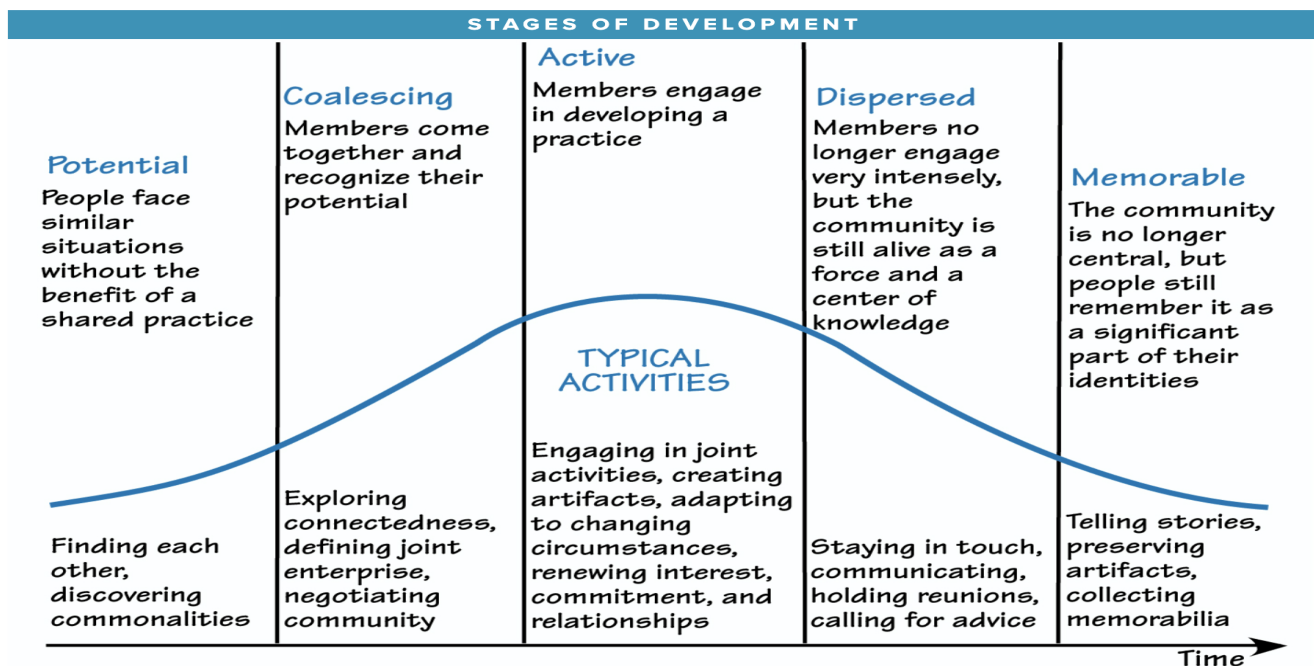
*For individuals . . . learning is an issue of engaging in and contributing to the practices of their communities. For communities . . . learning is an issue of refining their practice and ensuring new generations of members.*

The difference between learning and practice communities could be a matter of emphasising some processes over others or some interpretations. For us, this is not so much a question of whether a community of practice can *become* a learning community, but what sort of learning the particular community of practice fosters. The nature of the learning practice will determine whether the learning is predominantly transformative or reproductive.

## The Life Cycle

Communities of practice develop through various stages and each stage has a different set of activities and interactions through which they will develop. Often CoPs begin with a loose network of people who recognise common interests around a key issue. They may gradually establish the value of sharing knowledge and develop relationships and sufficient trust. When they become fully active, they clarify the CoP's focus, role and boundaries. The community must maintain its relevance and its voice, keep the tone and focus lively and engaging, and keep itself on the cutting edge in order to survive. They will naturally transform or die. Sometimes communities split into new communities or they merge with other communities. Sometimes they lose relevance or achieve their original purpose and come to an end.

Wenger, McDermott, & Snyder (2002)



Communities of practice move through various stages of development characterized by different levels of interaction among the members and different kinds of activities.

Figure 1: Stages of Development of communities of practice (Source: Wenger, McDermott, and Snyder (2002, p 69))

## B. Blended and Transformative CoPs for the Socio-ecological Transition

### Blended Communities of Practice

A blended CoP is a group or network of practitioners who meet regularly online and in-person, often according to an agreed schedule, sharing knowledge, problems, solutions, information and news about a specific issue that they care about. In doing so, they extend group learning through ongoing reciprocal interactions both online and offline. These interactions often generate tangible outputs (e.g. innovative tools, methods, products, improved processes) which have the potential to widen perspectives, change behaviour and mindsets on an individual and collective level. If CoPs put transformation as the core, this can result in shifts within systems.

Blended approaches to CoPs are important for supporting learning around the socio-ecological transition because they:

- Improve accessibility to learning by a) reducing the cost of engaging; b) allowing 'anytime learning'; c) removing the need for the learner to find learning support that is close by;
- Reduce carbon emissions from people travelling to an on-site event<sup>5</sup>;
- Facilitate a longer term approach to capacity building, which provides participants with more opportunities to put the learning into practice in their own context;
- Allow learning and support to take place in real time e.g. you can reach out to others when you need support with an active issue;
- Facilitate informal learning through conversation, meet-ups, chats where a learning goal has not been pre-defined;
- Can support and enhance transformative learning where shifts in perspective, attitude, understanding or insight can happen at any time, through any interaction in an unplanned way.

The concept of 'blending' comes from Blended learning which is typically defined as any form of learning which combines both in-person/on-site and online elements. Critical to the definition is "online learning, with some element of student control," otherwise, blended learning is no different from a facilitator beaming online curriculum to participants through an electronic whiteboard. Another important aspect of blended learning is "an integrated learning experience" This means that the online and face-to-face components work together to deliver an integrated course instead of technology-rich instruction which shares the features of traditional teacher-led instruction with technological enhancements only. Some examples are:

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<sup>5</sup> Note that virtual meetings are not carbon free:

- **Blended Mobility:** Participants from different countries register for a blended workshop. They come to know each other first in preparatory online meetings, and then each travel to a single venue for immersive interactive experiences. Once home, they meet again online after this in-person workshop for exchanges on how they apply their learning in their respective places.
- **Blended Course or Learning Journey:** following a course or learning pathway over time that moves through different levels or themes in learning, with some elements online and some elements in-person, for example with site visits in different countries, pooling insights from across countries, or a course that is partially taught online and partially in person, for example over a series of weekends at relevant venues.

## Transformative Communities of Practice

*“Transformative learning involves experiencing a deep, structural shift in the basic premises of thought, feelings, and actions... Such a shift involves our understanding of ourselves and our self-locations; our relationships with other humans and with the natural world; our understanding of relations of power in interlocking structures of class, race and gender; our body awarenesses; our visions of alternative approaches to living; and our sense of possibilities for social justice and peace and personal joy.” O’Sullivan, Morrell & O’Connor, 2002, p. Xvii.*

Transformative learning in the context of socio-ecological transition is particularly focussed on an approach that generates transformative outcomes in the inner; outer; individual and collective realms (See Wilber’s Four Quadrants).

Transformative CoPs are centered on the practice of developing and spreading new knowledge and capabilities at individual and collective levels. This is not limited to learning new skills, technical competencies, abilities and behaviours, instead it is a form of development that impacts on how we make sense as human beings – how we make meaning of the world around us. This includes the ability to think in more complex, systemic, strategic, and interdependent ways. It is about what we are aware of, how we think and how we see the world. This kind of learning can take place through a combination of life experiences, taking part in a programme, learning from a community, or simply being exposed to a new idea at the right time. Communities of Practice are fertile spaces for this type of learning to take place.

Without this deeper level of development within the CoPs - people can still end up operating from a position of fear, competition, or “predict and control” linear thinking which only reconstructs the “same old-same old” game, instead of being a game changer in the organisation and larger social system.

The transformative potential of a CoP is to become a system that has real power and influence. Pioneering efforts that hovered at the periphery suddenly become the norm. The practices developed by courageous communities can become the accepted standard. When this happens, people no longer hesitate about adopting these approaches and methods and they learn them easily.

# Transformative CoPs for the Socio-ecological transition

Socio-ecological transition is the process through which society as a whole, and therefore its communities, structures and individuals move from the current unsustainable state to a socially and ecologically sustainable state.

Socio-ecological transition embodies key characteristics of sustainability such as more equitable systems and social justice (including racial equity, gender justice, disability justice, food justice, land justice and queer and trans liberation) (within and between generations), circular economies and agroecological farming.

Transition therefore represents an outcome, as well as a process, that puts in place the essential systems, elements and relationships, at the macro and micro levels, for generating and maintaining resilient communities, regenerative ecologies and equitable socio-economic systems. CoPs with transformation at their heart are spaces where this learning and practice can grow.

## Equity, diversity and inclusion in Communities of Practice

*“...oppressive conditions exist in liberal, democratic societies, not necessarily as part of intended policies or practices, but as something that has been woven into the fabric of our major economic, political and cultural institutions<sup>6</sup>.”*

A major critique of grassroots environmental movements is their tendency to decouple their concerns, goals and activities around climate change and sustainability from issues around social justice. This leads to solutions being identified which risk perpetuating social injustice, where the needs of only some groups are met, i.e. ‘saving the climate for *who?* / who enjoys the benefits?’ It can also lead to the group itself being more likely to perpetuate inequality, exclusion or oppressive practices by not including an explicit reflection and critical analysis of how power manifests within its culture and structure.

Without a clear intention, many CoPs will continue to replicate patterns in which particular historically dominant groups (e.g. white, middle-class, male) are in leadership & decision-making roles and positions of power. . Addressing these disparities later on, after the CoP has already been established - and its vision, values and goals already defined - will risk perpetuating existing power structures, whilst the ‘after-thought’ inclusion of oppressed groups will serve more as a diversity check-list to legitimise the existing set up than a meaningful process of inclusion and equity. Hence, equity, diversity, and inclusion (EDI) must be considered from the onset and recognised as intrinsically part of the purpose of any CoP for meaningful transformation.

### Definitions of Key Terms

Terms around this theme are highly contested as each term is understood, used and actioned in different ways depending on the way it is being interpreted. For example, the

<sup>6</sup> [https://www.racialequitytools.org/resourcefiles/structural\\_analysis\\_oppression.pdf](https://www.racialequitytools.org/resourcefiles/structural_analysis_oppression.pdf)

terms 'equity' and 'equality' represent two strategies that we can use in an effort to produce fairness. However, their uses have very different consequences.

Equity is giving everyone what they need to be successful. Equality is treating everyone the same. Equality aims to promote fairness, but it can only work if everyone starts from the same place and needs the same help. Equity may appear to be unfair, but it actively moves everyone closer to success by what some organisations refer to as "leveling the playing field" with others advocating that it is about more resources going to those who need it the most<sup>7</sup>.

Diversity refers to demographic differences of a group – often at the team or organisational level. Some types of diversity are also protected characteristics by law e.g. in the UK this includes: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, 'race'<sup>8</sup> religion or belief, sex and sexual orientation. The term 'diversity' is contested as it can individuate experience, conceal inequalities and neutralise histories of antagonism and struggle. To overcome these risks, critics encourage an exploration of questions such as: how does 'diversity' work in any given context, what counts as diversity, who does 'diversity' work, and who is seen to 'embody diversity'? In other words, rather than trying to ask 'what is diversity?' ask 'how is it being (or not) integrated into organisations' (Ahmed, 2006)? Often in practice, there is a gap between symbolic commitments or virtue signalling to diversity and the actual lived experience of those who 'embody diversity'. Commitments to diversity can end up being "performative" in that they do not bring about what they name.

At the same time as needing to create the conditions for all to participate in and move toward 'success', we also need to recognise our differences as unique, and that there is no one definition of "success." By upholding just one definition of success, we actively erase our differences. Our differences are not the obstacles, but rather - like the biodiversity of a healthy soil biome - each difference plays a necessary and critical piece in a tapestry that together forms the wider ecology of human and non-human life, without which we become (non-resilient) monocultures.

Inclusion is commonly defined as the extent to which everyone at work, regardless of their background, identity or circumstance, feels valued, accepted and supported to succeed at work. When practicing 'inclusion', it is important to be aware that those people representing 'difference' are not pressured nor forced to assimilate into a dominant culture or system that marginalises them in order to be 'included'. Rather, for

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<sup>7</sup> Holistic Centres Network JEDI Grounding Statement

<sup>8</sup> This is the official wording under UK law - however, it is worth stressing the importance of recognising misconceptions of 'race' as a biological characteristic rather than a deeply problematic social and political term used to oppress some and privilege others. See for more:

<https://theconversation.com/we-need-to-unpack-the-word-race-and-find-new-language-138379>

inclusion in the learning spaces (organisations, networks, groups) to be meaningful, the culture and system must accommodate everyone represented, including needs, values and goals and sense of safety.

