COMMUNITIES OF PRACTICE

within and across organizations

A GUIDEBOOK

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Preface

PREFACE

You do not need to read this book to get started with communities of practice. Many people, including the leaders of the two organizational initiatives we describe, started cultivating them without this book.

If, however, you want to look over the shoulder of people who have worked in this area for a long time, then you might want to take advantage of what we have learned so far, the frameworks and language we created to make sense of what we were doing, and the insights, heuristics, principles, and tips we gathered along the way.

We didn't mean for this guidebook to be so fat. It's just that once we started, it turned out there was a lot to say. You could get around that by using the table of contents to focus only on what seems useful to you. In any case, do not let the thickness of the book discourage you or make your job seem overly daunting. Our intention is to capture in one place what we have learned over the years, not to make something that remains fundamentally commonsense seem more complicated than it needs to be.

In writing the guidebook we had in mind the people who endeavor to cultivate communities of practice in and across organizations. These initiatives range from those that start with a single community and grow from there to others that start with a set of communities around strategic domains. Some are more top down, and others are more bottom up. Some start easily, as if they had been waiting to spring into existence, and some need careful nurturing before they can come to life. There are communities and initiatives that start with great promise, only to stall when a key leader leaves or organizational politics get in the way; and there are others that begin slowly, then thrive over years and decades.

We are hoping that this guidebook will be useful for a range of people—from those who are running broad community of practice initiatives at an organizational level, to those who focus on cultivating single communities, or even to members who take the lead on a community meeting or activity. In addition, we think the guidebook will be helpful for someone who acts as a facilitator or who coaches community leaders. It could also be useful for organizational sponsors of communities of practice to get a sense of what this is all about and what their role entails.

Who are the authors?

We are Etienne Wenger-Trayner, Beverly Wenger-Trayner, Phil Reid, and Claude Bruderlein.

Etienne and Beverly have been launching and accompanying communities of practice and organizational initiatives for more than three decades. Etienne is known for his seminal work on communities of practice, including co-authoring the book where the term was coined. Beverly is known for her work with international organizations, including cross-boundary communities and the use of new technologies. Together they have authored several books on social learning.

Phil is an experienced technologist who currently works at JPMorgan Chase, one of the world's largest financial services institutions with a technology workforce of over 55,000 globally. He has a deep interest and experience in social learning and communities of practice, and along with a large force of volunteers, helped to create a global initiative called *Ignite*, which started as a small experiment in 2016, and is now intrinsic to the strategy and culture of the company's global technology organization.

Claude is a frontline negotiator turned researcher at Harvard University. He has been a Strategic Advisor to the President of the International Committee of the Red Cross (ICRC) for almost a decade. He contributed to the creation of a community of practice of frontline humanitarian negotiators across multiple organizations under the auspices of the Centre of Competence on Humanitarian Negotiation (CCHN). His research interest focuses on the translation of peer exchanges within this community of practice into innovative tools and methods to negotiate access to populations in need in conflict areas.

A conversation among three stories

We call this book a guidebook because it was designed to help orient social learning leaders in their unique journey. But it is not a recipe. While it reflects a wealth of experience in diverse contexts, it does not offer an authoritative model to be implemented faithfully as a guarantee of success. It is not something that you should measure your success against either. Rather, this type of work takes a finely tuned antenna to the strategic imperatives, the contexts, the social fabric, and the resources at hand.

This guidebook is best understood as the interweaving of three stories:

- Etienne and Beverly recount what they have learned from their experience with communities of practice of all sizes and shapes in both the private and public sectors.

- Phil recounts the evolution of *Ignite*, an organizational initiative at JPMorgan Chase serving as an umbrella for grassroots communities of practice in the bank.
- Claude recounts the birth and growth of the CCHN community of practice, a large, worldwide, cross-organizational community in the field of humanitarian negotiations.

Often, guidebooks use concrete stories to illustrate how people have implemented the guidance. This is not the case here. In this regard, it is significant that neither initiative had access to the guidebook or even involved Etienne and Bev as consultants in its beginning. The two initiatives were started by the JPMorgan Chase and CCHN teams on their own to improve their own contexts. It was only after a few years that both teams independently discovered Etienne and Bev's work. They found that it gave them a language and framework to make sense of what they were doing. It helped them reflect on their own experience and provide a common source of inspiration on how to plan their next steps. This guidebook came together at the meeting of these independent stories—reflecting in their distinct journeys the diversity of communities of practice and ways to foster and support them. Read this guidebook as a conversation among three stories—providing a resource and a springboard for creating your own.

How to read this guidebook?

There are many ways to read this guidebook. If you are so inclined, you can of course read the whole book cover to cover to see how the three stories talk to each other across the whole series of topics.

But you can also focus on one of the three stories by reading the book in separate "columns." If you only want to read the story of a single initiative, it should be easy to follow the story on the left or the right as shown in the boxes here:

The *Ignite* story

You can read the *Ignite* story at JPMorgan Chase by jumping from box to box on the left, color-coded in ocre.

The CCHN story

You can read the humanitarian story at CCHN by jumping from box to box on the right, color-coded in light teal.

Etienne and Bev's story forms the unmarked middle column. If you want to focus on the guidance of the book, you can simply skip all the boxes.

While the three stories are independent, we have tried to integrate them by addressing the same topics in the different sections. So, you can also focus on selected sections of relevance to your role, jumping from the table of contents to see what all three stories have to say about a topic. We like to imagine someone "tearing out" a section, a page, a graphic (or the digital equivalent), to give to someone who needs guidance for a specific task.

The sections are organized into six chapters, each addressing one theme in the work of cultivating communities of practice.

Chapter 1 - This chapter provides a general introduction to the concept of community of practice. It ends with introductions to the contexts and origins of the two initiatives described in boxes throughout the book.

The next three chapters discuss dimensions of the work at three levels of scale, starting with the broadest organizational level and focusing on increasingly granular levels:

Chapter 2 - Organizational initiative: issues in creating an organizational context in which communities of practice can flourish.

Chapter 3 - Community cultivation: the challenge of cultivating individual communities of practice, how to launch them, and to sustain them over time, and how they can mature in different ways.

Chapter 4 - Meetings and activities: guidance and specific ideas for facilitating meetings and designing social learning activities.

Chapters 5 and 6 - These chapters address issues of technology and evaluation, which straddle all three levels of scale.

Epilogue - The epilogue is a short reflection on what is, for each of us, the significance of this work.

Appendix - Here we add new stories that provide a useful contrast in approach. This second edition includes the story of communities of practice at ABInBev by Monica Ramirez.

Note that the sequence of chapters 2—4 does *not* reflect a chronological order. We chose *levels of scale* as a structuring device because different people may be interested in one level more than the others. But this is not to suggest that the work is done in this order. Indeed, chronologically, cultivating communities of practice can start at any level of scale:

Activity level
A specific meeting spurs further actions that lead to a community of practice over time—as in the CCHN story.

Community level
One or a few communities of practice start creating value and inspire others to form a community of their own—as in the JPMorgan Chase story.

Organization level
An executive decision is the impetus for an initiative to make communities of practice a way of working—as in many of the organizations Etienne and Bev have worked with.

In practice, the three levels become interwoven over time.

