



# **Starting and Managing Successful Communities of Practice**

COMMUNITY OF PRACTICE TOOLKIT

Version 2.0 (June 2019)



# Welcome

This toolkit contains a variety of useful advice on **how to start and maintain successful communities of practice**. Though this toolkit was designed for employees of Catholic Relief Services (CRS), the guidance and recommendations can be applied by other organizations. Click on a topic below to jump directly to a specific section or read on to get a more detailed overview of the information presented.

## Quick-Start Topics



[Deciding whether to start a community of practice](#)

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[Planning for a successful launch](#)

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[Getting help with common challenges after launch](#)

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[Choosing the right collaboration technology](#)

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[Managing your community effectively](#)

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[Measuring and communicating success](#)

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# The Role of Communities of Practice

In a global organization engaged in the complex and ever-changing field of international development, collaboration is of significant importance. For as long as such organizations have existed, dedicated groups of people have come together, both formally and informally, to address challenges, achieve project objectives, learn from one another's experiences and engage in meaningful discussions around common interests and areas of expertise. Today, collaboration across geographies, departments and institutions is more critical than ever and is being made easier by the variety of new online collaboration technologies at our disposal that allow for people to connect with one another and work together, regardless of where they are located. Though this toolkit was designed for staff of Catholic Relief Services (CRS), the guidance can be applied by any large organization.

Collaboration groups take a variety of forms at CRS, but they share one thing in common: they provide an effective means to more quickly and efficiently put our collective knowledge and experience to work for those we serve, both inside and outside the agency. More specifically, these groups can help us to:

- Support a continual cycle of learning and doing
- Bring together a range of perspectives to address critical challenges
- Link people with shared functional expertise across organizational boundaries
- Ensure "mission-critical" knowledge is accessible to those who need it
- Support use of tacit (what we know) and explicit (what is documented and available) knowledge through collaborative reflection, interpretation and problem-solving

**This toolkit is primarily focused on supporting effective use of communities of practice to support collaboration and learning at CRS.** That said, you may find many of the ideas and approaches presented to be equally applicable to other types of collaboration groups you are involved with. (See Appendix C for a description of common collaboration group types.)

# Introduction

## About This Toolkit

This toolkit has been developed by the CRS Global Knowledge Management for Excellence (KM4X) team for use by all CRS staff worldwide to support the effective launch, management and use of communities of practice. The toolkit content reflects best practices in the fields of knowledge management and organizational learning as well as lessons learned by CRS staff while leading and participating in such communities. The guidelines and information presented will be updated regularly based on user feedback and the changing landscape of collaboration approaches and technologies at CRS and in the field at large. Feedback and suggestions are always welcome and can be sent to Nicole Balliette, Sr. Advisor for KM and Learning, at [nicole.balliette@crs.org](mailto:nicole.balliette@crs.org).

## How to Use This Toolkit

This toolkit was designed to support all CRS staff in successfully launching and managing communities of practice. The information presented can be particularly helpful when...

- Trying to decide if a community of practice would be helpful in achieving specific work objectives
- Thinking about starting a new community of practice
- In the process of launching a community of practice
- Looking for ways to enhance the effectiveness of an existing community
- Trying to decide what technology can be used to support your community

**It's not necessary to read this toolkit from start to finish.** In fact, we recommend that you don't! Are you thinking about starting a community of practice? Read the section entitled ***When to Start a Community of Practice*** on page 7 and use the questions presented to guide you in your journey. Do you already manage an active community and just want guidance on making improvements? Feel free to visit the section entitled ***Help! When Your Community Needs an Intervention*** on page 10.

On a final note, much of the information presented in this toolkit corresponds directly to fields within the community charter template provided in Appendix A. While this template is primarily used during the initial planning stage, existing communities may find it useful for revisiting or updating their reason for being or for attracting new members.

# First, Some Basics

## Communities of Practice Defined

A community of practice is a collaborative group of practitioners focused on advancing their work in a specific domain. Respected thinker on this topic Etienne Wenger defines a community of practice as:

*“A learning partnership among people who find it useful to learn from and with each other about a particular domain. They use each other’s experience of practice as a learning resource...and they join forces in making sense of and addressing challenges they face individually or collectively.”<sup>1</sup>*

The type of knowledge being exchanged is often at a high level of detail and is purposefully directed toward specific actions, such as sharing best practices, developing technical standards or providing on-the-job training or peer mentoring. Community members can be preselected or self-selected but are generally characterized by a deep level of knowledge and/or interest in the community’s area of focus and a passion for learning and knowledge sharing.

Due to their ongoing nature, these communities often focus on one or more priority activities at a time while at the same time supporting open ideas exchange and learning among members. Leadership and facilitation of these communities is typically the responsibility of one or more individuals with deep, domain-specific knowledge. This function may rotate periodically so that the work can be shared across multiple members. (For more on community facilitation, see related section on page 26.)

**Community of Practice Key Characteristics<sup>1</sup>**

**Member Selection:** Generally self-selected, based on expertise, interest or role, but can be recruited or assigned

**Key Drivers of Participation:** Passion, commitment and identification with the community and its expertise; desire for access to information; sense of like-mindedness

**Community Lifespan:** Evolve and end organically, lasting as long as there is interest in learning together and people to support effective community

<sup>1</sup>Wenger, E., Trayner, B., de Laat, M. Promoting and assessing value creation in communities and networks: a conceptual framework (2011). Netherlands: Ruud de Moor Centrum.

## When to Start a Community of Practice

Communities of practice can take a variety of forms depending on their purpose, membership profile and the context in which they operate. In the field of international development, communities of practice have become a critical modality for learning, sharing and collaborating within and across geographic, departmental and institutional divides. These flexible structures, which often use a combination of in-person and online interactions, provide an agile, responsive framework for problem-solving, sharing of best practices and on-the-job learning, all of which are critical to the success of organizations working in this dynamic field.

Common reasons for starting a community of practice include:

- Knowledge and experience in how to advance practice in a particular domain resides with individuals who do not know each other and/or who are based in different locations
- Staff sharing a common role or function across the agency do not have a forum for routine sharing with and learning from one another
- There is an ongoing need to develop guidance in a given area of practice that reflects the best thinking from across the agency
- There is an ongoing need to routinely capture and share best or emerging practices in a given area of practice and share the information gathered inside or outside the agency
- And many more!

**“Communities of practice can bring together a range of perspectives on a problem, and ensure that relevant knowledge is accessible to those who need it. This is far more than the exchange of knowledge. It is about making sense of and the interpretation of knowledge within the members’ specific contexts.”**

(Hearn and White, 2009)

## Key Considerations Before Starting a Community of Practice

Once the reasons for starting a community of practice are established, it's also important to take into consideration other factors that may help you decide whether starting a community of practice is in fact a good idea. The figure below outlines some of the key considerations you will want to make before deciding whether a community of practice will be the right vehicle for achieving your objectives. Click on a header title to be taken to the corresponding section of this toolkit where you will find additional guidance.