#### Justice<sup>9</sup>

Dismantling barriers to resources and opportunities in society so that all individuals and communities can live a full and dignified life.

#### Intersectionality<sup>10</sup>

intersectionality is the concept that all oppression is linked. More explicitly, the **Oxford Dictionary** defines intersectionality as “the interconnected nature of social categorisations such as race, class, and gender, regarded as creating overlapping and interdependent systems of discrimination or disadvantage”. Intersectionality is the acknowledgement that **everyone has their own unique experiences of discrimination and oppression** and we must consider everything and anything that can marginalise people – gender, race, class, sexual orientation, physical ability, etc. First coined by Professor Kimberlé Crenshaw back in 1989.

#### Accountability<sup>11</sup>

All of us have our own role and responsibility to take in ending harm. Community/group based solutions to harm require that we all step up and think about the ways we may have contributed to harm, the ways we may need to acknowledge and make amends for our contribution to harm, and the ways we can take action to make sure that harm does not continue and that healthy alternatives can take its place.

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<sup>9</sup> <https://jedicollaborative.com/>

<sup>10</sup> <https://www.womankind.org.uk/intersectionality-101-what-is-it-and-why-is-it-important/>

<sup>11</sup>

<https://www.creative-interventions.org/wp-content/uploads/2020/10/CI-Toolkit-Final-ENTIRE-Aug-2020-new-cover.pdf>



## C: Developing a CoP - Phase by Phase

This guide will follow the model below which sets out the various stages of developing a CoP into which we will incorporate considerations for creating a blended CoP focused on transformative learning.



There are several models which suggest the different life cycle phases or stages of a community of practice. This CoP guide is adapted from the Cambridge and Suter (2005) model (and McDermitt, 2002) as follows:

### 1. Observe

Through a process of exploration and inquiry, identify the audience, purpose, goals, and vision for the community.

### 2. Design

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

### 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.

### 4. Launch

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



## **5. Cultivate**

Engage members in collaborative learning and knowledge sharing activities, group projects, and networking events that meet individual, group, and organisational goals while creating an increasing cycle of participation and contribution. This includes developing the learning, maintaining the knowledge commons and ensuring easy access to the "products" by the community to inform new strategies, goals, activities, roles, technologies, and business models for the future.

## **6. Celebrate**

Review the CoP, evaluate member experience and celebrate achievements. Check it is still relevant and useful and transform or archive as needed.

For each phase, you will find some or all of the following aspects:

1. Steps involved in this phase
2. Considerations for:
  - Blending your CoP
  - Creating a space for Transformative Learning
  - Equity, diversity and inclusion and any broader themes around shifting to a new socio-ecological reality
3. Reference to tools, methods or reflective questions you can use to support your work with this stage

See Annex 1: Community of Practice Maturity Model self-assessment checklist for a quick and useful checklist of considerations when preparing to launch and manage a CoP.

## Phase 1: Observe and Inquire

This phase involves answering - at least provisionally - the following questions<sup>12</sup>:

**Audience:** Who is this community for? Who are the community's important stakeholders?

**Domain:** Given the intended audience, what are the key issues and the nature of the learning, knowledge, and tasks that the community will steward?

**Purpose, Goals, and 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 organised to meet?

### 1.1 Observation of needs and gaps in support

Key to developing a healthy Community of Practice is to spend some time carrying out a needs assessment through informal discussions, formal interviews, surveys, and/or focus groups. Questions to consider include:

- What is currently on offer and what are the needs that do not feel met by this?
- Who has those needs?
- Would the CoP have a sponsoring organisation (that hosts the CoP)?
- What would the benefits of the CoP be for each stakeholder (individual sponsors, individual community members, defined subgroups, the community as a whole, and the sponsoring organisation)?
- What would be the major topic areas for community content and exploration?
- What resources are available for establishing a CoP? What would be the estimate of the cost for community technology, special technical development, facilitation, and support?
- Will there be a defined role to look after the CoP - will it be voluntary/paid?
- Who would form the core team to get the CoP up and running?
- How will power dynamics be addressed?

### 1.2 Identifying your members and clarifying boundaries

Some CoPs will have very clear and potentially rigid boundaries about who can, and can't be part of the CoP. A CoP focussed on midwifery is unlikely to accept brain surgeons, unless part of their learning is focussed in this area.

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<sup>12</sup> <https://library.educause.edu/-/media/files/library/2005/1/nli0531-pdf.pdf>  
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The community of practice forms around the shared domain, or the practice, and usually both. A CoP based mostly on the domain may eventually need to transform into a series of discrete CoPs. For example, as the permaculture community has grown since the early 1980s, its communities of practice have also become increasingly specific, to the point where the UK Permaculture LAND CoP is focussed on people working and leading LAND Centres (demonstration sites open to the public). The broad domain is permaculture, but the practice is quite specifically focussed around engaging and supporting visitors, volunteers and learners who are working in LAND Centres registered with the Permaculture Association.

## Relationship to work teams and networks

Whilst the CoP may feel like it has a clear boundary, in reality CoPs are usually embedded within a broader and more complex reality. Often people share what they've learned in their *work teams* by contributing to communities of practices that they join. Lessons are then further shared through *social networks*, where members also seek new knowledge by following communication between members but where 'ties' between people are likely to be weaker. Communities are a context in which people - with mixed social ties (strong and weak) make sense of new knowledge and information through interactions and conversations with their peers, and then learning can be brought into their work teams. Your future CoP participants are likely to be drawn from all three of these groups.

## 1.3 Embedding a CoP into an Organisation

Where your CoP is primarily developed within an organisation or group of organisations, there are particular challenges to be aware of. Wenger suggests that there are five potential types of relationships that a CoP can hold within an organisation - each with a corresponding challenge.

COMMUNITY'S RELATIONSHIP TO OFFICIAL ORGANIZATION		
Status	Definition	Typical Challenges
Unrecognized	Invisible to the organization and sometimes even to members themselves	Lack of reflexivity, lack of awareness of community's value and limitations
Bootlegged	Only visible informally to a circle of people "in the know"	Getting resources, having an impact, keeping hidden
Legitimized	Officially sanctioned as a valuable entity	Scrutiny, overmanagement, new demands
Strategic	Widely recognized as central to the organization's success	Short-term pressures, blindness of success, smugness, elitism, exclusion
Transformative	Capable of redefining its environment and the direction of the organization	Relating to the rest of the organization, acceptance, managing boundaries

George Por<sup>13</sup> proposes that CoPs can be a forward thinking mechanism to foster innovation if they get the quality of attention and support that they need from the organisation(s) that gives rise to them. Measures to support that quality of attention include:

- Person-centric technical support
- Systems for knowledge harvesting, flow and weaving (such as personal and shared knowledge blogs)
- Training of learning facilitators, community hosts, cybrarians, and knowledge brokers
- A strategic framework for alignment with such functions as Research and Development (R&D), strategic management, knowledge and innovation management, and HR that supports the CoP's work

To reach this transformative stage, there is often important work for groups and organisations to do first, such as:

- developing procedures around how to set boundaries (personal and institutional)
- dealing with conflict and tacit power dynamics
- transparent decision-making
- being inclusive and equitable when recruiting or inviting new members, and
- accountability to each other and the broader community

#### 1.4 Developing a purpose, vision and values

The formation of a community of practice is usually grounded in a sense of shared purpose which may evolve over time. Initially it may relate directly to tangible activities and outputs related to the domain or practice, gravitating around one of the following areas of activities

<sup>14</sup>.

- Peer-to-peer help in problem solving
- Developing and validating best practices
- Upgrading and distributing knowledge in daily use
- Fostering unexpected ideas and innovation

However, as deeper benefits of being part of a CoP are realised, the purpose of the CoP may evolve or expand. CoPs may be a place for:

- recognising our interconnectedness with each other
- reducing the ego or addressing our atomised/individualised tendencies
- healing a sense of alienation
- helping us to live our values
- develop greater awareness of ourselves through interactions with others.

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<sup>13</sup>

[https://www.researchgate.net/publication/228379610\\_Liberating\\_the\\_innovation\\_value\\_of\\_communities\\_of\\_practice/link/02e7e5151dfe434f93000000/download](https://www.researchgate.net/publication/228379610_Liberating_the_innovation_value_of_communities_of_practice/link/02e7e5151dfe434f93000000/download)

<sup>14</sup>

[https://www.researchgate.net/publication/228379610\\_Liberating\\_the\\_innovation\\_value\\_of\\_communities\\_of\\_practice/link/02e7e5151dfe434f93000000/download](https://www.researchgate.net/publication/228379610_Liberating_the_innovation_value_of_communities_of_practice/link/02e7e5151dfe434f93000000/download)

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- addressing systemic issues in society that lead to greater exclusion, marginalisation and polarisation

The CoP, therefore, may develop a purpose in simply existing and bringing a sense of connection with others.

### **Social Identity Cycle - importance of validation/reward**

According to the social identity cycle, community members go through three stages: 1) identification; 2) participation and 3) validation. This latter stage is about the need for there to be some kind of reward.

Rewards release dopamine, telling our brain that it was a good experience and making us want to participate again. In behavioral economics, rewards exist in two norms:

- Extrinsic rewards. The exchange is transactional, following market norms (money, gifts).
- Intrinsic rewards. The exchange provides rewards following social norms (respect, sense of belonging, reputation, being a part of change).

Ideally, a community will provide both intrinsic and extrinsic rewards. If someone is only participating for an extrinsic reward, they're not helping to develop the fabric of a strong community. As soon as the extrinsic reward is taken away, the participation disappears.

**Vision:** A Vision Statement is a description of the preferred future you are trying to create as a result of your work - what do you see?

**Mission/Purpose:** A mission/purpose statement is a statement about your CoP's central reason for being. A mission/purpose statement should answer, clearly and succinctly, three key questions: whom do we serve?; for what purpose (why)?; in what unique ways (how)?

**Values and Ethics:** Core values are 4-6 key principles that guide your work, decision-making, and interactions. They represent the things you hold most dear, are least willing to compromise on, and are most likely to be upset about if violated for example: social justice and equity (we accept and meet people where they are, with compassion and integrity to move our communities towards justice); and collaboration (we continuously seek and engage community input).

Deciding on common values can form part of the process of defining purpose and creating a container for groups to share, learn and collaborate within a CoP. Key to deciding on values or ethics in a CoP is being clear about what they mean to the group and how they connect to any vision, purpose or strategy and how they will inform decisions.

### **Alternatives to Ground Rules<sup>15</sup>**

<sup>15</sup> This material is adapted from course materials from the Ulex Project, Spain.

A CoP's foundation is deeply rooted in its "social" nature. It is important not to stifle people with rules. The values that the CoP is living by can be a source of connection and belonging.

Ground rules or 'codes of conduct' are limited in the following ways: a) get ignored once written, with a sense that the task of building agreements has been 'done'; b) can become out of date and not evolve with the group; and c) risk being set by the mainstream of the group (who have more power to decide what is acceptable) and therefore not support those on the margins and further marginalise them. Alternatives to setting group rules include:

**Shared agreements:** These are less rigid and include a more open process of exploring what members feel they need to feel safe, develop trust, share and learn.

**Guiding principles:** These account for the reality that we are all learners, that tension might arise, and that part of being in the CoP is about developing one's ability to work well with others rather than expecting that to be the case from the start. These act as more of a way of engaging in ongoing conversation, reflection and learning e.g. being committed to learning and working through difficulties together; honouring and embracing differences; being honest and authentic etc.

**Shared practices:** A further approach might be to agree practices or behaviours that the group commits to working on. This can also help reduce the learnt tendencies to seek control, or have things our own way, and instead, move towards an attitude of understanding what is 'good for the whole' and what will most support us to develop together. Examples of practices or behaviours are: approaches for resolving conflict, giving and receiving feedback, practices that share airtime etc.

These kinds of mechanisms help to inform the culture of the CoP and are likely to be conveyed both through implicit means (the behaviours that manifest, the language used, the processes and approaches commonly adopted) and they can be made explicit in writing or in introductory videos.

## Considerations for Transformative CoPs

One shortcoming levelled at the socio-ecological transition movement is its inability to address how extractivism, separation from nature and colonial domination, that drive climate catastrophe also (re)produce social injustice.

Our capacity to tackle climate disaster is directly linked to our capacity to tackle social injustices such as racism and gender discrimination.