Acknowledgments

This guidebook has been a long time in the making. It started in 2017 as a strategic document that Etienne and Bev prepared as consultants for the Fort Bend Independent School District, in Texas, USA, whose support we acknowledge here. The book has gone through many drafts since then. We thank all the people who have encouraged us to complete it into a guidebook for general readership, and those we have worked with along the way and with whom we have learned a lot. This joint learning is reflected here.

Phil's contribution to this guidebook constitutes a major milestone in his journey. From the outset, the experience of growing and nurturing *Ignite* has been one of social learning practice, along with hundreds of emergent leaders who care to make a difference and to empower other people in their careers. They are willing to explore new knowledge boundaries together in order to grow and support communities of practice at JPMorgan Chase. Each of those peers illuminated the roadway ahead in their own way, and they deserve great thanks and appreciation. In addition, deep gratitude goes to Per Hammer and Heidi Madsen. Ever since *Ignite* started, Per was a great source of guidance, inspiration and thought leadership, and without his involvement, it just would not have been the same. Joining a little later in the journey, Heidi brought boundless energy, creativity, a level head, and a most welcome diversity of thought that helped to keep the group on the right path. Phil has always said that he counts it a great privilege to learn from, and with Bev and Etienne. In all, the various accomplishments with *Ignite* are the culmination of all of those people's work—and this experience has changed Phil's life for the better.

The CCHN community of practice came to light thanks to the initiative and continued support of the International Committee of the Red Cross (ICRC), in particular its president, Peter Maurer, who invested considerable energy in guiding this effort over the recent years and mobilizing other heads of agencies in providing a safe space for humanitarian practitioners to exchange on their negotiation practices on the frontlines. Other agencies also offered technical and financial support to this endeavor including the World Food Programme, the UN High Commissioner for Refugees, Médecins Sans Frontiéres and the Centre for Humanitarian Dialogue. The CCHN team has also been delivering ongoing support to the community of practice in organizing and facilitating peer-to-peer exchanges between humanitarian practitioners across contexts, conducting empirical analysis on these practices, and promoting the development of a new domain on humanitarian negotiation. As the Centre begins a new phase of its journey as a dedicated social learning team under the leadership of its new director, Joélle Germanier, the CCHN team is fully committed to drawing the lessons learned from this guidebook to deepen its engagement toward the CCHN Community and enhance the ability of humanitarian negotiators to operate on the frontlines.

Preamble: two member stories

Ajanta

When Ajanta joined JPMorgan Chase's Software Engineering Program (SEP) in Mumbai, she was excited to get hands-on experience in a collaborative software engineering role, encompassing the end-to-end cycle of product delivery and ownership.

As a lifelong learner with a deep interest in Machine Learning and Data Science, she was also interested in finding a place to explore these topics with others. When she and her fellow graduate new hires were introduced to *Ignite* communities of practice in Mumbai, they were delighted at the prospect of joining.

Ajanta said, "I attended as many community meetups as I could, not just of Machine Learning and Data Science, but also several others in Mumbai such as DevOps and Big Data. I was so inspired by the fact that there are events of constant engagement happening throughout the year. There was so much to learn and practice that I never found the community repetitive. These communities of practice were particularly helpful to me in adjusting to the working environment here at JPMorgan Chase."

Ajanta continues, "One of the best things that I saw here is inclusivity, which I practice myself. Nobody in the community is judgmental in any way. The atmosphere around you is all about learning, irrespective of what you know and what you don't. Such a positive and vibrant atmosphere gives you a healthy environment to talk about interesting ideas and develop them into something useful. All this makes me realize nothing is impossible; coming right from college and seeing this culture, I am assured I will always have the right motivation in my life and will be able to create a healthy network. This is all because of *Ignite*."

Rachel

Rachel is a young humanitarian professional working for the last four years with the International Committee of the Red Cross (ICRC). Born and raised in various countries in East Africa, she developed a sharp awareness of the vulnerability of populations affected by conflict and armed violence. Yet very little prepared her for the type of challenges she encountered as she gained her first work experiences in the Dadaab Refugee Camp on the Kenyan border with Somalia. Apart from the physical strain imposed by long days of work in a harsh and overcrowded refugee camp, she felt ill-equipped to deal with the unexpected animosity expressed by the refugee community she served and the acts of intimidation by the authorities of the camp towards international NGOs.

Despite her best efforts to explain the mission of the ICRC, political actors in the camp constantly mobilized the population against foreign organizations and accused humanitarian workers of being colonial agents. As a result, the security of humanitarian staff deteriorated steadily during her stay, resulting in a series of threats against humanitarian staff by armed militias. The ICRC responded by imposing strict security measures that kept its staff, including Rachel, away from the camp population. They were confined to increasingly remote tasks with limited opportunities to mix with the population she used to be so connected with. Rachel felt increasingly isolated and depressed by the situation.

Through a more experienced colleague from West Africa, Rachel heard about an informal group of frontline humanitarian workers who faced similar challenges across Africa and beyond. They met from time to time to share their negotiation experiences and learn from each other how to operate in intense and complex environments. Despite some initial hesitations by her hierarchy, she opted to join a “peer workshop” organized by the CCHN.

Joining this community enabled her to learn some good practices for engaging with populations in conflict settings. It also provided an opportunity for her to socialize with other humanitarian workers facing similar challenges. She

quickly became an active member of this community of practitioners by facilitating onsite and online meetings and fostering a safe environment for the sharing of frontline experiences. She even attended a World Summit on Frontline Humanitarian Negotiation organized by the CCHN in Switzerland, strengthening her sense of belonging to a recognized global community of frontline negotiators.

She now sees the pressure she faced as an integral part of her work in difficult environments. She feels more equipped to prevent and mitigate potential oppositions in conflict settings. She is able to share her experience with peers regularly and feels supported in her efforts to deal with some of the most challenging aspects of her engagement with local communities, authorities, and even armed groups. She looks forward to learning more from other colleagues, supporting their efforts for improved humanitarian engagement in complex environments, and contributing in her own ways to the development of the domain of humanitarian negotiation.

1 INTRODUCTION

1 Introduction

> Communities of practice 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.

The aim of this guidebook is to provide resources for people working with communities of practice. In this introductory chapter, we clarify the concept of community of practice, its basic elements, and the kind of learning it enables. We also distinguish communities of practice from other familiar organizational structures to clarify how they add value for members and organizations. At the end of the chapter, we introduce the two initiatives whose stories we will follow throughout the guidebook.

1.1 What are communities of practice?

Communities of practice are formed by people who engage in a process of collective learning in a shared domain of human endeavor: a tribe learning to survive, a band of artists seeking new forms of expression, a group of engineers working on similar problems, a clique of pupils defining their identity in the school, a network of surgeons exploring novel techniques, a gathering of first-time managers helping each other cope.