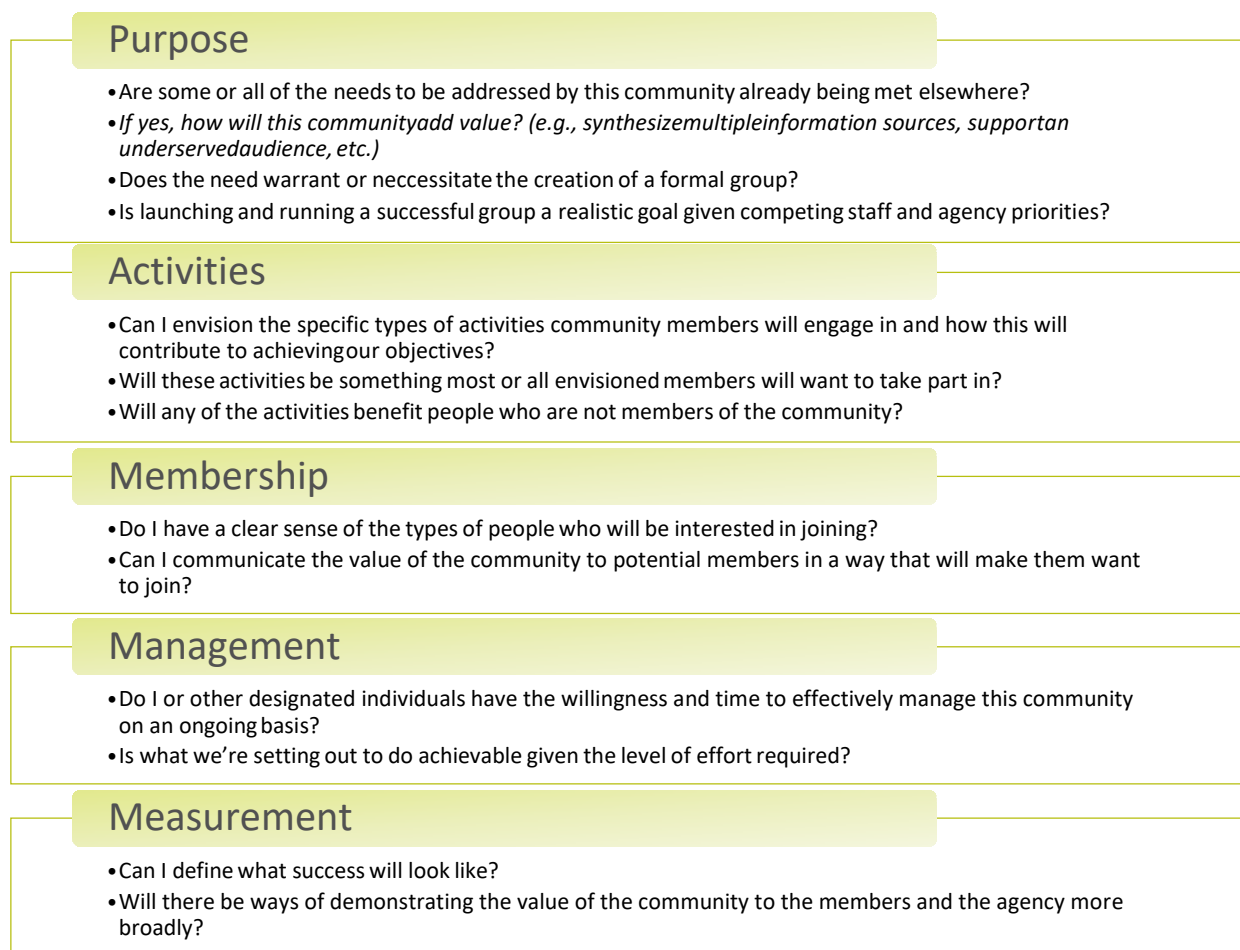


Figure 1. Key Questions to Ask Before Starting a Community of Practice



You may not be able to answer “yes” to all the questions presented in Figure 1 right away and that’s perfectly normal at this stage. Now that you’re familiar with the key considerations, we invite you to dive into the relevant sections of this toolkit for additional guidance.

## The Community of Practice Life Cycle

All communities of practice follow a life cycle characterized by different stages of growth and development. Whether a community’s lifespan is finite or ongoing, it is important to plan for and be aware of the factors that will contribute to the community’s success at every stage of its life cycle. While community facilitators will have a specific role to play at each stage (a topic covered in a later section), Figure 2 below provides an overview of the four key stages of a community’s life cycle and the primary activities that support success at each stage.

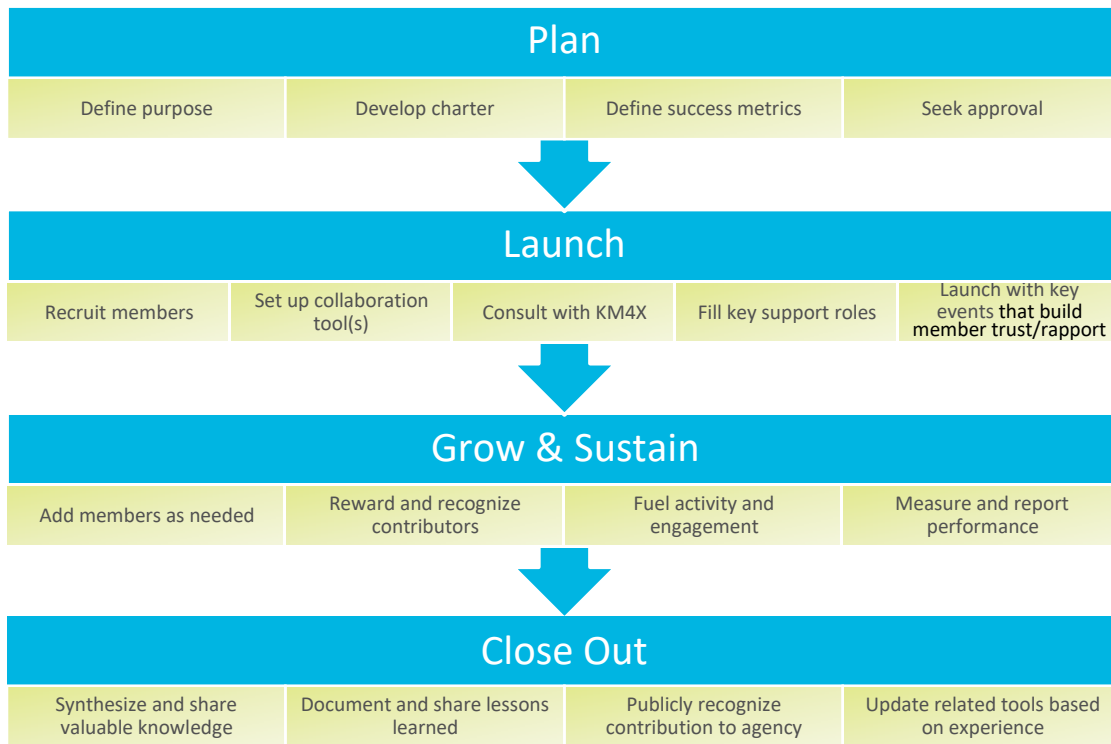


Figure 2: Typical Community Life Cycle and Key Activities at Each Stage<sup>2</sup>

<sup>2</sup> Adapted from USAID. Communities @ USAID Technical Guidance. September 2006.