*"...You can't have climate change without sacrifice zones, and you can't have sacrifice zones without disposable people, and you can't have disposable people without racism. We're in this global environmental mess because we have declared parts of our planet to be disposable" (<https://www.sierraclub.org/sierra/racism-killing-planet>).*

Understanding the ways in which extractivism and disposability are the guiding principles on which our capitalist economic and political orders are built is critical. Becoming conscious of how these principles govern and show up in our relationships to both nature (climate) and our relationships to people (social) is a necessary first step to building a more just, equitable and regenerative society within which all living beings are able to thrive.

The group itself is more likely to perpetuate inequality, exclusion or oppressive practices by not including an explicit reflection and critical analysis of how power manifests within its culture and structure.

### **Who sets the DNA of the CoP?**

Having a defined audience or 'community' is one of the three core elements of a CoP along with the domain and the process. This defined audience consists of the main group of people who will make key decisions and shape the direction, process and culture of the CoP - in other words the DNA of the community.

If the 'DNA' is set by a founding group, and if that founding group doesn't represent diversity of people, experiences and perspectives, then it can be more challenging to shift this at a later stage. The needs and desires of diverse groups need to be part of building the community in the early stages.

This is counter to 'performative diversity', i.e. the outward appearance of diversity without any willingness to meaningfully change the status quo or similarly a form of 'inclusion' that means 'welcoming' everyone but only if a predetermined vision and set of values are accepted.

If you find that your entire community is white and middle-class for example, and/or its sub-groups are all-male led, while this may not have been your intention, it is worth considering collectively how this came to happen - including the structures, power dynamics and culture in place - and how this is a microcosm of wider society. Taking time to explore this will help to avoid the impulse to reach for relatively superficial fixes to the underlying structural problem, such as asking one or two people with a different background to join.

### **Recognising cultural differences**

As visions and values are often culturally and socially constructed, what is deemed important, culturally approved and hoped for may look different to each member and this is likely to be affected by their rank, privilege, position or culture. Key questions therefore are: who gets to set the vision and values of the CoP and whose vision and values are included and whose are excluded? A further question might be: do we all agree on what the values we have mean in practice? For example, one may value 'inclusion' without recognising that inclusion in practice often means marginalised groups needing to assimilate into an existing, dominant culture, even if it means repressing their own views, values, ways of life and/or in ways that doesn't give them access to 'a seat around the table' or to decision making.

Different individual perspectives can be a source of creativity, growth, better understanding, community care and innovation when we learn to communicate with others in ways that connect us rather than separate us.

## Considering language

Every time we speak or sign in our particular accents and dialects, syntax and rhythms, cadences and inflections, we identify ourselves and bring social history and personal experience with us. When we come together to dialogue, it is important that we are able to express ourselves in the language that most fully conveys the depth and nuance of our hopes and ideas, our frustrations and questions. And it is important that we feel respected as speakers. It's not just what we have to say, but also how we say it. For these reasons, strategies for bridging the divides of language are essential to any endeavor that truly seeks to be inclusive of people from different cultures, different backgrounds, different abilities and different perspectives.<sup>16</sup>

## Using indicators and monitoring audience

Aorta's *Continuum of Transformative Anti-Oppression Work* on becoming a transformative anti-oppression organisation is a useful reference point. Whilst this has been written for organisations rather than CoPs, there are still useful indicators in this framework around what transformative practices look like.

<https://aorta.coop/continuum?rq=Continuum>

Another option is to set protocols or collectively agree intentions about representation of different identities or backgrounds in any decision making/core/sub-groups. Then gather data and monitor who is part of the group (anonymous) to encourage transparency and reflection on desired versus actual audience.<sup>17</sup>

### Personal work of understanding Power and Privilege

The way in which identity and power intersect is complex, particularly within group settings. There are a multitude of factors at play in how power and identity interact (political, economic, historical, cultural and contextual - including roles and organisational setting).

Furthermore, the ways in which identities intersect within an individual gives rise to complex layers of both privilege and oppression - even within the same individual, let alone a group. Some groups are privileged on the basis of their identity - such as their gender, ethnicity, race, class, ability - with access to power, accumulation of assets, safety, comfort, self-determination and anonymity etc whilst others are excluded from or have to work harder for the same resources and systematically experience unequal treatment, discrimination, and structural and institutional barriers. Much of this will

<sup>16</sup> How to build language justice - Antena

<sup>17</sup> This can also be a privacy issue and oppressed groups (especially groups like asylum seekers) can lose out/be put at risk from data gathering exercises. If gathering data, a privacy policy needs to be considered and it needs to be clear how that data will be used



remain unconscious - particularly to those experiencing privileges - which they may perceive as 'entitlements' or the result of one's own hard work.

Conversations around identity and power are often highly emotive given what is at stake, especially if people with less privilege feel their experiences are not being validated nor heard or actively denied; that speaking up further disadvantages or alienates them; or that they are being blamed for another's experience. Victim blaming and defensiveness are a common occurrence when power and privilege and systemic oppression are pointed to.

People with more privilege may perceive that their worldview is in question, and without the tools to integrate these new perspectives, may feel uncomfortable and even panicked, shutting down the conversation and generating greater pain. Because of these complexities, the conversation is often avoided altogether.

Not addressing the issue is itself a practice of entrenched privilege and dominance that preserves the status quo, because - for those with more privilege - not engaging in such topics is a choice, as they may justify that it does not relate to them, or that they cannot change anything or that it is too hard or not a priority. This choice itself exemplifies privilege (as for those with less privilege, their everyday lived realities do not afford this choice) and it serves to allow those with more privilege to avoid feeling discomfort or working through strong emotions such as defensiveness, shame, guilt or apathy, which in turn lead to avoidance or inaction.

However, self-reflection and communication are key to understanding power and how it shapes us and the groups we form. Thus engaging with this inquiry from early on in a group process can be deeply liberating, encouraging and connecting for all involved and lead to healthier, more authentic interactions, and more impactful groups.

Social inequality not only permeates through social and economic structures, it also gets internalised into our individual and collective consciousness.<sup>18</sup> When group members have a deeper understanding of their own relationship with power and how that relates to how social systems are upheld or dismantled, they can bring their values in line with their behaviour, dismantling those biases and prejudices that they have internalised through their socialisation. They can build common language and communication channels to more deeply express and understand theirs and others' experiences. They can build trust and mutually supportive contexts. And they can build greater resilience to work through challenges and conflicts as they inevitably arise. They can become true partners in addressing social inequity.

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<sup>18</sup> <https://www.northwestern.edu/care/about-us/philosophy/assets/theoretical-foundations-for-social-justice.pdf>

Another part of the personal work that can be encouraged and integrated into the CoP is to learn about the implicit biases that our brains have learned and automatised. Discriminatory biases are deeply internalised and present in all parts of society, with very few exceptions. If you want to test your implicit biases related to different groups you can try this [implicit bias test](#).

It may be helpful to explore one's relationship with particular aspects of identity in greater detail as well as understanding power more generally and intersectionality<sup>19</sup>. For example, in learning about one's racial identity, common barriers to addressing systemic racism by those identifying as white include mechanisms such as silencing, othering, colour blindness, anti-blackness, tokenism, essentialism and dehumanisation. You can learn more about these mechanisms in readings such as 'Me and White Supremacy' (Layla Saad, 2020). Doing this personal work makes it more likely for everyone to bring humility, compassion and commitment to being part of changing aspects of systems, policies, practices and culture that are perpetuating inequality or oppression.

## Considerations for Blended CoPs

In this stage of your CoP it is crucial to begin considering how the chosen values and ethics of the CoP - and its aim of contributing to a socio-ecological transition - will shape decisions about which technology to use and how to use. This is often referred to as responsible technology.

*'Technology has the ability to be good in some contexts and for some people and bad in others... Ethics and responsibility are just as complex as the technology systems being built — they often involve weighing trade-offs, creative thinking, and acceptance that most issues don't have a clear answer. Responsible technology is about being able to transparently and openly articulate the problems, look for solutions outside of the same networks and viewpoints, and continuously improve.'* [Sam Brown, Doteveryone 2018]

Blended learning presents an opportunity to mitigate some amount of the negative environmental impact created through travelling to traditional face to face meetings, and to create a more accessible and flexible learning experience for everyone. However there are clearly potential negative impacts of blended CoPs that it is crucial to consider right from the start.

Ethical impacts are likely to fall into five areas:

- Environmental impact

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<sup>19</sup> <https://www.womankind.org.uk/intersectionality-101-what-is-it-and-why-is-it-important/>  
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- Safeguarding and privacy
- Lack of accessibility to individuals
- The wider ethical impact of individual companies behind technology products used
- Unintended negative consequences through disrupting the ecosystems and behaviours of the members of the CoP

*"We cannot have a society in which, if two people wish to communicate, the only way that can happen is if it's financed by a third person who wishes to manipulate them." Jaron Lanier*

When considering values and ethics for blended and transformative Communities of Practices, it is worth considering our choice of 'humane' or 'people care' focused technology.

It can feel intimidating when we see these areas of ethical responsibility laid out ahead of designing the CoP, but thankfully there are some straightforward tools to evaluate and mitigate these areas:

- The Consequence Scanning activity for designing responsible tech  
<https://doteveryone.org.uk/project/consequence-scanning/>
- DigiSafe, the step by step digital safeguarding guide for new services  
<https://digisafe.thecatalyst.org.uk/> Chapter 5. Design for safety will most likely be the most useful
- Tech for Good Responses to the Climate Crisis, tips and tools to minimise environmental impact [bit.ly/TechForGoodResponsesToClimateCrisis](https://bit.ly/TechForGoodResponsesToClimateCrisis)
- Center for Humane Technology Co-Founders Tristan Harris and Aza Raskin set out a tech ethic and outline a new, more hopeful path for technology at SFJAZZ Center in San Francisco: <https://vimeo.com/331897593>;  
<https://hackernoon.com/a-cyborgs-choice-singularity-or-sustainment-2312f4020f37>

In Phase 2 'Design', you will be shown how to apply the wisdom in these tools to your specific CoP's needs and opportunities.

Technology access is a barrier to learning for many students. Lack of access to technology disproportionately affects under-resourced participants.

## Phase 2: Design

Some useful questions to explore in this phase include<sup>20</sup>:

Activities: What kinds of activities will generate energy and support the emergence of community presence? What will the community's rhythm be?

Learning & knowledge sharing: What are the learning goals of the community, and how can collaborative learning be supported? 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?

Collaboration: How will community members collaborate with each other to achieve shared goals?

Communication & interactions: What kinds of interactions (with each other and with the content of the community) will generate energy, care and engagement? How will members communicate on an ongoing basis to accomplish the community's primary purpose?

Roles and Social Structures: How will community roles be defined (individuals, groups, group leaders, community administrators, etc.) and who will take them on?

### 2.1 CoP Activities and Timing

#### Formal activities

Agreeing regular ways in which the CoP will meet or engage with each other (e.g. meetings, check-ins, events) gives everyone a sense of the 'fixed' or formal practices of the CoP and a sense of the potential time commitment, effort and opportunities within the CoP for collaborating and sharing. Identify any face-to-face meeting opportunities (which may be virtual) for community members and define how these will be incorporated into the community experience (conferences, etc.) supported by online tools and processes that maintain regular interaction and community participation.

#### Informal and self-organised activities

There also needs to be an informal nature to the CoP which can arise and not be limited by the formal aspects. Members need to feel empowered to organise their own activities according to special interests, changes in the external environment and arising needs, challenges and dynamics of the group. For this reason it is essential that a CoP has a communication system that allows members to talk to each other, independently of a central organiser. This will also support members to develop their own ways to feel a sense of validation or get 'rewards' from being members of the CoP (see section 1.4).

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<sup>20</sup> <https://library.educause.edu/-/media/files/library/2005/1/nli0531-pdf.pdf>

## Rhythm

Vibrant communities of practice also have a rhythm. When that rhythm is strong the community has a sense of aliveness. Consider what the community's "rhythm" will be. A CoP does not have to be a huge time commitment. If the rhythm is too fast people will get overwhelmed and may stop participating. When the rhythm is too slow, the community will lack energy and focus. Meet as often as is practical for your community and ensure synchronous and asynchronous events and activities are included in the rhythm and that they are frequent. Creating a sense of community amongst members is essential for keeping individuals actively engaged with the CoP. Lay out a tentative schedule for the community (weekly, monthly, quarterly, and/or annually). Make sure that you consider the needs of your members, such as those with greater burdens of care or those that face chronic illness, in determining how often or for how long you can meet.