The structure of communities of practice

To understand how communities of practice act as containers for social learning and how to cultivate them, it is helpful to keep in mind three basic structural elements, which fit together like a jigsaw where each piece is distinct, yet only functions as a necessary part of the whole (see figure 1.1):

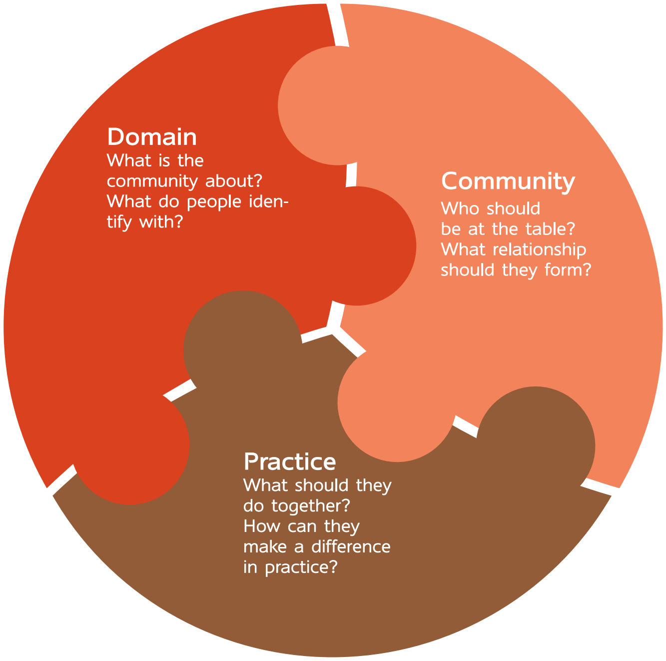


Figure 1.1

Structural elements of a community of practice

- **Domain.** A community of practice focuses on a capability that members identify with and care about. Therefore, the first thing to consider is the area of capability that brings the community together, gives it its identity, and defines the key issues that members address together. Within and across organizations, many domains will center on specific professions, jobs, or roles. But it is important not to limit domains to existing professions or roles. Many areas of capability can be relevant domains for communities that include multiple professions or roles. There may also be distinct areas within a profession that are better served by different communities able to focus on shared issues of practice. The domain of a community can have a very narrow focus, or it can be very broad—depending on how members define what they need to focus on to make progress.

- **Community.** The ability of a community of practice to make progress depends on the composition of the group of people who need to be involved. It also depends on the relationships they develop over time, including trust, support, commitment, and knowing each other's contexts and areas of expertise. This requires enough continuity of membership over time. When the domain is a profession, members will mostly be practitioners of this profession. When it is an issue, it is a matter of gathering the relevant voices. In general, it is better to leave the question open for each community to decide who should be involved, either as full members or as occasional invitees. Because a community of practice depends on commitment, leadership, and initiative of its members, communities of practice work best when participation is volunteer—encouraged rather than mandated—although we have seen many variations along this spectrum.

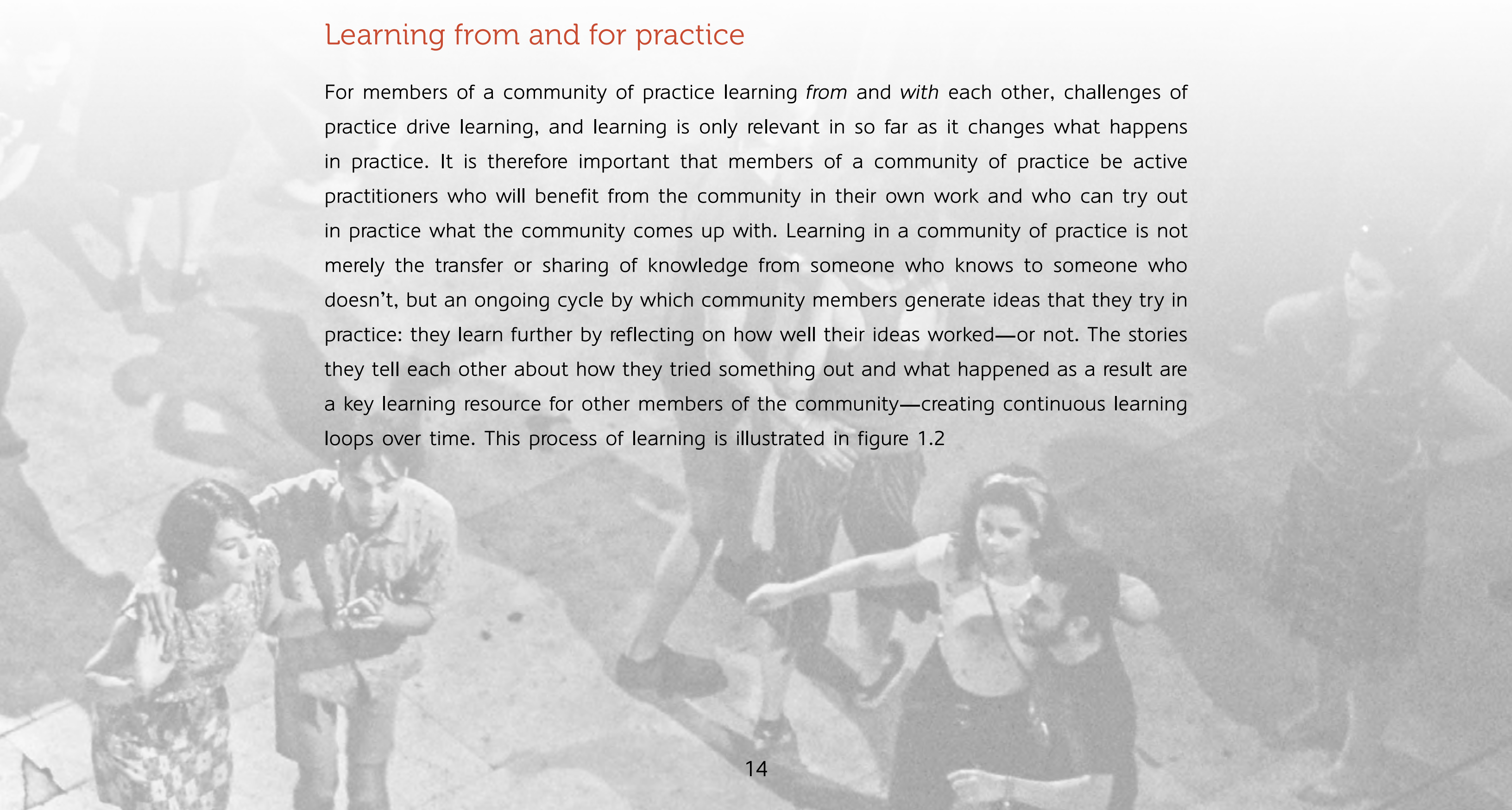
- **Practice.** The term domain suggests that a community develops a sense of "ownership" of this area of capability: members take responsibility for defining the set of challenges they share and for structuring a learning process to address them. But they do so from the perspective of practitioners. As practitioners, they understand the demands, challenges, and context of their job and their learning is tuned to that. They can learn *from* each other because they can appreciate the relevance of their individual experience. They can also learn *with* each other by combining their collective wisdom to understand a challenge or devise an innovative solution. The practitioner perspective also means that their learning includes all aspects of what it takes to get the job done, including the technical and tacit dimensions, and also the personal, psychological, and interpersonal demands, as well as the organizational context. The learning is not separated from the learner, the knowledge from the knower, the practice from the practitioner.

Over time, when the three aspects are well aligned, a community of practice can make a big difference to members' ability to accomplish what they want, individually and collectively. The domain provides a common focus, both for members and for external stakeholders; community builds relationships that enable mutual engagement and collective learning; and practice anchors the learning in what people do, both as a source of lived challenges and as a place to try new things. This suggests three sets of questions for cultivating communities of practice:

- What is the community about? How will members identify with it? Is it an existing profession, a subgroup, or is it an issue that needs the involvement of multiple professions? Is identification with the domain a source of dynamism? How to keep it that way? Is the domain understood and recognized as an important area of capability by external stakeholders or in the wider world?
- Who should be at the table? What relationships should they form? What degree of engagement is expected? Who can take leadership? How to invite people to participate and contribute meaningfully? How to sharpen attention to important voices that are missing or silenced?
- What should members do together? How to make the real experience of practice—with all its subtleties, nuances, and uncertainties—discussable as a learning foundation? How can this learning enable practitioners to make a difference in practice? How can the community demonstrate its success by showcasing its value in practice, both internally and to the world?

