COVID-19

Tips for Setting Up a Virtual Community of Practice

A. Defining the Community of Practice (CoP)

A CoP is a group of practitioners or experts who "share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise by interacting on an ongoing basis.[1]" It facilitates knowledge sharing and coaching among peers through recurring meetings with active participants; it is not a lecture series. The Center for Disease Control and Prevention (CDC) website has resources to help you determine if your idea could be a CoP and numerous practical tools to help launch and sustain an active CoP.

A virtual CoP takes place entirely in an online space and is distinctive because in some cases participants and facilitators have never met in person and there are unique challenges to building trust and maintaining engagement and interaction.

B. Setting Up for Success

From our experience, there are key factors that lead to the successful forming of a CoP with sustained engagement overtime.

- **Mid-size groups** of 15–25 allow for balanced interaction and real-time peer coaching

- **Regular meetings** that occur on a predictable schedule

- **Aligned interests**
  › All participants are involved in an existing program, are peers in similar roles, or are dealing with similar challenges.
  › Access to shared resources and experts of interest can compel participation.

- **Strong facilitation**
  › A facilitator who knows all members and is comfortable calling on participants, handling participants who talk too much, summarizing key points, and managing time is more effective.

› An effective facilitator is knowledgeable, able to adapt, and prioritizes showcasing the knowledge and expertise of others.

• **Clear expectations and norms**

› The facilitator will guide participants to establish community expectations, norms and the session agendas.

› For example, make it clear that all participants are encouraged to contribute.

• **Creative time management**

› Time management is often a challenge and facilitators often under-estimate how long it will take to cover the agenda and account for technical difficulties. Potential tactics to proactively address time management are below.

– Plan 45 minutes of interaction for a 60-minute session

– Plan 5-10 minutes for a grounding exercise, introductions and settling into the virtual space.

› Establish a time-based run-of-show for each session to set shared time expectations.

› Use the "agenda that never ends" which works well when reviewing mini-cases (see section D). The facilitator will add case submissions to a running agenda. The community will move through the mini-case discussions and stop at the allotted time each session. The next session starts with the next case on the running agenda.

• **Tailored modes of learning**

› Learning should be specific to experiences of the experts in the community.

› For example, the mini-cases should come from the participants, with the facilitator support in selecting cases and establishing themes to ensure discussions are not variations of the same case every session.

C. Promoting Virtual Engagement

The essential ingredients (aligned interests, regular schedule, strong facilitation) to an engaging CoP are mentioned above. Creating an environment where participants are comfortable sharing ideas as equals, with substantive discussion takes work, especially in the beginning. It is even more challenging in the virtual environment.

• **Define roles.**

› Establish clear roles for facilitation, managing technology and managing participation in the chat.

› Assign a team member to take notes and summarize critical insights to support the facilitator who will have a lot of information to process.

• **Promote video presence.**

› Ask participants to turn on their camera. Unless they absolutely can't, this should be required, especially when giving and receiving feedback, as it helps to build trust.

› Ask participants to update their user names so that everyone in the room is comfortable addressing them by name.

› Communicate norms around calling from a quiet place and muting when not speaking.

› Use a virtual meeting format where all participants can be visible and see who else is in the room

• **Use interactive technology**.

› Run polls to spark discussion on the theme of the session or to solicit feedback quickly.

› Use break out rooms to brainstorm on a specific topic, with insights being brought back to the larger group.

› Encourage raising hands to speak and using the applause and thumbs up features to show support for ideas and comments.

D. Using Creative Techniques in the Virtual Environment

• **Standardize effective approaches for engagement.** Using a different format for each meeting creates more work for the facilitator and the participants. Identifying 2-3 modes of learning helps participants know what to expect and to get more comfortable participating. The facilitator may experiment over the first few sessions to find the approach that works best. Example approaches are below.

› **Lightning rounds.** The facilitator proposes a question, such as "We want to hear from each of you: what is the biggest challenge you face right now in implementing X?" in a lightning round is a good way to establish this norm and help the facilitator to get to know each participant. Used regularly from the beginning, this approach helps all participants to feel empowered to speak.

› **Mini-cases.** CoP participants share the written mini-case with the facilitator in advance. The mini-case has two parts: 1. describe problem you're dealing with now (2-3 sentences), and 2. describe the context (several sentences). The facilitator receives these submissions from participants and then selects cases to add to the agenda. The purpose of using mini-cases is to get participants to talk to each other and share their solutions laterally. Good cases don't have one "right" answer and provoke a lot of discussion. ECHO uses this approach.

› **Community brainstorming.** Structured brainstorming sessions can aid a community member in getting diverse ideas from fellow experts when stuck on a problem.

› **Mini-lectures.** Lecturettes have the advantage of being comfortable and familiar to some presenters, particularly those from academia. It works well to set strict time limits (10-15 minutes) and to use a structured discussion with interactive technology to help participants engage with the content.

› **Expert interviews.** The facilitator manages the design of questions and talks with

the expert in advance to be sure they understand the audience and what key points they should convey. This approach works best when the expert is available for a Q&A or group discussion. Remember that experts can come from within and outside of the community.

> **Story telling.** Community members can share knowledge through [telling stories](#) of their successes and failures. When deliberately crafed to illuminate key lessons, stories can be a useful learning tool.

- **Create themed sessions.** Dedicate a session to a specific theme to allow the group time to go deeper. Write 2–3 learning objectives for that theme. Share the objectives in advance, use them to guide the discussion and clearly reinforce them at the end of the session. The thematic approach works well with expert interviews and materials that define the theme can be shared in advance of the session.

For detailed information on establishing a community of practice, refer to the [CDC Resources.](#)

1   Wenger, Etienne, McDermott, Richard, Snyder, William M. C ultivating Communities of Practice. Harvard Business School Press. Boston, MA. 2002.