## 2.2 Defining Tasks, Roles, Governance and Decision Making

### Tasks & Roles

In order to encourage a sense of ownership within the community it is important to identify the roles within a CoP, so that members can put themselves forwards for tasks. Often roles are randomly rotated on a monthly or quarterly basis to balance power. Clarity over who is doing what when, is important to ensure tasks are distributed well across all community members and to maintain self organisation and accountability.

These could include:

- Inducting and welcoming new members and helping them navigate the community, its activities and any agreements
- Connecting community members by encouraging participation, facilitating and seeding discussions and keeping events and activities engaging and vibrant.
- Searching, retrieving, transferring and responding to direct requests for the community's knowledge and content
- Identifying, capturing, and editing relevant knowledge, best practices, new approaches and lessons learned into documents, presentations and reports
- Coordinating, organising and planning community events, activities or meetings
- Driving the level of commitment and growth of the community
- Taking responsibility for documentation
- Overseeing and maintaining the community's collaborative technology and helping members navigate its terrain
- Communicating the CoP's work to the wider community (in similar fields, policy, etc)

As the CoP progresses, it is worth developing documentation about each role and organise some mentoring and development opportunities for those doing the roles, as well as some means to recognise each person's work.

### Distributing leadership throughout the community

Wenger advises that CoPs - even when arising spontaneously - require some form of leadership through those with recognized expertise. He suggests a number of forms of leadership and these roles can be held formally or informally, by a core group or

distributed throughout the community but the key is that these individuals have what he calls 'intrinsic legitimacy' in the community.

- Inspirational leadership provided by thought leaders and recognized experts
- Day-to-day leadership provided by those who organize activities
- Classificatory leadership provided by those who collect and organize information in order to document practices
- Interpersonal leadership provided by those who weave the social fabric
- Boundary leadership provided by those who connect the community to other communities
- Institutional leadership provided by those who maintain links with other organisational constituencies, in particular the official hierarchy
- Cutting-edge leadership provided by those who lead "out-of-the-box" initiatives

As the CoP progresses, some of these could be developed into new roles related to harvesting and creating best practices (e.g., "gardeners," summarisers, synthesisers).

## Governance

*"The very characteristics that make communities of practice a good fit for stewarding knowledge—autonomy, practitioner-orientation, informality, crossing boundaries—are also characteristics that make them a challenge for traditional hierarchical organizations."* Etienne Wenger

In any project involving several people, governance is a key element in achieving a common goal. Communities of Practice tend to be fluid in structure, non-hierarchical and driven by the interests and needs of their members. Although communities of practice are fundamentally informal and self-organising, they benefit from cultivation and participative governance. A greater autonomy of individuals requires clear agreements and systems of self-governing to enable smooth collaboration between community members.

*In many communities of practice decisions need to be taken, conditions need to be put in place, strategic conversations need to be had. Not all members see value in being involved in these processes. Whether you call them leaders, co-ordinators, or stewards, someone needs to do it – and it is as well to recognize them for the role they play<sup>21</sup>.*

Sociocracy (aka Dynamic Governance) meaning "governance by peers or colleagues" is an increasingly popular governance and decision-making approach based on the principles of transparency, equivalency, and effectiveness that is relatively quick and easy for a CoP to utilise.

## Sociocracy

<sup>21</sup> <https://wenger-trayner.com/introduction-to-communities-of-practice/>  
*BLAST Community of Practice Guide*

Sociocracy 3.0 (a.k.a. S3) is a framework comprising a selection of principles based patterns - definitions, guidelines and flexible processes - that have proven helpful when collaborating to achieve shared objectives and can be used and adapted as needed by the community.

Sociocracy is an effective way of organising connections and is a mode of governance that allows for a group of people working together to behave like a living organism and self-organise. Often called dynamic governance, it is a highly structured method of governance that can be applied in a CoP.

Sociocracy or Dynamic Governance allows a CoP to manage itself as an organic whole.

<https://sociocracy30.org/>

<https://www.sociocracy.info/what-is-sociocracy>

<https://www.sociocracyforall.org/>

**Self-organisation:** Self-organising CoP choose how best to accomplish their work, rather than being directed by others from outside the system.

**Circles:** Authority in sociocracy is decentralised into circles with each circle having its own defined aim and making decisions by consent. Everything that needs attention in a CoP can be taken care of by a group of people called a 'circle'. The community maintains a structure for decision-making consisting of semiautonomous circles.

**Participatory decision-making:** Decisions in Sociocracy are made using consent decision-making, rather than consensus or majority voting. Decisions by consent are participatory and designed to remove all of the circle members' objections one by one so that, at the end, there are no objections. No decision can be taken while a participant makes a reasonable and argued objection; however, an objection commits its maker to actively look for a solution, along with the entire circle. Community members ask themselves if it is 'good enough for now, and safe enough to try'. If not, then there is an objection, which leads to a search for an acceptable adaptation of the original proposal to gain consent.

See also the reference side-by-side comparison between Holacracy vs Consensus vs Sociocracy [Governance and Decision-making tools](#).

## Decision Making

There are many different types of decision making: consensus, consent, delegation, majority voting. Link your decision making approach with the context and nature of the decision. It is important in collectives for decision making to be conscious, open and agreed upon. If decision making is made in an ad hoc way, with little attention to process, it risks future conflict. Ensuring that all voices are heard in decisions that affect everyone, even if not everyone is directly involved in making the decision, will give extra energy and potential to the work, and create a stronger foundation for the community.

Some useful questions to ask - to decide how much consultation and consent is necessary include:

- Does everyone need certain information to decide?
- Is it time sensitive, is it urgent?
- What will the consequences be?
- Who will the decision affect? How many people need to be involved? How much commitment and 'buy in' is needed?
- Is the decision reversible?
- What is the risk involved in this decision? How long do you need the decision to hold for?

### **How can our group make decisions online?**

By 'Leading Groups Online: a down and dirty guide to leading online courses, meetings, trainings and events during the coronavirus pandemic' Published by Daniel Hunter. © 2020 Daniel Hunter and Jeanne Rewa.

Making decisions with a group is challenging enough in person. Online a common dynamic we see is that people fall into a pattern of treating silence as agreement.

Most of us wouldn't have to think long to remember a time when our silence in a decision-making process was not because we agreed! When our work is moving to remote spaces, it's crucial that the quality of our decision-making doesn't fall off just because we are doing it online.

Here are some key lessons we've learned for making quality decisions online:

- Hold on to the decision-making processes and values you already have. If your group is used to making decisions based on consensus, don't just change to majority-based voting because you're moving online.
- Make your existing values and processes work. Rely less on non-verbal cues. It's especially important to use a range of ways to read your group when making decisions online. Instead use polls, the chat, or verbal affirmations.
- Use an opener to get people talking before you jump to decision-making. Often there are things under the surface that a group needs to work through before they are ready to make a solid decision that they can get behind.
- Online it can be much harder for the group to naturally break the ice and start those conversations. You can help by setting up an activity that helps the group get a sense of where each other are and gets people talking more easily. Some examples include using a spectrum to see where the group is leaning/feeling, doing breakouts in pairs, starting with some journaling, doing a sentence completion go-around. Hear from everyone.
- When it comes time to make your decision, use a participation format that ensures each person contributes, and no one's silence is assumed to mean they agree. Some options are: do a go-around, have one person share and they pass to the next person and so on until everyone has shared, ask everyone to share in chat or out loud and track that each person has responded, or use a polling tool.



## Considerations for Transformative CoPs

### Healthy Feedback, Learning and Conflict Processes

Key to healthy and transformative group spaces is realising that everyone is different, has their own views and perspectives, lived experiences and their own triggers. We need to expect and prepare to give and receive feedback about our actions or behaviours and have processes to support us to work through any conflict that arises. It is much easier to do this when we prepare for this from the start - rather than being surprised or frustrated when difficulties arise. Where we are aiming to actively shift into and create a new socio-ecological reality - this will inevitably require recognition and willingness to shift norms around power, decision making and communication. We need to have the emotional resilience and self and collective awareness to have difficult conversations.

Concerns and questions raised about systemic and structural issues or even incidents of discrimination should not be categorised as conflicts. These are deeply rooted issues that require other ways of dealing with them. Setting up the CoP with a good EDI plan and shared agreements will help, but challenges can still arise as people can't suddenly get rid of their biases and how they have been socialised, especially if part of historically dominant and privileged groups.

It is worth considering setting up regular surveys for your community and/or provide mechanisms for feedback, such as voicing incidences, experiences or concerns around discrimination, bias or exclusion and mechanisms for addressing that feedback.

#### Recommendations on Embracing and Preparing for Conflict - Adapted from Rhizome<sup>22</sup>

Conflict is usually defined as two or more people having a serious disagreement or argument, typically a protracted one. It can feel difficult to be involved in a conflict, and difficult to see conflict happening. Emotions can be triggered that may interfere with our ability to understand each other, or respond appropriately.

At source, our conflicts may be due to how we deal with our diversity, the way we understand or communicate those differences, and how they affect us. We sometimes forget just how different people are: we come from different backgrounds, and have different experiences and needs. Sometimes we may be swayed by others, even adapt ourselves to become part of a group's 'mainstream'<sup>23</sup>, sometimes just to 'survive' or to avoid conflict.

Conflict may also come from how we deal with differences in our power or rank, in both our groups and in life. It can be hard to accept that conflicts are natural, especially as we have rarely been trained in working well with conflict. When we do try and sort something out, we may rely on things that worked well before, not realising that different circumstances this time may need different processes.

If the last time our experience of conflict was that it was not managed well, we may be

<sup>22</sup> <http://rhizome.coop/wp-content/uploads/2017/06/conflict-intro.pdf>

<sup>23</sup> For more on mainstreams and margins - see Phase 5 - Considerations for Transformative Learning  
*BLAST Community of Practice Guide*

less inclined to even try. Conflict can feel difficult, if not impossible, to manage. Indeed, for some, it can be so difficult that it compromises people's ability to cope, creating challenging or sometimes unmanageable stress.

Options can seem limited or non-existent. People can stop being able to look after themselves, become depressed and unable to function. Similarly a whole group can become unhealthy, dysfunctional, engulfed by a conflict, or unable to manage its work. Eventually, people may become disenchanted or leave, or the whole group may fold.

But conflict can be useful. It can challenge our outdated or limited view of ways of working or expand our understanding of the world. It can be creative and help us to develop and adapt to new ways of working, or achieve change to something better.

During conflicts we can learn about ourselves as well as other people, find skills and resources that we didn't realise we had, or develop new ones. People involved in conflict that's handled well can increase their confidence and become stronger.

## Considerations for Blended CoPs

### Preparing the online space

In order for the online space to be engaging from the start, there are a number of approaches you can try including:

- Include graphics and/or metaphors that represent the CoP
- Populate the knowledge commons with new content e.g. links to resources and best practice
- Prepopulate some online discussions
- Create an online meeting space where people can start conversations
- Determine the structure of the member profile/directory and pre-populate it with a few of the core members/organising team
- Set up a system for adding new member accounts or enable self-joining membership and group affiliations.
- Think about accessibility of the online space and tools being used.

Technology can support or hinder your ability to connect with and engage your audience. The more familiar and comfortable you are with it, the easier it will be for you to facilitate and build a community online. However, if you and your team (if you have one) are novices - here are some tips:

- Keep the technology simple
- Avoid introducing videos, webcams, screen sharing, and breakout rooms all in the first session.
- Develop your team and CoP's technological skills over time, perhaps introducing a new technology or approach with each couple of sessions, and making time to introduce it and support participants to learn it or overcome practical technological challenges.

- Technologies that use a lot of bandwidth (like video and webcams) are more likely to crash than enhance your participants' experience.
- Good online facilitation is much more important than lots of fancy technology applications.

Online interaction builds on face to face processes and has a clear complementary purpose especially in the starting phase of the community. Online interaction offers a low cost opportunity to follow up on face-to-face meetings, maintain regular interaction, and to expand participation and membership. The act of sharing what works well and what doesn't can bring opportunities for growth and innovation in the learning environment and empowering educators to try new things.

### Face to face activities

These are important for developing trust and a sense of community and affinity, and to nurture the willingness to remain actively involved. For widely dispersed CoPs, local chapters may be able to meet in person occasionally. Where the opportunity to meet in person is very limited, it is useful to ensure that time is made for online community building by incorporating 'unofficial' spaces for personal sharing, fun activities and deeper reflections.

### Choosing and Designing your Use of Technology

Technology presents an incredible opportunity for real learning, connection and transformation across distances and time, but it is not as straightforward as there being the best digital tool to use, or one way of using tech to facilitate learning.

In this design stage it is important to learn about your prospective members' tech behaviours, preferences and digital access needs. Prioritising using the digital tools and ways of collaborating remotely that your members are already comfortable with will likely lead to higher quality engagement in the CoP.

