European Commission

The Communities of Practice Playbook

A playbook to collectively run and develop communities of practice

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Executive summary

WHY THE PLAYBOOK WAS DEVELOPED

Working through communities of practice has never been more encouraged in organisations than it is now. Better **gathering, sharing and using of data, information and knowledge** in public organisations such as the European Commission are essential to deliver integrated policy work and overcome silo mentalities. This is highlighted explicitly in European Commission President von der Leyen's work guidelines **stipulating transparency** and the ambition to become a **digitally transformed, user-focused and data-driven administration**.

Communities of practice are an excellent instrument for fostering collaboration among internal and external stakeholders: they can bring groups with different knowledge perspectives together and can strengthen their capacity to work and learn creatively together. Thus, communities of practice harness the collective intelligence in organisations and help improve performance.

HOW IT TOOK SHAPE

Based on scientific research and empirical experience, we explored the life cycle of communities of practice in the European Commission. We considered all of the questions that arise when setting up a new community or keeping an existing one alive and thriving.

Through surveys in different parts of the organisation and mentoring and coaching sessions with over 25 community managers, we tested and refined the *Communities of Practice Success Wheel* methodology, which underpins *The Communities of Practice Playbook*.

WHO IT IS FOR

Everybody with an interest in or the task of managing a community can use this playbook to understand and apply processes that enable communities to thrive and deliver on their vision.

This methodology can be applied in any organisation, as it assists organisations in developing communities, networks and other formal or informal structures that require collaboration and cooperation between various stakeholders who need to work together with a common purpose and vision.

This playbook equips everybody interested in running communities to be able to understand and apply the most important factors that enable communities to thrive. It consists of evidence-based guidance, good practices and interactive visual boards. Community managers with sponsors, core groups and members can work together on these boards by following the step-by-step guidance and questions posed in this playbook. The playbook covers eight success facets that allow you to develop, engage and empower your community at every stage of its journey.

WHAT IT IS

The playbook consists of **guidance, good practices and interactive visual boards**. Community managers with sponsors, core groups and members can work together on these boards by following the step-by-step guidance and questions posed in this playbook. It covers eight success facets that allow you to develop, engage and empower your community at every stage of its journey.

The playbook provides you with the tools and processes to create your **community roadmap**. These tools and processes are based on in-depth and interactive explorations of eight community success facets:

1. **vision** – what is your community raison d'être, what are the goals it aspires to achieve and what are the corresponding SMART objectives?
2. **governance** – how do you work together, and with whom and how do you take decisions?
3. **leadership** – how will you ensure strong leadership participation by both sponsors and core groups?

4. **convening**–what kind of convening opportunities work for your community?
5. **collaboration and cooperation**–how do you co-create and coordinate different cooperation and collaboration processes to deliver concrete community knowledge assets/artefacts?
6. **community management**–how do you facilitate dynamic, hybrid and (a)synchronous community interactions?
7. **user experience**–how do you ensure a member-centric community experience while delivering on the tasks set and supporting members' needs?
8. **measurement**–how do you understand and measure community vitality and what can you learn from it?

WHAT IT CAN DO FOR YOU

The playbook:
- **helps you run and develop communities**, networks and any other formal or informal structures that require collaboration and cooperation between various stakeholders who need to work together with a common purpose and vision;
- **proposes** a step-by-step approach on how to co-create your policy proposals or policy implementation actions through communities;
- **supports** you in designing and facilitating convening opportunities, as well as blended synchronous and asynchronous interactions;
- **guides** you on how to ensure systematic community engagement and participatory decision-making to harness the collective intelligence of your organisation and its partners;
- **offers** a community-building backbone for creativity, productivity and co-ownership of results;
- **provides guidance** on ways to make your community/network prepared, resilient and responsive to today's challenges.

HOW TO USE IT

This playbook is intended to empower everybody interested in running communities to understand and apply the most important facets that enable communities to thrive.

You can use it as a guiding framework on your own to:
- **assess** where you are with your community and identify areas of and processes for improvement;
- **dive deep** into one area of community development with your core group and/or with your members to unlock your community potential (e.g. how you could work on governance to create more engagement);
- **refer** to, using it as a point of reference whenever your community faces questions on how to work towards a goal;
- **equip** you with all you need to start a community or a similar structure, namely **guidance**, **good practices** based on extensive research and experiences of other communities and the **processes** you need to follow to get started.

HOW TO CONTACT US

You can reach us via *EC-COMMUNITIES@ec.europa.eu*

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Why was this playbook developed?

1.1. Rationale, ambition and scope

Working through communities of practice (CoP) has never been more encouraged in organisations than it is now. Better **gathering, sharing and using of data, information and knowledge** in public organisations such as the European Commission are essential to deliver integrated policy work and overcome silo mentalities. This is highlighted explicitly in European Commission President von der Leyen's work guidelines **stipulating transparency** and the ambition to become a **digitally transformed, user-focused and data-driven administration.**

Communities of practice stimulate cross-organisation collaboration and knowledge sharing. These communities are **'groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly' (Lave and Wenger, 1991 and 1996)**. The idea of connecting people through their practice both within and outside organisations has been around as long as people have been part of organisations. The increasing interest in communities of practice in organisations could be attributed to the useful perspective they provide on explicit and tacit knowledge, learning and development within a field of practice as being key to improving performance. Resilient organisations invest in the learning and development of their people and the organisation as a whole (Webber, 2016).

The idea of the playbook came about from extensive research into the internal and external communities managed by the European Commission's staff. A first assessment of about 20 internal communities in the Commission was undertaken at the end of 2018 to understand the current status of communities of practice and to provide a framework for continued improvement.

The framework that was developed–**the Communities of Practice Success Wheel**–features eight success factors for communities to thrive and succeed. This framework was used to create the **methodology to set up, run and evaluate communities of practice in the European Commission.** This methodology can be applied in any organisation, assisting them in developing communities,

networks and other formal or informal structures that require collaboration and cooperation between various stakeholders who need to work together with a common purpose and vision.

In the second communities assessment carried out in 2019/2020, which resulted in a research report and this playbook, we intended to look beyond the previously assessed communities. The scope of this assessment was twofold: (1) to explore, listen to and learn from existing communities at different stages in their life cycle and (2) to take these lessons learnt and integrate them into a revised framework that would build on community managers' capacity. There were three guiding questions that led this endeavour.

1. **What brings communities together and lets them thrive?** This stipulated a review and adaptation of the previous community of practice success factors and framework.
2. **What are the challenges that communities face?** This question was aimed at identifying barriers to community success and facilitators of change.
3. **How can we support communities in their life cycle?** Based on the insights gained from the previous two questions, this question guided the assembly of a capacity-building package tailored to the communities' needs, including the development of this playbook.

Overall, this simplification and support exercise took stock of the present **community ecosystem** within the European Commission and moved from the proposed streamlined general methodology towards developing a more **concrete and action-based capacity-building framework** for communities.

This capacity-building package proposes to embrace three main overarching areas that are highlighted in *the revised Communities of Practice Success Wheel* methodology:

1. **co-ownership** – participatory decision-making culture and community governance;
2. **convening** – integrating and facilitating offline and online interactions (a) synchronously between internal and external stakeholders;
3. **collaboration and cooperation** – concrete productivity, user experience and stakeholder engagement guidance around community vision, purpose and objectives.

This playbook is part and parcel of this capacity-building framework. It is intended to empower everybody interested in running communities of practice to understand and apply the most important facets that enable communities to thrive.

In Chapter 3 of this playbook, each section describes a different success facet that is important for enabling a community to thrive. Each facet has its own challenges and processes that we recommend you go through (e.g. what is the role of governance in the running of a community (of practice)?).

As such, this playbook can be used as a point of reference whenever your community faces questions on how to work towards a goal. This guiding framework allows you to focus on being more productive and creative, knowing you are moving in the right direction owing to the extensive research and exchange of experiences that fed into this report.

1.2. Methodology on which this playbook is based

UNDERSTAND

- **Two-stage survey (*selection and quantification*)**
- **Exploratory survey** *November/December 2019* (all European Commission employees, random encounter 'in real life', EU survey online; face-to-face interviews and multiple choice/open online survey)
  - ▸ *Proof-of-concept* based on existing success wheel facets: objectives, sponsorship, leadership, boundary-spanning, risk-free environment, community management, tools and user experience
- **In-depth survey** January-March 2020 (sampled communities through initial exploration according to: frequency of mentionings, maturity, variation in host, bottom-up/top-down impetus, open/closed membership; open/multiple choice EU survey)
  - ▸ *Revised-concept* based on refined success wheel facets: shared vision, participation and engagement, community and knowledge, trust and confidence, communication

DEFINE STRATEGY

- **Discussion and coaching sessions around second survey responses (*specification and qualification*)**
- **Communities' inner workings** February/March 2020: illustrations, behaviours and routine interactions, key results, goals and general community ambitions, needs for support
- Thematic analysis of answers

HELP AND SUPPORT

- **Capacity-building package**
- Co-ownership
- Convening
- Collaboration and Cooperation

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CASE SELECTION SCOPE		
	2018 Communities of Practice Success Wheel report	**2019/2020 Communities of practice review report**
Community identification	Nascent support/steering interest	European Commission-wide exploratory survey, most frequently mentioned
Maturity	Mostly nascent	Mixed
Host variation (community reach, boundary-spanning)	Mostly Joint Research Centre	Whole European Commission
Community management need (bottom-up/top-down)	Top-down emphasis	Balanced
Membership	Mostly formal	Mixed (informal added)

As just outlined, the ambition of this review exercise was to broaden the scope of the communities consulted to create a more diverse experience landscape that better covers the various modi operandi, challenges and good practices of communities of practice in the Commission.

Therefore, first, an **exploratory survey** (including both random offline encounters in various office buildings of the European Commission and an online survey) was conducted in November/December 2019 to map, select and qualify communities that were beyond the scope of those covered in the previous report. The aim was to explore and acknowledge the rich variety of community types and aims present in the Commission.

In a second step, the communities that were convenience sampled through this initial screening were subjected to an **in-depth survey** covering the reviewed success facets based on the conversations held as part of the exploratory survey. In this step, a quantitative survey and qualitative follow-up interviews were undertaken to combine insights from both realms, each enriching the other. In total, this playbook is based on 37 in-depth survey entries split over 22 identified communities of practice and knowledge centres, as well as six additional entries through the Collaboration Hub–the community of collaboration practitioners in the European Commission.

	KNOWLEDGE CENTRE	COMMUNITY OF PRACTICE	NETWORK
Governance formality	Strong	Mixed	Weak
Official sponsorship	High	Mixed	Low
Hierarchy	Vertical, direct	Vertical and horizontal, direct and indirect	Horizontal, indirect
Formal meeting regularity	Frequently	Mixed	Infrequently
Practices and actions	Co-create, discover and integrate	Collaborate, share and peer support	Connect and explore
Goal attainment	Official knowledge body	Knowledge transmission medium	Knowledge opportunities
Work opportunity	Structured	Complex	Loose
Shared vision	Integrated	Mixed	Floating
Participation and engagement	Formalised	Formalised and organic	Organic
Knowledge retention and circulation	Governed and explicit	Mixed	Non-governed and implicit
Sense of community	Mixed	Prevalent	Shallow
Inclusive communication	Corporate	Mixed	Diverse

1.3. The community universe
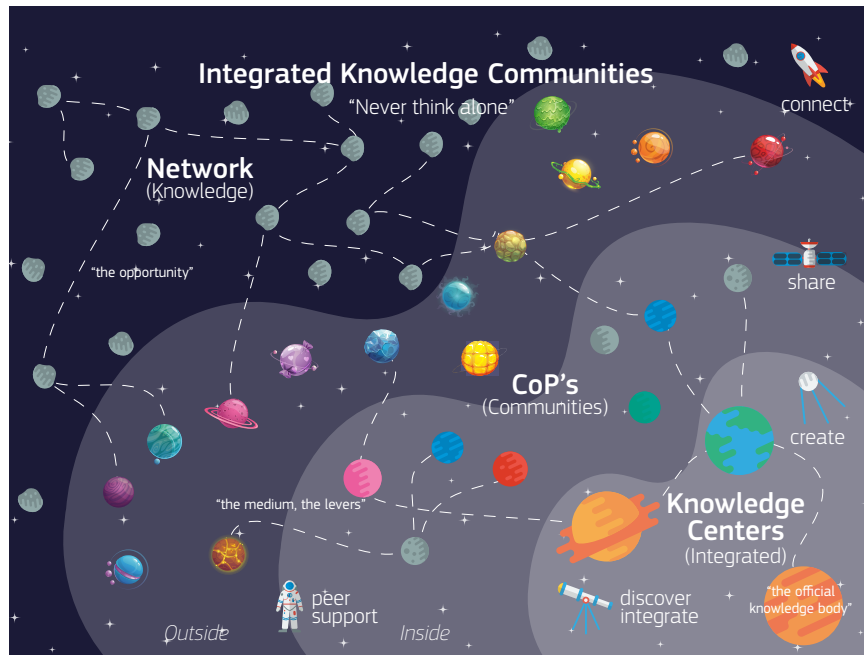
The outlined methodology let us explore a volatile community universe in the European Commission. This universe sets the scene for the playbook and is point of departure for the described observations.

So how does the EC community universe look like? The interstellar system- or universe of (knowledge) communities-within and around the European Commission (EC) is highly diverse in its levels of governance and sponsorship, practices and actions, as well as collaboration opportunities.

In this universe, the **stellar vectors** (the practices and actions) help to navigate between and connect the elements of the **interstellar system** with the aim of seeking and integrating knowledge across internal and external communities. This system is made up of **planets** (knowledge centres, namely European Commission official knowledge bodies), **intergalactic stars** (communities of practice, namely European Commission knowledge mediums that convey knowledge among stakeholders) and **intergalactic satellites** (namely (non-European Commission) networks that provide knowledge-sharing opportunities).

All of those planets, intergalactic stars and satellites navigate the **galaxy nebula**–the abundance of unstructured information and creative collaboration opportunities–to implement their visions and stimulate innovation.

In this diverse and volatile knowledge and collaboration universe of the Commission, there is a multiplicity of knowledge centres, communities (of practice) and network constellations, each with particular interaction and stakeholder patterns. In particular, knowledge centres, communities (of practice) and networks have different roles and working modes:

- **communities (of practice)** act as the bridge between networks and knowledge centres, and identify and disseminate relevant, applicable knowledge;
- **knowledge centres** serve to structure, synthesise and underpin this knowledge in an accessible, formalised and expert manner;
- **networks** offer moderated opportunities for both communities (of practice) and knowledge centres to explore new knowledge angles.

In this regard, the convening of boundary-spanning and stakeholder-mapping exercises across knowledge centres, communities (of practice) and networks remains a challenge. As such, collaboration opportunities and knowledge retention and circulation incentives should be created to stimulate the growth and continuity of communities.

1.4. Community hurdles and emerging success conditions

Using the methodology outlined above, we surveyed communities, focusing on the following five emerging success conditions–or *Communities of Practice Success* Wheel facets–built around *managing, steering, building, and driving* communities (of practice):

(1) shared vision, (2) participation and engagement, (3) community knowledge retention and circulation, (4) trust, confidence and the sense of community, and (5) inclusive communication.

From this survey, **six champions** (constituting 16.2 % of all surveyed communities)–self-reporting to be doing at least well across all of those facets–and **eight struggling communities of practice** (constituting 21.6 % of all surveyed communities)–self-reporting to be not doing well in at least one of those facets–emerged.

As a cautious note stemming from these insights, the European Commission environment remains one in which community interactions are bound by colleague, unit or working group silos as well as by (time) resource, recognition, and digital literacy restraints. Informal de facto communities (of place or circumstance) prevail over more formal community types (of practice, knowledge and work) in this volatile and diverse knowledge ecosystem. **In the European Commission ecosystem, communities of interest and action have the potential to cut across this divide and to serve as motivational anchors for curiosity and engagement.**

Nevertheless, the community of practice collaboration experience in the Commission is overall rated as good, but room for improvement is mentioned frequently.

On the one hand, the **passive push roles of communities (of practice)** are rated as working fine, namely the following roles:
- ▸ amplifying–helping to understand important but little known information;
- ▸ curating–organising and managing important information;
- ▸ convening–bringing together different individuals or groups.

On the other hand, the **proactive pull roles of communities (of practice)** are rated as needing improvements, namely the following roles:
- investing and providing–offering a means to give members the resources they need;
- community building–promoting and sustaining values/standards among relevant stakeholders;
- learning and facilitation–helping communities to work more efficiently and effectively.

This playbook takes note of those areas of struggle and provides guidance across these areas. The more in-detail discussion of each of these areas in Chapter 3 identifies specific angles from which to tackle these issues.

1. Shared vision
- A core group serving as the 'governing body' is paramount–community managers need to work with a core group and for this they need to 'loosen ownership' from their side and cultivate and make changes to work towards co-ownership.
- Constantly adapting and aligning the community's vision, purpose and objectives in a community feedback loop is essential to keep track of progress and keep a community thriving..
- Engaging in boundary-spanning practices is crucial for a community to succeed in its projects. Stakeholder and audience mappings and consultations are important, as are network expansions and professional exchanges. However, these are currently limited in reach.

2. Participation and engagement
- A. There is maturity in the way communities convene offline, but this is not true of how they convene online. A seamless combination of both is seen as a challenge by most.
- The more concrete results and deliverables that stem from a community

are, the better its vitality is rated (i.e. when its functioning is perceived as better and engagement is higher). However, there is no consensus about how regular community interactions should be for good community vitality (i.e. ad hoc interactions are as valuable as recurring scheduled ones).
- Bridging formal and informal interests and action ambitions is one way of growing curiosity in engaging in community interactions; leading by example and support by management are other important motivators.

3. Community knowledge retention and circulation
- Knowledge retention and work applicability is shallow, often without consistent digital participation or coordination. Knowledge pooling and spawning of new ideas are, however, perceived as strong advantages of communities of practice.
- Community management is often perceived as cumbersome and lacking in resources (time/recognition). More concrete guidelines for collaboration, cooperation, coordination, connection and communication are needed.
- Clear role and expectation definitions are needed for community managers (and their peers) to delineate action ambitions and clarify structures.

4. Trust, confidence and the sense of community
- Management engagement through leading by example and official sponsorship are driving motivational forces for communities of practice.
- Peer familiarity and exchange between members; transparent, inclusive and diverse membership; and participatory decision-making procedures, as well as perceived community reliability, are paramount in building trust.
- Feeding and guiding organically grown community structures supports the perception of an informal and welcoming community atmosphere and therefore a trusted 'we are in this together' environment.

5. Inclusive communication
- Communities of practice are valued for their open information sharing and for the breaking down of communication barriers among stakeholders.
- Available communication and productivity platforms/tools lack user-friendliness and communities of practice lack resources to exploit their potential both offline and online; thus, community awareness and overall networked stakeholder engagement levels remain low.
- Timely and democratic information sharing across internal and external stakeholders creates trust and engagement and drives the community of practices' impact factor.

1.5. Determining community pain points

Based on the review findings outlined above, this section **synthesises the specific needs for support** within the five community success domains.

This section summarises the discovered areas in which communities struggle, which serve as points of departure for this playbook. It dives into the most pressing issues that were discovered around the four action pointers driving communities of practice: to *steer, build, manage, drive* a community.

Participation and engagement
- **Build** capacity to combine and create continuity between offline and online community interactions.
- **Steer** willingness to provide and manage participation resources and incentives.
- **Drive** curiosity about community interactions.
- **Manage** awareness about community activities and attractiveness for work productivity.

Community knowledge retention and circulation
- **Steer** community awareness and the use of both online and offline interactions and of knowledge retention strategies and tools.
- **Drive** community attractiveness for work productivity.
- **Build** and manage tangible community objectives, goals and knowledge management strategies, including applicable tools and community managers' capacity and role.

Where do communities need additional support to thrive?

Shared vision
- **Steer** the creation, adaptation, agreement and circulation of shared goals, objectives and visions.
- **Manage** clear and flexible community structures.
- **Drive** and encourage participatory contributions to communal knowledge resources.
- **Build** sufficient management support.

Community knowledge retention and circulation
- **Steer** knowledge implementation and the creation of new networks.
- **Drive** the circulation of knowledge and the improvement of its accessibility.
- **Manage** new members' onboarding.
- **Build** engagement incentives and share best practices and routines.

Trust, confidence and the sense of community
- **Manage** participatory decision-making structures, ensuring they are clear, flexible, inclusive, open and fair.
- **Drive** transparency and informality within organic (membership) structures.
- **Build** a community competency reservoir and routines.
- **Steer** domain leadership and management support.

Inclusive communication
- **Drive** the creation of user-friendly communication and knowledge management tools.
- **Steer** and build (mapped and outside) stakeholder engagement.
- **Manage** timely and open community responsiveness.

You can find more insights on good practices in the field in Chapter 5, 'Additional resources'. Discover what makes communities rate themselves as functioning well, in contrast to what makes communities rate themselves as struggling.

The next chapter presents how this playbook will address the struggles and challenges outlined, namely by guiding and empowering all those people who sponsor, lead or manage communities and want them to thrive, helping them bring value to their organisation and community.

2
What is in this playbook?

2.1. The Communities of Practice Success Wheel

Measurement
Assessing community vitality – practices and behaviours, as well the results delivering on the objectives

Vision
Strategic shared agreement about the long-term mission and goals of the community

User experience
Ensuring a user-centric experience constantly adapting community workings and tools to the members' needs

Governance
Structures and decision-making rules and practices that make sense and lead to co-ownership

Community management
Facilitation of the synchronous and asynchronous flow of the community dynamic social processes

Leadership
Leaders from both within the community and senior and middle management steer and invest in the community

Collaboration/cooperation
Working purposefully together towards delivering a community concrete deliverable

Convening
The art of to bringing the community together to connect members and engage them in meaningful conversations

Community success conditions–the wheel facets–are built around **driving** the community with a vision and with purpose; **steering** it with good governance and core group leadership in place; **building** the community through convened conversations and collaboration among members to build qualitative deliverables related to the practice, through cooperation and coordination of different parts, inputs and expertise; and **managing** the community with the help of competent community managers and the core group supporting them, constantly measuring impact against objectives and ensuring a sound fit-for-purpose user experience.

The playbook thus covers the following eight facets.

1. **Vision**. A community needs a vision that has to correspond/contribute to the organisation's vision and long-term goals. It needs a purpose expressing its *raison d'être* and a co-created vision that, in turn, has to be translated into SMART objectives.
2. **Governance**. A good governance framework is central to a well-functioning community. This starts with defining community membership via stakeholder mapping and continues with setting up meaningful structures (informal and formal) to take decisions and to ensure a risk-free environment.
3. **Leadership**. Community leadership is both about support, investment and participation from senior and middle management and about leadership from within the community. A core group of community members taking the lead is a key element to steer the community through co-ownership.
4. **Convening**. Convening is the art of (regularly) bringing the community together to keep engagement alive and connect community members in meaningful conversations. To convene meaningfully also means to regularly inject external expertise into the community and to ensure access and connections to other communities/networks/platforms in a boundary-spanning manner.
5. **Collaboration and cooperation**. This is about working purposefully together towards delivering a concrete community deliverable. The more a community creates something concrete together, the more engaged it is: this requires effective coordination and co-creation methods.
6. **Community management**. A community cannot work without systematic community management. Specifically, facilitating the community's dynamic social processes and navigating the continuity of asynchronous, synchronous, 'in real life' and online community interactions is central to the community manager's three main roles as organiser, convener/catalyst and synthesiser/knowledge manager/broker.

7. **User experience**. Your community operational model is developed based on input and feedback from your membership. Working with personas ensures a user-centric experience providing the structures, processes and tools corresponding to members' needs.
8. **Measurement.** Last but not least, measuring the community's vitality and engagement is key to understanding what works in terms of practices and behaviours that deliver on the objectives set, what does not work and what you would like to understand better to improve your community.

2.2. Structure of this playbook

Do you want to find out how you can take your community's engagement and activities to the next level and unlock its potential?

When you start a community you need a plan that links everything together.

This playbook provides you with an overview of all of the elements that you need to write 'your own script', namely your community roadmap. It helps you run and develop communities, networks and any other formal or informal structures that require collaboration and cooperation between various stakeholders who need to work together with a common purpose and vision. It consists of guidance, good practices and interactive visual boards for each of the community success facets outlined. These elements need to be addressed and require constant engagement to encourage, run and empower a community or network. Community managers, together with sponsors and core groups, can work together on these boards by following the step-by-step guidance and answering the questions posed in this playbook.

This playbook can be used as a point of reference whenever your community is facing questions on how to work towards a goal. This gives you the freedom to focus on being more productive and creative, knowing you are moving in the right direction. It will also help you understand your target audience better and how to address their needs. By doing so, you could address engagement issues, something that our research shows many communities face. The playbook proposes processes on how to get everybody involved and aligned, which is a key part of reaching a community's goals.

By working through each section of Chapter 3 and using each of the visual boards, you will be able to feed your reflections back into your community roadmap to shape and improve your community's operational model and experience. In this way, you can create links between and connect all of the community success domains by integrating all insights into one implementable overview–the community roadmap.

The following sections of Chapter 3 are organised according to the eight community success facets. For each you will be answering the following questions:

1. **Vision** – what is your community raison d'être, what are the goals it aspires to achieve and what are the corresponding SMART objectives?
2. **Governance** – how do you work together, and with whom and how do you take decisions?
3. **Leadership** – how will you ensure strong leadership participation by both sponsors and core groups?
4. **Convening** – what kind of convening opportunities work for your community?
5. **Collaboration and cooperation**–how do you co-create and coordinate different cooperation and collaboration processes to deliver concrete community knowledge assets?
6. **Community management** – how do you facilitate dynamic, hybrid and (a)synchronous community interactions?
7. **User experience** – how do you ensure a user-centric community experience while delivering on the tasks set and supporting members' needs?
8. **Measurement** – how do you understand and measure community vitality and what can you learn from it?

In each section of Chapter 3, you will find **a narrative** showcasing good practices in the field (from both our and academic research), guidance on how you can work on the success facet in question and **a visual board** that you can work with for ideation, co-creation and alignment with the accompanying instructions and questions posed in every step of the proposed process. Please note that the steps in the boards do not necessarily reflect the numbering structure in the narrative but follow their ideational impetus.

Each section ends with structured note spaces where you can scribble down your ideas in preparation of a co-creation session supported by a visual board or your take-aways from that session.

The visual boards and the structured notes are available to be downloaded on our website where the playbook is published:
https://ec.europa.eu/jrc/en/publication/communities-practice-playbook

The playbook also includes a common vocabulary, making it easy for the reader to understand what we mean with the terms we use. You will find this in Chapter 4.

Do you feel like you do not know where to start? Section 3.1 guides you through discovering what to focus on at the start of your community journey.

Make sure

to go through all of the *Success Wheel* elements, section by section, to capture all of the insights you need to set up, run or revive a community or network and design your community roadmap.