## Help! When Your Community Needs an Intervention

If you lead, facilitate or are a member of a community of practice, you may be familiar with something often referred to as “the trough (i.e., ditch or trench) of disillusionment.” This is a stage at which everything seemed like it was going great, excitement was high and then, for no apparent reason, the activity of community members dropped off dramatically or ceased altogether. Or perhaps everything was full of promise during the planning stage and then, when your community launched, the anticipated level of activity never occurred. If you ever find yourself in one of these situations, don’t despair! There are several things you can do to remedy the situation. The table below lists some common challenges and suggested interventions that can help breathe new life into your community.

Table 1: Symptoms, Causes and Interventions for Common Engagement Challenges

SYMPTOM	POSSIBLE CAUSE	SUGGESTED INTERVENTION(S)
<p><b>Member activity never took off after launch</b></p>	<ul style="list-style-type: none"> <li>● Members may not be clear on what specifically they should be doing and how often</li> <li>● Members may be intimidated or shy, they don’t want to be “first”</li> <li>● Members may be having trouble using the designated technology platform</li> </ul>	<ul style="list-style-type: none"> <li>● Post provocative questions for members to answer</li> <li>● Engage members in one or more group activities where there is a clear output within a specific time frame</li> <li>● If not done previously, engage members in defining a clear purpose, activities, etc. (see charter template in Appendix A)</li> <li>● Recruit willing members to initiate engaging group discussions or activities and invite others to join in</li> <li>● Check in with members individually to ensure they are comfortable using the community’s technology platform and/or provide a group training</li> </ul>
<p><b>Everything was going great and then...crickets (i.e., no activity)</b></p>	<ul style="list-style-type: none"> <li>● A specific activity members were engaged in has ended</li> <li>● One or more new projects is competing for members’ time</li> </ul>	<ul style="list-style-type: none"> <li>❓ Poll members to define new sets of activities or outputs</li> <li>❓ Survey existing members to assess satisfaction with the group and gather ideas for improvements (see survey template in Appendix B)</li> </ul>

SYMPTOM	POSSIBLE CAUSE	SUGGESTED INTERVENTION(S)
<b>Cont'd: Everything was going great and then...crickets (i.e., no activity)</b>	<ul style="list-style-type: none"> <li>Some of the more active members left or changed roles</li> </ul>	<ul style="list-style-type: none"> <li>Actively recruit new, passionate members</li> <li>Assess whether the community has reached the end of its life cycle and should be decommissioned</li> </ul>
<b>There is a small group of active/vocal members but most members are not engaged</b>	<ul style="list-style-type: none"> <li>Other members may feel shy about contributing when they feel others have more expertise or experience</li> <li>The activities or topics of focus may not be directly relevant to other members</li> </ul>	<ul style="list-style-type: none"> <li>Reach out individually to members to encourage their contributions or solicit their ideas for other activities/discussion in which they'd like to engage</li> <li>Survey existing members to assess satisfaction with the group and gather ideas for improvements (see survey template in Appendix B)</li> </ul>

## Step One: Planning Your Community

The establishment of a community of practice is led by one or more facilitators at the outset of group activities. The community facilitator assumes responsibility for the successful definition and launch of the community and will therefore be critical to ensuring the early success of the community. At the outset, it is critical to establish the **WHY**, **WHAT** and **WHO** of your community to lay a foundation for a successful launch. The **HOW** of leading and facilitating your community will be dealt with in the following section.

This information will also form the basis of your community charter (see template in Appendix A) that will be circulated to management or others for approval and to potential community members for feedback and to generate interest. In this section we will explore each of these key elements.

### WHY: Community Purpose and Objectives

It is always best to begin by defining the specific community purpose and set of objectives, as this focus will drive all subsequent community activities. It will also be important at this stage to define what types of activities will be the primary focus of your community.

#### Purpose

The purpose should be a concise, overarching statement about the community's reason for being and the outcomes it is seeking to achieve. This should include a description of any specific challenges or needs the community will help address. Examples include:

- ❑ To improve the quality of HR practice at CRS
- ❑ To support the successful operation of the XX Project
- ❑ To increase knowledge and awareness around the topic of gender-based violence in international development

#### Objectives

The community objectives will be specific enough to guide community participants in relation to the stated purpose while leaving room for the community to change and evolve over time. The list below provides examples of some common collaboration community objectives:

- ❑ Share and apply promising and best practices
- ❑ Support peer-to-peer knowledge exchange and learning

- ❓ Provide peer support and feedback on ongoing work
- ❓ Engage in group problem-solving and idea generation
- ❓ Support and promote active discussions around areas of interest and/or practice
- ❓ Share updates and news from inside and outside the agency related to our work
- ❓ Work together on the development of resources and guidelines related to our work

## WHAT: Community Activities and Expected Benefits

### Activities

Based on your community's purpose and objectives, define the core set of activities, which may include:

- ❓ Participate in online discussions
- ❓ Collaborate on key documents and guidelines
- ❓ Plan and convene in-person and/or remote gatherings and events
- ❓ Locate and engage in discussion with peers based on their knowledge and/or experience

### Benefits

It will be important at the outset to define the benefits of your community, both for community members and the agency more broadly. Thinking about your intended objectives, what will be the value generated once these objectives are achieved? Examples of potential benefits include:

#### *Member Benefits*

- ❓ Professional development through increased knowledge and awareness
- ❓ Expanded network of colleagues
- ❓ Ability to more easily learn from and connect with others
- ❓ Increased sense of community and support
- ❓ Ability to stay up-to-date on the latest developments and innovations
- ❓ Ability to engage in joint problem-solving
- Ability to share one's knowledge and expertise with those engaged in similar work

### Agency Benefits

- ❓ Accelerated learning and improvement
- ❓ Synthesized knowledge and lessons learned reflecting a diversity of perspectives
- ❓ High-quality knowledge products reflecting agency best practices
- ❓ More engaged and knowledgeable staff
- ❓ Increased support for rapid problem-solving in the flow of work
- ❓ Support for increased learning opportunities outside of formal training

### WHO: Community Membership

Selection of community members will be driven by the purpose and objectives you define. You will want to consider the membership composition of your community (homogeneous vs. diverse), formality (structured and formal vs. unstructured and informal), dispersion (distributed vs. centralized), location (within organizations/networks or across organizations/networks) and focus (broad and far-reaching vs. closely defined).<sup>3</sup> Also think about the different roles the members of your community may play in terms of their contribution as well as their professional profile and expected level of engagement. Finally, you will want to think about the ways in which people can join your community. The following are some defining characteristics to help guide your member-related decisions.