Learning from and for practice

For members of a community of practice learning *from* and *with* each other, challenges of practice drive learning, and learning is only relevant in so far as it changes what happens in practice. It is therefore important that members of a community of practice be active practitioners who will benefit from the community in their own work and who can try out in practice what the community comes up with. Learning in a community of practice is not merely the transfer or sharing of knowledge from someone who knows to someone who doesn't, but an ongoing cycle by which community members generate ideas that they try in practice: they learn further by reflecting on how well their ideas worked—or not. The stories they tell each other about how they tried something out and what happened as a result are a key learning resource for other members of the community—creating continuous learning loops over time. This process of learning is illustrated in figure 1.2



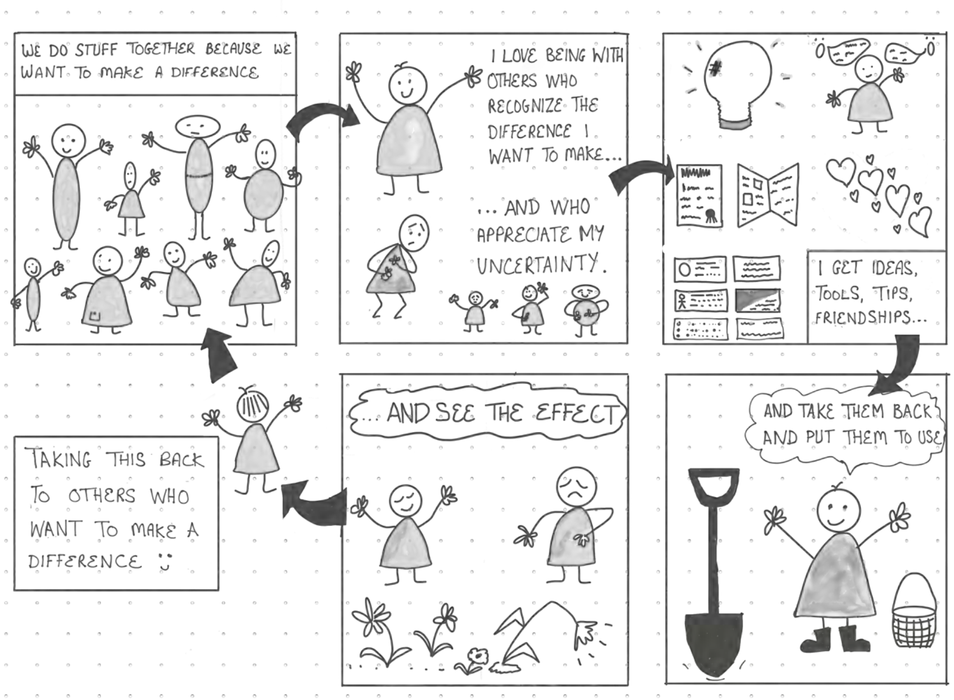


Figure 1.2
A community of practice as an ongoing learning loop

Contrast with other organizational structures

To clarify the specific contribution that communities of practice can make in organizational contexts, we provide contrasts between a community of practice and other familiar structures, as summarized in figure 1.3. The aim of this comparison is not to identify which structure is best, but to show that all structures serve different purposes, with communities of practice serving one.

Team. The main distinction is that a team is focused on a task, a project, or a specific function. When the task is accomplished, the team disperses. Team members are likely to face new challenges and learn something in the performance of that task, but this learning does not define the team. It is the task that keeps them together. And it is their respective commitment and contribution to the task that is the main source of trust and cohesion among them. A community of practice is held together by the "learning value" members find in their interactions. They may perform tasks together—and thus perhaps act as teams for that project—but these tasks do not define the community. It is the ongoing learning that sustains their mutual commitment.

In an organization, a team delivers a **product or a service**. A community of practice delivers a capability. The domain of a community of practice is usually a strategic **capability** essential to the mission of the organization. This creates a focus that it different from teams. While communities of practice do help their members achieve their goals in their respective teams, projects, or business units, their focus on delivering a strategic capability also tends to give them a broader and more long-term view oriented to the sustainable success of the organization.

Name	Characteristics of other structures	Communities of practice
Team	▪ Deliver a product, service, or function ▪ Focus on a task with a joint commitment to achieving it ▪ Disband when task is done	▪ Deliver a capability ▪ Commitment to a learning partnership across multiple tasks or teams ▪ Evolve until domain no longer relevant
Task force	▪ Seeking solution to a broad problem ▪ Members come as representatives of specific constituencies ▪ Agreed solution requires negotiation across perspectives	▪ Members participate as individual learners even if they represent different organizational units ▪ Mutual engagement not necessarily expected to produce a unique, negotiated position
Training	▪ Transmission of a curriculum defined by experts ▪ May or may not be relevant to practice ▪ Timebound learning events	▪ Practitioners in the driver's seat ▪ Learning driven by challenges of practice and directly relevant to practice ▪ Ongoing learning loops over time
Network	▪ Defined by connections among people ▪ Does not require a collective identity or focus ▪ Enables information flows in broad and unpredictable ways ▪ Easy entry and exit	▪ Defined by identification with a shared domain ▪ Commitment to collective progress in practice ▪ Information flows more focused and predictable because of shared commitment ▪ Membership significant

Figure 1.3
Differences between communities of practice and other common structures

Task force. This is a special type of team pulled together to address a specific problem, usually of broad scope. Often people are selected to represent an organizational unit or a constituency in the negotiation of a solution. The need to engage across constituencies and their perspectives can drive learning for participants. But it is their commitment to the process of coming up with a joint position that keeps them going. It is respect for the voices they represent that determines the level of trust. Members of a community of practice may come from different organizations or perspectives, but it is their engagement as individual learners that is the most salient aspect of their participation.

Professional development or training session. In organizational contexts, communities of practice usually end up serving professional development needs, but it is not a prescriptive approach. A training session serves learning with a curriculum—defined by experts and designed to transmit a body of knowledge. It is the commitment to acquire this curriculum that keeps the group together. By contrast, a community's learning is in the hands of the members who drive the process from their practical challenges. This makes the learning of a community of practice less predictable, but more likely to be directly applicable. A community of practice also has more continuity than a course, so that learning keeps progressing as members loop back what happens in practice over time.

Network. With the proliferation of social networking on the internet, it is also useful to contrast social networks with communities of practice. All communities of practice are networks because they involve a system of connections. But not all networks are communities of practice (though many networks contain or give rise to communities of practice). A community requires an identity around a domain, an experience of learning partnership often manifested in a collective intention by members to help each other push their practice forward and, in doing so, contribute to the advancement of the shared domain. A network does not require such shared identity. But as a system of connections, it does serve social learning by acting as a wide-reaching channel for information flows.