3
How to work with the playbook?

3.1. The community of practice roadmap

The community roadmap structures your design thinking along the eight *Communities of Practice Success Wheel* facets. By working through each section and using each of the visual boards, you will be able to feed your reflections back into this roadmap to shape and improve your community's operational model and experience. In this way, you can create links between and connect all of the community success domains by integrating all insights into one implementable overview.

As such, the roadmap can be used as a point of reference whenever your community faces questions on how to (organise) work and in every community feedback consultation. This section guides you on how to build your community roadmap and what you need to focus on at the start of your community journey. The goal of The *Communities of Practice Playbook* is to provide guidance on building this roadmap and to equip communities with the relevant capacity to do so. Every community should ideally have a clear view of their actions, responsible actors and resources in their roadmap.

Community of practice roadmap

How satisfied are you with the workings of each community facet?

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Months 7 to 9	Months 10 to 12	Who is responsible?	What resources are needed?
Vision — What is the challenge you want to address / the problem to solve? What is your long-term goal?	1.1|1	1.1|2	1.1|3	1.1|4	1.1|5	1.1|6	1.1|7	1.1|8		
Community purpose — What is the community's *raison d'être* in support of the vision?	1.2|1	1.2|2	1.2|3	1.2|4	1.2|5	1.2|6	1.2|7	1.2|8		
Objectives — What is your strategy to reach your community vision? Define SMART steps, behaviours and rituals	1.3|1	1.3|2	1.3|3	1.3|4	1.3|5	1.3|6	1.3|7	1.3|8		
Governance — How do you work together, take decisions and act on them? List working practices and processes fitting the community needs, purpose, and values.	2.1|1	2.1|2	2.1|3	2.1|4	2.1|5	2.1|6	2.1|7	2.1|8		
Stakeholder mapping — Define your membership and the surrounding community ecosystem. Who are the actors involved in/impacted by the community?	2.2|1	2.2|2	2.2|3	2.2|4	2.2|5	2.2|6	2.2|7	2.2|8		
Risk-free environment — What are key elements to building trust and guaranteeing a safe place?	2.3|1	2.3|2	2.3|3	2.3|4	2.3|5	2.3|6	2.3|7	2.3|8		
Leadership — How will you ensure strong leadership participation?	3.1|1	3.1|2	3.1|3	3.1|4	3.1|5	3.1|6	3.1|7	3.1|8		
Core group — How do you get your core group to steer the community?	3.2|1	3.2|2	3.2|3	3.2|4	3.2|5	3.2|6	3.2|7	3.2|8		
Investment and sponsorship — What support do you need from management? How do you get them involved and create participation opportunities?	3.3|1	3.3|1	3.3|3	3.3|4	3.3|5	3.3|6	3.3|7	3.3|8		
Convening — What kind of convening opportunities/events fit with your community in general?	4.1|1	4.1|2	4.1|3	4.1|4	4.1|5	4.1|6	4.1|7	4.1|8		
Communication, connection and conversation — What convening opportunities will you design to create and encourage connections, conversations and communication?	4.2|1	4.2|1	4.2|3	4.2|4	4.2|5	4.2|6	4.2|7	4.2|8		
Boundary-spanning — How do you regularly feed your community with external expertise and promote access to other networks?	4.3|1	4.3|2	4.3|3	4.3|4	4.3|5	4.3|6	4.3|7	4.3|8		
Collaboration/cooperation — How do you make members collaborate and/or cooperate to enrich the common practice and produce knowledge assets/qualitative deliverables?	5.1|1	5.1|2	5.1|3	5.1|4	5.1|5	5.1|6	5.1|7	5.1|8		
Coordination — How do you coordinate members' work towards delivering on the objectives agreed?	5.2|1	5.2|2	5.2|3	5.2|4	5.2|5	5.2|6	5.2|7	5.2|8		
Co-creation — What content needs to be curated/synthesised/co-created and what methods will you use to succeed in this?	5.3|1	5.3|1	5.3|3	5.3|4	5.3|5	5.3|6	5.3|7	5.3|8		
Community management — What role and tasks will the community manager perform?	6.1|1	6.1|2	6.1|3	6.1|4	6.1|5	6.1|6	6.1|7	6.1|8		
In real life and online — How will you combine and ensure the flow between real-life and online, asynchronous and synchronous community interactions?	6.2|1	6.2|2	6.2|3	6.2|4	6.2|5	6.2|6	6.2|7	6.2|8		
Facilitation — What facilitation methods do you need to get the best out of the community's dynamic social processes?	6.3|1	6.3|2	6.3|3	6.3|5	6.3|5	6.3|6	6.3|7	6.3|8		
User experience — How do you ensure a user-centric experience for the tasks (you want) members (want) to do in the community?	7.1|1	7.1|2	7.1|3	7.1|4	7.1|5	7.1|6	7.1|7	7.1|8		
Experience design — What are the community's personas and their user requirements, as well as the pain points to address?	7.2|1	7.2|2	7.2|3	7.2|4	7.2|5	7.2|6	7.2|7	7.2|8		
Support — What processes and content do you need to put in place to provide support?	7.3|1	7.3|2	7.3|3	7.3|4	7.3|5	7.3|6	7.3|7	7.3|8		
Measurement — What have you achieved? What can you learn from those measurements and how will you address the challenges/obstacles?	8.1|1	8.1|2	8.1|3	8.1|4	8.1|5	8.1|6	8.1|7	8.1|8		
Vitality — What habits and behaviours should you observe and encourage?	8.2|1	8.2|2	8.2|3	8.2|4	8.2|5	8.2|6	8.2|7	8.2|8		
Results — How do you measure the key results in delivering on the community objectives? How will you capture impact stories?	8.3|1	8.3|2	8.3|3	8.3|4	8.3|5	8.3|6	8.3|7	8.3|8		

Short-term actions (1-3 months) overall ambition of the community	Medium-term actions (4-6 months) overall ambition of the community	Long-term actions (7-12 months) overall ambition of the community

European Commission

3.1.1. WHAT IS A COMMUNITY ROADMAP?

A community roadmap translates your community strategy into an action plan, outlining the activities and the resources required to help your community achieve value for the business. It maps the community's activities and initiatives to the key objectives they will address.
Roadmaps mark milestones in a community's journey, making it easier to track progress. A roadmap shows which activities are important to invest in, in order to grow your community

3.1.2. WHAT CAN A ROADMAP DO FOR YOUR COMMUNITY?

According to the Community RoundTable (2014) a community roadmap can support you to:

"Align priorities
*A roadmap **highlights your community's objectives** and how you will achieve them. When you have a roadmap, your conversations with stakeholders become more productive. Instead of talking about 'why we should invest in community', you can discuss where to target your investments.*

Communicate better together
A roadmap shows which activities are important to invest in, in order to grow your community. As a communication tool, it documents community decision-making.

Organise planning
Roadmaps translate strategy into action because they itemise the resources needed for effective outcomes. Connecting resources to how they will advance the community strategy makes it easier to measure value."

The community roadmap proposed in this playbook is structured around community success facets, namely the conditions that enable your community to thrive and deliver on its vision. *The Communities of Practice Playbook* equips you with the tools to help you create **your community** roadmap based on in-depth and interactive explorations of *the eight Communities of Practice Success Wheel facets*.

The playbook provides guidance on each of these eight facets, along with visual boards and a proposed step-by-step approach to co-creating **your community** operational model. Each section ends with structured note spaces where you can scribble down your ideas in preparation of a co-creation session supported by a visual board or your take-aways from that session. The visual boards and the structured notes are available to be downloaded on our website where the playbook is published:
https://ec.europa.eu/jrc/en/publication/communities-practice-playbook

Together with your core group and/or sponsor, you should evaluate **your community** roadmap based on each section: vision, governance, leadership, convening, collaboration and cooperation, community management, user experience and measurement. You will be able to evaluate how you are doing through the questions posed.

3.1.3. LEARNING OUTCOMES

You will learn:

- how to structure your design thinking along the eight *Communities of Practice Success Wheel* facets and how to (organise) work in every community feedback consultation;

- how to create a community roadmap, namely how to translate your community strategy into an action plan and how to outline the activities and the resources required to help your community achieve value for its vision;

- how to equip communities with the relevant capacity to build their community roadmap for a clear view of their actions, responsible actors and resources.

While working on the roadmap in each of the following sections using the corresponding visual board, you will learn:

Vision

- how to design and communicate your purpose, vision, objectives and strategy;
- how to use appreciative inquiry to identify and design a vision for your community needs, challenges and opportunities;
- how to pitch your community's value proposition;

Governance

- how to do stakeholder mappings;
- how to draw up community governance guidelines and a community operational model;
- how to create and support a risk-free community environment;

Leadership

- how to identify your core group, leadership and sponsorship;
- how to map and situate community leadership stakeholders in your community ecosystem;
- how to form responsive and inclusive leadership structures;

Convening

- how to choose different convening methods and make them work for your community;
- how to design and bridge the gap between interactions within and outside the community;
- how to ensure community engagement is based on a solid convening strategy built on conversation, connection, communication and boundary-spanning activities;

Collaboration and cooperation

- how to combine and apply methods of co-creation and coordination strategically;
- how to design a cooperation and collaboration roadmap for your community;
- how to enrich the common practice and deliver on your community's objectives by applying collaboration processes and methods;

Community management

- how to facilitate your community life and interactions by combining online, 'in real life', asynchronous and synchronous ways of working;
- how to identify and fulfil different community management roles: organiser, convener/catalyst and synthesiser/knowledge manager or broker;
- how to co-create a community engagement roadmap;

User experience

- how to define and work with personas;
- how to identify and act on community member levels of satisfaction/concern with the workings of the community;
- how to gauge what member support is needed;
- how to revise/adapt user experience approaches based on satisfaction/importance levels;

Measurement

- how to explore and define what impact and vitality mean for your community;
- how to assess the community as regards the success factors and how to continually ask questions of/with your community to keep you on your mission/vision track;
- how to gauge what community challenges and opportunities you face/lie ahead so that you can revise your approach to focus on specific success facets.

3.1.4. WHERE TO START?

You should approach the *Communities of Practice Success Wheel* by considering it as a circular journey–you can start anywhere, but eventually you will travel through all of the domains, as they are interwoven and interdependent.

We advise you to start with vision, but you can also chose to start where you feel you are struggling most in your community life at the moment.
In the latter instance, ask yourself the following questions and indicate your thinking via colour coding on the roadmap.

What is the most important community facet to be tackled now? How satisfied are you with the workings of each community facet?

To begin, take your roadmap and reflect upon the main questions listed for each domain.
Make sure to go through all of the elements to capture all of the insights you need to set up, run or revive a community and design your community roadmap.

While working on your community roadmap, ask yourself the following questions:
How would you rate the functioning of your community (of practice) in general?

How would you rate the functioning of your community (of practice) in the following facets?
- shared and applied vision and objectives;
- effective and inclusive governance structures and practices;
- clearly mapped and defined leadership and sponsorship relations;
- convening opportunities and engagement methods fitting your community objectives;
- aligned and coordinated collaboration and cooperation processes, methods and knowledge needs;
- articulated community management mandate, roles and tasks applying hybrid interactions (synchronous, asynchronous, online and 'in real life');
- outlined user experience persona needs and satisfaction/importance mapping;
- understanding of what to include and why in the community measurement considerations.

Do you have overall actions, responsibilities and resources set in place for the following periods?
- short term (1–3 months)
- middle term (4–6 months)
- long-term (7–12 months).

Communities of Practice Playbook | Roadmap

1 **Vision |** What is the challenge you want to address / the problem to solve? What is your long-term goal?

2 Community purpose | What is the community's *raison d'être* in support of the vision?

3 Objectives | What is your strategy to reach your community vision? Define SMART steps, behaviours and rituals

4 **Governance** | How do you work together, take decisions and act on them? List working practices and processes fitting the community needs, purpose, and values.

5 Stakeholder mapping | Define your membership and the surrounding community ecosystem. Who are the actors involved in/impacted by the community?

6 Risk-free environment | What are key elements to building trust and guaranteeing a safe place?

Communities of Practice Playbook   Roadmap

7 **Leadership** | How will you ensure strong leadership participation?

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8 Core group | How do you get your core group to steer the community?

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9 Investment and sponsorship | What support do you need from management? How do you get them involved and create participation opportunities?

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10 **Convening** | What kind of convening opportunities/events fit with your community in general?

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11 Communication, connection and conversation | What convening opportunities will you design to create and encourage connections, conversations and communication?

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12 Boundary-spanning | How do you regularly feed your community with external expertise and promote access to other networks?

Communities of Practice Playbook | Roadmap

13 **Collaboration/cooperation** | How do you make members collaborate and/or cooperate to enrich the common practice and produce knowledge assets/qualitative deliverables?

14 Coordination | How do you coordinate members' work towards delivering on the objectives agreed?

15 Co-creation | What content needs to be curated/synthesised/co-created and what methods will you use to succeed in this?

16 **Community management** | What role and tasks will the community manager perform?

17 In real life and online | How will you combine and ensure the flow between real-life and online, asynchronous and synchronous community interactions?

18 Facilitation | What facilitation methods do you need to get the best out of the community's dynamic social processes?

Communities of Practice Playbook   Roadmap

7 Cs

19   **User experience** | How do you ensure a user-centric experience for the tasks (you want) members (want) to do in the community?

20   Experience design | What are the community's personas and their user requirements, as well as the pain points to address?

21   Support | What processes and content do you need to put in place to provide support?

22   **Measurement** | What have you achieved? What can you learn from those measurements and how will you address the challenges/obstacles?

23   Vitality | What habits and behaviours should you observe and encourage?

24   Results | How do you measure the key results in delivering on the community objectives? How will you capture impact stories?

3.2. Vision

Your starting point should be the purpose or the mission of your community—why does your community exist? The community's purpose often comes from the organisation's leadership, corresponding to the organisation's business goals. It is normally predefined by the sponsor alone or by the sponsor with a group of people. Once the sponsor sets the 'why', you will be co-creating the vision for the community with your sponsor, a preliminary core group and potential members. When the vision has been formulated and aligned, you will be working on the strategy in support of delivering on the vision. At this stage, you will be working on high-level objectives.

You will learn:

- how to design and communicate your purpose, vision, objectives and strategy;
- how to use appreciative inquiry to identify and design a vision for your community needs, challenges and opportunities;
- how to pitch your community's value proposition.
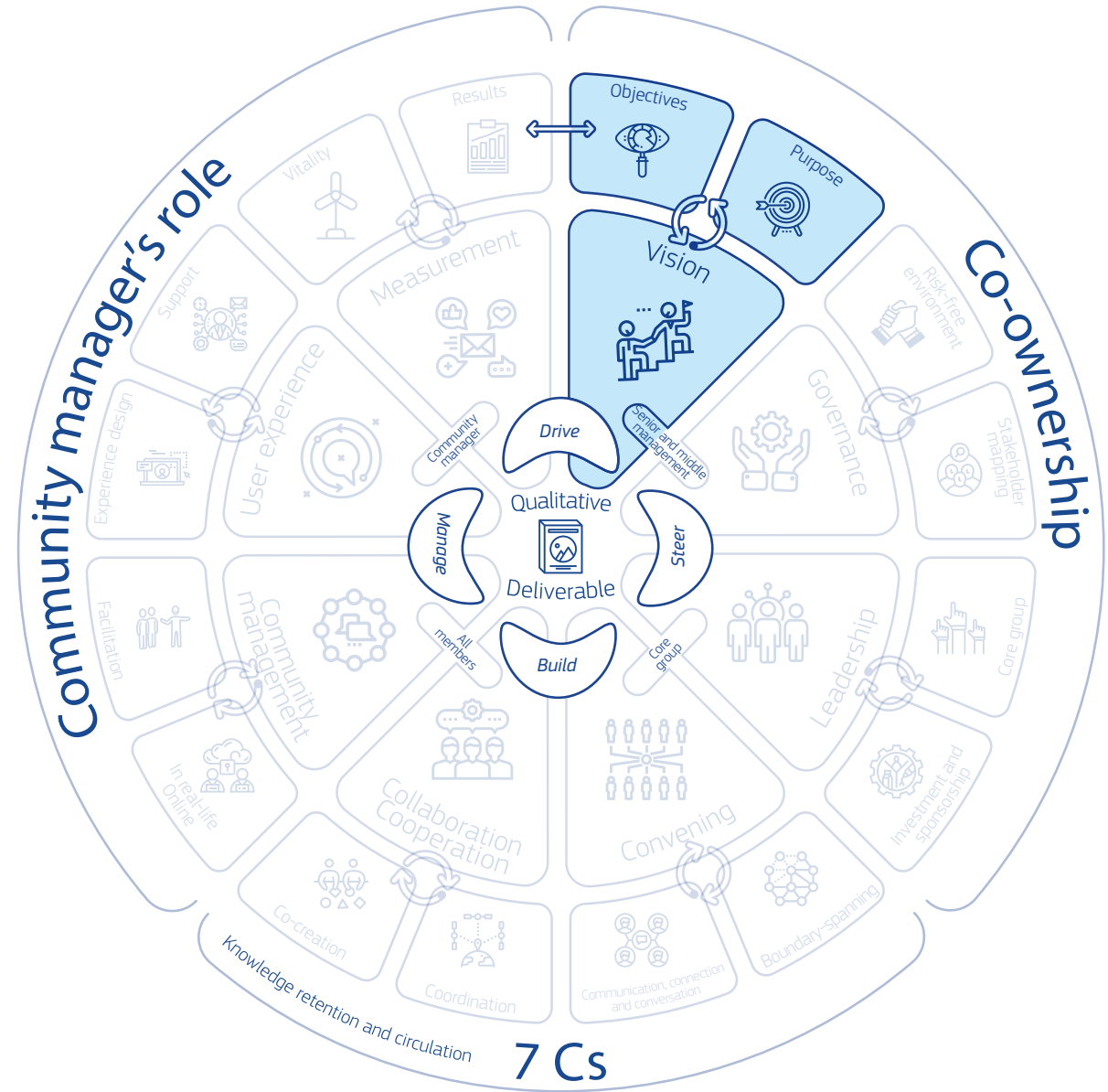
3.2.1. PURPOSE/MISSION

Why does the community exist?
What is the community's *raison d'être*?
Why will it matter for the organisation?

The purpose of your community is normally predefined by the sponsor alone or by the sponsor with a core group. The assigned purpose needs to answer the question 'why does the community exist?'.

When working on the purpose, you should bear in mind the following.

- A clear focus is key.
- You should describe why the community exists. The purpose/mission should be short and designed to capture both hearts and minds and to encourage ownership within the community.
- To determine your purpose, ask questions such as the following. What is the business need that the community addresses? What is outside the scope of your community? What is in it for members?

You will go into more detail on personas under Sections 3.3, 'Governance', and 3.8, 'User experience', but, at this stage, you will remain at a higher level of thinking.

3.2.2. DEFINE THE CHALLENGE(S) OR PROBLEM

What is the challenge that we want to address or the problem that we want to solve?

3.2.3. SHARED VISION

Once the purpose of your community is clear, develop a long-term vision in a participative and recurrent way.

The community will succeed when its members share and work from the perspective of a common vision. The shared vision guides actions and decisions and provides a sense of how to proceed in times of change. A shared vision also inspires people to contribute their best work and to collaborate for the success of the community.

When people are aligned around a shared vision, they understand where the community is going, how it will foster the development of its members, the organisation and other stakeholders, and what it will take to succeed. They understand how their work serves the bigger picture–the organisation's success–and they feel that they are at the centre of things, making a significant contribution.

Two main questions will guide you to work out the vision:
- what do you aspire to achieve?
- what is your long-term goal?

One way to determine a shared vision is **through an appreciative inquiry exercise**, inviting a **preliminary core group and potential members**, called by the sponsor, to enter a state of dreaming about the community's successes. Appreciative inquiry is a strategy for intentional change that identifies the best of 'what is' to pursue dreams the ideas and possibilities of 'what could be'.

People are more confident and comfortable progressing into the future when they carry forward parts of the past. The assumption here is that, in every community, something works. If we carry forward parts of the past, we can get the best outcome. As part of this process, consider the following questions.

- Describe a time when you felt most involved in the big picture of the organisation. Tell us about the situation. How did you know you were involved in the big picture? What about the situation brought out the best in you?

- Reflecting back on the situation you just described, what did you learn about how to create a shared vision within this community?

Alternatively, the appreciative inquiry exercise can be undertaken as a longer structured process of five phases.
1. **Definition** – define your community's challenge.
2. **Discovery** – identify what works well in the field/practice of the community/ in the organisation and elsewhere: appreciate 'what is'.

3. **Dream** – envisage the community's end goals and achievements: imagine 'what might be' – this is the **vision**. While '*dreaming' and imagining what might be, what* **rituals and behaviours** *can you see, hear and feel that are developing and happening?* Describe in concrete ways how you see the community's members and other stakeholders behaving and being involved.

4. **Design** – plan and prioritise these goals and achievements: 'determine what should be', namely identify the high-level **objectives**.

5. **Delivery and strategy** – what deliverables will be created and how will you achieve the objectives??

Other questions that you may want to bring into the conversation around vision are related to values, success definition and brand.

- **Values** – what is important to us as a community?
- **Success definition** – how does the community define success? Why would this work or why would it fail?
- **Brand** – how does the community express itself?

Example: A community around the Green Deal

Purpose/mission: Our mission/purpose is to support Green Deal new policies with scientific evidence.

Definition: The challenge is to connect the dots among all of the information and knowledge in the Commission and beyond.

Discovery: Describe a time when you felt you were making an impact on policy proposals by having the relevant and comprehensive knowledge that policymakers needed. For example, we had impact on policy proposals by bringing different stakeholders and knowledge together–a lot of scientists came together and connected, and this was what made their input have an impact on policy proposals.

Dream: Imagine that all of those scientists were to convene on a regular basis, namely every week/month 'in real life' and virtually, and they came up with proposals that had an impact and were taken on board by policymakers. From what you have learnt, describe the ideal scenario or dream, namely when all of the conditions for success are there. One may imagine over 100 reputable scientists contributing systematically to informing the Commission's new Green Deal policies. To do so, they would convene regularly to discuss topics and calls for contribution and exchange practices and the most credible knowledge in the field.

Rituals and behaviours: These scientists have set up mechanisms for curation, peer reviewing and collective synthesis reports to deliver to policymakers.
They also have regular sessions on 'science meets policies' where policymakers exchange views with scientists and try to understand each other's worlds. Subcommunity leaders meet regularly to take stock of the latest knowledge in the field and determine policy-relevant insights.

Design: For the dream to become a reality, what do you need to do? The community has set strategic high-level objectives such as to get to an increased pool (100 +) of contributors (scientists) to cover all areas and sub-areas of the Green Deal, to produce a first evidence report for a priority area by the end of 2020, etc.

Delivery and strategy: How will you achieve the objectives? For example, for the first objective, we will be undertaking a stakeholder mapping exercise to define our membership, identify who we are and whom we are missing; we will also determine strategies on how to recruit the members we need.

3.2.4. OBJECTIVES

What is your strategy to reach your community's vision?

Setting clear and measurable objectives provides community members with a concrete direction to follow. When objectives are clear, the deliverables for the community are well known and plans to achieve them can be put in place.

As a core group and with other community members, we recommend to **define five strategic, high-level objectives**. These five objectives should set out the steps you envisage delivering in order to meet your community's vision. They should **tell the journey of your strategy**, and they need to be **SMART** (**specific**, **measurable**, **achievable**, **realistic** and **timely**).

The following questions will help you to set objectives and plan how to deliver on them.

- What do you need to accomplish?
- What do you think is realistic?
- How are you planning to accomplish this objective?
- What resources are you looking for? What kind of people do you need?
- By doing this will you have delivered on the objective?

At this stage, stick to **high-level objectives**; do not jump into actions. After defining your objectives, you will then build your roadmap and define actions corresponding to each community success facet: **governance**, **leadership**, **convening**, **collaboration and cooperation**, **community management**, **user experience** and **measurement**.

Some guidance on how to formulate objectives
- A strategic high-level objective is a high-level statement that outlines what exactly you want to achieve, with a clearly stated deadline.
- You could use the following structure: **action + result/outcome + deadline**. Using a verb in an active voice forces you to be specific about what you are trying to do, and including the result/outcome and a deadline helps you to stay on track with progress.

The following are examples of high-level objectives:
- to have an inventory of simulation models in place by mid-2021 in support of EU policymaking – the strategy to achieve this objective would be to create such an inventory;
- to increase the organisation's capacity in the field of collaboration/space/participatory leadership;
- to ensure that all of the Commission's policy proposals are informed by a pool of knowledge (tacit and explicit) in the field of migration and demography from across the organisation;
- to produce a map of the organisation's skills and knowledge in the field of data visualisation by the end of 2020.

3.2.5. POSSIBLE DELIVERABLES

A community charter
Purpose, vision and high-level objectives need to be defined clearly, communicated clearly and shared with the community and within the organisation. This can take the form of an agreed **charter or terms of reference**, clearly stating the community's purpose, vision, high-level objectives, values, boundaries, membership criteria, scope, ways of working, sponsors, special focus areas and measures of success. In this way, members are clear about the purpose of the community and its role in convening, advocating for and building the community.

Your community pitch
Try to work through these nine steps (adapted from Williams, 2011) to craft and deliver your pitch.
One of the best ways to pitch your community vision is by telling it as a story. **Try to work through these nine steps to craft and deliver a 5-minute storytelling pitch for your community**.

Create empathy
At the outset, you must orientate the audience about the pitch; your objective is to spark **their empathy**.

- **Step 1**: Establish the inadequacy of current clichés (the status quo).
  To set the scene, you need to quickly and effectively demonstrate a problem of parity in your industry and uncover some clichés to demonstrate that everyone is doing the same thing or that nothing has changed.

- **Step 2**: Explain why this is an issue (the observations).
  Put the focus on your audience/stakeholders. Remember, the more visual and sensory-rich your observations are, the better your audience will remember them.

- **Step 3**: Explain how it is frustrating for the target audience (the story).
  For people to take action in your community once you come to the end of the pitch, they have to feel empathy at the beginning. The way to make them care is through the details of one key story from your research activities. What did you hear or see that could bring the points of frustration to life for your audience in the most memorable way?

Build tension
This is the point at which you must bring in surprise, intrigue and curiosity for the pitch audience. Your objective is to build tension by delivering an unexpected insight and opportunity.

- **Step 4**: Tell them something they do not know (the insight).
  Review the key insight that gave rise to your opportunity. Frame the insight in such a way that it subverts your audience's expectations. Emphasise the aspect that goes against common sense, namely the part they do not know or are not expecting.

- **Step 5**: Provide a sense of how this knowledge could be used (the opportunity). A disruptive opportunity is to a pitch what a turning point is to a movie. Once you have the opportunity described, add credible logic with key supporting observations and facts gathered from your research.