You can easily find out more about what technological habits people currently have by surveying a representative sample of your prospective CoP members. A survey might include questions around:

- Aspects of people's existing tech use such as levels of comfort and enthusiasm around using specific collaborative working tools and any particularly positive online group learning experiences they have had before which you may be able to incorporate
- The amount of digital access the prospective CoP members have such as those living in areas of lower bandwidth who may struggle with video calls, or those who primarily use phones rather than laptops or desktop computers and may struggle with certain tools or using a shared tool, like a miro board and being on a call simultaneously

- Any additional needs that prospective members may have such as the need for interactions to be encrypted because of particular sensitivity of the CoP topic in their area
- Ideal interaction times and lengths taking into consideration any other jobs and caring responsibilities that they may have
- Needing live captions or interpretation (zoom automatically generates live captions)

Once you have gathered these insights you can begin to use the tools learned about in Phase 1, the Consequence Scanning activity and the DigiSafe safeguarding handbook. Using these tools in more depth will help you to understand where the ethical balance for adopting these ways of working would all be, and where there may be room for adjustments. For example: for groups who learn very well through Zoom or Teams video calls you could test using the more privacy-friendly call tool Whereby which won't require them to download new software, and can be used on all web browsers and on mobile too. Likewise, video calls can create a sense of group connection but it has been found that participants turning off cameras for the duration of the call and relying on auditory connection instead could cut the carbon emissions of the call by 96%.

You can find many other suggestions of tools and switches to consider by looking through the [Tech for Good Community Responses to the Climate Crisis collection](#) and this practical tools and tips [Trello Board](#).

The following table summarises the core technical features which are used to support an integrated approach to relationship building, learning, knowledge sharing, and actionable projects<sup>24</sup>. The author's advice is to:

- Consider the table below as a menu.
- Identify the appropriate combination of features to support your own community's specific goals.
- 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.

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<sup>24</sup> Community of Practice Design Guide  
A Step-by-Step Guide for Designing & Cultivating Communities of Practice in Higher Education  
*BLAST Community of Practice Guide*

	Relationships	Learning	Action	Knowledge
<b>Core Technical Features</b>	<ul style="list-style-type: none"> <li>▪ Distributed account management</li> <li>▪ Member networking profiles</li> <li>▪ Member directory with relationship-focused data fields</li> <li>▪ Subgroups that are defined by administrators or that allow members to self-join</li> <li>▪ Online meetings/chat</li> <li>▪ Online discussions</li> <li>▪ User-controlled delivery modes for notifications and information</li> <li>▪ Community activity reports</li> </ul>	<ul style="list-style-type: none"> <li>▪ Narrated PowerPoint presentations</li> <li>▪ E-learning tools</li> <li>▪ Assessments</li> <li>▪ Web conferencing and webcasts</li> <li>▪ Online meetings</li> <li>▪ Online discussions</li> <li>▪ Web-site links</li> <li>▪ Interactive multimedia</li> <li>▪ Variety of community member roles and responsibilities is supported</li> </ul>	<ul style="list-style-type: none"> <li>▪ Project management</li> <li>▪ Task management</li> <li>▪ Document collaboration</li> <li>▪ File version tracking</li> <li>▪ File check-in and check-out</li> <li>▪ Instant messaging</li> <li>▪ Web conferencing and online meetings</li> <li>▪ Online discussions</li> <li>▪ Individual and group calendaring</li> <li>▪ Subgroup working spaces</li> </ul>	<ul style="list-style-type: none"> <li>▪ Keyword and full-text searches (site-wide and by section)</li> <li>▪ Structured databases and database tools</li> <li>▪ Digital stories</li> <li>▪ Idea banks</li> <li>▪ Web conferencing</li> <li>▪ Online meetings</li> <li>▪ Online discussions</li> <li>▪ Announcements</li> <li>▪ Web-site links</li> <li>▪ Multiple modes for knowledge representation</li> <li>▪ Resources directly associated with interaction</li> </ul>

## Collaboration, co-creation and meeting tools

Here are some examples of our top picks of online tools divided into 4 categories:

### 1. Collaborative documents editors

Collaborative editors are a solid choice when working with a small team and you know how to set up and lead the exercise you're using. These were the only really easy option for teams with accessibility requirements. Examples: ethical choices such as <https://www.nuclino.com/> and <https://cryptpad.fr/> or [Etherpad](#) or [notion.so](#) and corporate tools like [Google Docs](#), [Dropbox Paper](#)

For an extensive list of tools for virtual teams to help you work better remotely, go to: <https://www.collaborationsuperpowers.com/tools>

### 2. Simple sticky note applications

These products are all pretty easy to use for short sessions. They don't have a lot of extra features that might confuse people, and the interactions are all basically point-n-click. But for any team trying to brainstorm and prioritise ideas at scale, we'd suggest using a different type of tool. Examples: [IdeaFlip](#), [lino.it](#), [Jamboard](#)

### 3. Retrospective and Design Meeting Tools

For development and design teams collaborating on internal projects, these products provide an excellent combination of simple process support, low cost, and no-fuss customisation. For the non-technical folks or those working with people outside your team, collaborative documents or decision support tools are a better choice. Examples: [IdeaBoardz](#), [Retruim](#)

### 4. Dedicated Brainstorming and Decision Support Software

These products give you the benefits of having a trained facilitator armed with packets of sticky-notes on staff. If you can afford it, learning to use a dedicated decision support tool can add a level of richness, engagement and effectiveness to your meetings that you can't achieve any other way. That said, tools in this category aren't right for everyone. Examples: [MIRO](#), [Mural](#), [GroupMap](#), [PowerNoodle](#), [Meeting-Sphere](#)

**Loomio** is an open-source online tool that incorporates consent decision making to make it easy for CoPs to make decisions. Simple to use and easy to get started with, Loomio can support your community to be more effective in your decision-making and collaboration. <https://help.loomio.org/en/about/>

### 5. Chat/messaging apps

Chat functions are also a great tool for facilitating regular communication in communities of practice. These apps offer teams across the globe the ability to communicate in real-time, removing some collaboration boundaries. CoP members can pose questions and receive answers immediately, without the delay of sending and receiving emails. And should the questions arise again, most messaging apps also provide an easy search mechanism that can help members discover answers.

### 6. Social System Mapping

[Social System Mapping](#) is a tool that is useful to understand and engage with the invisible dynamics of human networks and systems, and could be a powerful way to map connections and relationships between members of the CoP. Social System Mapping is emerging from the increased functionality of the combination of sumApp and Kumu. Learn more from this 17 minute video.

<https://www.youtube.com/watch?v=H7UJhn6bENQ>  
<https://help.sum-app.net/portal/en/kb/articles/what-is-social-system-mapping>

### 7. Knowledge Commons

There are several types of knowledge management software which are free and open source. Examples include:

- [Freeplane](#) - a mind mapping, knowledge and project management tools which allows you to develop, organize and communicate your ideas and knowledge;
- [OpenKM Document Management - DMS](#) - a Document Management System and Content Management System

- Wikipedia: allows you to create your own wiki (collaborative knowledge portal) or make a community website which allows members and visitors to contribute to your website easily. Wiki Software options include:
  - [MediaWiki](#) is a free open source web-based Wiki Software Application which you can use as a content management system, or for internal knowledge management of your community or for creating a website on the lines of Wikipedia. It is being used to run Wiki websites like Wikipedia, Wiktionary, and Commons.
  - [DokuWiki](#) comes as an Open Source Wiki Software. It is highly versatile, simple to use and supports over 50 languages. DokuWiki doesn't require a database and it is designed for collaboration.
  - [TikiWiki](#) is an open source and free Wiki Software. It has the most built-in features. Besides Wiki Pages and Database Tracking System Tiki offers Forums, Blogs, Calendars and Events, File and Image Galleries and Surveys, Quizzes, and Polls.
- <https://www.kiwix.org>: KIWIX lets you access free knowledge – even offline. This is particularly useful where internet access is not available or is too expensive. Content such as (scraped) websites can be converted to .zim files which can be stored and shared, then loaded into the Kiwix software for offline reading. For example, the whole of Wikipedia can be downloaded in the English language in a file size of 79GB (including all images, excluding videos). In this way searchable data can be taken to areas without the internet.

## Phase 3: Prototype

This is a short but vital phase which is important not to skip in a rush to launch your community of practice. Key questions for this phase include<sup>25</sup>:

How will care of the community be organised and shared between members?

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 branding, images and metaphors can help project its purpose and values?

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 measured and communicated to the broader stakeholder groups?

<sup>25</sup> <https://library.educase.edu/-/media/files/library/2005/1/nli0531-pdf.pdf>  
 BLAST Community of Practice Guide

### 3.1 Designing your pilot

The community will need to be 'fed' with content and a few events and activities will need to be facilitated which are designed to short-term value added goals (learning, encouraging collaboration etc). Decide which assumptions and activities to test during the pilot and which indicators to track during the pilot. Decide who will be responsible for tracking the indicators that you set and how long the pilot will go on for. Who will be responsible for looking at the data and deciding what changes to make?

Key questions to consider here are:

- Who takes part in these activities and why? Are there barriers to involvement which will reduce the participation of certain groups of people on an ongoing basis?
- Are people taking ownership of these activities to the extent that you hope they will - or are they defaulting to the same people for leadership?
- What is the level of participation and what is helping participation to grow?
- What communication norms are starting to form and are they in line with the values and hopes of the CoP? If not, what is helping them to shift? Are the values being modelled by the facilitators/organisers or how could this be improved?
- Where is the energy of the group, what is the group interested in and engaged in and how can this be built on?
- Is the initial 'seed' content, themes, topics, proving interesting to the group?
- Are roles and support mechanisms for care and mutual aid clear?

During this phase a group can test the technology that has been chosen to support specific activities.

- Does it work the way we intended it to?
- Are there any needs that we have not considered accommodating for?
- What level of support do people need to use it?
- What type of questions are asked and how can the answers be built into the onboarding process?

### 3.2 Selecting who will be part of the pilot

Who is involved in testing assumptions, activities and technologies is a critical consideration. If the testing group all have similar levels of understanding of the background to the CoP, similar backgrounds (e.g. professions), similar physical needs, and social and cultural backgrounds then they are unlikely to pick up how different needs and values can be integrated into the CoP design. Choose a diverse group of people to do the testing with - consulting those who:

- Speak English as their second language
- Live with a disability (including chronic illness)
- Are neurodivergent
- Those from a range of class, genders, sexuality, race, religious, age, educational and cultural backgrounds
- Those living in places with weak or unstable connectivity to the internet
- Those with children or other caring responsibilities



- People with different job types (including informal or jobs paying minimum wage)
- People with different working hours e.g. part time
- Those in different time zones
- Those with little involvement in the project so far

### 3.3 Making changes to the CoP

Taking all of the data gathered, you can now refine the strategy and the processes. It is worthwhile reporting findings back to the test group, and to other key stakeholders to check that they are in agreement with the proposed changes. This also starts to create a healthy culture of observing, listening, being open to change and being adaptable to feedback.

#### Considerations for Transformative CoPs

Many issues which arise in your CoP can be identified and learnt from during your pilot phase so it is really important not to skip this phase. Transformative practice encourages flexibility, adaptability and responsiveness<sup>26</sup> to needs and to the context. A critical awareness is that as organisers, we can have a limited perspective and need to make sure that the CoP is only meeting limited needs, and only built to accommodate perspectives similar to ours.

Early on, processes need to be designed for: dealing with healthy dissent; creating feedback channels; working with conflict; and clarifying roles, decision making, analysis of the existing power dynamics and how and where power will be held and shared.

#### Considerations for Blended CoPs

One of the most useful aspects to incorporating a digital aspect to your CoP is that the feedback loop is incredibly fast; you can very quickly know how many and in what ways your first CoP members are using the digital learning environment that you have designed in the previous phase.

Where the prototype is working you need not make changes for the Launch phase. Where there are areas which have seen little engagement from the first CoP members you may need to make changes. One of the most straightforward ways of finding out engagement levels is to look at any analytics data you get from any of the tools you've used, such as views or messages sent. Where there is no analytics data then observational methods will work equally well, such as how many members are interacting in any asynchronous discussion spaces, contributing to shared documents or attendance to group calls.

Aside from this qualitative kind of data, the other method to find out what is working and what could be improved at this stage is by asking a sample of the CoP prototype members about their experiences. This is sure to give you a deep understanding of their experiences and they are likely to have ideas to improve it too!

It's also important at this stage to check back to the safeguarding measures and consequence scanning actions that you put into place in the previous phase and see if they are working as intended.