1.2 Why should organizations be interested?

We live in times when the speed of change is high and predictability low. Staying up-to-date and the need to keep innovating become key challenges. Having access to information about good practice and new research may be easier with the internet, but it is not enough to make a sustained difference in practice, taking into account the subtle nuances of particular contexts. For this you need a community of practice:

- Communities of practice enable practitioners to take collective responsibility for the learning they need, recognizing that, given the proper support, they are in the best position to drive this process. Even if they occasionally invite an expert to delve into a topic, they are in the driver's seat.
- Communities among practitioners create a direct link between learning and engagement in practice, and thus performance.
- Practitioners can address the tacit and dynamic aspects of learning, as well as the more explicit and established aspects.

Developing strategic capabilities

Communities of practice are an ideal vehicle for developing strategic capabilities in organizations. This is because they involve the relevant set of practitioners directly in the process, recognizing and leveraging their experience. Their learning directly affects their practice, and they feel empowered to make a difference. A community of practice combines into one social learning process the professional development of members and the continuous development of organizational capabilities.

When considering the value of communities of practice in organizations, it is useful to think along two dimensions as summarized in figure 1.4.

	Short-term	Long-term
Organizations	■ Work collectively to solve both local and organization-wide problems ■ Avoid repeating mistakes across teams, departments, and contexts ■ Create synergies and economies of scale between organizational units ■ Benchmark approaches and solutions across contexts ■ Mentor newcomers to help them get up to speed quickly	■ Build strategic capabilities for ongoing success ■ Involve practice-based partners in strategic conversations about future capabilities ■ Transform local innovations into widespread yet locally adapted practices ■ Build a more engaged and committed workforce ■ Retain employees and promote them internally
Members	■ Connect with colleagues beyond one's team ■ Receive just-in-time help not limited to personal network ■ Get tips and ideas for one's job ■ Know what is happening in other teams, departments and organizations ■ Organize practical and relevant professional development ■ Find new opportunities for emergent leadership	■ Develop new skills and capabilities ■ Build a stronger sense of professional identity ■ Gain recognition and reputation by helping people in other organizational units ■ Gain a collective voice to engage organizational stakeholders around relevant issues ■ Expand one's professional network ■ Develop leadership capabilities

Figure 1.4

Short-and long-term value to organizations and members

- **Short-term and long-term value.** The focus on practice means that members solve immediate problems and learn immediately relevant skills. But over time these communities also build capabilities that have long-term effects.

- **Value to organizations and to members.** The challenges that communities of practice address and the capabilities they build contribute to organizational success. But a community depends on personal engagement; it will only reach its full potential if members find value in it for themselves.

Bridging across silos

Because communities of practice are not limited by formal structures, they can forge useful connections among people across organizational and geographic boundaries. They can create human bridges across silos among business units, projects, or local offices. Large organizations tend to swing on a pendulum between **centralization and decentralization.** This is because each has complementary advantages and problems. Communities of practice offer a middle way to deal with the trade-offs involved in the centralization/decentralization dilemma. Because they are learning partnerships and not regulating entities, they connect without imposing uniformity. Members listen to each other, but they are free to adapt ideas to their contexts. Communities of practice can therefore create synergies across silos without imposing the type of top-down alignment that strong centralization tends to demand. But close discussions of practice across organizational units provide a flexible counterweight to the type of fragmentation that can result from extreme decentralization.

1.3 The stories of two initiatives: contexts and origins

The next two boxes introduce the contexts and origins of the JPMorgan Chase and CCHN initiatives. Throughout the guidebook, the two initiates will share their experience: in the case of *Ignite*, developing and running a broad intra-organizational initiative with many communities of practice; and in the case of CCHN, crafting and nourishing a diverse, cross-organizational, community of practice across a worldwide domain.

The *Ignite* initiative at JPMorgan Chase

In 2016, at JPMorgan Chase's Glasgow Technology Centre, a group of like-minded colleagues gathered to brainstorm ideas for creating the conditions for grassroots communities of practice to spring up, thrive, and have every chance of a long life.

A main source of inspiration for this originated from my experience of a community of practice that was welcoming, safe, and positively impactful at a time of anxiety when I moved into a brand-new role in a different part of the company. There was so much goodness from this little community whose members helped to allay the onset of "impostor syndrome" and gave me access to many useful resources. It seemed regrettable that there weren't more communities like this, well-supported and given the resources they needed.

Staffed entirely by technologists, the Glasgow office is a large software engineering hub. We could see that our colleagues shared common interests, but they were missing out on the opportunity to collaborate and were sometimes solving the same problems in isolation because there was nothing to connect them.

We had seen the positive impact that CoPs can make in this regard. A few communities had been launched by noble pioneers and they had been profoundly beneficial to their members and to the organization. Not only did they improve practice, they also fostered a sense of community and social rooting, as well as a culture of safe learning and innovation. Yet, we had witnessed most of these communities of practice fizzle out due to a lack of organizational visibility, support, and legitimacy.

Initially, we set out to solve this problem in Glasgow, but soon we witnessed viral growth. In the four years that followed, recommendations and word of mouth helped to transform the initiative into a global "community of communities." Today, there are over 170 active communities of practice in more than 25 locations worldwide. To support this development, our organization has created three full-time positions for leading the initiative. From the beginning, we chose the name *Ignite*, as a nod to the energy communities generate among their members.

Ignite communities of practice bring our people together based on shared interests, enabling them to develop new skills in a social, collaborative learning environment. By design, our communities are open and inclusive. They ignore the traditionally siloed corporate structure to bring people together on a professional topic they are interested in or passionate about. In addition to inclusivity, another guiding principle behind *Ignite* is that the initiative is driven by its members. Anyone can propose a new community, with those generating the most interest receiving support and resources to launch and have every chance of success.

The relationship between the organization and *Ignite* communities is symbiotic. The communities receive the resources they need in order to be successful, and so much of what the communities do aligns perfectly with the company's vision for the future of the Technology division. In addition, *Ignite* has become a platform for people to learn new skills, innovate, explore topics close to their hearts, and even forge new career paths for themselves.

The story of the Centre of Competence in Humanitarian Negotiations (CCHN)

Humanitarian negotiation refers to the task of negotiating access to populations in need in times of conflict for the purpose of providing life-saving assistance—such as delivering food or providing medical care. Requests for access are often met with suspicion, venality, or outright hostility by those in charge. Obtaining access can thus require delicate negotiations in difficult—and frequently hazardous—circumstances.

In 2013, the Office of the President of the International Committee of the Red Cross (ICRC) undertook to study negotiation practices in the

organization since the end of the Cold War. In the absence of information on negotiation experiences at the ICRC, it used a network-centric approach to detect the most agile frontline negotiators, asking for five personal recommendations from a first group of ICRC practitioners. It then made a similar request to people identified by the first group as frontline negotiators and so on, pursuing this census up to three to four degrees of connection. As several names came back two or more times, this process allowed the identification of emblematic practitioners within the ICRC who were perceived by their peers as leaders in their domain. It facilitated the detection of a latent community of practice among frontline workers, since each of them learned to negotiate with a set of specific individuals. The research project went on to interview the most referenced or “emblematic” practitioners, collecting a first set of common observations on ICRC negotiation practices.

In 2014, a group of 24 of frontline negotiators from the ICRC gathered in Naivasha, Kenya, to reflect on the common challenges and dilemmas of engaging with belligerents in conflict zones to seek access to populations in need. In the absence of a recognized negotiation framework to guide their engagement with armed groups, these practitioners undertook to develop their own set of tools drawing on their personal negotiation experience. A first framework emerged from these early deliberations referred to as the “Naivasha Grid.” It provided a practical template to plan and prepare a humanitarian negotiation on the frontline.