- **Step 6**: Use a familiar example to help them understand the potential (the analogy). The potential of the opportunity has to be intuitive. To make your community opportunity resonate among the audience, you need to quickly signal to your audience that it is disruptive, yet familiar. The easiest way to do this is to juxtapose it with an example of something they are already familiar with. Try some analogies in the following format:

We are doing for_____what_____(analogous example) did for

_____(alternative category).

Example: 'We are doing for socks what Nike did for running shoes.'

Make your audience believe
This is where you unveil your community's value proposition to the pitch audience. Your objective is to build their belief in the value it delivers.

- **Step 7**: Reveal your approach to the opportunity (the solution).
  Identify the core value of the solution and the key benefit you need to communicate. Then craft a brief description that captures the essence in one sentence.

- **Step 8**: Explain the motivation for stakeholders to make the change that you are suggesting the community can offer (the advantages).
- After you make it clear what you want to change (empathy) and why (tension), you need to persuade your audience that the changes offered by the community deliver clear advantages to the people who will be part of the community and who will benefit from its delivery. You need to shift the focus of your audience from the need for disruptive change to the motivation for disruptive change.

- **Step 9**: Communicate the community's higher purpose and potential (the ethos). An ethos gives your solution a higher purpose, something that goes beyond pure functional and emotional value. It is the narrative theme around which people will remember your community.

Make sure

you are always aligned with your leadership and business vision, guided by the purpose or *raison d'être* of your community and have a strategy with SMART high-level objectives to reach your vision.

Ask yourself if:

☐ you have laid out a community *raison d'être* with an articulated reason why it matters for the organisation and its business goals;

☐ you have collectively made sense of what you aspire to achieve as a community;

☐ you have set up a **SMART** strategy to reach your community vision and have a pitch on your community's value proposition in place.

Communities of Practice Playbook | Vision

Vision

Your starting point should be the purpose or the mission of your community – why does your community exist? The community's purpose often comes from the organisation's leadership, corresponding to the organisation's business goals. It is normally predefined by the sponsor alone or by the sponsor with a group of people.

Once the sponsor sets the 'why', you will be co-creating the vision for the community with your sponsor, a preliminary core group and potential members.

When the vision has been formulated and aligned, you will be working on the strategy in support of delivering on the vision. At this stage, you will be working on high-level objectives.

Make sure you are always are aligned with your leadership and business vision, guided by the purpose or raison d'être of your community and have a strategy with SMART high-level objectives to reach your vision.

Community purpose

Objectives

MISSION

1

Define purpose, raison d'être
Why does the community exist?
What is the community's raison d'être?
Why will it matter for the organisation?

Focus on your strengths

2

Identify challenges
What is the challenge that we want to address/the problem to solve?

VISION

3

Discover
'Appreciate what is'
Identify what works well in the field/practice of the community, in the organisation and elsewhere
Here you are trying to identify the journey to define the vision

Make it concrete

4

Dream
'Imagine what might be'
Envision the community's end goals and achievements
What do you aspire to achieve?

OBJECTIVES

5

Describe behaviours, habits, rituals
What are the steps, behaviours and rituals you envisage for delivering on the community vision? What is your long-term goal to reach?

Bring it together

6

Design
'Determine what should be'
Plan and prioritise these goals and achievements
Set and define five SMART high-level objectives

STRATEGY

7

Deliver
'Create what will be'
What is your strategy to reach the community vision based on those objectives?
What deliverables will/should be created?
Describe your strategy journey and build a community charter around your community pitch and the SMART objectives

This links back to the measurement visual board

Create empathy | Set the scene
This is the point of orientation for the pitch audience, where your objective is to spark their empathy.

Build tension | Engage your audience
This is the point of surprise, intrigue and curiosity for the pitch audience. Your objective is to build tension by delivering an unexpected insight and opportunity.

Make your audience believe | Unveil the community value
This is where you unveil your solution, the community's value proposition, to your audience. Your objective is to build their belief in the value the community delivers.

8 Pitch the community's value proposition
What does your community bring to the table and why is it important?

1 2 3

3 4 5

5 6 7

Communities of Practice Playbook | Vision

1

MISSION

Define purpose, *raison d'être.* Why does the community exist? What is the community's *raison d'être*? Why will it matter for the organisation?

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2

Identify Challenges : What is the challenge that we want to address/the problem to solve?

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Focus on your strengths

3

VISION

Discover *'Appreciate what is' :* Identify what works well in the field/practice of the community, in the organisation and elsewhere
Here you are trying to identify the journey to define the vision

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4

Dream *'Imagine what might be' :* Envision the community's end goals and achievements. What do you aspire to achieve?

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Communities of Practice Playbook | Vision

Make it concrete

5 **Describe behaviours, habits, rituals :** What are the steps, behaviours and rituals you envisage for delivering on the community vision? What is your long-term goal to reach?

OBJECTIVES

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6 **Design** *'Determine what should be' :* Plan and prioritise these goals and achievements, set & define five SMART high-level objectives

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Bring it together

7 **Deliver** *'Create what will be':* What is your strategy to reach the community vision based on those objectives? What deliverables will/should be created? Tell your strategy journey and build a community charter around your community pitch and the SMART objectives

STRATEGY

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Communities of Practice Playbook | Vision

8 **Pitch the community's value proposition**
What does your community bring to the table and why is it important?

1 **2** **3**

Create Empathy | *Set the scene*
This is the point of orientation for the pitch audience, where your objective is to spark their empathy.

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3 **4** **5**

Build Tension | *Engage your audience*
This is the point of surprise, intrigue, and curiosity for the pitch audience. Your objective is to build tension by delivering an unexpected insight and opportunity.

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5 **6** **7**

Make Your Audience Believe | *Unveil the community value*
This is where you unveil your solution, the community's value proposition, to your audience. Your objective is to build their belief in the value the community delivers.

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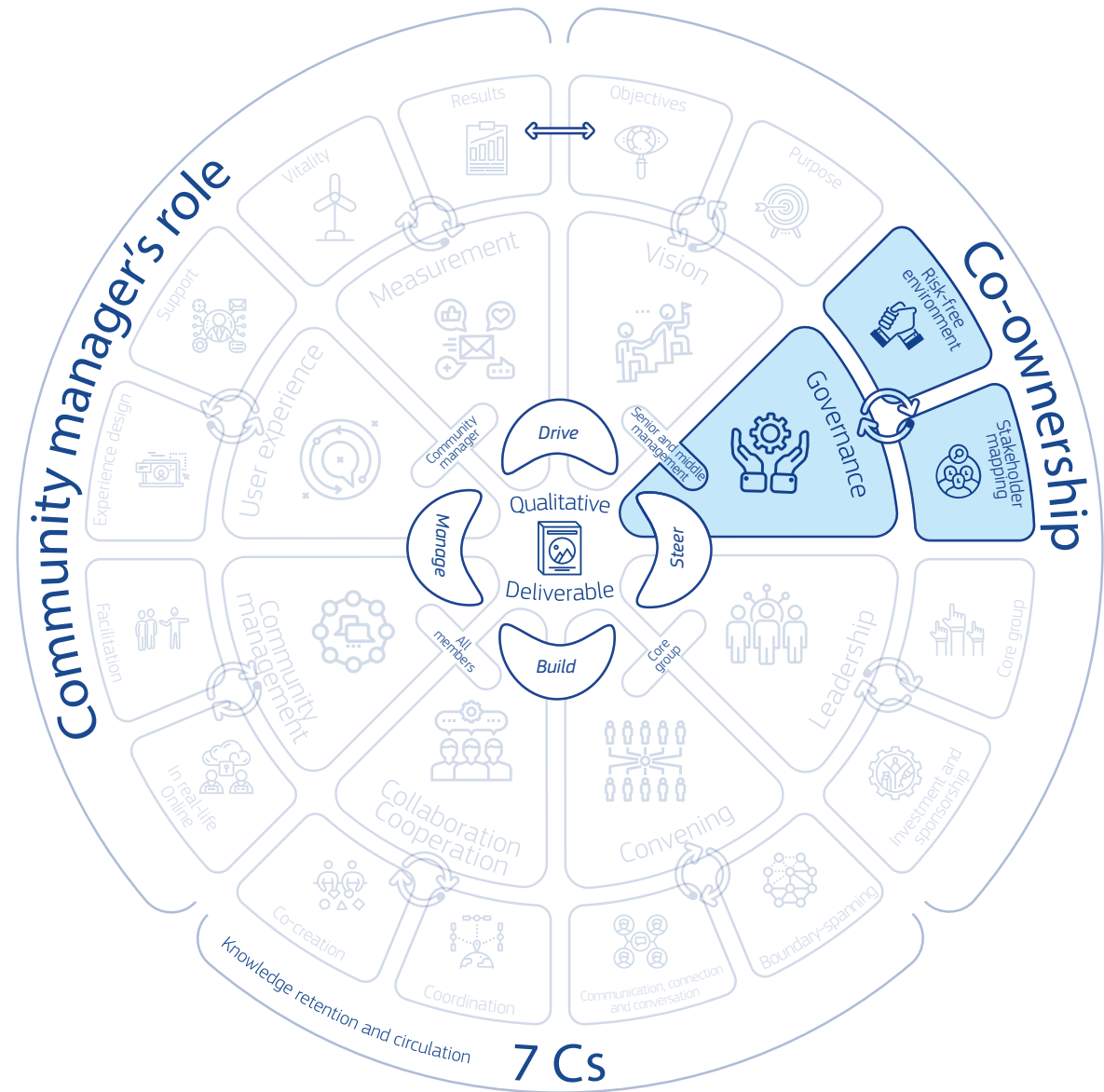
3.3 Governance

Governance is about how you work together and take decisions. In this section you will identify the community working practices and decision-making processes that fit best your community needs, purpose, and values.

Make sure you co-create decision-making and working practices that structure your community experience and let you achieve your set vision. Governance defines your community operational model, which is made up of all of the processes, tools and ways of working and organising that meet members', leadership's and sponsorship's expectations and needs.

You will be further defining the community operational model when working to ensure a sound user experience (see Section 3.8) for all community members and the community ecosystem.

Governance includes defining your membership and the surrounding community ecosystem, mapping stakeholders and creating a risk-free environment, which stimulates learning and innovation. You will want to proactively steer engagement and get senior and middle management involved.

You will learn:

- how to do stakeholder mapping;
- how to draw up community governance guidelines and a community operational model;
- how to create and support a risk-free community environment.

3.3.1. YOUR COMMUNITY MEMBERSHIP AND STAKEHOLDER MAPPING

To put in place the governance structures of a community, you first have to map the stakeholders who need and want to get involved in and also those who are impacted by the community.
Once you have identified and prioritised the categories of stakeholders by using the influence/interest matrix and assigned roles and responsibilities, you can come up with a set of structures and processes by which the community is governed-together with a *core group* of those stakeholders.

Answering the following questions will help you to do this:
- *How do you work together, take decisions and act on them?*
- *What working practices and processes would fit the community needs, purpose, and values?*

How is your (potential) membership defined? *Who are the actors involved in or impacted by the community?*

- **Membership** of the community (of practice) needs to be defined and well rounded, with actions in place to fill any gaps and to provide well-balanced representation, while diversity needs to be well handled.
- A **stakeholder mapping** is the (visual) process of identifying and laying out all the stakeholders of your community. This is usually a visual representation of all the people who have an interest in the community, who can influence it, and/or are likely to be affected by it. The mapping also shows how these people relate to the community.

1. **What are the benefits of a stakeholder mapping?**

- A **stakeholder mapping** allows you to get an overview of all key stakeholders who could get or are involved in and influence your community;
- It helps identify the stakeholders' interests, positions, alliances and their knowledge related to the community;
- It helps you see who could get involved in and benefit most from your community and so focus on them;
- It allows you to see who has involvement constraints and who has more resources to get involved and/or to sponsor the community;
- It helps you have a concrete stakeholder relations/involvement plan that can be your reference when you work on community engagement and other community success facets.

2. **How does stakeholder mapping work?**

There are different ways of doing a stakeholder mapping. Certainly, it is not a one-off exercise. You will need to go back to mapping stakeholders along your community journey to further determine which stakeholders are essential to engage with and if and how their needs and interests have changed.

We recommend that you take the following four steps to build a stakeholder map.
In brief, you have to (1) **identify** and **list,** (2) **cluster,** (3) **check interest** and **influence,** and **select** the most important ones you need to engage with based on this.
When you do your selection, you have to reflect about what you want to do with all the stakeholders: engage closely, keep satisfied and meet their needs, or keep informed and maintain a regular minimum contact? In a final step, you will need to work on a **responsibility assignment matrix** (4).

Identify and list all potential stakeholders
- These could be individuals, groups, departments, other structures, communities, networks or organisations associated with the community's purpose (*raison d'être*) or those who have an influence, an interest or a concern in its success.
- Write down their names on a flipchart or a virtual whiteboard or space. At this stage you can be as granular as possible.
- You can do this by brainstorming with your core group, with senior leadership, or talking to individuals who are close to the community's practice.

- **For this, use the first visual with circles in the related visual board.**
  - ▶ The circles will allow the people doing the exercise to have a visual representation of the stakeholder relationships with the community.
  - ▶ You can decide with your group how you place the stakeholders in the circles by defining your own criteria.
  - ▶ For example, in the centre you could place the stakeholders who you consider to be the closest to the community, you and your core group while those placed in the outer circles are considered to be only loosely linked to the community, but still with an interest. These would probably be your transactional/peripheral members (please refer to Section 3.9, 'Measurement').
  - ▶ While brainstorming, you can move your stakeholders on post-its all the time to re-categorise them. Invent and create your own instructions while doing so.

Categorise the various stakeholders by clustering them
- You now group the results of your brainstorming. Define criteria based on **what they do** and **what they need** in relation to your community.
- Have a conversation on these criteria while brainstorming and clustering. These criteria might evolve when you add stakeholders to the map.
- Criteria could be internal/external, management/non-management, level of interaction, roles, types of relationship, or level of expertise in the practice of your community. Invent and create your own criteria while brainstorming.
- Make sure that the categories you define are as specific as possible and that you capture different sub-categories. For example, if you have come up with the category of young researchers, you could further differentiate them into young researchers who are already in the practice and young researchers who have an interest in the practice but are not yet practitioners.

Prioritise your stakeholder categories by using the influence/interest matrix
- Once you have a large pool of clustered stakeholders, you can begin to assign them their level of interest regarding the community as well as the current and potential involvement in it. Also assign them their level of influence or power.
- Questions you may want to ask:
  - ▶ Who is most **influential**? Who will be **impacted**? Who is/will get **involved** in the community?
  - ▶ Which stakeholders will be most needed in your community?

- ▶ Who has an emotional interest? What matters to them?
- ▶ What are their aspirations? What are their worries and struggles?
- ▶ What do they see, do, hear, think and feel with regards to your community?
- ▶ Who are important people who won't be considered community members? How could you handle them?

- Brainstorm on your stakeholders' perspectives and on what could be affecting their thoughts. Map each stakeholder individually. A useful way of doing this is to **define personas** or profiles for the kind of members that your community needs (background, experiences, skills, etc.). For working on your community personas, please see Section 3.8, 'User experience'.
- Plot your stakeholders in the **influence/interest matrix** (the third graph on the related visual board). **Interest** measures to what degree the stakeholder is likely to be affected by the community and what degree of interest or concern it has in it. **Influence** measures the power the stakeholder has over the community and to what degree it can help achieve or block the community›s vision and objectives.
  - ▶ Not all **stakeholders** have the same stake in the community interventions. It is important to recognize the level of influence each stakeholder has on the project and its evaluation.
  - ▶ Stakeholders with **high influence and interest** aligned with the community are the people or organisations that are important to engage with closely and to bring on board. Add the names of your stakeholders into the appropriate matrix.
  - ▶ Stakeholders with **high interest but low influence** need to be kept informed. For example, they may contribute to some of the community's deliverables.
  - ▶ Stakeholders with **high influence but with low interest** need to be kept satisfied and ideally brought on board as sponsors or supporters for the community. They may benefit from the community's interactions or deliverables.
- A high diversity of community member or persona backgrounds is desirable, but this can also mean a diversity of expectations and needs. Therefore, the value proposition of your community needs to be defined for those different personas.

The following playbook sections help you with this:
- In Section 3.5, 'Convening', you will plan how you will recruit all these stakeholders.
- In Section 3.7, 'Community management', you will work on your engagement roadmap for which the interest/influence matrix is an essential reference.
- In Section 3.9, 'Measurement', you will assess and link the stakeholder mapping with your membership participation levels.
- Once you have completed the stakeholder mapping exercise, you will analyse your key stakeholders. Using the interest/influence matrix allows you to have **an overview of your stakeholders' level of potential engagement and participation**. You will get an understanding of what motivates your stakeholders, e.g., what is in it for them to participate in the community, and how you need to recruit and engage with them.

Stakeholder responsibility assignment matrix
This phase is about designing your community governance. You can start doing so by asking yourself the following question: **What is and what could be the community's relationship with those categories of stakeholders?**

One way to answer this question is by working on assigning roles and respective decision-making responsibilities. There are many responsibility assignment matrixes out there. One framework which could work for communities, *invented by Bain*, is RAPID®. It identifies participants who:

"R: *make* **recommendations**
A: establish **agreement**
P: **perform** *and execute*
I: provide necessary **inputs**
D: make centralised **decisions** *and enforce them"*

For example, the community manager(s), the sponsor(s), the community steering board and/or your core group can make **recommendations** on the community workings. The core group steering the community provides necessary **inputs**, discusses community challenges and possible activities, and reaches **agreements**. The community steering board (ideally including the community sponsor) makes centralised **decisions** and enforces them together with the core group and the community manager(s). The community members, organised or not in different committees or working groups, provide necessary **inputs** and can also make **recommendations** and establish **agreements.**

Step 4 in the accompanying visual board will guide you through a RAPID exercise. However, the assignment of roles and responsibilities can be done in a very simple manner, remains a relative exercise and is dependent on the community's culture.

3.3.2. GOVERNANCE

Once you have a clear overview of who your stakeholders are, you need to figure out how you will work together, take decisions and act on what you have decided together.

You can co-design governance structures and then let them emerge. Because there are unspoken dynamics in a community, it is important to make the implicit explicit. Communities may have both formal and informal governance structures depending on their purpose, mandate, sponsorship, type of leadership or the kind of support they get from the organisation.

You can work out your community governance by:
1. mapping your surrounding **community ecosystem** and forming committees with sponsors, community leaders and other stakeholders;
2. identifying and deciding on **what** you need to take decisions on. You can work with **governance committees** such as steering boards/committees or advisory boards which are composed of sponsors (middle and/or senior managers), community leaders and/or other stakeholders (identified in the stakeholder mapping) that come together on a regular basis. They are necessary to ensure that the community gets the mandate, the means and the promotion it needs. We normally encourage communities to be steered by a core group sharing leadership responsibilities. The core group members are either appointed by the organisation or group, or they may emerge. While roles and responsibilities normally emerge from interactions of the community, it is useful to make them explicit;
3. formalising governance structures through **governance artefacts** and by spelling out "how we take decisions". Governance artefacts are part of the **community operational model**, **i.e.** how we work together in this community.

Your **community operational model** could also include habits, etiquette, ethics or rituals which often clarify and reinforce the community's purpose and give shape to the community experience, standards, pace, rhythm and more.

Governance artefacts could take the form of:
- **terms of reference** summarising and spelling out the community's **purpose**, **vision** and **objectives**, and/or the **scope, boundary-spanning nature**, **decision-making principles** and **ways of working;**
- **community charters** including a code of conduct, community values, or a manifesto on what members share as principles and commitments;
- any other **artefact** which makes the implicit explicit and which is lived and not only aspirational.

Decision-making structures should be clear, flexible, inclusive, open, and fair. Remember that governance structures are there to serve the community's purpose. Enable the governance structures and artefacts to evolve as the community grows and changes.
Regularly ask yourself the questions:
What if the governance artefact does not support the community's purpose anymore?
How to enable the governance structures to evolve as the community grows?

3.3.3. RISK-FREE ENVIRONMENT

Through having good governance structures in place, you can build a risk-free and trusted environment.

What are key elements to build trust and guarantee a safe place?
By building trust, we mainly mean nurturing **the conditions for trust to emerge**. Trust develops over time-and conditions for trust to emerge need to be put in place by leadership, community manager(s) and sponsors.
One way to develop conditions for trust is to investigate your stakeholders' sentiments or issues as well as to tap into their contexts, aspirations, skills, values, for example. You can try to address these elements to build sustainable and trustworthy relationships.

Community participation guidelines are the foundations of a community's culture as they lay out what the community values and the way the community would like to work. They include behaviours and enabling conditions and they address potential activity hurdles. Guidelines help to develop a 'safe place' to work, encourage participation and also help newcomers understand what the community is about and how they can get involved. They are created together with the community: they do not need to be cast in stone but can evolve. They are also an opportunity to remind the community of and align it with the goals and the way the community intends to reach them.

Our research shows that a community (of practice) that is a **hierarchy-free learning zone** sees community managers reminding members that they will not be judged and/or sanctioned by their direct supervisor if they make mistakes, ask naïve questions or admit that they have gaps in their knowledge. This is acted upon and reinforced by the sponsor when needed. A risk-free environment gives community members the opportunity to learn more and leads to innovation in the organisation in the long run.

Creating an environment where people feel safe and encouraged to share their practice related successes and failures leads to positive effects that a community brings to the organisation:
- efficiency, often by eliminating duplication of work or reinventing the wheel,
- effectiveness, by solving problem harnessing collective intelligence, synergies, and other management related benefits.

Make sure

you co-create structures, working practices and decision-making processes that lead to co-ownership and make sense with regards to your vision.

Ask yourself if:

☐ you have done/discussed/formalised your stakeholder mapping exercise and mapping of membership participation levels;

☐ you know and/or have discussed/formalised how you work together and take decisions (i.e. your community operational model through governance structures and artefacts);

☐ you have defined your community's key elements to build trust and guarantee a safe place (e.g. community participation guidelines or a hierarchy-free learning zone allowing creativity and flexibility).
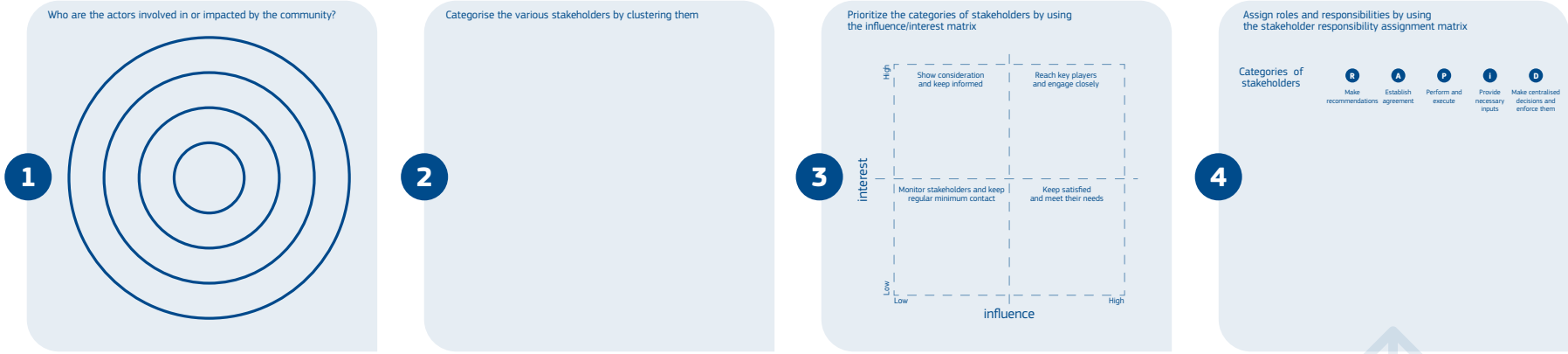
Communities of Practice Playbook | Governance

Governance is about how you work together and take decisions. In this section you will identify the community working practices and decision-making processes that fit best your community needs, purpose, and values.
Make sure you co-create decision-making and working practices that structure your community experience and let you achieve your set vision. Governance defines your community operational model, which is made up of all of the processes, tools and ways of working and organising that meet members', leadership's and sponsorship's expectations and needs.

You will be further defining the community operational model when working to ensure a sound user experience for all community members and the community ecosystem.
Governance includes defining your membership and the surrounding community ecosystem, mapping stakeholders and creating a risk-free environment, which stimulates learning and innovation. You will want to proactively steer engagement and get senior and middle management involved.
Make sure you co-create structures and working procedures that lead to co-ownership and make sense with regards to your vision.
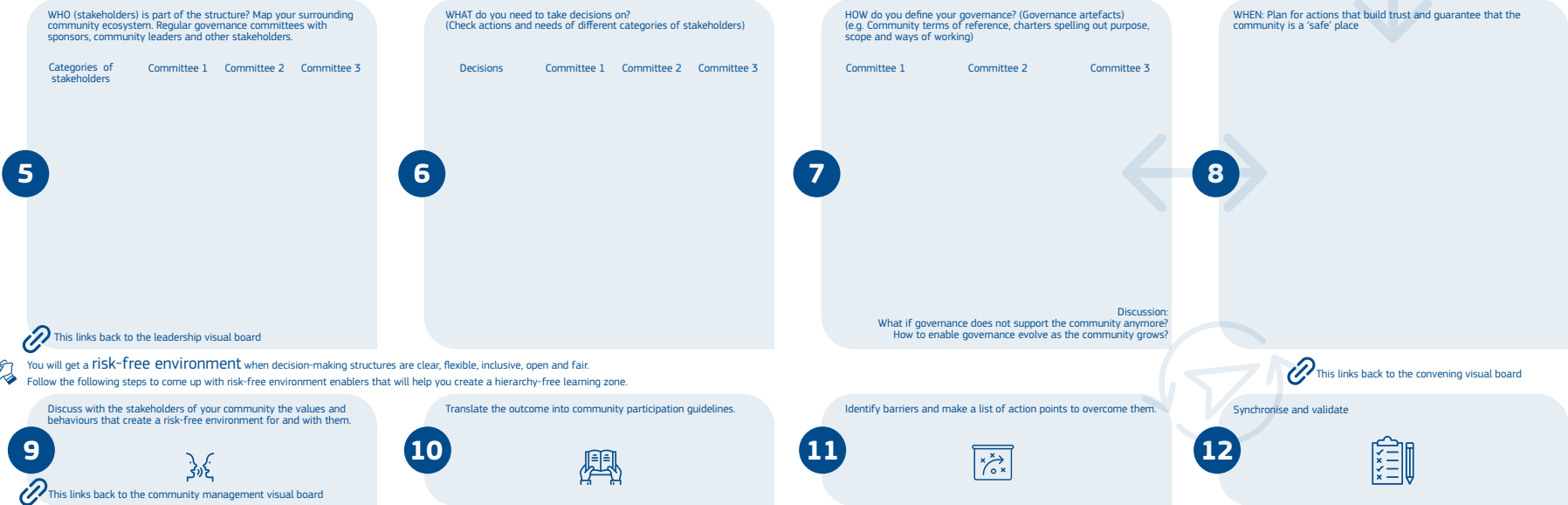
Membership and Stakeholder Mapping

Risk-Free Environment

Stakeholder mapping
Do you know your (future) members' needs?
Challenge — Define and understand who your members are and what they need.