#### Primary Audience

These are the people whom your community will primarily be serving. In some cases, this may be your only audience while in other cases you may welcome others who may not fit this profile but who may still be interested in being a member. There are near limitless types of groups, which could be based on such things as sector, geography, technical expertise and job function, among others. A few illustrative examples of primary audience types include:

- ❓ All HIV prevention program implementers and practitioners, regardless of location or specific role
- ❓ All HR staff in the WARO region

#### QUICK TIP

If there is a wider circle of people who could benefit from the information being shared in your community, consider one or more engagement or interest “circles” in addition to your core members. People in these circles can receive updates on the latest community outputs, provide critical input when outside perspectives are needed, and take part in events open to non-members.

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<sup>3</sup> Hearn, S., and White, N. Communities of practice: linking knowledge, policy and practice. Overseas Development Institute. November 2009.

- ☐ Senior technical staff worldwide interested in formally publishing their work
- ☐ All members of the [Project Name] Project Team

## Community Size

Here you will want to think about the expected and/or desired size of your community. This may be predefined if it is composed of the members of a department or a project team. If open, you will want to target a size that is well matched to your intended purpose and objectives. Do you want a large, diverse group representing differing perspectives and geographies, or should the community feel small and intimate, supporting high levels of trust and familiarity? Keep in mind that larger communities are more likely to achieve a healthy, sustained level of activity. But if your community will be involved in sensitive discussions or any type of activity that requires high levels of trust and familiarity between members, limiting the community size may be desirable.

## Community Access

Here you will want to define how people may become members of your community. In some cases, there will be a preselected list of members while in other cases you may make your community open for anyone who wishes to join. Types of access include:

- ☐ Closed, by invitation only
- ☐ Mixed, some members invited while others can request to join
- ☐ Open, all those interested can join

## Roles and Responsibilities

As you think about the members of your community, it will be useful to envision the various roles they may play and choose your membership outreach strategy accordingly. For example, will you have one or more active community facilitators who drive the activities of the community, or will you rely mostly on members to drive activity? If the latter, you may want to identify certain members as champions who will help promote and support the desired group activities. If the success of your community relies on the availability of knowledgeable experts in a given area, you'll want to make sure you have a sufficient number of these people so that the burden of answering questions doesn't fall too heavily on any one person. Some roles you may find useful for your community are outlined in Table 2.

Table 2. Key Community of Practice Support Roles

ROLE	PRIMARY ACTIVITIES	PERSONALITY PROFILE	LEVEL OF EFFORT
<b>COMMUNITY LEADER</b>	Set usage guidelines and objectives  Member outreach and activity monitoring/ reporting  Member surveys and continuous improvement	Action oriented  Responsible and timely  Understanding of group dynamics	Heavier at outset (3-5 hours/week); 2-3 hours/week ongoing
<b>COMMUNITY FACILITATOR</b> In many cases, may be an additional responsibility of the leader	Seed content and discussions  Post notes from meetings  Ensure a healthy flow of activity  Enforce usage guidelines  Ensure all discussions and questions receive a timely response	Outgoing and friendly  Professional demeanor  Ability to set the right tone for discussions	3-6 hours/week, depending on level of activity (often a rotating position shared among members)
<b>COMMUNITY CHAMPIONS</b>	Actively initiate and engage in activities  Provide regular feedback to facilitator to help improve effectiveness	Outgoing and friendly  Passionate about the community’s purpose  Comfortable engaging with people they don’t know well	1-3 hours/week, depending on level of activity
<b>SUBJECT MATTER EXPERTS</b>	Provide timely answers or input into discussion requiring expert feedback  Help set objectives and initiate activities	Knowledgeable and supportive  Comfortable engaging with people they don’t know well  Ability to provide guidance and advice without “talking down” to less experienced members	2-4 hours/month, depending on level of activity



## Step Two: Establishing Your Community

In this section, we will cover the steps needed to establish your community once the initial planning phase is complete. At this stage, you will have completed the initial version of your community charter (see Appendix A) and will have discussed it with your supervisor and/or other approvers and some or all of your potential community members.

### Choosing a Collaboration and Communication Model

The first step in establishing your community is to decide how and how often your community will need to collaborate and communicate. This will largely be driven by the objectives and activities you outlined in step one. Questions to guide you in your decisions around the appropriate model include:

- ❓ Is this an ongoing or time-limited community? If the latter, how quickly do you need to achieve your objectives?
- Will the community's activities be primarily around the creation of documents, more discussion-based or a mix of both?
- ❓ Is everyone comfortable speaking and reading the same language?
- ❓ Are people located in different locations and/or time zones?
- ❓ How comfortable are people using technology?
- ❓ How engaged will community members be? Is this a primary work activity or more of a voluntary/elective activity for them?

#### QUICK TIP

**If people in your community have different levels of ability speaking or reading the community's primary language, recruit members who speak other languages to translate in real time or provide written/oral summaries in other languages during key events or activities.**

Your answers to these questions will guide you in the selection of an appropriate model for your community. For most communities, it will make sense to use more than a single mode of communication or collaboration. Typically, models will include one or two of the following collaboration and communication approaches:

- ❓ Weekly or monthly conference calls (Skype or web conference) and sharing of notes
- ❓ Sharing and collaborating on documents in a shared folder or workspace

#### QUICK TIP

**If possible, launch your community in conjunction with an in-person event where some or all members will be present. This will help promote the purpose and existence of your community and provide a chance for members to meet and/or spend time together establishing shared group plans and objectives.**

- ❓ Online discussions in a shared group, forum or chat application
- ❓ Quarterly, semiannual or annual in-person meetings

Once you define your desired model you should include this information in your community charter. The next step will be to select the appropriate type of technology to support the smooth functioning of your community.