The process of community-based learning drew the attention of a growing number of field practitioners across agencies. This led to a second round of consultation aimed at widening participation in this conversation beyond the walls of the ICRC. A research team from the ICRC in collaboration with the Harvard Humanitarian Initiative carried out a series of confidential interviews with over 120 field practitioners from a selection of humanitarian organizations operating in conflict environments. Participants felt comfortable contributing to a research initiative involving Harvard University that recognized the value of their field experience, regardless of their individual position or level of seniority in a particular organization. The goal was to gather baseline information on negotiation practices across the humanitarian sector. It was also to assess their needs and find out their interest to share negotiation experiences across agencies. This led to first peer exchanges on frontline negotiation practices in Turkey and then Jordan.

The team observed a wide consensus among participants about the crucial nature of humanitarian negotiation in ensuring access to populations in conflict environments. Participants in the research also recognized the interdependency of humanitarian negotiation processes and the extent to which negotiation counterparts tend to play agencies against each other in these negotiations. There was therefore a clear need to invest in the negotiation capabilities of frontline staff through a neutral platform and to find ways to facilitate collaboration among field practitioners engaged in such activities.

In 2016, following this consultation, representatives of some of the largest humanitarian organizations, including the ICRC, the World Food Programme, the UN High Commissioner for Refugees, Médecins Sans Frontières, and the Centre for Humanitarian Dialogue adopted the terms of a Strategic Partnership on Humanitarian Negotiation. In 2017, the Partnership oversaw the establishment of the Centre of Competence on Humanitarian Negotiation (CCHN) to host and cultivate a community of practice across field operations.

The CCHN has since facilitated hundreds of peer-to-peer exchange workshops across the world, reaching over 4,000 field practitioners as of 2022. Due to the COVID-19 pandemic, many of these activities have moved online, opening the door to participation by deep-field practitioners and expanding the diversity of the peer exchanges.

2

THE ORGANIZATIONAL PERSPECTIVE

2 The organizational perspective

> A commitment to creating an environment in which practitioners can use their experience to drive joint learning within and across organizations.

The process of introducing communities of practice into an organizational context can start as a broad vision from the top or as a grassroots effort. In both cases, from an organizational perspective, it is useful to think of the cultivation of communities of practice as a *strategic initiative*. You may not want to call it that; change initiatives often have a bad name in organizations and people have become suspicious of them. But regardless of the name or approach, leveraging the full potential of communities of practice eventually requires an organizational framework. For some organizations, the purpose of such an initiative is to develop and sustain key strategic capabilities necessary for the organization's success. For others, the goal may simply be to connect people, often across silos, and to foster a generative culture of innovation and collaboration.

Regardless of the initial motivation, what is unique about communities of practice as a strategic initiative is that they put practitioners at the center of the approach. In this chapter, we describe some key ingredients for such an initiative.

2.1 The right approach for an organization?

Embarking on an initiative to cultivate communities of practice is not a decision to be taken without careful consideration. The very characteristics that make communities of practice a good fit for stewarding strategic capabilities—autonomy, practitioner orientation, self-governance, crossing boundaries between silos—are also characteristics that make them a challenge for traditional hierarchical organizations.

It is therefore important to consider how sponsoring organizations can provide a context in which communities of practice are likely to prosper. Unsteady organizational commitment has been the greatest obstacle to many communities of practice. Conditions that have contributed to the success of such initiatives include:

- A desire to involve employees in thinking and acting strategically about how to improve their competence and thus the performance of the organization in their domain
- A readiness to let go of the need for control and a willingness to welcome staff leadership and initiative
- An organizational culture that values continuous learning, candidness, and reflection
- A climate in which employees care enough about their work to invest energy in doing it better and in which disconnectedness, mistrust, and cynicism have not reached a dysfunctional level
- A recognition of the need for lifelong learning in any profession
- A commitment to free up employees' time so that they can participate without being expected to sacrifice their personal time (usually a few hours a month)

A key to communities of practice initiatives is for organizations to make it clear that they are culturally and institutionally ready to forge ahead and to meet staffs' inspiration with an organizational initiative that both reflects the organization's pursuit of excellence and honors staffs' own commitment and resourcefulness.

What motivated us to launch *Ignite*

Initially, we did not set out to solve a grand strategic problem with *Ignite*, but rather something that affected our colleagues in Glasgow.

Our motivation was simply to convene organic connections for people through collaboration and practice, bringing them together by means of shared interests and a passion for their domain.

In essence, we wanted to make the company "feel smaller," and to help our colleagues enjoy a more meaningful, purpose-driven experience at work by creating opportunities to unlock intrinsic motivations of autonomy, mastery, and purpose.

By fostering a culture of innovation and collaboration, we hoped to develop a generative learning culture, using safe social learning spaces where people could explore new knowledge boundaries—bringing new experiences back to their teams and aiding their personal development.

Years later, our motivation remains the same, despite our finding over time that *Ignite* has become a highly strategic initiative. In addition, our experience shows that organizational change initiatives benefit from partnerships with *Ignite* communities of practice, providing a bidirectional interface between grassroots practitioners and top-down strategy. Organizationally, the *Ignite* initiative is aligned to those setting the strategy from both workforce and technology perspectives, but the communities and their members fan out across all areas of the organization.

Emancipating frontline negotiation practices

Promoting the idea of a peer-to-peer community faced serious obstacles in the humanitarian sector—the main two being the need to keep negotiation practices under wrap and skepticism about institutional learning from frontline experience.

Keeping negotiations under wrap

The humanitarian sector is an environment renowned for the confidentiality of interactions with armed actors and the intense competition between humanitarian organizations. In initiating the research on negotiation practices, the ICRC had taken a risk. As crucial as these practices may be for securing access to populations in need, this research could inadvertently put at risk the reputation of an organization like the ICRC for being a neutral and principled organization. For obvious reasons, it is important not to disclose the level of compromise a negotiator is willing to make. Humanitarian organizations have traditionally been reluctant to publicly recognize the importance of developing trusted relationships with all belligerents. They are concerned that it will reveal the compromises that have been made in negotiations to gain access to vulnerable populations. Given the political connotation of negotiation activities and the reputational risks involved, agencies had been reluctant to invest in the capabilities of their field staff to negotiate on the frontline. As a result, these negotiations remained inaccessible to external researchers, and without a toolbox to rely on, field practitioners often remained poorly trained to negotiate in conflict environments. While agencies expected their frontline staff to carry out negotiations with parties to a conflict when necessary, they had traditionally preferred to keep these negotiations and their compromises under wrap. The idea of a community of practice would therefore have to overcome reservations from policy and operational circles who questioned the unveiling and study of internal negotiation practices.

Field practices and institutional structures

Early exchanges had drawn considerable interest across the humanitarian sector by uncovering robust negotiation practices hidden in plain sight and by opening a safe space for a community of practice to emerge. But as important as field practices may be for guiding the evolution of institutional practices, the inherent tension between the two is particularly salient in the humanitarian sector, where legal principles and a sense of moral mission are at the center of an agency's self-image. Organizations have to weigh up the need to adapt operational practices to new circumstances against the importance of upholding institutional policies and methods that embody the agency's historical mission and values. This commitment to mission and values will usually take precedence over ensuring that practices are evolving in response to changing circumstances. The ICRC, for example, is a 158-year-old organization. Before the creation of the CCHN community, learning from field experiences had rarely been perceived by hierarchies as a benevolent enterprise. On the contrary, field practices, especially coming from local staff, were viewed with too much suspicion to be considered as a source of institutional learning. Such learning would inevitably entail a profound challenge to established institutional norms and policies. It would demand a realignment of internal structures around more effective ways to create value in field operations.