1 — Who are the actors involved in or impacted by the community?

2 — Categorise the various stakeholders by clustering them

3 — Prioritize the categories of stakeholders by using the influence/interest matrix

High / Low — interest
- Show consideration and keep informed
- Reach key players and engage closely
- Monitor stakeholders and keep regular minimum contact
- Keep satisfied and meet their needs
Low / High — influence

4 — Assign roles and responsibilities by using the stakeholder responsibility assignment matrix

Categories of stakeholders
- **R** Make recommendations
- **A** Establish agreement
- **P** Perform and execute
- **I** Provide necessary inputs
- **D** Make centralised decisions and enforce them

Governance
Once you have a clear overview of who your stakeholders are, you need to figure out how you will work together, take decisions and act on what you have decided together. Define the community's operation model. Does it fit the community's needs, purpose and values? What are the key elements you have put in place to build trust and guarantee a safe place?

Challenge: Design a governance structure that fits the community purpose, needs, values; that encourages taking initative and provides, efficient ways to make the community work for all members and serves the organisation's goals. Spell out "how we take decisions"

5 — WHO (stakeholders) is part of the structure? Map your surrounding community ecosystem. Regular governance committees with sponsors, community leaders and other stakeholders.

Categories of stakeholders | Committee 1 | Committee 2 | Committee 3

This links back to the leadership visual board

6 — WHAT do you need to take decisions on? (Check actions and needs of different categories of stakeholders)

Decisions | Committee 1 | Committee 2 | Committee 3

7 — HOW do you define your governance? (Governance artefacts) (e.g. Community terms of reference, charters spelling out purpose, scope and ways of working)

Committee 1 | Committee 2 | Committee 3

Discussion:
What if governance does not support the community anymore?
How to enable governance evolve as the community grows?

8 — WHEN: Plan for actions that build trust and guarantee that the community is a 'safe' place

This links back to the convening visual board

You will get a **risk-free environment** when decision-making structures are clear, flexible, inclusive, open and fair.
Follow the following steps to come up with risk-free environment enablers that will help you create a hierarchy-free learning zone.

9 — Discuss with the stakeholders of your community the values and behaviours that create a risk-free environment for and with them.

This links back to the community management visual board

10 — Translate the outcome into community participation guidelines.

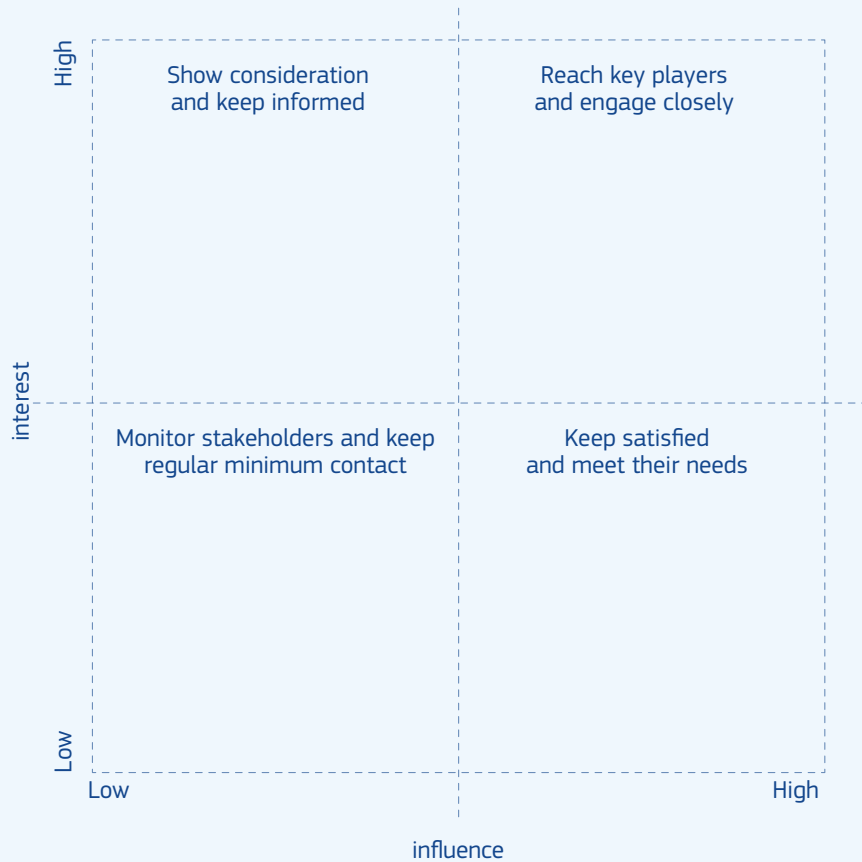**11** — Identify barriers and make a list of action points to overcome them.

12 — Synchronise and validate

Communities of Practice Playbook | Governance

Stakeholder
mapping

1 Who are the actors involved in or impacted by the community?

2 Categorise the various stakeholders by clustering them

Communities of Practice Playbook | Governance

3 Prioritize the categories of stakeholders by using the influence/interest matrix

High	Show consideration and keep informed	Reach key players and engage closely
	Monitor stakeholders and keep regular minimum contact	Keep satisfied and meet their needs
Low		
	Low	High

interest

influence

4 Assign roles and responsibilities by using the stakeholder responsibility assignment matrix

Categories of stakeholders

R Make recommendations

A Establish agreement

P Perform and execute

i Provide necessary inputs

D Make centralised decisions and enforce them

Communities of Practice Playbook | Governance

Governance

5 WHO (stakeholders) is part of the structure? Map your surrounding community ecosystem. Regular governance committees with sponsors, community leaders and other stakeholders.

Categories of stakeholders	Committee 1	Committee 2	Committee 3

6 WHAT do you need to take decisions on? (Check personas' actions and needs)

----

7 HOW do you define your governance? (Governance artefacts) (e.g. Community terms of reference, charters spelling out purpose, scope and ways of working)

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8 WHEN: Plan for actions that build trust and guarantee that the community is a 'safe' place

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Communities of Practice Playbook | Governance

9   Discuss with the stakeholders of your community the values and behaviours that create a risk-free environment for and with them.

10   Translate the outcome into community participation guidelines.

11   Identify barriers and make a list of action points to overcome them.

3.4. Leadership

The components of community leadership are twofold: (1) leadership from **inside** the community of practice and (2) support, investment and participation from **senior and middle management**, the **sponsor** and the alliance of sponsors in the field of your community of practice.

In our understanding of community leadership, everyone is a leader when they take initiative, bring people together and take responsibility. A core group of community members taking the lead and steering the community has been identified as a key element for success in our research. The community appreciates and values their input.

Identify your community leaders and seek strong leadership participation. This section is very much linked to vision and community management (see Sections 3.2 and 3.7, respectively) and is about identifying the core group, the community leaders and other sponsors and influencers with authority in the practice. The members of the core group together work out how they will steer the community towards its vision and agree on what the community will commit to through the set governance processes.
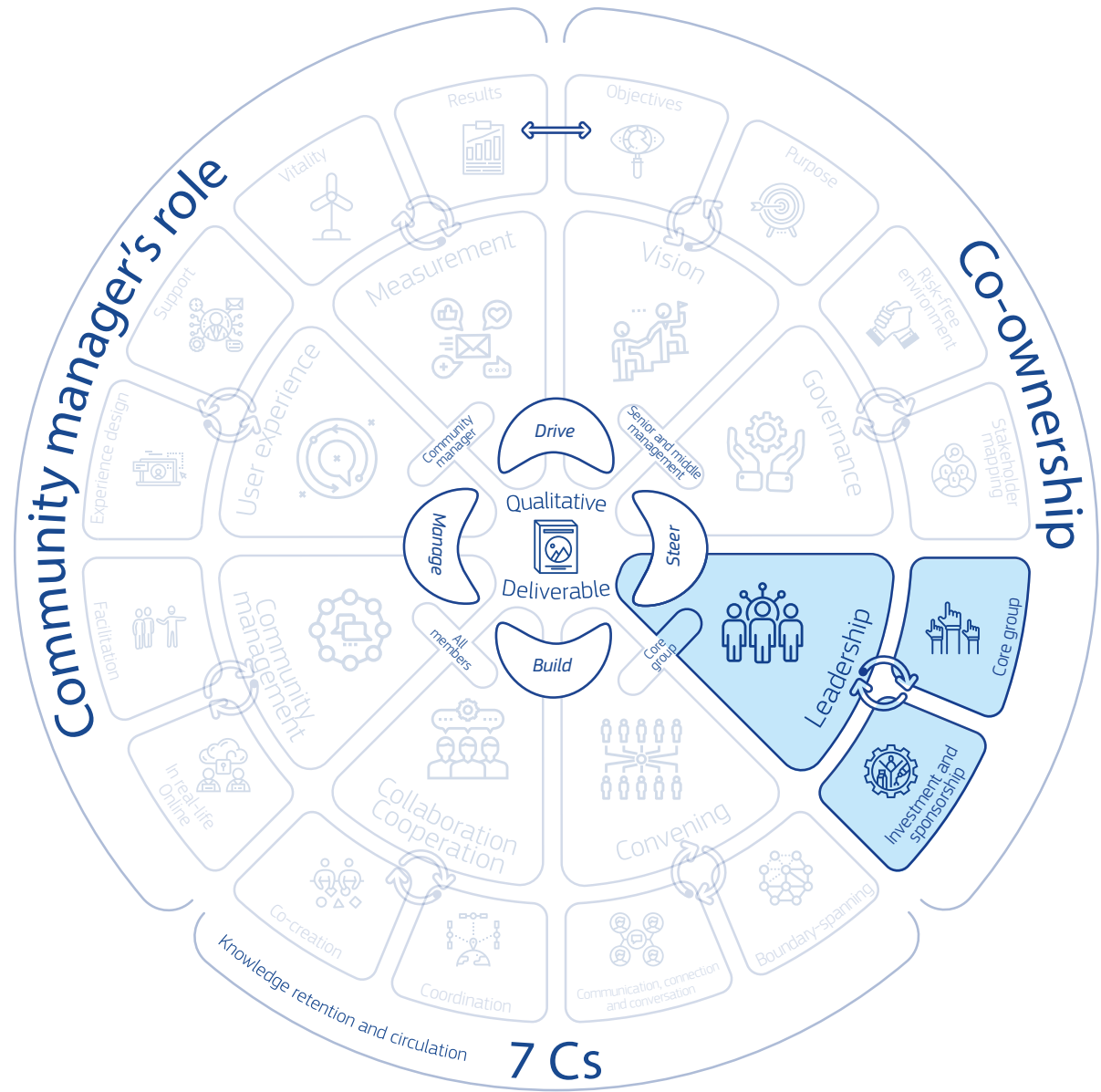
You will learn:

- how to identify your core group, leadership and sponsorship;
- how to map and situate community leadership stakeholders in your community ecosystem;
- how to form responsive and inclusive leadership structures.

3.4.1. INVESTMENT AND SPONSORSHIP

A community (of practice) needs leaders and sponsor(s) who proactively advocate for its cause, promote its results and impact, and invest time and resources in it. They need to show support for the community manager and the core group, and visibly acknowledge the community impact.

Our research shows that, for most communities of practice, the active participation of senior and middle management represents a critical success factor that needs to be increased. Sponsors' active participation shows that the community is relevant to the organisation and is led by example. This strengthens community cohesion and members' engagement and commitment to delivering on shared goals.

Before working with leaders from both within and outside the community and the organisation, it is important to take the time to map the leadership stakeholders that you need for your community.

Leadership stakeholder mapping
The core group works out and aligns around **a leadership stakeholder mapping.** Leadership stakeholder mapping will help you to identify:
- if you have all the people you need;
- possible other members of the core group;
- other influencers with authority in the practice
- the leaders who can bring resources into the community.

In the leadership stakeholder mapping, go through the following steps and questions

1. Who are the leaders who we need for supporting our community? Identify potential influencers, contributors, investors and sponsors. Form an alliance of sponsors and influential leaders.

2. As a core group, what support do you need from management? Define your needs and expectations from them.

3. Thinking of the leadership identified to support your community (of practice), try to define their expectations.

4. What are the ecosystems that are emerging? Identify ecosystems by making connections between the various leaders who you need for the community to become stronger.

5. As a core group, who do you need to reach out to and engage with? What ecosystems do you need to connect to?

6. Who is in the core group? Who are we missing? Who do we need?

Leadership roles
We have identified three main roles that community leaders can take on and their corresponding activities.

Driver
- Set the purpose/mission of the community.
- Actively participate in and steer community governance.
- Give the green light to the community manager to start the community (of practice) (e.g. steer or be part of the community governance committee).
- Ensure alignment with the organisation's vision and business goals and with any organisational changes.

Promoter
- Advocate for the community's *raison d'être* and for benefits that it brings to the organisation.
- Make the community visible in the day-to-day workings and operations of the organisation (e.g. acknowledge the community work and results in briefings, meetings and other communications).
- Raise the profile, value and importance of the community among senior leaders.

- Find ways to feed the community knowledge assets into formal processes (i.e. work programmes) and knowledge assets of the organisation (reports, studies, etc.).

Investor
- Invest in the community with organisational resources including by appointing one or two community manager(s).
- Actively participate in the community endeavours–'in real life' interactions and online.

Both the sponsor and the community manager fulfil the task of controlling whether or not the community effectively develops and shares good practices over a predetermined time.

Active participation of senior leaders and middle managers is a critical success factor, as it motivates the members and shows that the community (of practice) is recognised and integrated in the organisation's processes, as an important informal structure of the organisation.

To encourage active leadership, create and plan opportunities for senior management to actively participate in the community (of practice).

How do you get leaders involved and create participation opportunities? This needs to be part of the engagement roadmap, which you will develop under Section 3.7, 'Community management'.

3.4.2. YOUR COMMUNITY CORE GROUP

Who is in your core group?

The core group is a small group of community members who steer the development of the community and make sure the community workings lead to the achievement of its objectives and to delivering on the vision. Thus, the leadership of your community is shared seamlessly between several members who invest time and support in carrying out the role effectively. The community manager role is part of the core group and convenes the group on a regular basis.

You will need to identify **who needs to be in the core group**. You want to be sure to include experienced practitioners in the community field, influencers with authority in the practice, members or leaders of other similar communities or networks, but also try to include enthusiastic practitioners with a drive to share knowledge and to learn. You will need to make sure that there is broad coverage in terms of knowledge in the core group membership and that you are aware of any gaps in knowledge and practice.

As a core group, ask yourselves the following questions.
- **Who are we as a core group?** Who do we need in our group? Given the leadership mapping, are we missing anyone? Are the members we have sufficient? Are we an acceptable core group?
- **Who is responsible for what?**
- **What are our needs and expectations from one another?**
- **How do we work together as a core group to steer the community?**
- **What do you think is the best way of working for the community?**

Once you are clear about **who** you are as a core group and you have clearly defined roles (who is doing what), please refer to Section 3.7, 'Community management', for designing the **community engagement roadmap** together with the community manager.

Make sure

that there is balanced coverage in your core group membership to allow you to build on your governance model.

Ask yourself if:

- [ ] you know who you need in your core group (e.g. who is missing?) and who you need for which responsibilities and resources (i.e. potential influencers, contributors, investors and sponsors and alliances thereof for your community);

- [ ] as a core group, you know who you need to reach out to and engage with (e.g. have you mapped the emerging ecosystems you need to connect to?);

- [ ] as a core group, you have ways of working, rituals and practices in place for working together to steer the community.

Communities of Practice Playbook | Leadership

The components of community leadership are twofold: (1) leadership from inside the community of practice and (2) support, investment and participation from senior and middle management, the sponsor and the alliance of sponsors in the field of your community of practice.

In our understanding of community leadership, everyone is a leader when they take initiative, bring people together and take responsibility.

A core group of community members taking the lead and steering the community has been identified as a key element for success in our research. The community appreciates and values their input.

Make sure that there is balanced coverage in your core group membership to allow you to build on your governance model.

Leadership

Investment and sponsorship

Core group

1 Map and place all leaders and define their (possible) role for the community

○ Leader

◐ Influencer

⊖ Driver

⌒ Promoter

⊕ Investor

◎ Contributor

2 Define what you expect from them

3 Define what they expect from you

External to the organisation

4 Identify community ecosystems
Visually create connections to identify ecosystems among those leaders
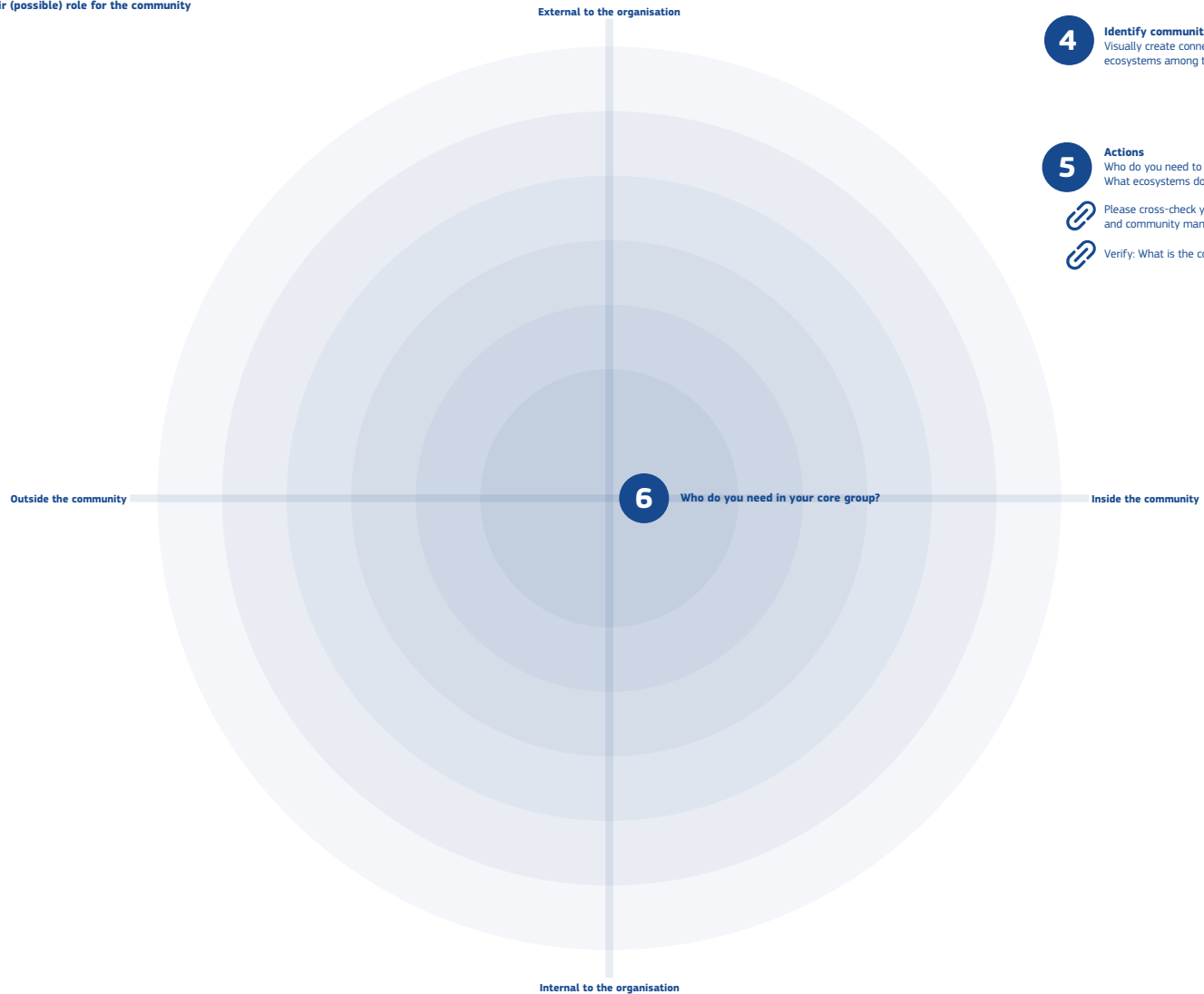
5 Actions
Who do you need to engage with?
What ecosystems do you need to connect with?

🔗 Please cross-check your inputs with the governance and community management visual boards

🔗 Verify: What is the community management's role?

Outside the community

6 Who do you need in your core group?

Inside the community

Internal to the organisation

Communities of Practice Playbook | Leadership

1 Map and place all leaders and define their (possible) role for the community
Driver, Promoter, Investor, Core group... **6**

External to the organisation
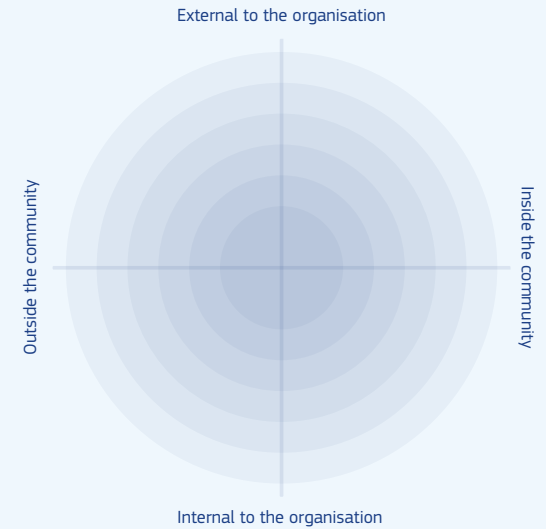
Outside the community   Inside the community

Internal to the organisation

2 Define what you expect from them

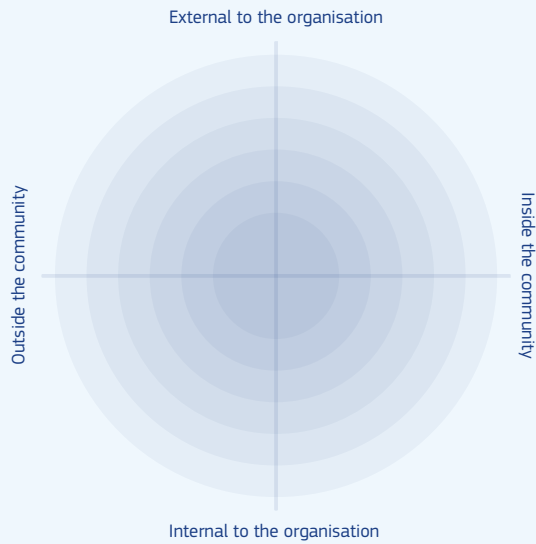**3** Define what they expect from you

![icon] **Communities of Practice Playbook | Leadership**

4 Identify community ecosystems
Visually create connections to identify ecosystems among those leaders

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External to the organisation

Outside the community | Inside the community

Internal to the organisation

5 Who do you need to engage with?
What ecosystems do you need to connect with?

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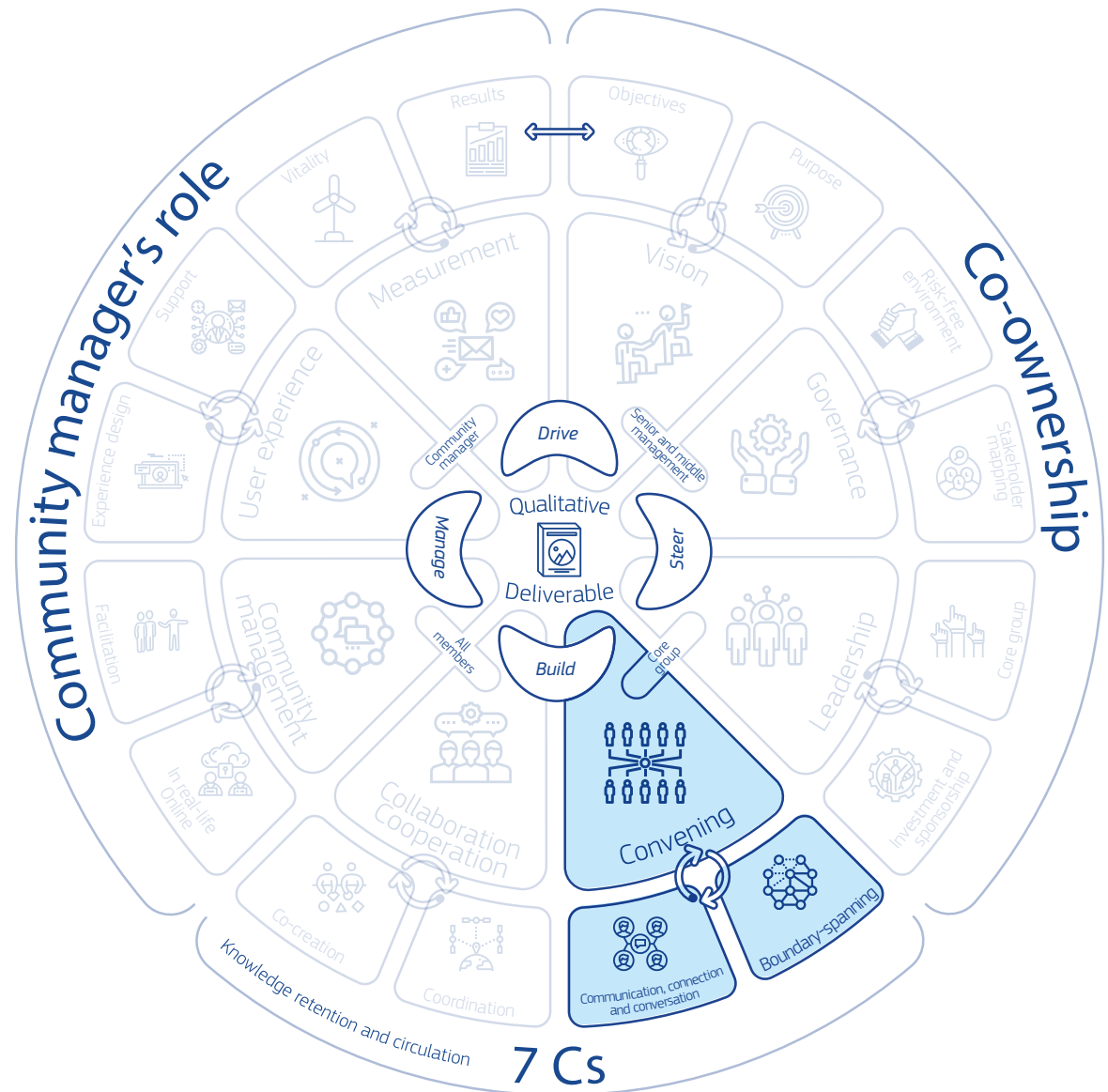..