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<sup>26</sup> <https://www.akpress.org/emergentstrategy.html> see Emergent Strategy by Adrienne Maree Brown  
BLAST Community of Practice Guide

## Phase 4: Launch

Key questions for this phase are<sup>27</sup>:

Why should someone join the community? What are the benefits?

How do new members learn about the community? What are the community's norms for behaviour? 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)? 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? How will success be measured?

How will the community be sustained over time, how will the finances work?

### 4.1 Promoting the CoP

Develop a 'charter' for your CoP

The Charter helps you to communicate the value of your CoP to potential members and clarifies:

- Who will your community serve?
- What will members get out of your community?
- Why would they want to contribute to the community?

Benefits might include : opportunities to share knowledge, experience and learning with others in their field; extending their networks; and getting support, advice and feedback. The CoP Charter also defines the focus of issues, themes and topics that will guide the CoP's work. It needs to be developed collaboratively by the members themselves and adapted over time.

The elements of the charter include:

- Background - Explaining the need
- Membership/Audience - Identifying the community
- Vision - A statement about the ultimate outcomes and value of the community.
- Mission/Purpose - A statement about the core purpose of the community.
- Goals - Specific actions your community will take in order to fulfill its mission and vision.
- Principles/Values - the culture that your CoP has decided it wants to create and why - what's important

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<sup>27</sup> <https://library.educause.edu/-/media/files/library/2005/1/nli0531-pdf.pdf>

- Activities and frequency - a statement about any regular/fixed activities that will take place and how often.

## Inviting people

The charter will help in ensuring you attract members to your CoP that are aligned with the domain of interest. Invite people working with common questions or interests to participate in the CoP. Look for members beyond 'the usual suspects', including those with different perspectives, those who are under-represented in the initial group that has formed and those who have a passion for the domain of interest. A diversity of colleagues and peers in a CoP will ensure deeper learning and give everyone a broader understanding of the range of experiences, needs, hopes and challenges that those working in the field face.

Many CoPs never grow beyond a network of colleagues because they fail to attract enough participants.

## 4.2 Onboarding

Onboarding is the process of ensuring new members have the knowledge, skills, and awareness to become committed, effective members of the CoP. A good onboarding process welcomes new members and then orientates them to the CoP.

Host a 'kick off' meeting to launch your CoP

The kickoff meeting should be the start of regular scheduled CoP meetings, and used to solidify the direction of the community.

An initial 'Kick Off' session could include:

- Check in and Icebreakers that help the group to get to know each other
- Clarifying the domain and practice that will be the focus of the CoP
- Helping participants find areas of common interest
- Generating excitement about collaborating
- Creating common understandings of terms, concepts and processes that will be explored in the CoP
- Reviewing the intention of the CoP, and creating opportunities for members to set their own intentions
- Identifying strategies to improve the trust and connectivity of the CoP members
- Define the roles and structures of the CoP
- Time for members to explore what technologies will be used in the CoP
- Finalise and publicise a community calendar of events
- Design and deliver synchronous and asynchronous events and activities
- Set up communication channels (news, announcements, newsletters, integration with face-to-face meetings, etc.).

For those joining at a later stage it will be important to:

- Give clarity on how new members become part of the group
- Welcoming them and help them feel part of the community
- Ensuring that they know the CoPs structure, vision, mission, goals (e.g. in a charter)

- Help them building relationships with others by ensuring that they know which activities and events which they can join

The onboarding process is never complete because communities evolve with time. As the community changes and your domain of focus changes, your onboarding process must also reflect the change.

### 4.3 Facilitating Meetings

It is usually necessary to have one person act as facilitator of initial meetings. Once Communities of Practice are up and running, and members have gained experience in organising communication, facilitation may also be rotated as long as there is someone facilitating and holding the space in each meeting, or for each section of the event.

Encouraging and supporting the rotation of facilitation ensures a broader spectrum of skills and expertise are shared and allows for a variation in leadership styles and values to be expressed.

#### **Facilitation Tools**

There are great resources on the Training for Change site including:

[https://www.trainingforchange.org/training\\_tools/leading-groups-online-book/](https://www.trainingforchange.org/training_tools/leading-groups-online-book/)

There are a number of tips for facilitating zoom meetings here:

[https://www.trainingforchange.org/training\\_tools/zoom-breakouts/](https://www.trainingforchange.org/training_tools/zoom-breakouts/)

Facilitating hybrid groups online i.e. when there is a mix of individuals and groups attending online (groups being with each other and sharing one screen:

[https://www.trainingforchange.org/training\\_tools/facilitating-hybrid-groups-online/](https://www.trainingforchange.org/training_tools/facilitating-hybrid-groups-online/)

[Meeting facilitation - no magic method](#)

[Holding Change](#) by Adrienne Maree Brown, author of Emergent Strategy

### Considerations for Transformative CoPs

#### Inclusive language

Within international communities, it is important to be aware of and deal with language barriers and to regularly employ tools that do not rely on language proficiency. Within professionally-mixed communities, it is important to prevent the use of jargon to impede effective communication. It is important to regularly check if language barriers hamper communication and understanding.

A good facilitator needs experience in managing group dynamics and in organising knowledge brokerage online and face-to-face. They need to be aware of the different

languages spoken among the community members and to be capable of bridging the differences in background.

The facilitator should assure that speakers do not talk too quickly or use specific jargon, and should regularly ask if everything is clear. Organising communication in smaller group settings can be helpful.

When opening the space it can be helpful to ask people to share which pronouns they would like used, or to add them to their screen name.

Facilitators should ask people to be mindful of how much space people take when speaking, and to understand their own privilege to make sure those who don't feel they can easily speak up have the space to do so.

Planning budget for interpretation and translation (e.g. for disseminating results and running workshops) is essential to overcome language barriers. The circulation of detailed written minutes for comments helps those with less distinct verbal skills to catch up with the outcomes of activities.

**Oppression is compounded by technology** - Extract adapted from Leading Groups Online by Jeanne Rewa and Daniel Hunter, 2021

If you end up tracking participation, you will likely see dynamics of oppression play out. Marginalized groups and those with oppressed identities often tend to participate less frequently. This can become compounded by technology in three ways:

- Oppression hammers people's confidence. As a result, folks' confidence in navigating a novel online space may be challenging. The risk of shaming and exposing ignorance may be much higher.
- People with less resources have less access to high end tech and a dedicated space to work from. Instead of working in front of a large computer with a headset, they might be perched on an outside stoop on their phone as traffic and neighbors pass by, making tasks like adding to wikis or monitoring slack very hard.
- People in money-poor areas have largely been abandoned by internet providers. That means people may have inferior internet access. Without high-end high-speed internet, people's connection may be spotty at best. We're both in poor small-town/rural areas, for example, and have faced the daunting challenge of trying to get stable connections. None of these issues can be fully alleviated without a change in systems bigger than us. So if you're annoyed about it, do join social justice movements for change.

Online training can be more accessible — like for people who are homebound, people with partial hearing loss, other disabilities, working parents, or people in small towns and rural areas where national organizations rarely go.)

As a facilitator, you have the power to make this situation worse or better:

**Don't always pick the quickest response.** Instead of picking the first person to say "I have an answer," look for opportunities to support less-heard voices. Make a point of being invitational. Likewise, if starting a 'go-round', consider who speaks first as this can 'set the tone' or influence what others share.

**Make sure all people — no matter their tech — can participate fully.** Try to always provide alternative options for participation. If someone cannot be on video, make sure there's a way to call-in. If people are calling in, give dedicated space for them to participate during activities and make sure the chat is read aloud. For groups across time zones, this means making sure you don't just offer sessions at times which are good for some people but bad for the same people waking up really early, going to sleep late or working through their regular meal times.

**Set people up for success.** Another way to cause shame is using right/wrong questions and telling people they're wrong in front of everyone. At the simplest, rather than asking "who doesn't understand this" you can ask "what haven't I explained clearly." This is a pedagogical belief we hold dear — and even more important to do when being online makes it harder to see someone slip into shame. Encourage a culture of questioning and clarifying particularly when there are new attendees or those who attending less regularly present.

**Think carefully about who can access the technology...** If people cannot access the technology, don't rush — take your time and work to ensure access first.

**Offer the space to support people.** During this crisis, people are going to have major life issues in front of them. We cannot be sure that our students or participants are not facing dire circumstances. Especially with on-going groups, create methods to provide checks-ins for people and even mutual assistance, such as:

- Each session have people write how they are doing on a scale of 1-10; use time outside of the sessions to check in with people with low numbers;
- In a safer group, you or your community might have an ongoing list where people can post "Things I have to offer" and "Things I need" — a way to support mutual aid;
- Connect the content to people's current lived experiences (that has either been freely shared with the group - or do an exercise to harvest what is going on for people - that they are happy to share)
- Open with moments of silence or guided meditations.

**Help make the underlying systems better.** It matters to people to see you caring about their situation. Another way to do that is to use time online to link people to groups and campaigns fighting to even the playing field. For example:

- Have people sign petitions asking internet agencies to extend to rural communities;
- Encourage people to participate in upcoming online climate strikes to support a healthy environment;

- Invite the group to support social movements that are working for equal technology access, for expanded paid sick leave, for paid parental leave, Universal Basic Income etc.

## Considerations for Blended CoPs

The launch phase of the CoP allows you to implement all that was learnt in the prototype to hopefully improve the tech design of the CoP.

This may be the first time that you gather insights from the members and ethical consequences and implement changes as a result of them, but it should not be the last. In order to continually improve the CoP to meet the changing learning needs you'll need to constantly check in on it, as we described in Phase 3, and be prepared to constantly iterate the tech and the ways you are facilitating it where necessary.

In this phase you are starting from scratch in one way or another. You are coming together as a new community of practice and for many this phase might be a key part of the transition away from more traditional ways of collaborating. There's a new initiative to run at and people are keen to get started. But there's also confusion, so you all need clarity and connection more than anything else at this stage. It is very normal for the first few interactions with your CoP to have glitches or feedback that it is confusing, difficult to navigate etc so the advice is to be prepared to invest time post-launch to iron out any teething problems.

The Scottish Council for Voluntary Organisations [Digital Tools pages](#) are a fantastic place to look for tried and tested digital tools for social good, organised by function, in the case that you need to try something new.

## Phase 5: Cultivate

In this cultivating phase we deepen the engagement of community members in collaborative learning and knowledge sharing activities that increase participation and contribution.

There are a whole range of questions to explore in these phases (merged here)<sup>28</sup>:

What are the emerging benefits of the community for members, subgroups, the community as a whole, the community's sponsors, and other key stakeholders?

What are the ongoing community processes and practices that are contributing to the liveliness and dynamism of the community and are keeping members engaged?

What are the emerging roles that one could play within the community? How are new potential community 'leaders' (official and unofficial) going to be identified, chosen, developed, and supported by the community?

How do members create their own community identity and presence? How is persistent community "presence" maintained in the minds of the community members? What are the different groups to which one could belong?

What are the most important elements of community culture that are emerging that should be recognised and represented in the online environment, as well as in formal policies and procedures? How do members get recognised and rewarded for their contributions?

What are the 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?

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 that of the community as a whole, what is the perceived return on participation?

How is the community addressing societal issues and needs local to the CoP or the CoP community members?

### 5.1 Levels of engagement

#### Levels of engagement

Creating social connections that support and nurture participation in the CoP requires intentional actions to build and nurture relationships. Community is about people and

<sup>28</sup> <https://library.educause.edu/-/media/files/library/2005/1/nli0531-pdf.pdf>

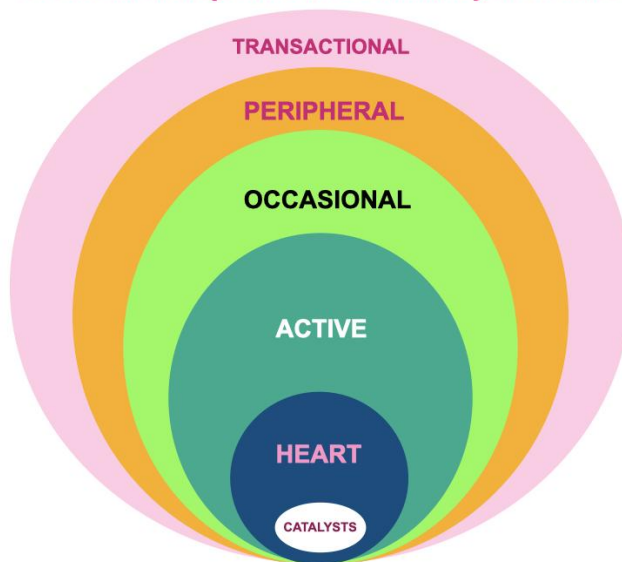


their connections to one another. Fostering a strong community can increase collaboration, accelerate problem solving, and lead to greater care, growth, understanding and innovation.