A community of practice born against the odds

All this leaves limited room for critical review of established field practices, particularly the experience of informal communities of practice on the frontlines. Yet it is precisely the experience from the field that will help agencies develop more relevant tools and methods for unpredictable circumstances. Given the sector's structural obstacles, the development of a robust, formally sanctioned community of practice on humanitarian negotiations has been a notable transformation. And the recent inclusion of field practitioners—acting as community members—in the governing board of the CCHN is a further sign of a radical evolution: the emergence of an influential, practitioner-driven learning community at the heart of the humanitarian sector.

2.2 Roles and responsibilities

Organizational environments that are conducive to successful communities of practice involve two kinds of organizational roles:

- **Strategic engagement:** senior leaders and executives who carefully and purposefully connect communities of practice to organizational objectives, resources, and structures
- **Operational leadership:** a social learning team that helps communities of practice achieve their full potential

This section describes these two types of roles. The roles are usually fulfilled by people who are not members of the communities of practice they enable (although they may be members of their own community of practice). Figure 2.1 provides an overall picture of these roles as well as the conversations, depicted by arrows, which need to surround communities of practice.

Sponsorship

Communities of practice are most likely to reach their full potential when they are well integrated in the formal structure of the organization—when their work is supported, their voice is heard, and their value is recognized. This is where managers and executives can play an important role by providing *sponsorship* to communities of practice. It is useful to distinguish four main types of sponsorship:

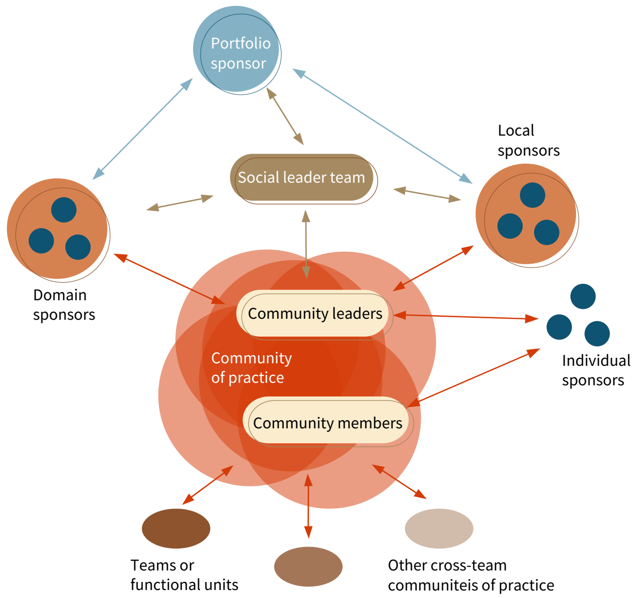


Figure 2.1
Roles and interactions in a communities of practice initiative

- **Initiative sponsor.** This level of sponsorship is directed at the portfolio of communities of practice as whole. It is provided by a high-level executive or a leadership team. The goal is to legitimize the cultivation of communities of practice in terms of strategic priorities, ensure that the value of community participation and leadership is widely appreciated and recognized, and create an environment conducive to sustained learning and honest reflection.

- **Domain sponsor.** Not all communities of practice have a specific sponsor for their domain, but it is often a useful addition to the generic sponsorship of the initiative. Domain sponsors are line managers who can appreciate the strategic importance of a community's domain. Because of their responsibility for results, they are attuned to the learning of the community and the specific contributions it can make. They listen knowledgeably to members' questions and suggestions, which they take to other organizational actors when relevant. It is also a person who is able engage with the community without expecting to control it.

- **Local sponsor.** In complex organizational contexts, it is also useful to secure the support of local managers for specific regions or organizational units. They will encourage and recognize local participation in broader communities of practice.

- **Individual sponsor.** In some cases, it is necessary to enlist the sponsorship of the direct supervisor of individual members to ensure that their time and effort in the community is recognized as part of, and a valuable contribution to, their work.

The role of sponsor requires the power and influence of a hierarchical position, but it is different from traditional management roles. It involves engagement and conversations rather than control. It is a way to channel resources and attention—providing a two-way connection with the formal hierarchy while recognizing that communities do not fit neatly in traditional organizational structures.

Senior support for our grassroots vision

Although *Ignite* is mainly a bottom-up initiative, many senior leaders are excited by our vision, have aligned themselves behind it, and have become active sponsors of *Ignite* communities after witnessing their role in the evolution of technology and employee experience at JPMorgan Chase.

This support goes to the top, and includes Lori Beer, the firm's Global Chief Information Officer (CIO). Lori is responsible for our entire Technology organization and is a member of the firm's Operating Committee, managing a workforce of over 55,000 people and a budget of over $14 billion.

As a long-time advocate for social learning and Communities of Practice, we asked Lori to share her perspectives about the impact and value of our *Ignite* communities. This is what she had to say:

"I've been a champion of *Ignite* since I first learned about it. I've always appreciated its self-organizing nature, how it flexes and optimizes for local scale and culture, and how easy it is for our technologists to opt into a few, or many communities of practice. When I visit our Global Tech Centers, I hear so many stories about *Ignite* communities enabling our people to learn and bring their passion to their current role, or even to find new opportunities internally. As I look ahead, I continue to see *Ignite* as a staple in our culture, critical to nurturing talent and future leadership, and as a way for employees to explore current strategic topics as well as emerging technologies."

In some ways, this quote is the "capstone" that summarizes how over the past several years, along with many senior leaders, Lori has shown herself to be an active sponsor and supporter of social learning through *Ignite* communities.

Navigating the politics of cross-organizational sponsorship

The leadership of the President of the ICRC, Peter Maurer, as the main sponsor of the initiative was instrumental in ensuring the success of the first phase. He had insisted on pushing the idea of a community of practice forward, even if this meant disentangling longstanding formulaic practices that appeared disconnected with the multi-agency and increasingly decentralized environment in which the ICRC operates. It was also challenging the perception of the ICRC as a self-reliant leader in humanitarian negotiation.

In 2015, he had connected with Antonio Guterres, at the time High-Commissioner for Refugees, and later with his successor Filippo Grandi, and with the Executive Director of the World Food Programme, Ertharin Cousin, to build a coalition of sponsors at the head of key humanitarian agencies. While engagement with the political leadership of these organizations proved to be extremely effective in grounding the legitimacy of a budding community of practice, it proved problematic among the institutional bureaucracies of the founding organizations, which saw the creation of the CCHN as a competing professional structure. Seeing the internal dynamics stirred by this change, middle and senior management from these agencies remained overly prudent regarding their personal engagement with the CCHN Community.