3.5. Convening

Convening is the art of bringing the community (of practice) and relevant stakeholders together to connect members and engage them in meaningful conversations. The diversity of a community and a risk-free and inclusive environment help develop conversations and engage members. To learn how to nurture a risk-free trusted environment, which is needed for meaningful convening, please see Sections 3.3, 'Governance', and 3.7, 'Community management'.

Convening the community on a regular basis keeps it alive and thriving. It involves **communicating with members**, **connecting** them and encouraging **conversations**.

It also implies **boundary-spanning** activities (i.e. linking the community with external sources of knowledge), which involve regularly injecting external expertise on the community of practice into the community and ensuring access and connections to other networks.

Community manager's role

Co-ownership

7 Cs

Convening

Communication, connection and conversation

Boundary-spanning

You will learn:

- how to choose different convening methods and make them work for your community;
- how to design and bridge the gap between interactions within inside and outside the community;
- how to ensure community engagement based on a solid convening strategy built on conversation, connection, communication and boundary-spanning activities.

You will need to plan **what** you will do to bring the community together in a consistent way and to ensure that such convening is a continuous process rather than one-off, random interactions.

3.5.1. BUILD THE FOUNDATION: CONVENE TO CO-CREATE AND AGREE UPON PURPOSE, GOALS AND OBJECTIVES

What kind of convening opportunities/events fit with your community in general?
Such opportunities need to match the community's objectives, governance and leadership style.

- **It is fundamental to start with convening your community around co-creating and aligning on the community's purpose**, **goals** and **objectives**. To learn more about how to do so, see Section 3.2, 'Vision'.
- For such co-creation exercise you ideally **connect** and create **conversations** with community members and other stakeholders regarding the community's purpose, goals and objectives; you then need to **communicate** those so that everybody is on board and aligned in their thinking. The next step is **communicating** about your community to your community ecosystem.
- Creating and encouraging connections, conversations and communication is summarised in the **3C model** (**conversation, connections and communication**), as explained in the following section; this model guides your convening opportunities.

Community life cycle overview – what stage are you at?
Work with the visual board by looking first into building the foundation as described under Section 3.5.1. Once you have done so, determine what stage your community (of practice) is at (see examples of each stage below) and work through the 3C model from the perspective of this stage.

The community life cycle overview – examples of each stage.
- A **stage one** (emerging) community (i.e. a **community in its early stage** (a hub-like community)), would need to communicate a lot and have clear calls to actions; sponsor- and leadership-driven communication is important and regularity of communications is key. The community manager, together with the core group, is predominantly an **organiser and a catalyst**.
- A **stage two** community (i.e. an **existing structured community** (a platform-like community)), would feature strong conversations, with members strongly connected. However, the community core group and community manager would still need to take action to convene community gatherings. The community manager (together with the core group) is predominantly a **convener** of the core group, of the community or of boundary-spanning opportunities, and is also a **synthesiser**, distilling discussions into valuable community knowledge assets.
- A **stage three** community (i.e. a **self-organised sustainable community** (a service-like community)), would gather and organise itself in a fluid and rapid way. To be recognised, such a community needs to communicate about what it does to the outside world. Communication is still important but it is happening in a more formalised way. Here, the community manager, together with the core group, is predominantly a **formaliser**. This type of community functions like a 'fans' or 'family' community.

See more about the community manager's role in Section 3.7, 'Community management' and learn more about the community (of practice) typology – **hub**, **platform** – and **service-like communities** – in the 'Additional resources' Section.

3.5.2. CONVERSATION

To create and engage members in conversations, you will need to build curiosity and raise members' interest in learning from and with their peers. To learn how to engage your community in and combine real-time and synchronous and asynchronous conversations, see Section 3.7, 'Community management'. The present section focuses on the 'what' (i.e. on the substance and nature of convening), rather than on the 'how'.

1. **What** do you plan and organise for **formal** and **informal** convening opportunities? For example, do you allow subcommunities to grow? And how do you create links between such subcommunities?
    For example:
    Convening in small groups/subcommunities could suit your community interaction style very well. Once a year these subcommunities are convened together. For other communities, meeting once or twice a year fits their objectives and style better. This may mean organising a conference with a lot of workshops; the communication style would be more of a marketing style (promoting is important); during the conference you will need to organise networking opportunities for developing connections and for creating conversations (e.g. world cafes with breakout rooms)

2. What methodology (actions and practices) do you have in place to distil discussions into valuable **community knowledge assets?**

3. What specific tasks can leadership (the sponsor and core group) and the community manager undertake to praise small group conversations? And how can this be built on?

3.5.3. CONNECTION

1. **What will you put in place to create a welcoming, inclusive and diverse environment?**
Examples:
Connect people by putting in place a strong inclusive onboarding ritual, such as short getting-started guides, a forum thread such as a virtual ice breaker or a newcomers' blogging space.

2. **What actions will you undertake that connect members to each other and create links?**

3. **What actions will you take to increase connections between members to create a community feeling?**
For example:
You could organise weekly catch-ups, randomised coffee meetings between different members, walking meetings when possible, asynchronous check-ins, etc. In post-COVID-19 times, you may need to re-think the way you create networking opportunities and how to build connections online. See how you can do this under Section 3.7, 'Community management'.

3.5.4. COMMUNICATION

1. **What will you communicate to members, to the community ecosystem and beyond?**
You will need to understand the needs of your members and of your community ecosystem, namely what they want and need from the community and what makes them sit upright and make the effort to contribute to your community. For this, we recommend you get to understand your members and the ecosystem in which the community functions, and work with personas. If you have not done this, see Sections 3.3, 'Governance', and 3.8, 'User experience', for guidance.

2. **What are the appropriate communication channels?**
Find the right communication channels for your audience (e.g. where will you host your community online?). What type of communication do you need for your community? Is your community focused more on collaborating on documents or on content sourcing for meetings, or do you need to focus more on opportunities for exchange and ideation? Use a mix of channels, if necessary, and make it clear which tool you will use for which purpose.

3. **What is good communication?**
Learn about the best ways to reach your audience (online) – calls to action, keywords, catchy titles, formatting text, your community elevator's pitch – in Section 3.2, 'Vision'.

3.5.5. BOUNDARY-SPANNING ACTIVITIES

Evidence suggests that knowledge related to the community's practice is regularly gained from practice-related experts outside the community (of practice). These experts can be from other organisations or can be part of the organisation to which the community belongs. They can be either practitioners or academics. Access to intra- or interorganisational networks not only increases members' active participation but also ensures members' diversity.

A diversity of members' backgrounds and locations is desirable, but this can also bring diversity in expectations and needs. The community's value proposition and pitch needs to be defined for different personas. For instance, what is useful for a scientist may not be useful for a policymaker. For example, the answer to 'what does the community bring to the table and why is it important?' might differ from persona to persona.

1. **How do you regularly feed your community with external expertise and promote access to other networks?**
Find out what kind of external expertise you need in Section 3.6, 'Collaboration and cooperation', and where you can find this expertise, as identified in stakeholder mapping, in Section 3.3, 'Governance'.

2. **What interactions are you planning to initiate beyond the community boundaries with external stakeholders?**

3. **How do you use the support from community governance, leadership and sponsorship to carry out boundary-spanning activities?**

3.5.6. HOW TO DESIGN YOUR CONVENING STRATEGY

Your convening strategy will touch on four main areas (these are interdependent, but are also related to one another): **conversation**, **connection**, **communication** and **boundary-spanning** activities.

Criteria
Depending on your community maturity stage, you will design your convening actions based on the following criteria:

- including both **formal** and **informal** ways to convene and lead your community;
- ensuring **regularity** in various community gatherings;
- being **community** driven/**sponsor** driven;
- including both **internal** only and **boundary-spanning** (external to community) activities;
- determining **leadership/community managers' roles** – organiser, synthesiser or formaliser (see Section 3.7, 'Community management').

Make sure

to plan what you will do to bring the community together in a consistent way and to ensure that such convening is a continuous process rather than one-off, random interactions.

Ask yourself if:

☐ you know what kind of convening opportunities/events work for your community in general

☐ you have made (collective) sense of what formal and informal (boundary-spanning) convening opportunities you want to design to create and encourage connections, conversations and communication;

☐ you have in place a methodology (actions and practices) to distil conversations into valuable community knowledge assets.

Communities of Practice Playbook | Convening

Convening is the art of bringing the community (of practice) and relevant stakeholders together to connect members and engage them in meaningful conversations. The diversity of a community and a risk-free and inclusive environment help develop conversations and engage members.

To learn how to nurture a risk-free trusted environment, which is needed for meaningful convening, please see Sections 3.3, 'Governance', and 3.7, 'Community management'.

Convening

Convening the community on a regular basis keeps it alive and thriving. It involves communicating with members, connecting them and encouraging conversations. It also implies boundary-spanning activities (i.e. linking the community with external sources of knowledge), which involve regularly injecting external expertise on the community of practice into the community and ensuring access and connections to other networks.
Make sure to plan what you will do to bring the community together in a consistent way and to ensure that such convening is a continuous process rather than one-off, random interactions.

Communication, connection and conversation

Boundary-spanning

🔗 To learn how to nurture a risk-free, trusted environment,
please see the governance and community management visual boards.

🔗 To learn how to engage your community in and combine real-time, synchronous and asynchronous conversations,
please see the community management visual board.

3 Conversation | **4** Connection | **5** Communication | **6** Boundary-spanning activities

| Formal and informal convening activities | Actions and practices — Who is responsible? What resources are needed? | Formal and informal convening activities | Actions and practices — Who is responsible? What resources are needed? | What will you communicate... to and with members | to the community ecosystem and beyond | How do you regularly feed your community with external expertise and promote access to other networks? | Actions and practices — Who is responsible? What resources are needed? |

A stage three community, i.e. a self-organised sustainable (a service-like) community, would gather and organise itself in a fluid and rapid way. To be recognised, such a community needs to communicate about what it does to the outside world. Communication is still important but it is happening in a more formalised way. Here, the community manager (together with the core group) is predominantly a formaliser. This type of community functions like a 'fans' or 'family' community.

A stage two community, i.e. an existing structured community (a platform-like community), would feature strong conversations, with members strongly connected. However the community core group and community manager would still need to take action to convene community gatherings. The community manager (together with the core group) is predominantly a convenor of the core group, of the community, or of boundary-spanning opportunities, and is also a synthesiser, distilling discussions into valuable community knowledge assets.

A stage one (emerging) community, i.e. a community in its early stage (a hub-like community), would need to communicate a lot and have clear calls to actions; sponsor- and leadership-driven communication is important and regularity of communications is key. The community manager (together with the core group) is predominantly an organiser and a catalyst.

Build the foundation :
Convene to co-create and align members on purpose, goals and the objectives.

🔗 *To learn more about how to do that, please see the vision visual board.*

2 What kind of convening opportunities/events fit with your community in general?

1 At what stage is your community?

🔗 To create and engage members in conversations, you need to build curiosity and raise members' interest in learning from their peers.
For more information, see the collaboration and coordination visual board.

Communities of Practice Playbook | Convening

1 At what stage is your community?

2 What kind of convening opportunities/events fit with your community in general?

Communities of Practice Playbook | Convening

3 Formal and informal convening activities
Actions and practices. Who is responsible? What resources are needed?

Conversation

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4 Formal and informal convening activities
Actions and practices. Who is responsible? What resources are needed?

Connection

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5 What will you communicate to and with members?
What will you communicate to the community ecosystem and beyond?

Communication

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6 How do you regularly feed your community with external expertise and promote access to other networks?
Actions and practices. Who is responsible? What resources are needed?

Boundary-spanning activities

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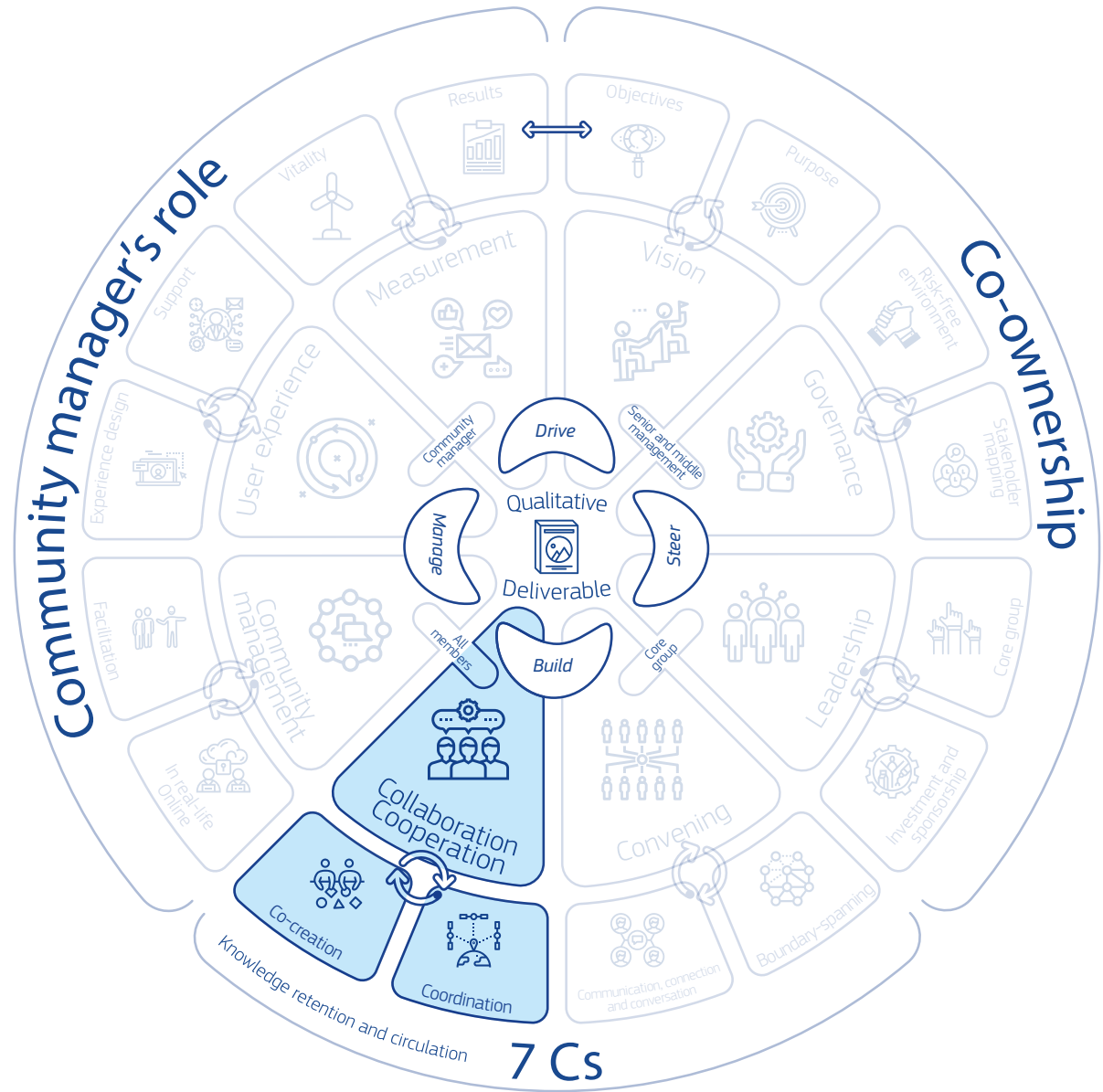
3.6. Collaboration and cooperation

Our research shows that the more a community creates something concrete together, the more engaged it is. This co-creation of a tangible community asset/qualitative deliverable requires effective coordination of different cooperation and collaboration processes. Engaging your community in delivering a concrete outcome implies carrying out effective **collaboration**, **cooperation**, **coordination** and **co-creation** practices and activities.

Collaboration is working together to create something new, a shared outcome, in support of a shared vision, shared goals or a shared purpose. The glue is the shared vision.

Cooperation happens when members and other stakeholders strategically choose to work separately on different aspects of one issue and share knowledge so that each party can accomplish their part in support of a shared outcome. Cooperation is important in networks where individuals exchange relevant knowledge in support of each other's goals, rather than a shared goal. Something new may be achieved as a result, but arises from the individual, not collective effort.

You will learn:

- how to combine and apply methods of co-creation and **coordination** strategically;
- how to design a cooperation and collaboration roadmap for your community;
- how to enrich the common practice and deliver on your community's objectives by applying collaboration processes and methods.

3.6.1 HOW DO YOU MAKE MEMBERS COLLABORATE AND/ OR COOPERATE TO ENRICH THE COMMON PRACTICE AND PRODUCE KNOWLEDGE ASSETS AND QUALITATIVE DELIVERABLES TOGETHER?

You **cooperate** with different community members and stakeholders outside the community boundaries to collect different insights, perspectives and inputs to feed into the community all of the knowledge needed for the **co-creation** of a new knowledge asset (e.g. a report, an inventory or a roadmap).

Back in the **collaboration** space of your community, you integrate this new piece of knowledge into an asset together with the community members. This reflects the shared vision and goal and advances the common practice defined in the governance of your community operational model.

You **coordinate** different pieces of work to get the co-created knowledge asset presented in the way that the community sponsor requires.

What does this mean concretely?
Ask yourself the seven questions in the following sections to work through the collaboration and cooperation interactive visual board.

3.6.2. CO-CREATE A QUALITATIVE DELIVERABLE

1. What content needs to be curated/synthesised/co-created?
2. What kind of expertise related to the practice do you need to co-create a community knowledge asset/product/deliverable?
3. What methods will you use to succeed in co-creating a community deliverable (e.g. ideation, brain writing, crowdsourcing, calls for papers/contributions, sense-making)?
4. How do you make sure that co-creation takes place from beginning to end and leads to a concrete and shared outcome?
5. In the co-creation exercise, it is important to ask yourself the following question: what can you do for others and what can others do for you?

Define roles, steps and the consultation/validation process
Apply your governance and operational model to the co-creation process. It is important that everyone knows what is expected of them. During and after going through the co-creation steps, ask yourself the following questions:
- With whom, how and when will you need to collaborate?
- With whom, how and when will you need to cooperate?
- In what ways will your stakeholders' goals/needs be addressed through collaborating and cooperating with your community?

See Section 3.7, 'Community management', for guidance on synchronous/ asynchronous co-creation and see Section 3.5, 'Convening', for guidance on how to convene to co-create and find agreement on the community's goals, purpose and objectives.

3.6.3. COORDINATE (MEMBERS') WORK

6. How do you coordinate members' work to deliver on the objectives agreed?
   - Define with members the best governance structures for coordination. Who is doing what?
   - Get inspiration from others, both within and outside your organisation.
   - Organise peer learning sessions. Check that this is in line with the governance structures you have come up with under Section 3.3, 'Governance'.
7. What are the processes and methods you need to put in place for coordination

and a sustained action plan? The challenge here is how you build and drive a sustained action plan leading to results (e.g. support notifications, a timeline and task and project management).

See Section 3.8, 'User experience', for the tools you may need for digital coordination.

3.6.4. EXAMPLE OF COLLABORATION/COOPERATION/ COORDINATION/CO-CREATION

working together on shared goals or purpose

working together on the same thing but with different goals or motivation

Producing a handbook on the practice of a community
Your sponsor/manager asks you to produce a handbook on the practice of a community (of practice). Writing such a report is complicated, because the topic is so vast; one person could not do it alone.

Therefore, you may want to co-create it with your community. For this, you would need to craft a **co-creation** plan (following the questions under Section 3.6.1). One of the actions could be that you need to organise a workshop, during which you would collect inputs for and different perspectives on the report. To organise that workshop, you would need external stakeholders to **cooperate** with. You find two participatory leadership practitioners to help you.

While they are helping you to facilitate the **co-creation** exercise, it gives them an opportunity to practice and to showcase the participatory leadership practice to other colleagues in the European Commission. This is a win–win situation. Once the workshop is done, you will return to the collaboration space.

At this stage, you would need to make sense of all of the inputs and **coordinate** the steps that follow and the consultation/validation processes. Another action could be that you need some advice to solve a problem you came across in the process. Therefore, you would need to **cooperate** with an expert to solve that problem before you continued the **collaboration** exercise of **co-creation**. Therefore, in this scenario, you cooperated with people within and outside your community to gain insights, collaborated with the community to co-create the shared outcome – the report – and coordinated all of the cooperation and collaboration actions to get the report done.

Make sure

that the co-creation processes take place from beginning to end and that they lead to a concrete and shared outcome.

Ask yourself if:

☐ you know/have agreed upon **what content** needs to be curated/synthesised/co-created;

☐ you know/have agreed upon **how** to make members collaborate and/or cooperate to enrich the common practice and to produce knowledge assets and qualitative deliverables together;

☐ you know/have agreed upon **what kind of expertise** related to the practice you need from within or outside your community and organisation to co-create community knowledge assets/deliverables.

Communities of Practice Playbook | Collaboration and cooperation

Collaboration Cooperation

Our research shows that the more a community creates something concrete together, the more engaged it is. This co-creation of a tangible community asset / qualitative deliverable requires effective coordination of different cooperation and collaboration processes. Engaging your community in delivering a concrete outcome implies carrying out effective collaboration, cooperation, coordination and co-creation practices and activities.

Collaboration is working together to create something new, a shared outcome, in support of a shared vision, shared goals or a shared purpose. The glue is the shared vision.

Cooperation happens when members and other stakeholders strategically choose to work separately on different aspects of one issue and share knowledge so that each party can accomplish their part in support of a shared outcome. Cooperation is important in networks where individuals exchange relevant knowledge in support of each other's goals, rather than a shared goal. Something new may be achieved as a result, but arises from the individual, not collective effort.

Make sure that the co-creation processes take place from beginning to end and that they lead to a concrete and shared outcome.

Coordination

Co-creation

CO-CREATE a qualitative deliverable

1 **What** content needs to be curated/synthesised/co-created?

2 **What** kind of expertise related to the practice do you need in order to co-create a community knowledge asset/products/deliverable?

3 **What** methods will you use to succeed in co-creating a community deliverable?

4 **How** do you make sure that the co-creation takes place from the beginning to the end and leads to a concrete amd shared outcome?

5 **What** can you do for others and what can others do for you?

Collaboration

Based on the steps 1 to 5, fill in the roles and steps on Collaboration and cooperation (**Who**, **When**, **How**)
Define roles, steps, consultation/validation process. Apply the governance to co-creation. It is important that everyone knows what is expected from them.

Collaboration is working together to create something new, a shared outcome, in support of a shared vision, goal or purpose. The glue is the shared vision.
Cooperation happens when members and other stakeholders strategically choose to work separately on different aspects of one issue and they share knowledge so that each party can accomplish their part in support of a shared outcome.

6 Cooperation is important in networks where individuals exchange relevant knowledge in support of each other's goals, rather than a shared goal. Something new may be achieved as a result, but it arises from the individual, not from collective effort.

See more information on the community management visual board for synchronous/asynchronous co-creation and the convening visual board for how to convene around that co-creation.

Cooperation

7 How do you coordinate members' work towards delivering on the objectives agreed?

Check that this is in line with the governance structures you have come up with.

COORDINATE (members') work

What are the processes and methods you need to put in place for coordination and a sustained action plan?

8 See the user experience visual board for the tools you may need for digital coordination.

Communities of Practice Playbook | Collaboration and cooperation

Co-create
a qualitative
deliverable

1 **What** content needs to be curated/synthesised/co-created?

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2 **What** kind of expertise related to the practice do you need in order to co-create a community knowledge asset/products/deliverable?

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3 **What** methods will you use to succeed in co-creating a community deliverable?

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4 **How** do you make sure that the co-creation takes place from the beginning to the end and leads to a concrete amd shared outcome?

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Communities of Practice Playbook | Collaboration and cooperation

5 **What** can you do for others and what can others do for you?

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6 Based on the steps 1 to 5, fill in the roles and steps on Collaboration and cooperation (Who, When, How). Define roles, steps, consultation/validation process. Apply the governance to co-creation.
It is important that everyone knows what is expected from them.

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Coordinate (members') work

7 How do you coordinate members' work towards delivering on the objectives agreed?

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8 What are the processes and methods you need to put in place for coordination and a sustained action plan?

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3.7. Community management

A community cannot function without a community manager, just like a wheel hardly rolls without oil. We have identified three main roles that a community manager needs to take on: (1) the organiser, (2) the convener and catalyst and (3) the synthesiser, knowledge manager or broker.

The community manager's tasks also focus on facilitation and strategies to combine and integrate 'in real life', online, synchronous and asynchronous interactions.

Although in all other areas of the *Communities of Practice Success Wheel,* leaders, the core group and/or members play an important role, there are three areas that mainly belong to the domain of the community manager: **community management**, **user experience** and **measurement**.

Community management tasks are strongly linked to all other community operation areas, in particular to governance, leadership, collaboration and cooperation, and convening.

You will learn:

- how to facilitate your community life and interactions by combining online, 'in real life', asynchronous and synchronous ways of working;
- how to identify and fulfil different community management roles: organiser, convener/catalyst and synthesiser/knowledge manager or broker;
- how to co-create a community engagement roadmap.

This section covers the main roles and tasks of a community manager; these are strongly linked to the activities that you defined in Section 3.5, 'Convening'. It also focuses on strategies to combine and integrate 'in real life', online, synchronous and asynchronous interactions. This section also proposes a tool for **creative scenario building** that will help you to develop strategies for community development and to find the right tools to use and optimise user experience.

3.7.1. THE COMMUNITY MANAGER'S ROLE

The **prerequisite** here is that the community has a credible community manager (CM) in place, who has dedicated time and support to carry out the role effectively. Community managers have a mandate, and their roles and tasks are officially recognised as being part of their job description. With time and experience, the community manager's performance is integrated into the appraisal process; peers recognise, appreciate and value the community manager's input and their leadership/facilitation activities.

You should answer the following three questions in relation to your community (of practice).

1. Does your community manager have a clear mandate and consequently official recognition to lead the community? Is it clear to the community manager how much time can be spent on leading the community)?
2. What roles and tasks will the community manager(s) perform and what is expected of them?
3. How is the community manager's performance included in the appraisal?

First, we invite you to consider the different roles that the community manager has to take on in order to define various tasks and related activities. You will then be able to put these roles in the right place on the engagement roadmap.

The community manager's roles and the related tasks do not have to be performed by the community manager(s) only. We recommend that community management tasks are also taken up by community leaders who are members of the core group – in coordination with the community manager. This increases the co-ownership of community leadership.