CoPs are generally self-organising. Their members have the freedom to determine their own level of engagement. People often move between different levels of engagement over time. The levels of participation can be represented as a series of nested circles, each indicating different levels of engagement and commitment. Natural movement of people among CoPs and levels is healthy. It allows new knowledge and fresh ideas to flow across the networks.

It is helpful to provide opportunities in the community for members to play new roles, experiment with new community activities, and examine new technology features - this will help them shift between levels of engagement.

### Levels of Participation in a Community of Practice



**Catalyst and Heart** – The core circle forms the heart of the community that will organise, document, on-board new members and cultivate the community. The catalyst roles are shared within this group.

**Active** – These members work closely with the core team to nurture the learning and help shape the definition and direction of the CoP. This includes defining the community's shared vision, purpose, roles, strategies for collaboration and communication.

**Occasional** – These members participate when specific topics of interest are addressed or when they have something to contribute. They are often the largest group in the community.

**Peripheral** – These members feel a connection to the community but engage on a very limited basis. These could be newcomers, people that are experienced and busy, or those who have a more casual interest in community activities.

**Transactional** – These members are the least connected to the community and may connect only to access CoP resources or to provide a specific service to the CoP.

A CoP is made by and for its participants. Its real value lies in the sense of belonging, engagement and commitment of its members. Consider inviting different levels of participation. CoPs need the diversity and interaction that makes them come alive. Many CoPs fall apart soon after their launch because they don't have enough energy to sustain themselves and a lack of trust erodes relationships leading to the spaces becoming toxic. Consider meeting with these less connected people to understand their needs and find out if there is any particular reason they aren't as connected. This can lead to enlightening information and ideas and help highlight places where more relevant/better communication is needed.

## 5.2 Centering Connection

A common challenge after a blended CoP has begun to mature is how can even more connection between the members sharing their learning be created. An answer to this is the [Human Connection Framework](#) from Deepr and Catalyst.

There are many tools that comprise it, but a good place to start is the researched five conditions for human connection online:

- **Presence** - So that people are engaged and attentive: So much of how we interact is automatic, but automatic behaviours don't foster connection. Maintaining people's attention when there's an opportunity for connection is essential. One way is to explore ways to keep interactions fresh and new.
- **Equality** - So that people experience minimal power imbalance: Building and acknowledging equality creates an even footing for connection. That might mean using inclusive language or weaving reciprocity into the ways we interact with people who use our web tools. In order to achieve this, we must also acknowledge differences between us.
- **Accountability** - So that people feel invested in our relationship: Connection is a two-way street. We should design our services so that there is much to gain for people in taking care of the relationship between us - we can do that by using real names and photos online, or building in two-way feedback into our processes.
- **Autonomy** - So that people have agency and choice: We must engage people to think, decide and act for themselves in terms of 'what' we do together and 'how' we do it. A way to achieve this is to hand over responsibility of an aspect of the service to members of your community.
- **Whole self** - So that people can be safe in fully expressing who they are: The more we're able to bring our vulnerable whole selves to digital interactions (as both provider and receiver), the more likely we are to build trust, then connection, then relational wellbeing.

## 5.2 Creating healthy group dynamics

Communities of practice are formed by groups and, therefore, an understanding of and ability to support healthy group dynamics is critical for a CoP to thrive.

## Building connection and trust

Online environments are more impersonal than face-to-face meetings, so welcoming each participant by their full name, either verbally or via chat, and finding more out about people - where they are calling in from, what their pronouns are, how their day is going, what is keeping them busy, acknowledging world events that might be impacting on people, checking in on people's family and so forth can remind us of our wholeness and help build connection, care and compassion for others as we navigate the challenges and celebrate the joys of life.

For bigger groups, this may have to be posing questions for people to respond to in the chat box. Verbally acknowledging responses helps to connect with people and get a sense of the energy of the group.

### Mindful Meetings

These ideas come mostly from Time to Think by Nancy Klein – as well as from a host of organisations that practice mindfulness as part of their culture. Care needs to be taken to choose approaches that fit the group & context.

**Appreciation, celebration, laughter:** We are prone to focus on negative. Negatives can release stress hormones in our bodies which cloud our thinking and affect our decision making. Building in moments for connection can get lost in our time/resource scarce & action biased cultures.

- Schedule 10 mins at the start for people to have personal chat, banter, tell stories
- Ask people to do a round of how they are and include something they appreciate that has happened this week
- Acknowledge anything that has happened recently in the workplace/someone's personal life worth celebrating.
- Appoint someone as the 'energy checker' in meetings who can monitor energy levels and suggests breaks or exercises

**Connection, trust building and the whole person:** We often attend meetings only showing part of ourselves, hiding other parts, or feeling that some parts of us are accepted and others not. Working towards people being able to show up as their whole selves.

- Do a round or pairs asking people to say how they are at the start of the meeting
- Acknowledge/ask people to share what they are having to let go of to be here
- Ask people to share something about themselves that people at work might not know
- If appropriate - check in on or acknowledge how what is happening in the outside world is/might be affecting people and their families and friends (*being careful to show concern and care without probing or pushing*)

**Legitimise and share feelings:** Allow people to share whatever is true for them without their feelings needing to be justified.

- In pairs or in a 'go around' asking for emotions in just one word
- Take a break if emotions are high and give people space to process what they are feeling in their own way before coming back (some organisations give this a name which everyone knows e.g. 'state shifter' which helps create a culture of accepting that emotions are part of work)

**Assumption checking:** We all make assumptions and base our decisions on them. Checking in on our assumptions can help us avoid misunderstandings and make better collective decisions.

- Ask questions of the group like ‘what assumptions are you/we basing our current view on?’ – give time in pairs to consider
- Convert untrue limiting assumptions into questions. ‘if X were not the case, what would that mean..../what is possible.../what would we do’

**Acceptance, challenging perfectionism & unwillingness to make or own mistakes:** It is easy to judge ourselves against high standards and to find it difficult to own our flaws, faults, mistakes and set-backs

- Ask people what has gone well in the meeting in terms of process and what could be done better – give people a chance to build a meeting culture that genuinely works for them, makes them feel motivated to come, willing to engage and do their best thinking

### **Encouragement:**

People think better when they feel encouraged to share their views without interruption, knowing that they will be listened to

- Turn agenda items into questions which immediately get the brain engaged. Think about what it is that is needed from the meeting: a decision; an idea; the implications of a decision; know how people are feeling; hear and consider new information; update each other; face a difficulty; connect with each other – and base the question around that goal.
- Give people time to do their best thinking: don’t be discouraged from allowing people to do a couple of minutes thinking in silence then/or in pairs or small groups before sharing – not everyone thinks well in large groups
- Ask pairs or groups to only share their best/freshest thinking rather than sharing everything - to encourage enthusiasm and discernment

## Understanding low engagement during synchronous events

Communities of practice are, in the broadest sense, about communication. So what happens if members aren’t talking? Silence or reluctance can feel like failure, but it is a common pain point in virtual environments. While no foolproof solution exists to get quiet groups talking, the most effective strategies start from an understanding of why no one is talking. The following are frequent reasons behind less talkative groups:

- **Misunderstanding**  
Communities of practice as a concept can mean different things to different people. Some may come in with an expectation of a listen-and-learn environment. Be sure to set expectations before the first event and keep reinforcing the idea of a community of practice as an on-going conversation.

- **Discomfort**  
The online environment can be intimidating for participants because it can feel like public speaking, especially if the event is recorded. When the atmosphere feels overly formal, loosen up the group by using a more conversational and questioning tone. Perhaps start with icebreakers that focus on creating social cohesion before diving into the subject matter.
- **Hierarchy, power and privilege**  
Take a look at who is a part of your CoP. Are members true peers or are there hierarchies? Sharing can make members feel vulnerable, especially if their supervisor or funder is participating. If possible, try to limit membership to peers. Otherwise, encourage leaders to reassure members that they welcome tough conversations, and be attuned to hierarchical and power related tensions that may still crop up.
- **Multitasking**  
How do facilitators convince participants that giving the CoP one hundred percent of their attention is worth it? A good place to start is to make it a part of your group norms. But what will really make a difference has to do with the agenda. Giving people an agenda and sticking to it can help them get excited about the meeting and prioritise their time
- **Skepticism**  
For some people, communities of practice can feel too abstract. Why dedicate the time to “talking” instead of “doing”? It can be hard to demonstrate the value of a CoP when participants aren’t sold on the premise. For groups like this, reinforce the tangible benefits it provides, like shared resources and access to outside experts. When they feel like they’re getting something out of the group, they’re much more likely to give it their time and attention.

Whatever the reason, it is important to take an encouraging tone. Chastising a quiet group for not participating will likely render them even quieter. Instead, vary the way you are asking members to interact, and between CoPs solicit feedback and suggestions. Celebrate even the smallest moments of interaction and prepare extra material just in case.

## Consideration for Transformative CoPs

### Understanding mainstreams and margins

One important concept to become aware of and apply to one’s CoP is that of mainstreams and margins<sup>29</sup>. The mainstream, though not necessarily the majority, is the part of the group that sets the tone, communication-style and way of working. It is usually done unconsciously. The margins might express other behaviours, but if it doesn’t become the new norm of the group, they remain in the periphery.

Every group, team and organisation marginalises certain behaviours or characteristics. Sometimes it’s more obvious what or who is pushed to the edges, and at other times you

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<sup>29</sup> This material comes from: Rhizome Advanced Guide to Groups: an [rhizome.coop](https://rhizome.coop) - Rhizome Advanced Guide to Groups: an [rhizome.coop](https://rhizome.coop). The terms originate from Process Work and have been further developed by Training for Change.

will need to observe closely to become aware of it. What is marginalised will vary between groups and will change over time, but it is often a reproduction of the power structures in wider society as explored above.

Rank, which is given on the basis of characteristics like social status, professional status/role in the group - is carried into groups. For the whole group to thrive, these dynamics need to be discussed and negotiated. Importantly, change is generally instigated by the margins, who usually have more awareness of the power dynamics within the group. Diagram X presents some of the ways to spot whether people are in the mainstream or margins.

Mainstream	Margins
talking on behalf of the group, e.g. "of course we all think...", "everyone knows that..."	talking together on the edge of meetings and events
not noticing that other people have different experiences, beliefs or expressions on their faces	speaking up but that not being taken seriously or emulated
staying in their comfort zone and/or requiring 'safety' in the group before engaging	having a clearer sense of the group dynamics at play
reacting to margins' feedback or naming dynamics as personal attacks	occasionally seeking 'revenge'
not taking what is said on board	disengagement with the life of the group and not taking on actions
engaged with life of group	taking on roles that are undervalued or not seen
'policing' what or how things are said or calling-out things as off-topic	saying things others say are deemed irrelevant or off-topic
surprised or confused when the dynamics rear their head	leaving part of their identity 'at the door'
sense of freedom as they set the group's norms	sense of freedom as the group does not depend on them

Some reflective questions which can help a group explore this include:

- Are there safe and heard spaces to share concerns about equality and inclusion within the CoP?
- Are people experiencing defensiveness or exhibiting defense mechanisms? How can this be explored and understood to support the whole CoP to move forward?
- Are all groups engaging in the process rather than only a few driving it?
- Are people - particularly people on the margins - experiencing emotional and psychological drain/fatigue related to their labour of creating an equitable, just and inclusive space?
- Are there spaces that allow conversations about self-care?

Emotions that arise in a COP can point towards unjust and exclusive dynamics. To transform this, the COP needs to be able to engage in deep reflection and analysis of the roots of emotions and the unmet needs which underpin them. Emotions are an important aspect of the human experience and are shaped by societal, cultural and historical power dynamics - including the lasting impact of systems which privilege some over others (patriarchy, white supremacy, ableism, CIS-hetronormativity).

## Considerations for Blended CoPs

### Screen time and overload

Your audience is likely to be busy and wanting less screen time!

In that kind of communication and collaboration context, facilitators need to be mindful of the participant's cognitive surplus and attention economy, while figuring out the right balance between normally occurring participation inequality and collaborative overload. While cognitive surplus could be defined as available time that individuals have to engage with collaborative activities using online communication and collaboration tools, attention economy is about managing individuals' attention as a limited resource on a daily basis, which is similar but different from available time.

In Internet culture, participation inequality, the 1% rule, 1-9-90 or 90-9-1 rule is a rule of thumb related to participation in an internet community: 90% of users are lurkers who never contribute, 9% of users contribute a little, and 1% of users account for almost all the action. When a collaborator spends so much time engaging with colleagues and responding to their requests that they have little time for their own work we talk about collaborative overload.