## Guidelines for Selecting a Collaboration Technology Platform

The choice of technology to support your community's activities is critical to the smooth functioning of your community. CRS has a variety of technology tools available to support the different types of communication and collaboration your community may need. Your selection of a tool should consider the model you developed in the previous section as well as the features and functionality of the variety of technology available. In this section, we will review the key aspects of the following CRS tools to help guide you in your decision-making process (at the end you will find a Quick Guide to tool selection):

- ❓ Office 365 Groups
- ❓ Microsoft Teams
- ❓ SharePoint Sites
- ❓ OneDrive
- ❓ Yammer
- ❓ Chatter
- ❓ Skype for Business

### Office 365 Groups

Groups in Office 365 function as a place within Outlook to connect users with people, information and applications. They are also available in, and make use of, other Office 365 applications like OneNote and Planner. Groups are open by default to enhance discoverability and sharing, but users can also create private groups for sensitive, or otherwise group-specific, content and discussions.

While Groups functionality is available through several apps, the main point of access is Outlook. From within Outlook users can access the following functionality:

- Shared Inbox – for email conversations between your members. This inbox has an email address and can be set to accept messages from people outside the group and even outside your organization, much like a traditional email distribution list.
- Shared Calendar – for scheduling events related to the group.
- SharePoint Document Library – a central place for the group to store and share files (Note: when an Office 365 Group is created, a SharePoint Site is created automatically).
- Shared OneNote Notebook – for gathering ideas, research and information.
- SharePoint Team Site – a central repository for information, links and content relating to your group.
- Planner – for assigning and managing project tasks among your group members.

## Microsoft Teams

Microsoft Teams is a chat-centered workspace in Office 365 that supports team-based collaboration. Microsoft Teams serves as a hub for teamwork, providing instant access to chat conversations, content and tools from across Office 365 in a single workspace. SharePoint and OneNote are built in, and team members can work on Office documents from within the app.

Aside from chats, Microsoft Teams also supports video calls and meetings to enable teams to meet live, whether on demand or scheduled. Team members can easily collaborate with multiple teams and search across people, chats and files. Microsoft Teams works across Windows, Mac, web browsers, Android and iOS platforms. When a Team is created, an Office 365 Group and a SharePoint Site are created automatically. Teams is not yet available for use with external (non-CRS) users.

## SharePoint Sites

SharePoint Sites are used when it is necessary to create a place primarily for publishing to internal audiences or when it is necessary to create a customized user interface or microsite-type experience. Typically, Sites are used for Departments (i.e., Human Resources) to create a space to share information with employees.

## OneDrive (Supporting tool)

OneDrive is a cloud storage space used to store work files across multiple devices. OneDrive supports sharing with internal and external colleagues and allows collaboration and real-time editing of Office documents with Office Online. OneDrive also supports file syncing to local drives.

OneDrive is based on SharePoint and is used in conjunction with Microsoft Teams and Office to provide content management and document collaboration features. Users can add documents to Groups and Teams by uploading files or by sharing documents from OneDrive or other cloud storage services.

## Yammer<sup>4</sup>

Yammer is a collaboration platform that provides the ability to support multiple internal and external collaboration groups. Yammer offers a rich set of social features, including:

- ❓ A rolled-up Social Activity Feed
- ❓ Direct messaging and chat
- ❓ Liking, announcements, praise and polling
- ❓ Topics (tags)
- ❓ Following

Yammer supports both internal and external groups. External users must have a business email address (i.e., not Gmail) and Yammer connects to their corporate account, or creates a corporate account if one doesn't exist. Files uploaded or shared to a Yammer group are stored within Yammer, although a SharePoint Document Library is provided as well.

## Skype for Business

Skype for Business is a communication platform that allows you to engage in conversations with people inside and outside of your organization. While it offers the same features as Skype, it is configured for business use and has enhanced security and people lookup features. Three types of conversations are supported for individuals and groups: instant message/chat, video calls and voice-only calls. Skype for Business can also be used for web conferencing and screen sharing.



Table 3 provides an overview of the key strengths of each collaboration tool in terms of how it might be used to support the activities of a community. A full list of features and functionality is beyond the scope of this document, but a more complete description of the tools is being updated and will be made available soon. More information and training on use of these tools can be obtained by contacting a GKIM representative.

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<sup>4</sup> Note: Chatter is a similar application to Yammer available in Gateway (based on the Salesforce platform). It is used by CRS staff primarily for communications specific to a project. It allows for the formation of groups that are open or closed and supports discussion threads, tagging and sharing of documents as attachments.

Table 3. Comparison of CRS Collaboration Tool Key Features

	OFFICE 365 GROUPS	MICROSOFT TEAMS	SHAREPOINT SITES	ONEDRIVE	YAMMER	CHATTER	SKYPE FOR BUSINESS
CHAT		STRONGLY SUPPORTED					STRONGLY SUPPORTED
AUDIO/VIDEO CONFERENCING		STRONGLY SUPPORTED					STRONGLY SUPPORTED
DOCUMENT COLLABORATION	STRONGLY SUPPORTED	STRONGLY SUPPORTED	STRONGLY SUPPORTED	STRONGLY SUPPORTED	SUPPORTED	SUPPORTED	
THREADED DISCUSSIONS	STRONGLY SUPPORTED	STRONGLY SUPPORTED			STRONGLY SUPPORTED	STRONGLY SUPPORTED	
ANNOUNCEMENTS, POLLS, PRAISE, TOPICS, FOLLOWING, PROFILES					STRONGLY SUPPORTED		
LARGE-GROUP COLLABORATION	SUPPORTED		SUPPORTED		STRONGLY SUPPORTED	STRONGLY SUPPORTED	
SMALL-GROUP COLLABORATION	STRONGLY SUPPORTED	STRONGLY SUPPORTED					
ACCESSIBLE TO EXTERNAL (NON-CRS) USERS	STRONGLY SUPPORTED				STRONGLY SUPPORTED	STRONGLY SUPPORTED	STRONGLY SUPPORTED

 STRONGLY SUPPORTED
  SUPPORTED

While there are no hard-and-fast rules about which group type is matched to which tool, Table 4 offers some basic guidance to help you get started with tool selection. It is highly recommended that you consult with a KM4X representative before deciding on the best tool(s) for your community so that all variables and tool features can be considered and discussed.

Table 4. Quick Guide to Collaboration Tool Selection

GROUP TYPE	RECOMMENDATION
COMMUNITY OF PRACTICE	Use <b>Office 365 Groups</b> or <b>Yammer</b> . <b>Groups</b> is good for document collaboration and provides more structure features (e.g., Calendar, Planner). <b>Yammer</b> is good for social collaboration and provides more social features (e.g., Liking, announcements, polling). <b>Skype for Business</b> is useful as a communication tool for community calls but not as a primary platform for hosting ongoing discussions.
PROJECT TEAMS AND OPERATION TEAMS	Use <b>Microsoft Teams</b> if your team is all internal users. Use <b>Office 365 Groups</b> if your team contains external users.
FORMAL, “PERMANENT” GROUPS/DEPARTMENTS (E.G., PROGRAM TEAMS, REGIONS, COUNTRY PROGRAMS)	Use <b>SharePoint Sites</b> .