ROLE	ORGANISER	CONVENER/CATALYST	SYNTHESISER/KNOWLEDGE MANAGER/BROKER
Description	As an organiser, the community manager drives interaction opportunities for members within the community and the community's ecosystem. The community manager can request to participate in an event or respond to a challenge or question. Especially in the early stages of a community, the community manager is predominantly an organiser, although this role is not to be understood as an event planner. While a community is emerging, community management focuses on regular communication with existing and new members of the community. The community manager uses clear calls to action that the community understands and invites members to participate. It is important that communication is driven by both sponsors and leadership and that there is regularity. The community manager organises interactions at all levels. The community manager makes use of the governance structures in place to develop the community and drive it towards achieving its goals and delivering on its objectives. According to research, it is essential that a community manager is supported by a core group. In the beginning, the community manager builds and steers the core group. For example, (s)he calls for recurring meetings with the core group to design and agree together on community events, brainstorm on community development strategy, identify and organise boundary-spanning activities, etc. While building the community, the community managers are encouraged to 'loosen ownership' and make changes to move towards co-ownership with the core group in order to let the community grow and become more mature.	As a convener and catalyst, the community manager steers and triggers enthusiasm and energy in the community. The community manager processes the community's complexity and identifies all of the opportunities that are beneficial to the community vision within the mapped stakeholder environment. The community manager connects people and explicit knowledge, facilitates and cross-pollinates ideas and stewards knowledge. The community manager weaves the community fabric. This role is very much needed to keep a community resilient but also to create breakthroughs of excellence. As a convener, the community manager brings the community (and relevant stakeholders) together to connect members and engage them in meaningful conversations. Through such conversations, the community manager creates trust, honours and encourages diversity and cultivates a risk-free and inclusive environment.	As a synthesiser and knowledge manager/broker, the community manager distils discussions into valued knowledge assets. These become essential reading for all members and are the source of other products, guides and checklists for wider use. The community manager engages the community and sponsors to identify, share and make knowledge re-usable. The community manager puts mechanisms for capturing and sharing knowledge in place (including live and virtual events). The community manager gives the community legs (i.e. connects the community to the organisation's business goals) and demonstrates value for business through metrics, stories and community deliverables relevant to the organisation's business goals.

Questions to ask	• How do you organise community leadership interventions – are they both sponsor and core group driven?
	• What mechanisms/rituals do you put in place to build and steer the core group?
	• How do you make sure the workings of your community are effective?
	• How do you follow the community goals and objectives?
	• How do you get everyone to share information and resources so that each member can offer their input to support the community objectives?
	• How do you get everybody involved and contributing their best knowledge? How do you identify ways to get individuals to exchange relevant information and resources in support of the community's practice?
	• What are your organiser's rituals?
		• How do you convene your community, within and beyond the community boundaries?
		• How do you identify the potential of members and ideas in your community? How do you encourage and 'fertilise' those ideas?
		• How do you facilitate the community to get the best out of dynamic social intelligence processes (bridging, brokering, connecting, stewarding)?
		• What does your engagement roadmap look like?
		• What rituals do you put in place to ensure:
		  – diversity
		  – inclusiveness
		  – a risk-free environment?
			• How do you distil content and exchanges into valued knowledge assets?
			• What are the mechanisms for capturing and sharing knowledge, including 'in real life' and virtual events?
			• How do you retain knowledge and apply lessons learned or integrate knowledge feedback?
			• How do you set roles and tasks: who does what?
			• How do you co-create knowledge assets together?
			• What do you use as digital coordination tools and methods and how do you use them?
			• What are your synthesiser's/knowledge manager's/broker's rituals?

Sections it is linked to	3.2, Vision 3.3, Governance 3.4, Leadership	3.2, Vision 3.3, Governance 3.5, Convening 3.6, Collaboration and cooperation	3.6, Collaboration and cooperation 3.8, User experience 3.9, Measurement

Ideas in action
- Craft an engagement roadmap for the next 3 to 6 months listing task-oriented activities and conversation topics.
- Be clear about where and when people can express their ideas and start conversations.
- Place your community into the organisational context. This is how it gains traction (see more about pitching your community's added value in Section 3.2, 'Vision').

3.7.2. FACILITATION

Facilitation is about getting the best out of the community's dynamic social processes to harness its collective intelligence. It is about cultivating a safe space for collaboration and cooperation, a climate of trust and a feeling of belonging.

"*Facilitation is the art of leading people through processes toward agreed-upon outcomes – in ways that elicit participation, ownership, and creativity from all involved. In simple terms, it includes those skills and practices involved in leading group process.*" (Sibbet 2021)

What facilitation methods do you need to get the best out of the community's dynamic social processes?
List the various methods you use in response to the following questions and continue to explore other innovative ways to facilitate (there is no right or wrong method, just practices to be tried out!).
- How do you make shared knowledge visible, circulated and acted upon?
- How do you build regularity?
- How do you onboard newcomers? How do you create onboarding rituals?
- How do you create a safe space and a risk-free environment?
- How do you stir engagement and willingness to share?

Look back at Sections 3.3, 'Governance', and 3.5, 'Convening', for further information.

The following can also provide inspiration:
- participatory leadership and the art of hosting approaches (see for example https://www.artofhosting.org/)
- design thinking and (collective) sense-making (see for example https://www.cognitive-edge.com/)
- co-creation methods and tools (see for example https://gamestorming.com/)
- visual collaboration
- techniques to mitigate adverse group dynamics and biases.

3.7.3. ENGAGEMENT ROADMAP

How will you combine and ensure the flow between 'in real life', online, asynchronous, and synchronous community interactions?

Along with the facilitation methods outlined above, it is useful to craft an **engagement roadmap**.

In point 3 of the visual board, you are invited to navigate through a '**virtuous square' of synchronous and asynchronous interactions** in order to define the facilitation activities in three steps:
1. *define* activities related to **the tasks** following the framework provided in the visual board;
2. *place* your **activities** in the following four areas: facilitated synchronous, autonomous asynchronous, 'in real life' and online;
3. *work* on combining your 'in real life' and online activities so that engagement becomes a flow and not a one-off random activity.

You will need to combine and ensure the flow between 'in real life', online, asynchronous and synchronous community interactions.

For every convening task, think of how you will use synchronous and asynchronous interactions by working with the virtuous square in the visual board.

- De-construct what used to be your 'in real life' meetings/gatherings/rituals and re-construct everything for the virtual and hybrid interactions. Find more guidance in your organisation on how to organise efficient online meetings.
- Learn how synchronous and asynchronous collaboration tools work and combine them for community engagement.

Make sure

that the community management mandate reflects the community's operational model needs and that the facilitation practices are aligned with the convening and collaboration/cooperation needs.

Ask yourself if:

☐ your community manager has a clear mandate, roles and tasks defined and is officially recognised to lead the community;

☐ your community management touches on and fulfils the following roles: organiser, convener/catalyst and synthesiser/knowledge manager or broker;

☐ you know/have agreed upon how you combine and ensure the flow between 'in real life', online, asynchronous and synchronous community interactions;

☐ you know/have agreed upon how you ensure that shared knowledge is visible, circulated and acted upon regularly.

Communities of Practice Playbook | Community management

Community management

A community cannot function without a community manager, just like a wheel hardly rolls without oil. We have identified three main roles that a community manager needs to take on: (1) the organiser, (2) the convener and catalyst and (3) the synthesiser, knowledge manager or broker. The community manager's tasks also focus on facilitation and strategies to combine and integrate 'in real-life', online, synchronous and asynchronous interactions.

Although in all other areas of the Communities of Practice Success Wheel, leaders, the core group and/or members play an important role, there are three areas that mainly belong to the domain of the community manager: community management, user experience and measurement.

Community management tasks are strongly linked to all other community operation areas, in particular to governance, leadership, collaboration and cooperation, and convening.

Make sure that the community management mandate reflects the community's operational model needs and that the facilitation practices are aligned with the convening and collaboration/cooperation needs.

In real life
Online

Facilitation

1 What is the community manager's mandate and is it officially recognised?

Please see leadership and governance visual boards

3 Navigate through the following virtuous square framework to design your community facilitation activities

Facilitation

facilitated synchronous · autonomous asynchronous

in real life

online

3.1. Define activities related to the tasks following this framework
3.2. Where do you place your activities in theses four areas?
3.3. How do you combine your 'in real-life' and online activities?
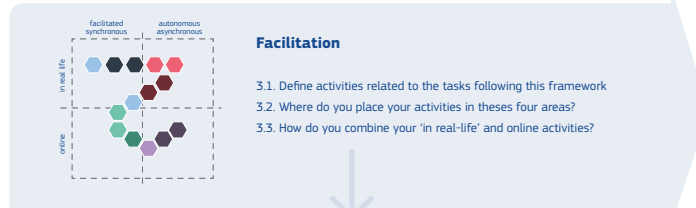
5 What does success look like for your community?

Informal/formal praise, feedback, criteria of success

Please see the measurement visual board

2 Capture all community management tasks from the **convening** visual board

and check alignment with your official mandate

In real-life, facilitated, synchronous. (e.g. workshop, meeting, etc.)

In real-life, autonomous, asynchronous. (e.g. café, exposition, space, etc.)

Online, facilitated, synchronous. (e.g. chat, webinar, etc.)

Online, autonomous, asynchronous. (e.g. collaboration tool, wiki, etc.)

Synthesiser

Please use an additional copy of this board if you have more tasks to cover.

Catalyst

Please use an additional copy of this board if you have more tasks to cover.

Organiser

The community manager's roles and the related tasks do not have to be performed by the community manager(s) only. We recommend that community management tasks are also taken up by community leaders who are members of a core group – in coordination with the community manager. This increases the co-ownership of the community leadership.

Count

4 Assign a number to each activity and create your engagement roadmap by defining all of the necessary elements per activity.

Channel	Audience involved	Type of content	When	Who
1.1				
1.2				
1.3				

Please see the governance (for stakeholder mapping, user experience personas and convening visual boards)

Communities of Practice Playbook | Community management

1 What is the community manager's mandate and is it officially recognised?

2 Capture all community management tasks from the convening visual board

Synthesiser

Catalyst

Organiser

Communities of Practice Playbook | Community management

3 Navigate through the following virtuous square framework to design your community facilitation activities
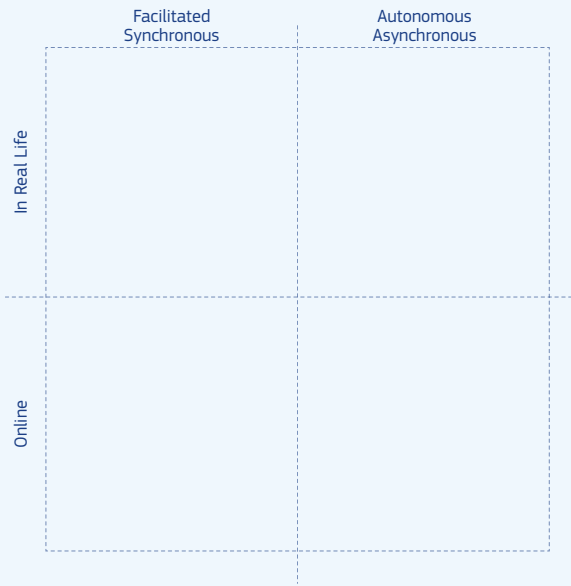
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	Facilitated Synchronous	Autonomous Asynchronous
In Real Life		
Online		

4 Assign a number to each activity and create your engagement roadmap by defining all of the necessary elements per activity.

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5 What does success look like for your community?

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3.8. User experience

In the context of a community (of practice), we understand user experience to be members' and the community ecosystem's experience of/with the community's operational model. This includes:

- the community processes and practices,
- the community's methods for organisation,
- the digital tools used and the way community members use them.

All of the above have a profound impact on the community's success. A user can be a community member, community leader, sponsor or anyone else within or outside the community who benefits from the community.

Mature, advanced communities are much more than a support forum. They thrive because they engage people and encourage them to share knowledge, experiences and resources.

When you care about community members' experience and acquire feedback on the quality of the community's online and 'in real life' environments, you ensure community engagement.

Integrating all of the discovered elements of the users' experiences and avoiding confusion are key to designing user-centric experiences. This ensures that users experience the right flow of support and information, and increases online interoperability.

This section and the accompanying visual board will guide you on how to design a thriving user-centric experience for your community.
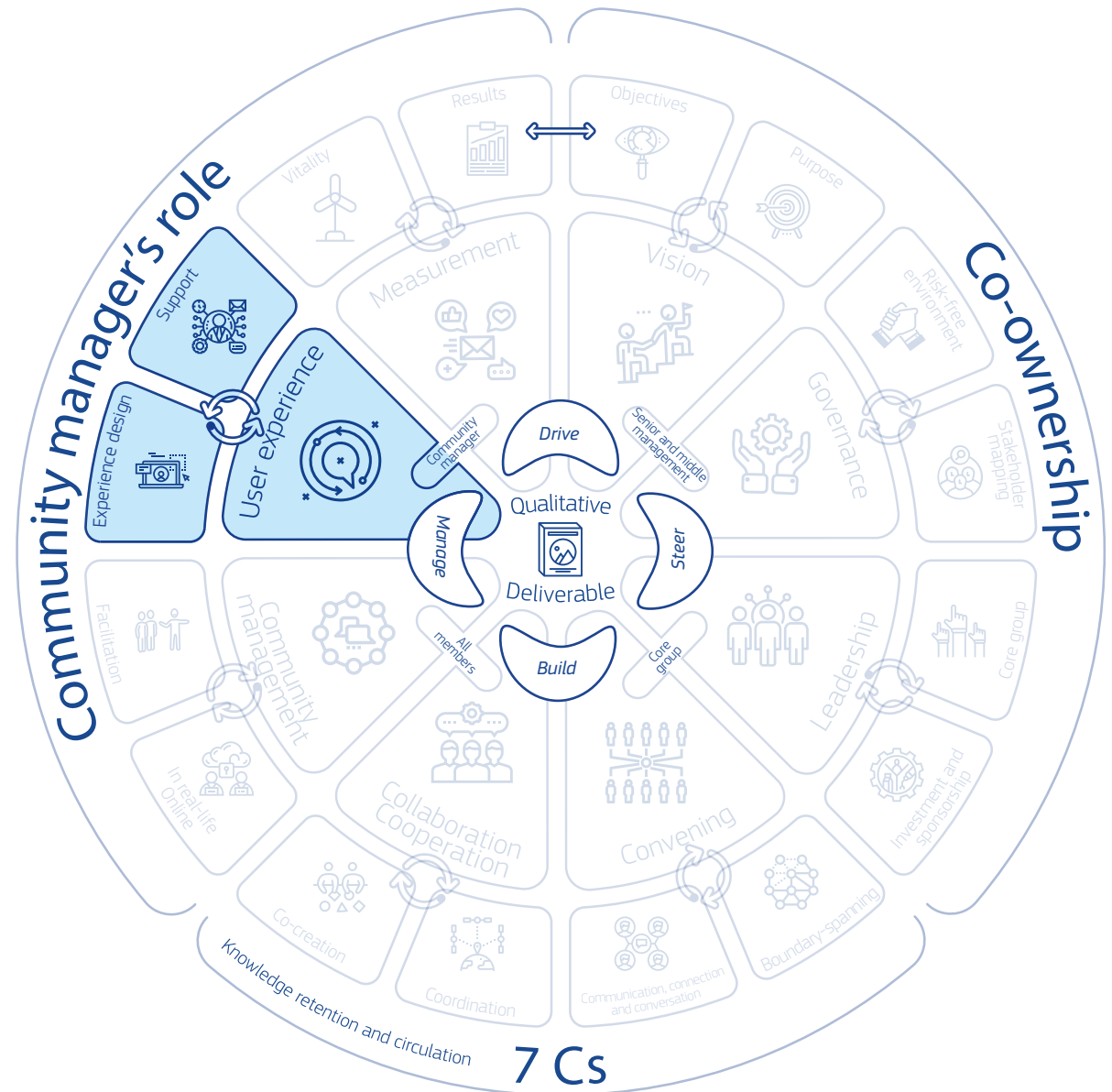
You will learn:

- how to define and work with personas;
- how to identify and act on community member levels of satisfaction/concern with the workings of the community;
- how to gauge what member support is needed;
- how to revise/adapt user experience approaches based on satisfaction/importance levels.

3.8.1. EXPERIENCE DESIGN

How do you ensure a user-centric experience in relation to the tasks you need members to do in the community? In other words, how do you make sure that your operational model addresses all your community personas' needs? To answer this question, we recommend to dedicate time and energy to designing your community members'/users' experience.

What are your community's personas and what are their user requirements, and what pain points need to be addressed?

1. **What personas are and how to work with them**

   - A user persona is a representation of the goals and behaviours of a group of users and must be based on empirical user research. It is not a person, but represents a group of people behaving in a specific way within a specific context. Demographic information, such as that used in traditional target audience segmentation, is often not relevant to user personas.

   - A persona tells you **why** people do what they do, whereas quantitative research mainly tells you what people do. It gives you context and **without context data are meaningless**.

   - In most cases, personas are synthesised from data collected from interviews with users, as **using personas should never be an excuse not to talk to real people**. If you do not speak to real people, you will base your personas on biases and your own perception of reality.

- Personas are made up of descriptions that include **behavioural patterns, goals, skills, attitudes, emotions/sentiment and the environment**, sometimes with a few fictional personal details to make the persona a realistic character or anything that will give more context to understand the behaviours of the persona. Understanding patterns in the behaviours of a user or stakeholder group can be done by mapping **the journey of a persona**. These patterns lead to user insights and better ways of framing your challenges and identifying new opportunities.

- Personas **cannot be generalisations, they need specific context!**

- Instead of being used in an overall, general context, personas are meant for ideation and for use in designing solutions within a specific scope of concern for your community.

- Personas help to build empathy and keep the focus on real human needs. Therefore, they are essential for any human-centric design process.

One way to construct your persona is by using the following schema:

I am _____ and I mostly do _____ (name the activities done). Therefore, my needs are_____because what is important to me is _____ The way I collaborate with others is _____.

Make sure that you identify the real need of your persona(s) by inquiring about the 'why' again and again. This can be validated by working through Section 3.9, 'Measurement'.

2. **How to design the user experience process**

   - When you work on your community's user experience, you will need to refer back to the stakeholder mapping that you did while working on your community's governance in Section 3.3. By now, you will have defined one or several personas of your community.

- If you have not done so, take some time to interview some of your community members and people from outside your community who benefit from the community work.
- Based on these interviews and on your work on all of the other visual boards, you will have identified community members' expectations and needs, as well as the tools and processes they need.

Try and answer the following questions while going through the visual board:

What expectations and needs of members/leadership/sponsorship have you identified?

Identify all of the needs for all personas and describe the specificities and the differences for each persona. We propose that you start by working on three personas, diving deep into their needs, and then, if needed, work on more at a later stage.

Do not aim to solve everyone's problems; you will need to tackle only those problems that are important for a majority of stakeholders. Avoid focusing on only those few who often voice their problems.

What processes, digital tools and ways of working do you propose, as defined by your governance, to meet those expectations?
For each process, tool and way of working, consider the following questions.

- For each need: what does the user already use/have in place today?
- How satisfied is the user with the solutions they use today?
- How important is this for the personas to get the job done?
- Is there room for improvement? Reflect on how it could be done better. Avoid focusing on tools and instead focus on your context.

Example:
Community members want/need to be synchronised/aligned so that they know they are not duplicating efforts, etc. – it is important for them, but they are not satisfied with the way that they do it now (they have to call each other, it takes a lot of time, etc.). A synchronous chat system could be a solution or a community weekly chat at a fixed time could be organised.

Given all of this, what operational model do you put in place to meet all of those needs and expectations in a way that is aligned with the importance and satisfaction levels identified?
- Work on an action plan and refine your operational model.
- For actions, employ the KISS process: **keep**, **improve**, **start**, **stop**.

Tips for defining your community operational model

Consider the following when working on **digital tools**.
- Align tools with your governance – find a tool/platform that supports your governance structure in reaching goals and in communicating and collaborating with members in the most efficient way.
- Make sure that the tool is easy to use and understandable for all levels of digital maturity.
- Bearing in mind your users' needs, determine how users with different levels of digital knowledge can find their way around and use the community 's interaction methods and content.
- Discover your **inner designer** – make sure that your online platform has a clear structure and layout, and reach out to people who can help you in setting up your community online.

Consider the following when working on **process tools**.
- Make sure that you design and put in place processes that fit your community needs, purpose and values.
- What are the rules and processes by which the community is governed? For example, how do you organise your community gathering? What processes do you use for engaging your members in those gatherings?
- What processes do you have in place for convening?
- How do you onboard new members?
- How do you reward people?

Consider the following when addressing **ways of working**.
- How formal/informal are your communications/exchanges?
- How do you work out loud? I.e. show your work and what you do at early stages.
- How do you nurture a risk-free trust-based environment?
- How do your members communicate with each other?
- How do you create spaces for creativity and innovation?

3.8.2. SUPPORT

What processes and content do you need to put in place to provide support?

We understand support as referring to the processes that you put in place to support your members, leaders and sponsors to ensure they have a satisfying and gratifying experience as part of your community.

Support may take the form of coaching, mentoring, ad hoc help, training and learning sessions, tutorials, guidelines and more.

- Maintain an overview of all the needs that people have and keep the visual board updated.
- Use the same visual board to go into the details of one persona or of one need. Expand on these needs.
- Analyse the details of a problem with empathy, and analyse exactly why something does not work.
- Any instances of room for improvement that you identify could be where you provide support – 'how can I help them?'.
- Find out which skills are essential for working with the tools/platforms of your community for each persona and also ask yourself the following questions. What does the community manager need to know? What does the core group need to know? What does management/sponsorship need to know? What does every user need to know?
- Provide the tools for asynchronous and synchronous coordination and communication (see Section 3.7, 'Community management').

Make sure

that your community's personas are satisfied and aligned with your operational model and its appropriate support.

Ask yourself if:

☐ you have mapped the community's personas and their user requirements, as well as the pain points to be addressed;

☐ you have proposed, in your governance model, processes, digital tools and ways of working that meet the needs and interests of your membership;

☐ you know/have agreed upon/have put in place the processes and content you need to provide support.

Communities of Practice Playbook | User experience

In the context of a community (of practice), we understand user experience to be members' and the community ecosystem's experience of/with the community's operational model. This includes:
· the community processes and practices,
· the community's methods for organisation,
· the digital tools used and the way community members use them.

All of the above have a profound impact on the community's success. A user can be a community member, community leader, sponsor or anyone else within or outside the community who benefits from the community.

Make sure that your community's personas are satisfied and aligned with your operational model and its appropriate support.

User experience

Experience Design

Support

2 What are the community members' and the community ecosystem's needs?

1 What are your personas?

3 Specify the needs for each persona

Refer back to the stakeholder mapping on the governance visual board

4 What do they already use / have in place today?

5 How satisfied are they with the solutions they use today? Place them on the scale

Very satisfied

Disatisfied

6 How important is this aspect for each persona to get the job done?

Very important

Not important

7 What is the room for improvement? Reflect on how it could be done better

Action
Keep | Increase | Start | Stop

Please cross-check your answers with the measurement visual board: Make sure that you identify the real needs of your personas by inquiring about the 'why' again and again - validate this through the measurement visual board.

Communities of Practice Playbook | User experience

1   What are your personas?

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2   What are the community members' and the community ecosystem's needs?

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3   Specify the needs for each persona

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4   What do they already use / have in place today?

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Communities of Practice Playbook | User experience

5 How satisfied are they with the solutions they use today?

6 How important is this for each persona to get the job done?

7 What is the room for improvement? Reflect on how it could be done better

3.9. Measurement

Measuring your community performance is an ongoing process, not (only) a one-off annual exercise. The community manager takes responsibility for constantly taking the community's 'pulse'. This includes all quantitative and qualitative approaches to assess the results, engagement, and vitality of the community (of practice) to make sure the community remains relevant in terms of its practice and the organisation's goals, stays engaged and delivers on its vision.

All elements that make up a community's vitality are to be measured: the rituals and behaviours, as well as the activities and interactions that are in place or need to be put in place to meet the community's objectives. You always refer to the community's vision and objectives when you measure your community's performance.

While you assess both the tangible and the intangible output and impact of your community to prove its value, you are also measuring your community's performance.

This will allow you to better understand what does not work, and why and how you could improve your community's operational model.

Your main overall performance measurement tools are *the community roadmap* and the *Communities of Practice Success Wheel*. You can use these to answer the following questions. How is the community doing in each facet? How would your rate your community on each question listed in the community of practice roadmap?
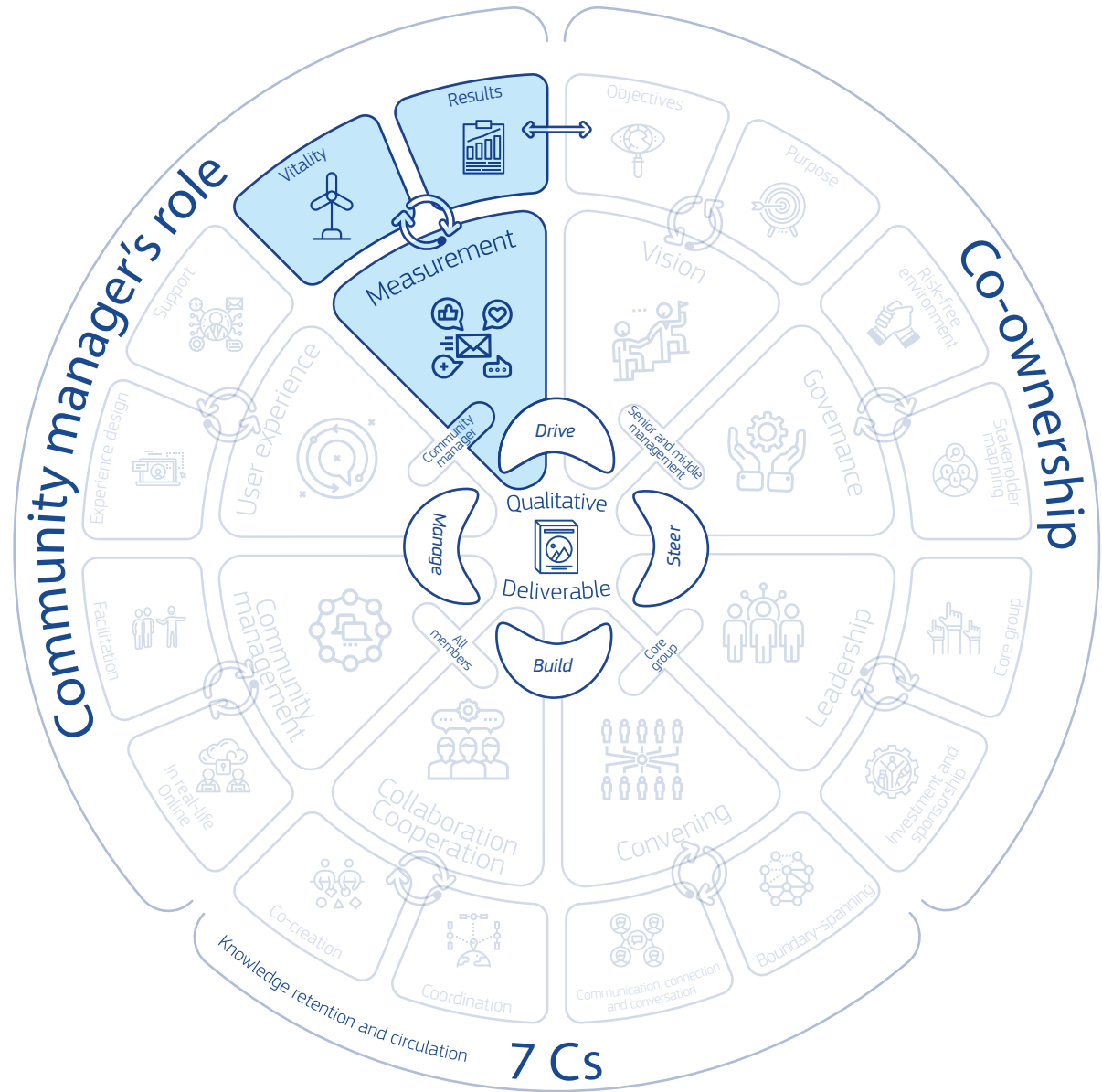
You will learn:

- how to explore and define what impact and vitality mean for your community;
- how to assess the community as regards the success factors and how to continually ask questions of/with your community to keep you on your mission/vision track;
- how to gauge what community challenges and opportunities you face/lie ahead so that you can revise your approach to focus on specific success facets.