## Phase 6: Reflect, Celebrate & Transform

Community building is encouraged through celebration. In this Phase we appreciate what the CoP has accomplished, evaluate what we have learned together and reflect on the original mission and vision and whether they are still being served.

Some useful questions to explore in this phase include:

To what extent is the CoP serving its members and accomplishing its stated purpose and goals?

From the perspective of individual community members what is the perceived return on participation?

Has it cultivated a sense of belonging?

What are members grateful for and how can appreciation be built into the community?

When is it time for the CoP to transform into something different or end?

### 6.1 Reflection, evaluation and learning

*“investing resources in actions and initiatives that are designed to support and foster CoPs necessarily leads to questions of whether these resources are being used wisely—questions that are difficult to answer, not least because CoPs are complex social systems, making it inherently difficult to directly connect cause and effect”<sup>30</sup>*

CoPs are living systems which grow and evolve in different ways. They grow organically - through different people connecting with each other, sparking ideas and conversations - and also clashing or conflicting with each other. They grow strategically through being shaped, influenced, expanded and limited by the core team. They also get transformed by external factors such as changes to the financial and time resources that are made available (by the hosts, and the participants); advancements in technology; and through shifts in discourse and the social, political, environmental and economic context.

Reasons to reflect

Whilst this nonlinearity of change makes evaluations seem more challenging - there are multiple reasons for investing time and effort in collective reflection:

- Strengthen the clarity of the purpose and goals of the CoP and the alignment of activities with these goals
- Support members to reflect on their contributions, interactions and learning in a critical and constructive way allowing them to grow individually and collectively

<sup>30</sup>

[https://assets.henley.ac.uk/legacyUploads/pdf/research/research-centres/henley-forum/Knowledge\\_in\\_Action\\_-\\_issue\\_31.pdf?mtime=20170410170924](https://assets.henley.ac.uk/legacyUploads/pdf/research/research-centres/henley-forum/Knowledge_in_Action_-_issue_31.pdf?mtime=20170410170924)

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- Inform how decisions are made and what decisions are made about the CoP
- Catalyse change in ways of thinking, behaving and relating about the theme of the CoP and about ways of working in groups
- Surface issues that are beneath the surface and can obstruct the CoP to fulfill its purpose and potential. Such issues might include internal tensions, lack of diversity, limiting assumptions or group norms.

## What to evaluate

One approach is to explore what is supporting and what is hindering members to:

- Participate as much as they want to
- Feel connected and identified with the CoP
- Share (resources, learning, skills, experience)
- Learn from each other
- Challenge/critique (views expressed, materials shared (or not) and the CoP set up itself)
- Collaborate and co-create
- Take on, rotate and fulfil roles to support the CoP
- Promote the CoP to others

CoPs which aim to foster transformation need to go further in their inquiry and consider whether the CoP is unintentionally replicating aspects of business as usual which need to be shifted to move to transition to a more sustainable and just future. The following areas of inquiry will help the CoP to gain insight into where and how this is happening and open space for debate on how these dynamics can be shifted:

- *Leadership*: Is leadership diverse with the presence of marginalised subgroups in highly visible leadership positions?<sup>31</sup>
- *Spaces*: Are there specific caucuses or independent organisations of marginalised subgroups within the CoP?
- *Discourse*: Do discourses in the CoP validate the experiences and perspectives of those from marginalised identities?
- *Decision-making mechanism*: Are key decisions made through discussion or deliberation? Are they relatively accessible? Who takes part in decision-making? Are there spaces for marginalised groups to self-organise?
- Are there regular opportunities for criticism and dissent of CoP decisions by marginalised groups (and others)?
- *Group agreements*: What happens when participants do not act accordingly to preordained rules - are they ejected or is there space to work through dissent?
- Are the values and principles of engagement of the CoP publicly known and discussed?
- *Harm reduction*: What happens when harm takes place? Are there accountability tools, processes and procedures for raising concern and addressing them?

## Who does the evaluation and when

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<sup>31</sup> (Einwohner et al. 2016)

Key here is to consider who is preparing the evaluation. It might be unavoidable that those doing the evaluation are part of the CoP so will be embedded in structures and power dynamics of the system they intend to evaluate<sup>32</sup>. This is worth considering in the development of the areas of inquiry.

Some recommendations for carrying out regular evaluations include:

- Consider who will instigate the reflection processes and the shape that they take - the more involvement members can have in the process, the more likely they are to feel willing to participate and take an interest in the results. Consider building a continual reflection process that involves some members as well as any core team and rotate roles.
- Identify appropriate regularity and opportune moments. For evaluations to result in meaningful outcomes, getting the timing right can be crucial. Once or twice a year during a virtual / blended gathering may be a suitable rhythm and context.
- Start with a strong intention to use the findings of the evaluation. One way to do this is to decide from the beginning what main questions the CoP is interested in knowing the answer to and what decisions you intend to make off the back of the evaluation - and then be prepared to change this pending the results of the evaluation. Depending on the questions, it may be helpful to collect data in advance of a gathering, via interviews or a survey, and then discuss the results and implications with members.
- Involve a high number of stakeholders to benefit the success of the evaluation - to do this find several ways that people can participate including means which are asynchronous, remote attendance, anonymous, and short (e.g. through quantitative
- Considering that evaluation often receives less attention and priority than it deserves, it can help to clarify up front the reasons for conducting evaluations, and the resources needed to do so in a meaningful manner.

Some tools to support review/evaluation processes include:

- Appreciative interviews:  
<https://www.liberatingstructures.com/5-appreciative-interviews-ai/>
- TRIZ (stopping counter productive activities and behaviours to make space for innovation) <https://www.liberatingstructures.com/6-making-space-with-triz/>
- Generative Relationships:  
<https://www.liberatingstructures.com/26-generative-relationships-st/>
- What, So what, Now What:  
<https://www.liberatingstructures.com/9-what-so-what-now-what-w/>
- The SCALE 3D tool:

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<sup>32</sup> (Luederitz et al., 2017)

## 6.2 Appreciation /cultivating care

Building appreciation and gratitude into our CoPs helps to shift our culture of individualisation and disconnectedness and instead remind ourselves of our interconnectedness, our common struggles and our wholeness. Research shows that we are much more likely to pay attention to the things that go wrong or feedback that we perceive to be negative when we balance this by sharing a greater degree of feedback and acknowledgement of things that we are grateful for and appreciate.

There are numerous ways to do this including:

- Having a moment every week when people are encouraged to share gratitude with one other person
- Doing a round of gratitudes (one person choosing one other) during an online event (or at the end of a meeting)
- Creating a 'gratitude' space on your online forum for people to share stories
- Ensuring that surveys and evaluations include space for 'what went well'.
- Sharing gratitude for oneself and the community/space
- Keeping a calendar of birthdays or significant events for community members
- Setting up a mutual aid fund, so in case someone needs to step back or requires support it's not seen as a burden or a cause of stress.
- Consciously developing a culture within which expressing gratitude and appreciation becomes the norm.

## 6.3 Closing a Community of Practice

Every CoP has its own life cycle, establishing and maintaining one is difficult but recognising when you're done and moving on can be even more difficult.

There could be many different reasons to close, merge or diversify into several other CoPs. It may be that the interests or priorities of the members have changed, or the focus of the CoP is no longer relevant. It might be that funding has been lost, or key individuals have moved on. Alternatively, the CoP may have grown too large and it might make more sense for smaller CoPs to form.

Signs that a CoP is naturally coming to a close and needs to end or be transformed include:

- The community is no longer a central source of knowledge gathering or sharing
- The energy and impetus has died down - with less meet ups, gatherings or people reaching out for support
- Key individuals have left or are no longer active and no one is stepping in to pick up the torch
- People talk about the community and the benefits in the past tense

Once a decision has been made to end the CoP or transform it into a new entity - final activities might include:

- Assessing and evaluating the learning and sharing lessons learnt externally
- Recognising and celebrating the achievements and acknowledging member's individual contributions

- Consolidate the shared body of knowledge and making it available for future learners inquiring into similar topics
- Removing any web pages and documents from that shared body of knowledge and work which are no longer of use to the remain or future learners, reducing waste online (see <https://sustainablewebdesign.org/have-you-considered-your-contents-end-of-life/>)
- Notifying members and stakeholders that the community of practice is closing.

Whatever the transformation will be, the learning of the CoP will live on in the experiences of its members and possibly in further communities of practice. This final stage is based upon gratitude and thankfulness, a recognition of what has happened, and appreciating what we have done.

## E. Annex

### Annex 1: Community of Practice Maturity Model self-assessment checklist

In the **Potential** stage:

- ☐ Leadership
  - ☐ Someone has Identified a need and wants to create the community
  - ☐ Leader(s) have time to dedicate to forming the community
  - ☐ Leader(s) have an initial vision and/or goals for the community
- ☐ Membership
  - ☐ There is an initial criteria for membership
  - ☐ There is an initial list of potential members
  - ☐ Potential members have been approached to join the community
- ☐ Knowledge and practices
  - ☐ Knowledge or practice gaps may have been identified and reflected in the goals
- ☐ Skills development
  - ☐ Skill gaps may have been identified and reflected in the goals
- ☐ Visibility and support
  - ☐ There is some organisational support for the community
  - ☐ Visibility has not extended past those that have been told about it yet

In the **Forming** stage:

- ☐ Leadership
  - ☐ Leader(s) are engaging and motivating members to take part
  - ☐ Leader(s) are setting the standards for what "good" looks like
  - ☐ Leader(s) are beginning to represent members outside of the community
- ☐ Membership
  - ☐ Members are meeting often and regularly
  - ☐ Membership only currently extends to the network of the leader(s)
  - ☐ Members understand the criteria for being a member
  - ☐ Members have agreed ways of working together and collaboration tools
  - ☐ Members have closed-door (members-only) meetings
  - ☐ Members' initial needs have been identified

- ☐ Members are beginning to build trust with each other
- ☐ Knowledge and practices
  - ☐ Members share through stories of their daily work and challenges
  - ☐ Members are beginning to identify their knowledge and practice gaps
- ☐ Skills development
  - ☐ Members are beginning to identify their skill gaps
- ☐ Visibility and support
  - ☐ There is visibility that a community is forming
  - ☐ There is an increase in participation and energy among members
  - ☐ Members make time to dedicate to the community

In the **Maturing** stage:

- ☐ Leadership
  - ☐ Leadership is shared among a core group; roles and responsibilities are understood
  - ☐ There are clear and understood vision and goals agreed by members
  - ☐ Members are able to influence community direction and activities
- ☐ Membership
  - ☐ Membership has reached further than the leader's network, people ask to join
  - ☐ There are open-door activities with people outside of the community
  - ☐ There are smaller knowledge-sharing groups within the community
  - ☐ Members have a safe and respectful environment, and deal with bad behaviour
  - ☐ Members actively advocate for the community
  - ☐ Members' needs are being met by the community
- ☐ Knowledge and practices
  - ☐ Tools are in place for members to share knowledge
  - ☐ Members are regularly reflecting and adapting community activities
  - ☐ Members create new practices and share them outside of the community
  - ☐ The community has a shared backlog of work
  - ☐ Interactions are varied and build trust, solve problems, create learning and share knowledge
  - ☐ Members bring in external knowledge on a regular basis
- ☐ Skills development
  - ☐ The community create or agree with the job description for the role
  - ☐ The community seeks out skills development from within and outside of the community

- ☐ Members' professional development is supported by the community
- ☐ Visibility and support
  - ☐ The community and its outputs are very visible to the organisation

In the **Self-sustaining** stage:

- ☐ Leadership
  - ☐ Leadership responsibilities are distributed throughout the community
  - ☐ The vision and goals are regularly updated by the community
- ☐ Membership
  - ☐ Members are engaged; the community is part of their normal routine
  - ☐ The community is responsible for hiring into the role and / or community
  - ☐ The community is able to measure and share its successes
  - ☐ The community on-boards new members
- ☐ Knowledge and practices
  - ☐ The wider organisation looks to the community to answer questions
  - ☐ Members actively share standards and practices with the organisation
  - ☐ The community manages its explicit and tacit knowledge
- ☐ Skills development
  - ☐ The community is responsible for its members' professional development
- ☐ Visibility and support
  - ☐ The community is an established part of the organisation
  - ☐ People outside of the community advocate for it

In the **Transformation** stage:

- ☐ There is a dramatic event
- ☐ A large part of the community leaves
- ☐ There is a sudden influx of new members
- ☐ There is a significant drop in energy
- ☐ There is a breakthrough in wider practice

## References

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