## Getting Started with CRS Collaboration Tools and Additional Resources

The information that follows has been provided by GKIM to support CRS staff in using the variety of available CRS collaboration tools. For further assistance with tool selection and setup, contact [servicedesk@crs.org](mailto:servicedesk@crs.org) and reference “Collaboration Tool Support” in your request.

### Yammer

**WHO CAN ACCESS:** All CRS staff have access to Yammer

**HOW TO ACCESS:** Go to <https://login.microsoftonline.com>, click on the menu in the upper left corner and select “Yammer” from the app launcher

**WHERE TO LEARN MORE:**

- 🔗 [Yammer Success Center](#)
- 🔗 [Yammer 101 Group](#)

**HOW TO GET HELP:**

- Contact the service desk ([servicedesk@crs.org](mailto:servicedesk@crs.org)) and reference “Yammer” in your request
- 🔗 Watch a video overview: <https://vimeo.com/69478241>

## Office 365 Groups

**WHO CAN ACCESS:** All CRS staff have access to Groups in Office 365

**HOW TO ACCESS:** Go to <https://login.microsoftonline.com>; Groups is integrated into Mail, Calendar, People and OneDrive apps on the left sidebar

### WHERE TO LEARN MORE:

- [Microsoft's Groups for Office 365 tutorials](#)

### HOW TO GET HELP:

- Contact the service desk ([servicedesk@crs.org](mailto:servicedesk@crs.org)) and reference "Office 365" in your request
- 🔗 Watch a video overview: <https://www.youtube.com/watch?v=t3OLvYXepvE>

## Microsoft Teams

**WHO CAN ACCESS:** All CRS staff have access to Microsoft Teams in Office 365

**HOW TO ACCESS:** Go to <https://login.microsoftonline.com>; Teams is one of the options available in the "waffle"

### WHERE TO LEARN MORE:

- 🔗 <https://support.office.com/en-us/article/Microsoft-Teams-Quick-Start-422bf3aa-9ae8-46f1-83a2-e65720e1a34d>

### HOW TO GET HELP:

- Contact the service desk ([servicedesk@crs.org](mailto:servicedesk@crs.org)) and reference "Office 365" in your request

## SharePoint Sites

**WHO CAN ACCESS:** All CRS staff have access to CRS Global (our intranet, based on SharePoint). For questions about setting up a new site, contact [servicedesk@crs.org](mailto:servicedesk@crs.org). Note that CRS is currently preparing to upgrade the intranet, which may temporarily affect decisions about new sites until the upgrade is completed.

**HOW TO ACCESS:** Go to <https://global.crs.org>

### WHERE TO LEARN MORE:

*Note: This section will be added following the intranet upgrade.*

#### HOW TO GET HELP:

- Contact the service desk ([servicedesk@crs.org](mailto:servicedesk@crs.org)) and reference “CRS Global” in your request



## Step Three: Managing Your Community

The approach you take to manage your community is the most critical factor in determining its success. Taking an “if you build it, they will come” approach will not be sufficient in sustaining the health of your community. It is common to refer to those in charge of a community’s ongoing care and feeding as facilitators rather than managers, since their primary role is to orchestrate rather than dictate group activity. Facilitation of a community can be shared among multiple individuals and often rotates over time so as not to overburden any one individual. When facilitators are rotated, it is advisable to have the former facilitator(s) share lessons and suggested approaches with the incoming facilitator(s) to support a cycle of continuous improvement.

### Facilitation Throughout the Community Life Cycle

Community facilitation must be a focused and sustained effort on the part of one or more people designated to serve in this role (see community role descriptions on page 15). This role will change and evolve over time as your community matures but is critical at every stage of the process. The table below summarizes key facilitation activities at each stage of your community’s life cycle. In addition to the specific activities outlined, a “can do” attitude, high energy and a positive attitude will be critical.

Table 5. Community Facilitation by Life Cycle Stage

LIFECYCLE STAGE	FACILITATION FOCUS	EXPECTED OUTCOMES
<b>START-UP</b>	Member recruitment Objective setting and goal alignment Seeding content/discussions	Desirable mix of members Member interest and engagement Member clarity on group objectives Consistent level of group activity
<b>ONGOING OPERATION</b>	Member reward and recognition Fostering connections between members Ensuring ongoing relevance Packaging/synthesizing knowledge for wider (nonmember) use Bridging in-person events with online engagement Supporting creation of desired outputs	Highly motivated and active members Diverse voices – not just the same people in every conversation High-quality outputs reflecting multiple perspectives Nonmembers able to access and benefit from knowledge generated Member and nonmember awareness of group’s value Member engagement, empowerment, collaboration and trust

LIFECYCLE STAGE	FACILITATION FOCUS	EXPECTED OUTCOMES
<b>ONGOING OPERATION (Cont'd)</b>	Facilitating intentional group learning Communicating group successes to members and agency at large	
<b>CLOSE-OUT FOR GROUPS THAT HAVE A LIMITED LIFESPAN</b>	Definition of follow-on activities, if any Ensuring knowledge transfer and synthesis from group exchanges Documenting lessons from group management for others Acknowledging member contributions	Member satisfaction with work achieved Wider agency awareness of value generated Application of lessons learned by other group managers Accessibility of knowledge generated to all who need it

## Principles of Effective Community Facilitation<sup>5</sup>

For any collaboration group to be successful, it must generate value for the agency as well as for its individual members. The following guidelines can help community facilitators ensure that their communities remain useful and relevant in the face of ever-changing priorities. This involves empowering members to contribute value and drive community priorities while at the same time ensuring the community stays true to its intended purpose and objectives.

### Foster instead of control

- Empower members to set the community’s goals and objectives (which can change over time) with a focus on community learning rather than simply the fulfillment of tasks
- Routinely recognize and thank members for their contributions
- Help members move their ideas into wider practice and stimulate their thinking through constructive feedback and challenges

**QUICK TIP**  
Consider organizing two or more thematic “tracks” within your community based on the topics your members care about most. Members can elect to serve as track leaders for a set period of time, during which they will host a series of activities related to their track.

### Focus on facilitation

- Facilitators should develop their skills and dedicate adequate time and energy to ensuring the community remains active and useful to its members

<sup>5</sup> Adapted from Hearn, S., and White, N. Communities of practice: linking knowledge, policy and practice. Overseas Development Institute. November 2009.