3.9.1. IMPACT AND VALUE

Communities thrive because they deliver value to the organisation and to the community members themselves. Value is key to community life, because participation in most communities is often voluntary. Communities organise events and activities and foster relationships that help members' potential value emerge and enable them to discover new ways of nurture that value. Often, the most valuable community activities are the small, everyday interactions such as informal discussions to solve a problem or one-on-one exchanges of information about a tool, approach or database. The real value of these exchanges may not be evident immediately. When someone shares an insight, they often do not know how useful it is until the recipient reports how the idea was applied. Tracing the impact of a shared idea takes time and attention.

This section takes you through community performance measurement in four concrete steps that shall inspire your own reflections on which questions to ask your community.

(1) What have you achieved?
(2) What tools and processes will you use to measure community feedback, results and impact?
(3) What did/does not work and why? What would you like to understand better?
(4) What can you learn from those measurements and how will you address the challenges/obstacles?

1. **What have you achieved?**
Close the circle of the *Communities of Practice Success Wheel* by going back to your vision and set objectives. Consider the following:
- as a community manager or core group, ask yourself **how you are doing as a community;**
- be clear about **who you will report to and with what frequency;**
- think of measurement with the **purpose of improvement in mind**;
- assess the **practice**, **knowledge** and **value** that the community brings to the organisation and to its members.

In addition to what is proposed in this section, feel free to come up with **your own evaluation criteria** that fit your community's vision and stakeholders' needs. Ask yourself the following questions.
What does impact (value) and vitality mean to you?
What do you want/need to understand when you look at your community?

The following are key rituals you could undertake for taking the pulse of your community:
- organise alignment workshops on a regular basis;
- hold core values interviews;
- share stories of impact sessions/interviews;
- convene anecdotal circles when the organisation's strategy changes.

Vitality and engagement – Qualitative self-assessment

- You can start measuring the vitality and engagement of your community by looking at quantitative data regarding your membership.
- Look at the different levels of participation among your community membership.
- Most online engagement platforms for communities should be able to give you data on online engagement. The levels of participation may differ from one online platform to another and social media platforms have their own definitions of what is, for example, an active user.

Good community architecture invites many **different levels of participation**. People participate in communities for different reasons – some because the community directly provides value, some for the personal connections

communities create and others for the opportunity to improve their skills. Because people have different levels of interest in the community, the expectation that all members should participate equally is unrealistic.

We propose five different levels of participation, inspired and adapted from Wenger et al. (2002) and the Scaled Agile Framework (Scaled Agile, 2019).

1. **Core group**. The core group forms the heart of the community and, together with the community manager, operates and drives the community (see more about the role of the core group in Section 3.4, 'Leadership'.
2. **Active members**. These are the members who work closely with the core group to help shape the direction and engagement of the community. This includes them getting involved in defining the community's shared vision and strategies for interaction, answering other members' questions, summarising knowledge pieces for others, and creating and sharing content regularly in the community.
3. **Participating members**. These members participate in community life occasionally by commenting, liking, rating and voting, and they often contribute to community deliverables. They participate when specific topics of interest are addressed or when they have something to contribute to the community. They are often the largest group in the community, together with peripheral members.
4. **Peripheral members**. These members feel a connection to the community but engage on a limited basis. These could be newcomers or those who have a more casual interest in community activities. They keep to the side lines, watching the interactions of the core group and active members. In their own way, they are learning a lot, as they gain their own insights from the discussions and they may put them to good use.
5. **Transactional members**. These members are the least connected to the community and may connect only to access community resources or to provide a specific service to the community (e.g. training or technical support).

It is common for people to move between different levels of participation and commitment over time. Communities are often self-organising and their members have the freedom to determine their own level of engagement.

The movement of people among communities and levels is healthy. It allows new knowledge and fresh ideas to flow across the organisation in ways that are different, but complementary, to formal information sharing.

Operational model and processes based on the community roadmap and the Communities of Practice Success Wheel (qualitative self-assessment)

Together with your core group and/or sponsor, take the community roadmap and go through each of the other sections: vision, governance, leadership, convening, collaboration and cooperation, community management and user experience. Evaluate how you are doing guided by the questions in the roadmap.

As indicated in the visual board, on the roadmap work with blue and red dots to indicate your evaluations in Section 3.1, 'The community of practice roadmap'. Alternatively, you can also work with the *Communities of Practice Success Wheel* in Chapter 2.

Specific pulse insights based on a short evaluation survey

For each section, you can take a short survey to get a pulse insight into your community performance in each of the other areas: vision, governance, leadership, convening, collaboration and cooperation, community management and user experience. These survey questions are provided in Chapter 5, 'Additional resources'.

Tangible results

Take stock of the tangible results that your community delivers and rate them on the visual board. A successful community curates content and together generates new knowledge. Look at the **content curated** by your community and at the **content produced** (i.e. tangible deliverables in the form of guidelines, standards, reports, etc.). Map this content on the visual board and evaluate its success and impact – both quantitatively through online platform metrics and qualitatively through stories, feedback and policy/political impact. Based on this analysis, you can decide where you want to focus more energy and what you want to stop doing.

You will want to go back to the community management visual board in Section 3.7 and see how you defined success. Then, go back to Section 3.6, 'Collaboration and cooperation', to see all of the content you create and curate, including the regularity. Position the content curated and created and the processes according to how impactful they have been for you.

What are the behaviours and rituals to observe and encourage (qualitative self-assessment)?

Translate your goals and objectives into concrete activities and desired behaviours – use this as a benchmark for how you are doing at the moment.

Behaviours become rituals when they have been embedded and become repeatable. Identify your existing and/or desired rituals. Develop them while working on the community management visual board in Section 3.7.

The following is an example of goals translated into behaviours from the community of practice on mapping.

GOAL 1	IMPROVED EFFICIENCY AND EFFECTIVENESS OF MAPPING
Behaviour 1	Members post their questions and challenges The community manager responds to questions on geographical correctness by highlighting key resources and inviting other members to respond
Behaviour 2	Members inform peers about their upcoming mapping activities and projects
Behaviour 3	Members attend regular meetings to discuss topics of interest
Behaviour 4	Members identify shared training needs

One powerful way to assess the benefits and the value added of communities of practice is through **stories**. You will need to put a mechanism in place to track, capture and share impact stories, with evidence. Encourage community members

to be explicit about the value of the community throughout its lifetime. Initially, the purpose of such a discussion is to raise awareness, rather than to collect data, as the impact of the community typically takes some time to be felt. Later, assessments of value can become more rigorous.

What stories did you capture?
A simple questionnaire can be used to collect stories, which could include questions such as:
- what did the community do?
- what knowledge resources did it produce?
- what are the benefits to the organisation?

Take the pulse of your three main stakeholders and gather their feedback on the community's performance. Ask for their feedback on the worth, impact and value of the community. You will want to understand how your community and stakeholders feel and think about the community. The perception of your community's performance can be different from one stakeholder to another (e.g. between the core group, sponsor and members), as their needs and expectations are different.

2. **What tools and processes will you use to measure community feedback, results and impact?**

There are various ways to measure your community's performance, including (this is not an exhaustive list):

- value creation stories;
- sentiment analysis;
- exploratory and in-depth surveys, both qualitative and quantitative;
- social network analysis and mapping;
- focus groups and interviews, held on a regular basis with different groups of stakeholders (core group, members, leaders and sponsor);
- feedback prompts (e.g. after an event or interaction) and regular tapping into feedback loops;
- practice observation and expert advice.

The following levers of the community (of practice) vitality could be tracked, namely the capacity for:

- **filtering** – organising and managing important information;
- **amplifying** – helping to understand important but little known information;
- **investing and providing** – offering a means to give members the resources they need;
- **convening** – bringing together different individuals or groups;
- **community building** – promoting and sustaining values and standards;
- **learning and facilitation** – helping to share knowledge and work more efficiently and effectively.

3.   What did/does not work and why? What would you like to understand better?

While you assess both the tangible and the intangible output and impact of your community to prove its value, you are also measuring your community's performance.
This will allow you to better understand what does not work, and why and how you could improve your community's operational model.

4.   What can you learn from those measurements and how will you address the challenges/obstacles?

What are your community's challenges and in what areas could improvements be made? What actions need to be taken and who is responsible for taking these actions?

Make sure

to identify and understand what usefulness and success mean to you, and to refer back to the *community roadmap* and the *the Communities of Practice Success Wheel* as your main overall performance measurement tools.

Ask yourself if:

☐ you have the tools, processes and resources in place to measure community achievements, feedback, key results and impact (stories);

☐ you (collectively) have reflected upon what you can learn from those measurements and how you will address the challenges presented;

☐ you (collectively) have reflected upon what you would like to understand better and what this would mean for the community.

Communities of Practice Playbook | Measurement

Measuring your community performance is an ongoing process, not (only) a one-off annual exercise. The community manager takes responsibility for constantly taking the community's 'pulse'. This includes all quantitative and qualitative approaches to assess the results, engagement and vitality of the community (of practice) to make sure the community remains relevant in terms of its practice and the organisation's goals, stays engaged and delivers on its vision.
All elements that make up a community's vitality are to be measured: the rituals and behaviours, as well as the activities and interactions that are in place or need to be put in place to meet the community's objectives. You always refer to the community's vision and objectives when you measure your community's performance.

While you assess both the tangible and the intangible output and impact of your community to prove its value, you are also measuring your community's performance.
This will allow you to better understand what does not work, and why and how you could improve your community's operational model.

Make sure to identify and understand what usefulness and success mean to you, and to refer back to the community roadmap and the Communities of Practice Success Wheel as your main overall performance measurement tools.

Measurement

Vitality

Results

1 Levels of participation

Vitality and engagement

	Today	Tomorrow	Target

Core group – the core group forms the heart of the community and together with the community manager operates and drives the community.

Active members – they work closely with the core group to help shape the direction and engagement of the community. They answer other members' questions, summarise knowledge pieces for others, create and share content

Participating members – they participate in community life occasionally by commenting, liking, rating and voting. They often contribute to community deliverables.

Peripheral members – they feel a connection to the community but engage on a limited basis. These could be newcomers or those who have a more casual interest in community activities.

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

2 Evaluate how you are doing guided by the questions in the roadmap. Operational model and processes.

Vision
Governance
Leadership
Convening
Collaboration and cooperation
Community management
User experience
Measurement

3 Take stock of the tangible results your community delivers.

Rate and explore content and processes. What did the community do?

Keep and improve practice

High success

Go back to the community management visual board and see how you defined success

Low success

Stop or change practice

Go back to the collaboration and cooperation visual board and see all of the content you create and curate and your processes, including their regularity. Position them according to the impact you think they had on the organisation.

Low impact

High impact

4 What behaviours and rituals should you observe and encourage?

5 Take the pulse of the three main stakeholders and gather their feedback.

Sponsor

Core group

Members

6 Highlight the operational model domains that are rated as working best or worst by those stakeholders.

7 What are your thoughts about those stakeholder evaluations?

8 Analysis

What did/does not work and why? What would you like to understand better?

9 Actions

What can you learn from those measurements and how will you address the challenges/obstacles?

See the vision and governance visual boards: Address those issues by embedding them into your community's vision and governance.

Communities of Practice Playbook | Measurement

1 Today's levels of participation of core group, active members, participating members, peripheral, transactional members.
What do you expect for tomorrow? What is your target?

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2 Evaluate how you are doing guided by the questions in the roadmap. Operational model and processes. Vision, Governance, Leadership, Convening, Collaboration and cooperation, Community management, User experience, Measurement.

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3 Take stock of the tangible results your community delivers.

*Rate and explore content and processes.
What did the community do?*

Keep and improve practice

High success

Low success

Stop or change practice

Low impact   High impact

4 What behaviours and rituals should you observe and encourage?

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🗨️ Communities of Practice Playbook | Measurement

5 Take the pulse of the 3 main stakeholders and gather their feedback

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6 Highlight the operational model domains that are rated as working best or worst by those stakeholders.

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7 What are your thoughts about those stakeholder evaluations?

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8 Analysis : What did/does not work and why? What would you like to understand better?

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9 Actions : What can you learn from those measurements and how will you address the challenges/obstacles?

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4
A common vocabulary for communities

4.1. Why do we need a common language?

The increase in the number and volatility of communities within the European Commission makes it necessary to find a common language for both internal and external stakeholders to describe and develop the workings of communities (of practice).

As outlined in the introductory remarks of Section 1.3 on the 'community universe', it is essential to navigate the knowledge (community) 'nebula' by finding common denominators among and understandings of experiences, insights and practices related to **community knowledge assets**.

In this regard, **knowledge assets** are the fundamental elements of the community's knowledge pool. They are the **artefacts of all the tacit and explicit knowledge** present within and around the community.

For example, this knowledge can be unstructured and personal (e.g. individual expertise and skills) or structured and codified (e.g. guidelines and regulations). The more these assets are made explicit and structured – namely codified or made reliably accessible over time – the easier it is to share and engage members in using and adding to that knowledge and its various sources.

By not making prior or implicit assumptions (or taking contextual knowledge for granted), but instead clearly stating any assumptions and contextual knowledge, it is easier for others to access this knowledge pool.

4.2. What are the different types of communities?

COMMUNITIES	DEFINITION
Network	A group or system of interconnected people building social relationships by interacting regarding a specific interest/circumstance
Community of place	Communities of people brought together by geographic boundaries
Community of circumstance	Communities of people brought together by external events/situations
Community of interest	Communities of people who share the same interest or passion
Community of action	Communities of people trying to bring about change
Community of practice	Communities of people (practitioners) sharing and stewarding a domain of knowledge with a collective intention
Knowledge/competence centre	Virtual entities that bring together experts and knowledge from different locations within and outside the European Commission, supporting evidence-based policymaking

4.3. Elements of the Communities of Practice Success Wheel and the community roadmap

MAIN SUCCESS FACETS	MAIN ACTIONS	ACTORS INVOLVED	DEPENDENT SUCCESS FACETS AND ACTIONS
Vision refers to the strategic shared agreement about the long-term mission and goals of the community *What do you aspire to achieve? Why this community? What is your long-term goal?*	Drive	Senior and middle management	**Purpose** What is the community's reason for existence? What is your mission statement? **Objectives** What are you striving to achieve (in the short term)? What do you need to do to achieve your goal?
Governance focuses on the decision-making procedures and working practices that communities exercise in order to structure and achieve their set vision *How do you work together and take decisions? What are your rules and processes fitting the community needs, purpose and values?*	Steer		**Stakeholder mapping** What defines your membership? Who are the actors involved in/affected by the community? **Risk-free environment** What are key elements to build trust and guarantee a safe place?
Leadership has two parts: (1) leadership from within the community and (2) (outside) support, investment and participation from senior and middle management, the sponsor and the alliance of sponsors in the field of your community *How do you get leaders involved and create participation opportunities?*		Community core group	**Investment and sponsorship** Which leaders do we need to support our community? What support do you need from management? How do you get them involved and create participation opportunities? **Core group** Who is in your core group? How do you get your core group steering the community?
Convening is the art of bringing the community (and relevant stakeholders) together to connect members and engage them in meaningful conversations *What kind of convening opportunities/events fit with your community in general?*			**Communication, connection and conversation** How do you communicate with and connect members and encourage conversation? **Boundary-spanning activities** How do you regularly feed your community with external expertise and promote access to other networks?
Collaboration and cooperation **Collaboration** is working together to create something new, a shared outcome, in support of a shared vision, goals or purpose. The glue is the shared vision **Cooperation** happens when members and other stakeholders strategically choose to work separately on different aspects of one issue and share knowledge so that each party can accomplish their part in support of a shared outcome *How do you make members collaborate and/or cooperate to enrich the common community practice and produce knowledge assets/qualitative deliverables together?*	Build	All community members	**Co-creation** What content needs to be co-created/curated/synthesised and what methods will you use to succeed? **Coordination** How do you coordinate members' work towards delivering on the objectives agreed (processes and methods)?

MAIN SUCCESS FACETS	MAIN ACTIONS	ACTORS INVOLVED	DEPENDENT SUCCESS FACETS AND ACTIONS
Community management Generally, three areas belong to the domain of the community manager: community management, user experience and measurement Community management tasks are also strongly linked to all other community operation areas, in particular to governance, leadership, collaboration and cooperation, and convening *What role and tasks will the community manager perform and under which mandate?*	Manage	All community members	**Facilitation** What facilitation methods do you need to get the best out of the community's dynamic social processes? **Engagement roadmap** How will you combine and ensure continuity between 'in real life', online, asynchronous and synchronous interactions?
User experience is the members' and the community ecosystem's experience of/with the community's operational model. This includes the community processes and practices, the community's methods for organisation, the digital tools used and the way community members use them, which all have a profound impact on the community's success. A user can be a community member, community leader, sponsor or anyone else within or outside the community who benefits from the community *How do you ensure a user-centric experience for the tasks you want members to do or that members themselves want to do in the community?*		Community manager	**Experience design** What are your community's personas and what are their user requirements, and what pain points need to be addressed? **Support** What processes and content do you need to put in place to provide support?
Measurement includes all quantitative and qualitative approaches to assess the community's results, engagement and vitality to make sure the community remains relevant in terms of its practice and the organisation's goals, stays engaged and delivers on its vision *What have you achieved? What tools and processes will you use to measure community feedback, results and impact? What did/does not work and why? What would you like to understand better? What can you learn from those measurements and how will you address the challenges/obstacles?*	Drive		**Vitality** What are the behaviours and rituals to observe and to encourage? How is the community doing, guided by the questions in the roadmap? **Results** How do you define and measure if key results are delivering on the community vision and objectives? What did the community do?

4.4. Glossary

The main facets of *the Communities of Practice Success Wheel* are explained in Section 4.3.

3C model
aims to create and encourage **connections**, **conversations** and **communication** to guide a community through convening opportunities.

Appreciative inquiry
is a model that seeks to engage stakeholders in self-determined change. According to Bushe (2013), it 'advocates collective inquiry into the best of what is, in order to imagine what could be, followed by collective design of a desired future state that is compelling and thus, does not require the use of incentives, coercion or persuasion for planned change to occur'.

Artefacts
include anything that is created that provides insight into/about something – this does not have to be a physical object; it can be ideational.
> **Governance** artefacts could take the form of terms of reference or charters spelling out purpose, scope and ways of working.
> **Knowledge** assets are the fundamental elements of the community's knowledge pool. They are the artefacts of all the tacit and explicit knowledge that is present within and around the community.

Boundary spanning
means linking the community with external sources of knowledge, in order to regularly inject external expertise into the community and ensure access and connections to other networks. This is inspired by findings showing that collective intelligence from diverse, inclusive and interdisciplinary groups of people deliver better results.

Co-creation
Is about connecting and creating conversations between community members and other stakeholders regarding any purpose, goals or objectives in order for the group to collectively design something from beginning to end together. In particular, it draws attention to the need for having constant inclusive feedback/ ideation loops in place.

Collaboration
refers to working together to create something new, a shared outcome, in support of a shared vision, goal or purpose. The glue is the shared vision.

Community ecosystem
is a knowledge and collaboration universe around a community. It covers all external and internal, formal and informal structures, networks, communities and stakeholders in relation or interacting with the community.

Community management (CM) roles
It is important that the community has a credible community manager (CM) in place, with dedicated time and support to carry out his or her role effectively.
Depending on the community's maturity, the community manager's main role differs:
> **Convener/catalyst** – steers and triggers enthusiasm and energy in the community and also navigates the community's complexity to identify opportunities beneficial to the community vision within the mapped stakeholder environment.
> **Organiser** – drives interaction opportunities for members within the community and the community's ecosystem.
> **Synthesiser/knowledge manager** – distils discussions into valuable knowledge assets by engaging the community and its sponsors.

Community maturity (digital)
How well are tools for community interactions understood and adopted? There are three stages of convening – linked to community manager roles:
1. a stage one community (i.e. an emerging community in its early stages (a hub-like community));
2. a stage two community (i.e. an existing structured community (a platform-like community));
3. a stage three community (i.e. a self-organised sustainable community (a service-like community)).

Community pitch (value proposition).
Why does your community exist? One of the best ways to pitch your community vision is by telling it as a story.

CoP
A **c**ommunity **o**f **p**ractice stimulates cross-organisation collaboration, knowledge sharing and relationship building as 'groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly' (Lave and Wenger, 1991 and 1996).

Community (of practice) roadmap
translates your community strategy into an action plan, outlining the activities and the resources required to help your community achieve value for the business. It maps the community activities and initiatives to the key objectives they will address. Roadmaps mark milestones in a community's journey, making tracking progress easier. A roadmap shows which activities are important to invest in to grow your community.

Cooperation
happens when members and other stakeholders strategically choose to work separately on different aspects of one issue and share knowledge so that each party can accomplish their part in support of a shared outcome. Cooperation is important in networks where individuals exchange relevant knowledge in support of each other's goals, rather than a shared goal. Something new may be achieved as a result, but it arises from the individual, not from collective effort.

Coordination
involves navigating collaboration and cooperation needs, ensuring that the different pieces of co-created knowledge are organised between stakeholders.

Core group
is a group of community members that takes the lead and steers the community; our research has identified this as a key element in a community's success. Community leadership has two parts: (1) leadership from within the community and (2) support, investment and participation from senior and middle management, the sponsor and the alliance of sponsors in the field of your community of practice. In our understanding of community leadership, everyone is a leader when they take initiative, bring people together and take responsibility.

Engagement roadmap
lists task-oriented activities and conversation topics regarding the community's maturity and participation levels – community manager roles should be adapted accordingly.

Facilitation
is about getting the best out of the community's dynamic social processes to harness its collective intelligence. It is about cultivating a safe space for collaboration and cooperation, a climate of trust and a feeling of belonging.

Knowledge assets
are the fundamental elements of the community's knowledge pool. They are the artefacts of all the tacit and explicit knowledge present within and around the community.

Leadership (roles)
Community leadership has two parts: (1) leadership from within the community and (2) support, investment and participation from senior and middle management, the sponsor and the alliance of sponsors in the field of your community of practice. In our understanding of community leadership, everyone is a leader when they take initiative, bring people together and take responsibility. There are three possible leadership roles:
1. driver – sets the purpose/mission of the community and actively participates in steering the community's governance;
2. promoter – advocates for the community's mission and benefits and makes the community visible in everyday workings and operations in the organisation;
3. investor – fosters the community by providing organisational resources (such as appointing community managers).

Objectives (SMART)
A community strategy should be built on specific, measurable, achievable, realistic and timely elements.

Operational model

is made up of all of the processes, tools and ways of working and organising that meet the members'/leadership's/sponsorship's expectations and needs with regard to the community's vision. One defines the community operational model when working to ensure a sound user experience for all community members and its ecosystem, while embedding it in the co-created community governance artefacts.

Participation (levels)

A good community architecture invites many different levels of participation:
- the core group forms the heart of the community;
- active members work closely with the core group to help shape the direction of and engagement in the community;
- participating members contribute to community life occasionally, mostly on specific topics of interest;
- peripheral members feel a connection to the community but engage on a limited basis only;
- transactional members are the least connected to the community and may link community members to other resources or provide specific services/advice.

Persona

A user persona is a representation of the goals and behaviours of a group of users and must be based on empirical user research. It is not a 'person', but represents a group of people behaving in a specific way within a specific context. Demographic information, such as that used in traditional target audience segmentation, is often not relevant to user personas.

Rituals

are behaviours that have been embedded and become repeatable. Rituals are regularly repeated, embedded practices that bring benefit to the community.

Sponsorship (linked to leadership)

The active participation of senior and middle management represents a critical success factor. Sponsors' active participation shows that the community is relevant to the organisation and is led by example. This strengthens the community's cohesion and members' engagement in and commitment to delivering on shared goals.

Stakeholder mapping

is the visual process of mapping out all of the relevant stakeholders and (vetoing) players relevant to a community (issue). It visually represents the different actors and their connections that (could) have an influence on the community or could be/are of benefit to it.

Vitality (levers)

refers to all the rituals and behaviours, as well as the activities and interactions, that are in place or need to be put in place to meet the community's objectives in way that feels useful to the community members.

5
Additional resources

5.1. Hands-on tools

5.1.1. THE COMMUNITIES OF PRACTICE SUCCESS WHEEL

5.1.2. MEASUREMENT PROMPTS – OVERALL COMMUNITY ASSESSMENT AND ASSESSMENT PER COMMUNITY SUCCESS FACET

Do you want to quickly assess where you stand and how you are doing with regard to a community success facet?

This extra resource offers around five questions per community success facet to allow you to gauge how your community is doing and get feedback from different stakeholders. You can engage the community (the core group, community members, sponsors and external stakeholders) by asking these questions to kick start an assessment discussion about the areas in which the community is struggling.

These questions are inspired by and aligned with the main questions in the guidance and visual boards of this playbook. They always include one general rating exercise with regard to the community success facet under scrutiny and further qualitative in-depth questions.

They are easy to access, distribute and use: you can, for example, use them as guiding questions in a workshop setting.

If not indicated otherwise, all questions are to be answered on this following scale:
• not at all
• somewhat no
• somewhat yes
• completely
• do not know.

The overall pattern of responses should be interpreted as follows:
• predominantly 'not at all' and/or 'somewhat no': attention needs to be paid and/or improvements are needed to this community success facet;
• predominantly 'completely' and/or 'somewhat yes': there is no need for specific attention, but sharing good practices would be useful;
• a cluster of 'do not know' responses also indicates that there is a need for action in this area (i.e. inclusive knowledge sharing, circulation and engagement).

Introduction to the roadmap
When you start a community, you need a plan that links everything together, that makes everything run smoothly.