- Where facilitator time is limited, consider using multiple facilitators who can share or rotate this function
- Facilitators should model the behavior they would like to see from community members (i.e., lead by example)

### Be responsive to members' needs and capacities

- Make regular efforts to assess and respond to what members are looking for in terms of value to their work and what they would like to contribute
- Identify the capacities of key community members (such as specialized areas of expertise) and encourage them to play a designated role, such as subject matter expert (SME)
- Send out a semiannual or annual survey to community members assessing their level of satisfaction with the community and soliciting input on community management, structure and objectives (see the following section on community measurement)

### Encourage critical thinking

- Actively steer members away from “community think” by encouraging dissent and sharing opposing viewpoints, whether personal or from outside sources (such as an article or editorial)
- Encourage questioning of the status quo and lively (but constructive and respectful) debate on hot topics of the day

### Support two-way learning

- Use content that is shared as a centerpiece for active discussion; communities of practice are not meant to be solely a means for dissemination of information, but rather an active space of knowledge generation through discussion and peer-to-peer learning
- When sharing a piece of content, include one or more provocative questions to encourage discussion on key points

### Balance learning and producing

- Intersperse production-focused activities (such as the development of guidelines or standards) with more learning-focused activities (such as formulating solutions to a key challenge)
- Place equal value on deliverables and “softer” learning exchanges to ensure participation in both streams of activity

## Methods for Growing and Sustaining Member Engagement

One of the biggest challenges community facilitators face is sustaining member engagement over time. The following are a few approaches that can assist in encouraging active participation by members as well as support from senior leaders and others. (Note: in addition to these methods, facilitators should routinely assess the community's relevance to members and adjust the focus and activities of the community accordingly [see the following section on community measurement for more on this topic]).

- Hold monthly or bimonthly calls featuring brief presentations followed by “roundups” of hot topics related to recent discussions
- Send quarterly conversation summaries and/or newsletters to community members and other interested staff (i.e., subscribers)
- Maintain an annual community event and activities calendar to build interest and excitement for what’s to come.
- Invite a “special guest,” such as an internal or external expert, to field questions from community members for a limited amount of time
- Invite community members with specialized expertise or a recent experience of interest to publish an article or discussion on the community’s collaboration workspace
- Hold a challenge or contest to generate ideas or solutions around an issue identified as a priority by the community and allow community members to vote for the best contributions
- Establish a “cost-of-membership” model (e.g., each member must document at least one promising/good practice per year or post X amount of questions/responses to remain in the community)
- Hold an annual in-person event where the most engaged members are publicly recognized for their contributions and/or are given an opportunity to present on a topic of interest
- Provide incentives for community contributions, such as points and badges (if supported by the collaboration tool) and other nonfinancial rewards and prizes
- Formally recognize community membership as part of regular staff performance evaluations

### QUICK TIP

To extend the benefits of knowledge generated in your community to nonmembers, synthesize key lessons, practices or discoveries shared into a brief document on a quarterly or semiannual basis. This document, which can contain quotes and examples from community discussions, can be disseminated broadly and made discoverable to those seeking information on the domain addressed.

## Setting Ground Rules for Participation

The often-overlooked step of setting ground rules for community member participation is extremely valuable for establishing the tone of your community and curbing any potentially damaging behaviors among members from the outset of activities. It is recommended that ground rules are created and reviewed/approved by members during the formation of your community and included in the community charter. Examples of ground rules to set a respectful and collaborative tone for your community are shown in the box below.

### **Sample Ground Rules for Community Members**

**All group members will...**

- **Participate to the fullest extent possible – community growth depends on the inclusion of every individual voice.**
- **Share challenges and lessons learned as well as successes.**
- **Create an environment of trust and foster insightful, nonthreatening discussion of ideas and experiences.**
- **Be respectful and use appropriate language in group discussions and listen and respond to each other with open and constructive minds.**
- **Contribute to an atmosphere of partnership and collaboration.**
- **Attempt to build on each member's strengths, and help each other improve areas in need of further development.**

## Step Four: Measuring Your Community

Communities should be routinely monitored and measured to assess their value and usefulness to members and the agency at large. This can be done through measurement of community activity as well as through the active collection of stories and perspectives from members on how the community is contributing directly to their work and professional development.

Information gathered should be routinely shared with members as well as key stakeholders within the agency to demonstrate and reinforce the organizational value of your community. This will serve to drive member engagement and encourage broader use of the community-of-practice model throughout the agency. Types of metrics that can be used to assess the productivity and value of a community are listed below.

### QUICK TIP

**More is not necessarily better when it comes to measuring your community. Choose the highest value metrics that tell the story of how your community is generating value to its members and the agency. These metrics should be relatively easy to collect, analyze and report to avoid overburdening community leaders.**

### Quantitative Metrics

These can often be collected using the analytics within the collaboration technology platform you select:

- Proportion of active/contributing members among all members
- Total number of questions and/or discussion threads posted (broken down by member- vs. facilitator-initiated and topic)
- Average number of responses per question/discussion
- Proportion of questions/discussions that received at least one response
- Number of outputs/products produced
- Number of resources (e.g., tools, guidelines) shared

### Qualitative Metrics

These will likely be collected in the form of a survey (see Appendix B for a sample survey) or during in-person interviews or focus groups. If the latter, it's important to ensure members have other channels available for anonymous feedback to community managers around suggested improvements.

- Member stories of how knowledge generated through the community positively impacted their program/project (can be in the form of a written narrative or video clip)
- List of emerging/good practices shared

- List of ideas or innovations shared
- Examples of successful peer-to-peer learning instances
- Feedback and suggestions on community management effectiveness
- Feedback and suggestions on use of tools

## Conclusion

We hope you have found this toolkit helpful in supporting the success and productivity of your community of practice. The CRS Knowledge Management for Excellence (KM4X) team is available to support the success of communities of practice in a variety of ways, from training and support on virtual group facilitation to assistance with using the templates and tools provided in this toolkit.

We are considering the idea of establishing a Collaboration CoP, where community facilitators could share approaches and seek advice from others engaged in similar work. If you would be interested in leading or supporting such a group, please contact [nicole.balliette@crs.org](mailto:nicole.balliette@crs.org). The creation of thriving communities is a never-ending learning process and we value your contributions to support the continual improvement of this important practice at CRS.

# Appendix A: Community of Practice Charter Template

[COMMUNITY OF PRACTICE NAME] Charter

For assistance in completing this template, contact a KM4X team member.