These community success facets are built around **driving** the community with a vision and with purpose; **steering** it with good governance and core group leadership in place; **building** the community through convened conversations and collaboration among members to build qualitative deliverables related to the practice, through cooperation and coordination of different parts, inputs and expertise; and **managing** the community with the help of competent community managers and the core group supporting them, constantly measuring impact against objectives and ensuring a sound fit-for-purpose user experience.

0. **Overall, how would you rate the functioning of your community (of practice)?** The community is functioning …
    • not at all
    • somewhat no
    • somewhat yes
    • completely
    • do not know

1. **How would you rate the functioning of your community (of practice) in the following facets?** The community is working well with regards to …
    • shared and applied vision and objectives;
    • effective and inclusive governance structures and practices;
    • clearly mapped and defined leadership and sponsorship relations;
    • convening opportunities and engagement methods fitting your community objectives;
    • aligned and coordinated collaboration and cooperation processes, methods and knowledge needs;
    • articulated community management mandate, roles and tasks applying the facilitation 'virtuous square' (synchronous, asynchronous, online and 'in real life');
    • outlined user experience persona needs and satisfaction/importance mapping;
    • understanding of what to include and why in the community measurement considerations.

2. **How would you rate the functioning of your community (of practice) in the following domains?** The community is working well in …
   - curating (**organising** and managing important information);
   - amplifying (helping to understand important but little known information);
   - investing and providing (offering a means to give members the resources they need)
   - convening (bringing together different individuals or groups);
   - community building (promoting and sustaining values and standards);
   - learning and facilitation (helping work more efficiently and effectively).

3. **Do you have overall actions, responsibilities, resources and ambitions set in place for the following periods?**
   - short term (1–3 months);
   - middle term (4–6 months);
   - long term (7–12 months).

Vision

The starting point for your community is the purpose or the mission of your community – why does the community exist? The community's purpose often comes from the organisation's leadership, corresponding to the organisation's business goals. It is normally predefined by the sponsor alone or by the sponsor with a small group of people. Once the sponsor sets the 'why', you will co-create the vision for the community with your sponsor, a preliminary core group and potential members. When the vision has been formulated and aligned, you will work on the strategy in support of delivering on the vision. At this stage, you will focus on high-level objectives. Make sure you are always aligned with leadership and the business vision; be guided by the purpose or raison d'être of your community; have a strategy, namely set high-level objectives to reach your vision.

0. **Overall, how would you rate the functioning of your community (of practice) regarding the vision facet of the Communities of Practice Success Wheel?**
   The community is functioning …
   - not at all
   - somewhat no
   - somewhat yes
   - completely
   - do not know

1. Have you laid out your community *raison d'être* with an articulated reason why it matters (for the organisation)?
2. Have you have collectively made sense of what you aspire to achieve as a community?
3. Have you identified, articulated, expressed and communicated the challenge that the community wants to address/the problem to solve?
4. Have you set out long-term goals to reach?
5. Have you set up a SMART strategy to reach your community vision?
6. Do you have a community charter and/or a community pitch in place?

Governance

Governance is about how you work together and take decisions. You will look into the rules and processes that best fit your community needs, purpose and values.

Make sure you co-create decision-making and working practices that structure your community experience and allow you to achieve your set vision. Governance defines your community operational model, which is made up of all the processes, tools and ways of working and organising that meet your members'/leadership's/sponsorship's expectations and needs. You will be further defining the community operational model when working to ensure a sound user experience for all community members and its ecosystem.

Governance includes mapping stakeholders and creating a risk-free environment that stimulates learning and innovation. You will want to proactively steer engagement and get senior and middle management involved. Make sure you create structures that make sense with regard to your vision and that they lead to co-ownership!

0. **Overall, how would you rate the functioning of your community (of practice) regarding the governance facet of the Communities of Practice Success Wheel?**

The community is functioning …
- not at all
- somewhat no
- somewhat yes
- completely
- do not know

1. Do you know and/or have you discussed/formalised how you work together and take decisions?
2. Do you know and/or have you discussed/formalised what your ways of working and processes are, ensuring that they fit the community needs, purpose and values?
3. Have you done/discussed/formalised your stakeholder mapping exercise and mapping of membership participation levels?
4. Have you set your operational model in/through governance structures and governance artefacts?
5. Have you defined your community's key elements to build trust and guarantee a safe place (such as community participation guidelines or a hierarchy-free learning zone allowing creativity and flexibility)?

Leadership

Community leadership has two parts: (1) leadership from within the community and (2) support, investment and participation from senior and middle management, the sponsor and the alliance of sponsors in the field of your community of practice. In our understanding of community leadership, everyone is a leader when they take initiative, bring people together and take responsibility. A core group of community members taking the lead and steering the community has been identified as a key element for success in our research. The community appreciates and values their input. Identify your community leaders and seek strong leadership participation.

This section is about identifying the core group, community leaders and other sponsors and influencers with authority in the practice. The core group members work together to determine how they will steer the community towards the vision and agree on what the community will commit to through the set governance processes.

0. **Overall, how would you rate the functioning of your community (of practice) regarding the leadership facet of the Communities of Practice Success Wheel?**

The community is functioning …
- not at all
- somewhat no
- somewhat yes
- completely
- do not know

1. Do you know who is/should be in your core group (e.g. who is missing) and who you need for which responsibilities and resources?
2. As a core group, do you know who you need to reach out to and engage with (e.g. have you mapped the emerging ecosystems you need to connect to)?
3. As a core group, do you have ways of working, rituals and practices in place for working together to steer the community?
4. Have you identified the leaders that your community needs for support (potential influencers, contributors, investors, and sponsors and alliances thereof for your community)?
5. Do you have practices and rituals in place ensuring strong leadership and/or management participation opportunities?
6. Have you captured and expressed the support you need/expect from management and vice versa?

Convening

Convening is the art of bringing the community (and relevant stakeholders) together to connect members and engage them in meaningful conversations. The diversity of a community and a risk-free and inclusive environment help develop conversations and engage members. To learn how to nurture a risk-free trusted environment, which is needed for meaningful convening, see also Sections 3.3, 'Governance', and 3.7, 'Community management'.

Convening the community on a regular basis keeps it alive and thriving. It means communicating with members, connecting them and encouraging conversations. It also implies undertaking boundary-spanning activities (i.e. linking the community with external sources of knowledge) to regularly inject external expertise on

the community practice into the community and ensure access and connections to other networks. You will need to plan what you will be doing to bring the community together in a consistent way and you will need to ensure that such convening is a continuous process rather than one-off, random interactions.

0. **Overall, how would you rate the functioning of your community (of practice) regarding the convening facet of the Communities of Practice Success Wheel?**
The community is functioning …
  • not at all
  • somewhat no
  • somewhat yes
  • completely
  • do not know

1. Do you know what kind of convening opportunities/events work for your community in general?
2. Have you made (collective) sense of what formal and informal convening opportunities you want to design to create and encourage connections, conversations and communication?
3. Have you decided/discussed what you will communicate to members and to the the community ecosystem and beyond, and through which (appropriate) channels?
4. Do you have in place a methodology (actions and practices) to distil discussions into valuable community knowledge assets?
5. Do you regularly feed your community with external expertise and promote access to other networks?
6. Have you identified and do you have in place rituals to increase connections between members and to create a welcoming, inclusive and diverse community feeling?

Collaboration and cooperation
Our research shows that the more a community creates something concrete together, the more engaged it is. This co-creation of a tangible community asset/qualitative deliverable requires effective coordination of different cooperation and collaboration processes. Engaging your community in delivering a concrete outcome implies carrying out effective collaboration, cooperation, coordination and co-creation practices and activities.

Collaboration is working together to create something new, a shared outcome, in support of a shared vision, goal or purpose. The glue is the shared vision.

Cooperation happens when members and other stakeholders strategically choose to work separately on different aspects of one issue and share knowledge so that each party can accomplish their part in support of a shared outcome. Cooperation is important in networks where individuals exchange relevant knowledge in support of each other's goals, rather than a shared goal. Something new may be achieved as a result, but it arises from the individual, not from collective effort.

0. **Overall, how would you rate the functioning of your community (of practice) regarding the collaboration and cooperation facet of the Communities of Practice Success Wheel?**
The community is functioning …
  • not at all
  • somewhat no
  • somewhat yes
  • completely
  • do not know

1. Do you know/have you agreed upon what content needs to be curated/synthesised/co-created?
2. Do you know/have you agreed upon how to make members collaborate and/or cooperate to enrich the common practice and produce knowledge assets/qualitative deliverables together?
3. Do you know/have you agreed upon how to coordinate (members') work towards delivering on the objectives agreed (e.g. coordination processes and methods)?
4. Do you know/have you agreed upon what methods you will use to succeed in co-creating a community deliverable (e.g. ideation, brain writing, crowdsourcing, calls for papers/contributions, sense making)?
5. Do you know/have you agreed upon what kind of expertise related to the practice you need in order to co-create community knowledge assets/deliverables, namely what can you do for others and what can others do for you?

Community management

A community cannot function without a community manager, just like a wheel hardly rolls without oil. We have identified three main roles that a community manager needs to take on: (1) the organiser, (2) the convener and catalyst and (3) the synthesiser, knowledge manager or broker. Although in all other areas of the Communities of Practice Success Wheel, leaders, the core group and/or members play an important role, there are three areas that mainly belong to the domain of the community manager: **community management, user experience** and **measurement.**

Community management tasks are strongly linked to all other community operation areas, in particular governance, leadership, collaboration and cooperation, and convening. These tasks also focus on facilitation methods and strategies to combine and integrate 'in real life', online, synchronous and asynchronous interactions.

0. **Overall, how would you rate the functioning of your community (of practice) regarding the community management facet of the Communities of Practice Success Wheel?**
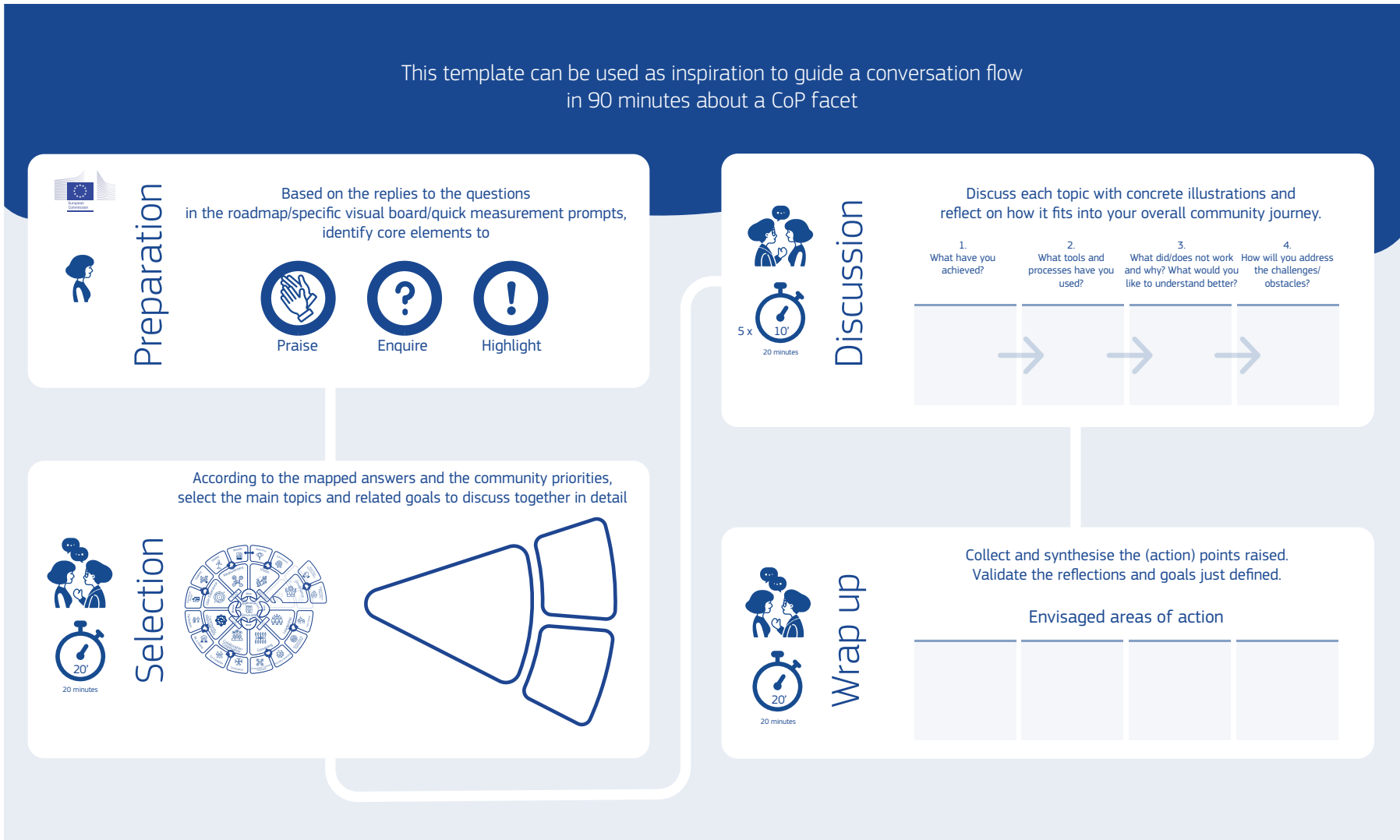The community is functioning …
   - not at all
   - somewhat no
   - somewhat yes
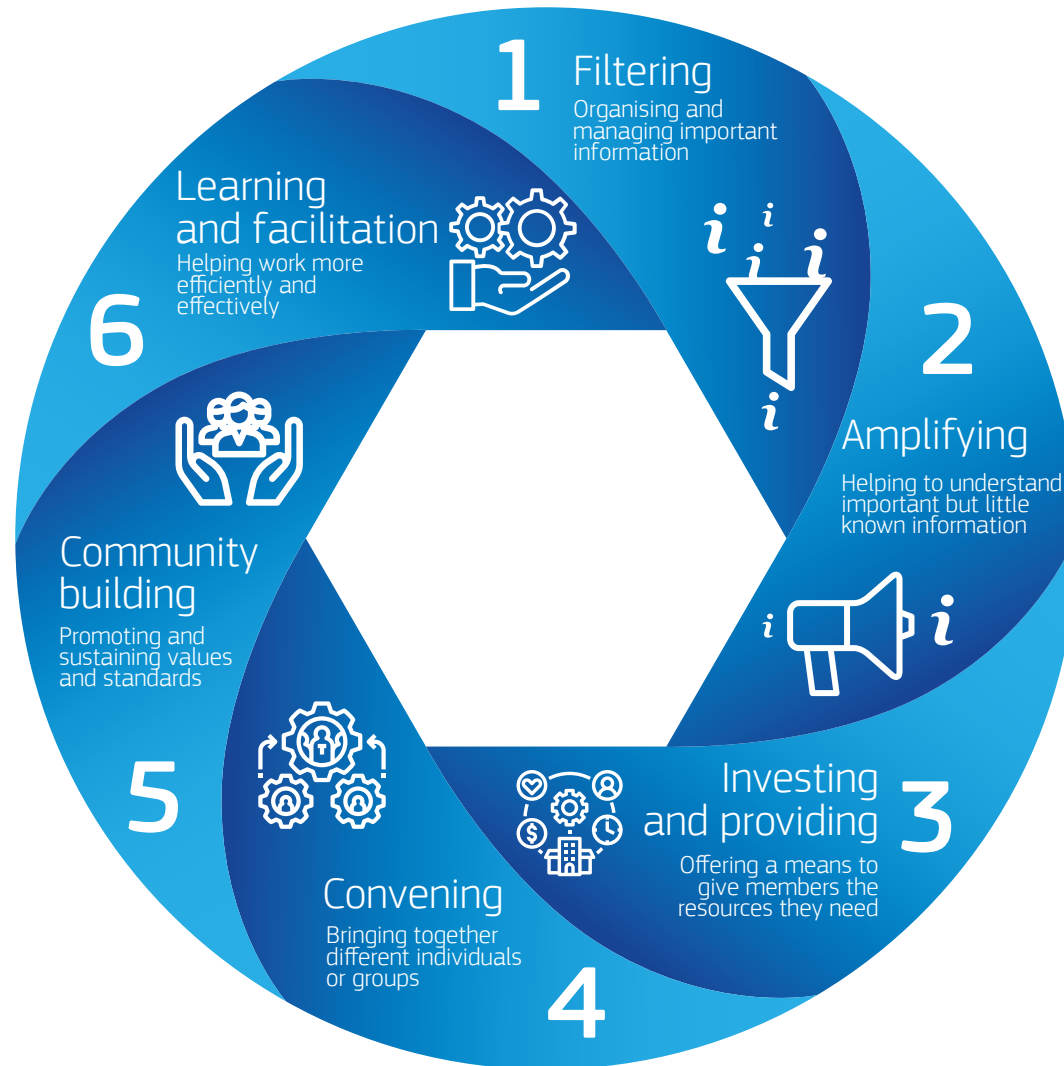   - completely
   - do not know

1. Does your community manager have a clear mandate and consequently official recognition to lead the community (i.e. is it clear to the community manager how much time can be spent on leading the community)?
2. Does your community manager fulfil the community management roles described in this playbook and have appropriate expectations been set and communicated?
3. Do you know/have you agreed upon how you will combine and ensure continuity between 'in real life', online, asynchronous and synchronous community interactions?
4. Do you know/have you agreed upon what facilitation methods you need to get the best out from the community's dynamic social processes?

5. Do you know/have you agreed upon how you ensure that shared knowledge is visible, circulated and acted upon regularly?
6. Do you know/have you agreed upon how you will onboard newcomers and create a safe space /risk-free environment where you can steer engagement and willingness to share?

User experience

In the context of a community (of practice), we understand user experience to be members' and the community ecosystem's experience of/with the community's operational model. This includes the community processes and practices, the community's methods for organisation, and the digital tools used and the way community members use them, which all have a profound impact on the community's success. A user can be a community member, community leader, sponsor or anyone else within or outside the community who benefits from the community.

0. **Overall, how would you rate the functioning of your community (of practice) regarding the user experience facet of the Communities of Practice Success Wheel?**
The community is functioning …
   - not at all
   - somewhat no
   - somewhat yes
   - completely
   - do not know

1. Do you know/have you agreed upon how you will ensure a user-centric experience for the tasks you need members to do in the community?
2. Have you mapped and identified what the members'/leadership's/ sponsorship's expectations are?
3. Have you mapped the community's personas and their user requirements, as well as the pain points to be addressed?
4. Have you proposed, in your governance model, processes, digital tools and ways of working that meet the needs and interests of your membership?
5. Do you know/have you agreed upon/have you put in place the processes and content you need to provide support?

Measurement

Measuring your community performance is an ongoing process, not (only) a one-off annual exercise. The community manager takes responsibility for constantly taking the community's 'pulse'. This includes all quantitative and qualitative approaches to assess the results, engagement and vitality of the community to make sure the community remains relevant in terms of its practice and the organisation's goals, stays engaged and delivers on its vision.

Measure all of the elements that make up the community's vitality: the rituals and behaviours, as well as the activities and interactions that are in place or need to be put in place to meet the community's objectives. You must always refer to the community's vision and objectives when you measure your community's performance. While you assess both the tangible and the intangible output and impact of your community to prove its value, you are also measuring your community's performance, which will allow you to better understand what does not work, and why and how you could improve your community's operational model.

0. **Overall, how would you rate the functioning of your community (of practice) regarding the measurement facet of the Communities of Practice Success Wheel?**
 The community is functioning ...
  • not at all
  • somewhat no
  • somewhat yes
  • completely
  • do not know

1. Do you trace what you have you achieved (e.g. do you have tools and processes in place to measure community feedback, key results and impact, namely if you are delivering on the community objectives)?
2. Do you have tools and processes in place to capture impact stories?
3. Do you (collectively) reflect upon what you can learn from those measurements and how you will address the challenges/obstacles presented?
4. Do you (collectively) reflect upon the best habits and behaviours to observe/encourage?
5. Do you (collectively) reflect upon what did/does not work and why?
6. Do you (collectively) reflect upon what you would like to understand better and what this would mean for the community?

5.1.3. A COMMUNITIES OF PRACTICE CONVERSATION FLOW TEMPLATE

This template can be used as inspiration to guide a conversation flow
in 90 minutes about a CoP facet

Preparation

Based on the replies to the questions
in the roadmap/specific visual board/quick measurement prompts,
identify core elements to

Praise   Enquire   Highlight

Selection

20'
20 minutes

According to the mapped answers and the community priorities,
select the main topics and related goals to discuss together in detail

Discussion

5 x 10'
20 minutes

Discuss each topic with concrete illustrations and
reflect on how it fits into your overall community journey.

1. What have you achieved?	2. What tools and processes have you used?	3. What did/does not work and why? What would you like to understand better?	4. How will you address the challenges/ obstacles?

Wrap up

20'
20 minutes

Collect and synthesise the (action) points raised.
Validate the reflections and goals just defined.

Envisaged areas of action

5.1.4. COMMUNITY LEVERS

1 Filtering
Organising and managing important information

2 Amplifying
Helping to understand important but little known information

3 Investing and providing
Offering a means to give members the resources they need

4 Convening
Bringing together different individuals or groups

5 Community building
Promoting and sustaining values and standards

6 Learning and facilitation
Helping work more efficiently and effectively

5.2. More about the outcomes of our research on communities

5.2.1. A COMMUNITIES OF PRACTICE TYPOLOGY (FROM 2018 REPORT)

Before identifying your community of practice typology, we will define what a community of practice is. Our working definition is as follows.

A community of practice is a group of individuals who have interests and problems within the same topic and gain a greater degree of knowledge and expertise through regular interaction.

The community of practice leaders who we spoke to broadly agreed with this definition, but the following considerations also emerged:

- our communities of practice are often more about information than knowledge;
- online interaction between members is typically low;
- the communities of practice that we discovered all felt very different; they did not adhere strictly to types or templates;
- some preferred to identify as communities of interest.

Approach

Three broad aims of community of practices that have been observed in our research:

1. communities of practice that aim to **inform**;
2. communities of practice that aim to **discuss**;
3. communities of practice that aim to **deliver**.

The discussion of these aims was instrumental in defining a typology of Commission communities of practice, and later these typologies were validated by community of practice owners:

- **hub** – communities of practice that connect people and knowledge content;
- **platform** – communities of practice in which members get Commission work done;
- **service** – communities of practice that provide a service for the rest of the Commission.

The analysis of value over time of these typologies shows how the types are related and transition from one to another. The Venn diagram provides a visual illustration of the typologies.

Value over time

Service
Established knowledge and competency generator
Cooperate as go-to experts with European Commission customers
Continuously develop and promote the value offer

Platform
Developing new explicit knowledge together
Enhancing collaboration and relationships
Converting tacit to explicit knowledge

Hub
Collecting good/best practices
Curating an explicit knowledge repository
Advertising and recruiting members

Purpose
Defining community of practice objectives
Gathering relevant knowledge
Inviting experts and interested parties

5.2.2 WHAT MAKES COMMUNITIES RATE THEMSELVES AS FUNCTIONING WELL AND WHAT MAKES THEM RATE THEMSELVES AS STRUGGLING?

Shared vision

(Champions / Struggling)

- Have a shared and clearly understood vision
- Members understand, agree on and identify goals and objective
- Community engages in an area of common interest to all members
- Community of practice topics are of interest to all members
- Chosen structure is clear and flexible for shared vision
- Relevant experience is present for shared vision
- There is a build-up of an agreed set of communal resources over time for shared vision
- There is sufficient management support
- All members own practice/experience in shared vision
- Have a clear focus in our sectors or themes
- Goals and objectives have strategic relevance

Participation and engagement

(Champions / Struggling)

- Awareness of activities is high
- There is personal curiosity by members about the content/activity in the community
- Time for participation is managed well
- Members have sufficient time/resources/incentives to engage
- There is sufficient willingness to provide time/resources/incentives
- The community serves as first go-to-point when questions arise
- The community is informal and/or welcoming
- Listening to, learning from, and sharing with others is a cardinal virtue
- Members are willing to give without immediate return
- Different thinking styles and practices are validated
- There is collective curiosity in the community

Community and knowledge

(Champions / Struggling)

- Members benefit in their daily work from the relationships established within the community
- Community experience/knowledge is alive and shared
- New members are encouraged to participate
- The community permits faster problem solving and better response times
- A long-term vision serves to sustain community
- The community spawns new ideas
- Listening, learning from others, and sharing with others is core value
- The community motivates members to share work-related knowledge
- There are procedures for changing and embracing (new) members
- Community experience/knowledge is mobile and actively drawn on, not duplicated
- New members easily adapt to the community and its information

Trust and confidence

(Champions / Struggling)

- The community includes all members in important decisions
- Members know each other inside the community and because of this interact without hesitancy
- Members trust each other
- The community builds and fosters trust and a sense of community
- The community can be relied on to keep its promises
- The community is open to the outside and therefore there's a feeling that interactions will be useful since they are accessible. (but split visions!)
- Members care about/are committed to a common interest
- The community treats all members fairly and justly
- The community is a domain leader in its field and therefore there is confidence in it
- The community is actively supported by management and therefore there is confidence in it

Communication

(Champions / Struggling)

- The community has user-friendly communication platforms/tools
- Members communicate well with each other
- The community breaks down communication barriers among members
- The community captures and stores tacit and explicit knowledge so it can be easily accessed and applied
- Community successes are celebrated/acknowledged
- We meet both on- and offline
- The community does not involve outside experts/stakeholders in our community
- The external communication is open and timely
- The community breaks down communication barriers to the outside
- The community is quick in asking/replying
- The community uses easy communication tools

Shared vision

Champions | Stuggling

Participation and engagement

Champions | Stuggling

The community helps me build relationships and network with others

There are incentives for new members to participate

Members draw direct and practical benefits from their involvement

Community facilitation is attractive/stimulating

In the community, everybody asks questions

The community provides a sense of belonging

The community is heterogeneous

The community is open to new members, inclusive and advertised

Community and knowledge

Champions | Stuggling

The community has adopted a consistent attitude to collaboration and knowledge sharing

The community builds knowledge sharing and learning into work life

The community enables accelerated learning of new knowledge

The community connects learning to action

There is a balance of giving and taking among members

The community is valued by members for its shared practices

The community extends and applies knowledge across relevant internal and external entities

The community strengthens collaboration across DGs/units

The community is guided by a dedicated and passionate coordinator

The community fosters professional development

Trust and confidence

Champions | Stuggling

Communication

Champions | Stuggling

The community does not always facilitate building relevant contacts across internal and external domains

+ Reach Goal
Measurement
Objectives
Sponsorship
Tools and user experience
Leadership
Community management
Boundary-spanning
Risk-free environnement

Always done by champions

Often done by champions

Often not done by struggling

Never done by struggling

+ | − | −− | x

5.3. Bibliography

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