## Key People

<b>Community Initiator(s)</b>	
<b>Community Sponsor(s)</b>	

## Community Overview

<b>Target Launch Date</b>	
<b>Purpose</b>	
<b>Objectives</b>	
<b>Activities</b>	
<b>Expected Benefits</b>	Member Benefits <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul> Agency Benefits <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li></ul>



## Audience and Access

<b>Primary Audience</b>	
<b>Target Community Size</b>	
<b>Community Access</b>	<ul style="list-style-type: none"> <li>● Closed, by invitation only</li> <li>● Mixed, some members invited while others can request to join</li> <li>● Open, all those interested can join</li> </ul>

## Key Community Roles & Responsibilities

<b>Name(s)</b>	<b>Community Role</b>	<b>Community Responsibilities</b>
	Community Leader(s)	Person(s) in charge of drafting the charter and recruiting initial champions and members
	Community Facilitator(s)	Person(s) responsible for day-to-day management of the community, including ongoing measurement and improvement
	Community Champion(s)	Person(s) responsible for promoting the community, serving as a model for other members and providing feedback and support to facilitators
	Subject Matter Experts	People with desired domain expertise who commit to engaging regularly in community activities, sharing their knowledge and ensuring member questions/issues are adequately addressed

## Collaboration and Communication Model

List all communication and collaboration modes and expected frequency

<b>Mode</b>	<b>Frequency</b> <i>Weekly, biweekly, monthly, semiannually, annually, ongoing, other</i>	<b>Comments</b> <i>Specifics on usage, etc.</i>
Community calls (Skype, other)		
Sharing meeting minutes		
Online discussions		
In-person meetings		

Online document collaboration		

## Technology Platform

The community's online collaboration and communication will be supported by the following CRS technology platform(s)

Platform Name	
Person(s) Responsible for Community Setup and Support	
Key Platform Features	
Community Link/URL	

## Community Measurement and Evaluation

Describe the methods and specific metrics that will be used to measure the performance and effectiveness of your community. These should reflect your community's objectives as well as overall member satisfaction and perceived value to their work. A good measurement approach should include both qualitative (write-in) and quantitative (numerical) metrics of success.

Method	Frequency	Metrics Collected
<i>Example: Collaboration group system metrics</i>	<i>1x/month</i>	<i># of new discussions Average # of replies/discussion</i>
<i>Example: Member Survey</i>	<i>1x/year</i>	<i>Member satisfaction</i>

## Ground Rules for Community Members

EXAMPLE – MODIFY AS NEEDED

All community members will...

- Participate to the fullest extent possible – community growth depends on the inclusion of every individual voice.
- Share challenges and lessons learned as well as successes.
- Create an environment of trust that fosters insightful, nonthreatening discussion of ideas and experiences.
- Be respectful and use appropriate language in community discussions.

- Listen and respond to each other with open and constructive minds.
- Contribute to an atmosphere of partnership and collaboration.
- Attempt to build on each member's strengths, and help each other improve areas in need of further development.

# Appendix B: Sample Community Assessment Survey Questions

The following questions can be delivered in the form of an anonymous survey to all community members to gather feedback and data on the effectiveness of your community and overall member satisfaction. It is suggested that this information be collected semiannually or annually, depending on the activity level and lifespan of your community. Once responses are collected, they should be synthesized and shared with all community members for discussion and reflection. It is suggested that any needed actions to address member feedback be developed and performed in collaboration with community members themselves.

- Please rate your overall satisfaction with this collaboration community
  - Very satisfied
  - Satisfied
  - Neither satisfied nor dissatisfied
  - Dissatisfied
  - Very dissatisfied
  
- How useful has this collaboration community been to your work at CRS?
  - Very useful
  - Useful
  - Somewhat useful
  - Not at all useful
  
- How would you describe your personal level of engagement with this community?
  - Very engaged
  - Somewhat engaged
  - Neither engaged nor disengaged
  - Disengaged
  - Very disengaged

- How much do you agree/disagree with the following statements?  
Options: Strongly disagree, disagree, neither agree nor disagree, somewhat agree, strongly agree
  - This community has given me access to knowledge and information I would not have otherwise had access to
  - This community has given me access to people/expertise I would not have otherwise had access to
  - This community has made it easier for me to solve challenges in my work on one or more occasions
  - This community has given me the opportunity to help my colleagues in ways that would have otherwise been difficult or impossible
  
- How satisfied are you with the overall quality of the community's outputs?
  - Very satisfied
  - Satisfied
  - Neither satisfied nor dissatisfied
  - Dissatisfied
  - Very dissatisfied
  
- How satisfied are you with the overall level of knowledge and information being shared and created by community members?
  - Very satisfied
  - Satisfied
  - Neither satisfied nor dissatisfied
  - Dissatisfied
  - Very dissatisfied
  
- How satisfied are you with the community management and facilitation?
  - Very satisfied
  - Satisfied
  - Neither satisfied nor dissatisfied
  - Dissatisfied

- Very dissatisfied
- How satisfied are you with the technology platform(s) used by this community for collaboration and communication?
  - Very satisfied
  - Satisfied
  - Neither satisfied nor dissatisfied
  - Dissatisfied
  - Very dissatisfied
- If the community engages in a mix of virtual and in-person collaboration and communication, how have you found the balance of these activities?
  - Too much virtual, not enough in-person
  - Just right
  - Too much in-person, not enough virtual
- What are your favorite aspects of this community?
- What aspects of this community are most challenging or most in need of improvement?
- Outside of those already agreed upon, what should the community's priority activities be in the coming year?
- Describe one or more specific examples of how this community has added value to your work at CRS

## Appendix C: Collaboration Group Types

Communities of practice are one of many types of collaboration groups found at organizations like CRS. This toolkit is focused specifically on internal communities of practice that are formal, actively managed groups but many other configurations are possible. All groups share a common goal of supporting member learning, exchange and collaboration but their usage and management differ in meaningful ways, as shown in the table below.

<b>GROUP TYPE</b> <i>from least to most formal</i>	<b>PURPOSE</b>	<b>MEMBER SELECTION</b>	<b>KEY DRIVERS OF PARTICIPATION</b>	<b>GROUP LIFESPAN</b>
<b>COMMUNITY OF INTEREST</b>	Share information and knowledge	Self-selection, anyone who is interested	Access to information and sense of like-mindedness	Evolve and end organically
<b>COMMUNITY OF PRACTICE</b>	Create, expand and exchange knowledge  Develop Individual capacity to address challenges  Raise levels of performance	Self-selection or invite/recruit, based on expertise and/or role	Passion, commitment and identification with the group and its expertise	Evolve and end organically (last as long as there is relevance to the topic and interest in learning together)
<b>PROJECT TEAMS OR TASK FORCES</b>	Accomplish one or more specific tasks	People who have a direct role in the project	Project goals and milestones	Predetermined – based on project completion
<b>OPERATIONAL TEAMS</b>	Take care of an ongoing operation or process	Assigned by management	Shared responsibility for the operation	Ongoing or as long as the operation is needed
<b>FORMAL DEPARTMENTS</b>	Deliver a product or service	All department members	Job requirements and shared goals	Permanent or as long as department exists