The same political caution applied to the selection of the founding partners, leaving aside some agencies and taking on others. At this early stage, the original intent of some of the agencies was to safeguard their interest as founding partners of the CCHN and ensure a degree of control over the composition of this emerging community of practice. They wanted to guide the development of the negotiation domain in line with their top-down institutional policies. Nevertheless, while line managers of humanitarian organizations were skeptical at first regarding the emergence of a community of practice on humanitarian negotiation across agencies, the executive heads of agencies saw the usefulness of structuring the community this way. With the increasing pressure on access as well as the growing numbers of security incidents, the CCHN Community appeared to be an effective way to align organizations around a shared set of tools and methods to plan negotiation and, eventually, collaborate in these processes. When the ICRC and its strategic partners established the CCHN in 2017, the community of practice they launched was radically cross-organizational: it welcomed unreservedly all field practitioners from across the humanitarian sector, sharing a common ethos of frontline negotiators.

Social learning team

Organizations that have adopted a strategy of systematically cultivating communities of practice have found that people who take leadership in their communities can usually use some help. These organizations have established a special team for this purpose. We call it a *social learning team*.

The aim of this team is to run the initiative, take a lead in integrating it in the organization, and provide a “one-stop shop” for people who lead or want to lead communities of practice. Their role includes responsibilities at three levels, which are outlined in figure 2.2.

Organizationally, the location of a social learning team can be significant. It is best for it to report to a part of the organization where communities of practice are valued for their strategic contributions and where the work of the team is strongly supported, legitimized, and if needed, protected by management. The team’s reporting location may also need to take into consideration the standing of the department. For instance, while HR is often an obvious choice—and an appropriate one—we have known cases in which the HR department lacked a reputation for strategic drive to be an exciting or productive home for the social learning team.

Role in the initiative	Responsibilities of the social learning team
Lead the initiative	■ Be the voice of communities, including at times putting up arguments or even fighting for them when there is resistance in some organizational contexts ■ Find, educate, support, and coach sponsors ■ Help connect communities with sponsors and negotiate expectations and accountability ■ Liaise with relevant organizational structures such as HR or IT as well as relevant other initiatives ■ Create links across communities when appropriate ■ Drive value-creation assessment and coordinate dissemination and reporting processes (see chapter 6)
Provide support for community development	■ Educate people about communities of practice ■ Provide training and coaching to community leaders ■ Help with community launch and renewal, agenda design, facilitation ■ Document guidelines and tips ■ Integrate ongoing assessment into community learning
Address Infrastructural issues	■ Steward the optimal use of technology, both tools and practices, for community needs and activities ■ Work with IT to ensure that needed technology is available ■ Help work out logistics for community meetings (e.g., meeting rooms, travel, etc.)

Figure 2.2

Typical responsibilities for the social learning team in the initiative

Social learning teams in *Ignite*

When we started *Ignite*, we didn't know what a social learning team was—in fact we hardly knew anything about social learning at all!

Naturally, at first, this function was performed by the small group of people who launched *Ignite* in Glasgow. Today, with the growth of the initiative and its recognition by management, we have become a central social learning team of three full-time leaders.

As the number of communities grew and spread to other locations, we needed to scale our approach. Through learning and experimentation, we quickly realized that we needed to attract a small team of volunteer 'community builders' at each location, with the primary purpose of helping to launch, support, and nurture their local communities. Nowadays, this type of social learning and emergent leadership comes from what we call our "*location core teams*."

This provides us with a distributed social learning team, which includes a node at each location operating within a "community of core teams" globally. Each team has direct access to key organizational contacts and funding, and they interact regularly with their local management. They are tasked with supporting their local communities through conversations and informal coaching. This helps to keep the dialogue open and a regular pulse on community vibrancy and activity.

As we rely almost entirely on noble community builders who have limited free time, we discourage our core team members from also leading communities of practice themselves, as experience shows that it can cause overload and mixes up their place and purpose in *Ignite*.

Evolving to suit local context and culture

We find that the most impactful core team members are those who are "culture carriers"—the people who are passionate about building social connectivity and a sense of community at their location.

With a technology workforce consisting of tens of thousands of people spread across more than twenty-five global locations, each with their own scale and culture, we understood from the outset that no single "cookie cutter" approach would work everywhere.

As people stepped forward to form a core team and help launch communities in a new location, we were intentional about research and adaptation, partnering with and empowering the new core team to drive the launch process. They knew their local people and culture better than we could, so the core team would take the lead—this helps to provide them with autonomy and purpose. It also creates important connections for local sponsorship and resources.

The core team experience: networking, listening, and learning

Colleen is an *Ignite* core team member from Chicago:

“Prior to hearing about *Ignite*, we had launched some communities in Chicago to facilitate learning at a local level. Some of the challenges we faced included finding a way to help people easily find and join our active communities of practice, learn what was discussed in recent meetups, and see what topics were planned for future.

“We found ourselves constantly explaining that these communities are not meant to be a typical teacher/student training session, but are more effective as social learning environments, where the community members are practitioners who share information and help each other solve problems.

“I was so excited when I learned about *Ignite* – this was exactly what we needed! We migrated our existing communities to *Ignite* at the end of 2017 and officially launched *Ignite* for Chicago in coordination with our internal tech conference in 2018.

“We built our local core team, received help with the *Ignite* launch, and secured senior sponsorship. As we continued to build up our core team for Chicago, I chose to support our Cybersecurity, Project Managers, Python, and Public Presence and Speaking communities, in addition to my main role.

“I can’t say enough good things about the Ignite communities and the networks they create—especially across lines of business. Our core team has members from all over the organization, and in the meetups I can hear what practitioners are challenged with and if there’s anything I can offer to help.

It's a great way to informally see how our teams are approaching common initiatives or challenges, share what we're doing, and experiment with ways to improve our own approaches.

"I also regularly represent our Chicago *Ignite* core team in firmwide forums, lead meetups with community leads, and publish blogs promoting our communities. All this has strengthened my communication and leadership skills."

The CCHN social learning team

The CCHN social learning team supports a dynamic community of practice made up of over a thousand humanitarian negotiators across agencies and context. The team is composed of 5 regional specialists (Latin America and the Caribbean, Africa, Europe, Asia, and the Middle East), each of them with significant negotiation experience. They are supported by a team of 5 associates and 3 content experts. Two senior staff and one associate develop curriculum and training. An additional professional and an associate manage the social platform of the Community, CCHN Connect. A total of 28 staff, associates, and consultants work full time for the CCHN in 2022, up from only 3 staff in 2017.

The evolving role of CCHN as a social learning team

The CCHN played a central role in convening field practitioners and facilitating the establishment of a safe space for the sharing of negotiation experiences. It designed tools and methods to frame a review of the experience of participants and tested various facilitation frameworks to encourage an active participation by members of the community. It also managed to mobilize agencies in the field in supporting these initiatives by not only facilitating the participation of their staff—at times coming from remote areas—but hosting some of the peer-to-peer events as well.

This work contributed to the recognition of humanitarian negotiation as a professional domain. The CCHN published the first *Field Manual on Frontline Humanitarian Negotiation* in 2018. It served to promote the development of academic curricula in various universities around the world.

While the CCHN took a lead role in making these achievements possible in the first phase, it has entered a new phase in which this role needs to take a backseat to encourage community members to take on a greater role in determining the orientation of their community and their contribution to the development of new tools and methods. As a social learning team, the CCHN must take care not to overshadow the critical role of field practitioners as the main source of negotiation expertise and ultimate guide in the orientation of their community.

This transformation of the CCHN from an incubator for a community of practice to a support platform and a social learning team is still a work in progress. Indeed, the role of community members has not yet been sufficiently affirmed, especially in view of the current dominance of Western policy and academic centers in the domain of negotiation. In addition, there is a desire on the part of many participants in the Global South to be certified by the CCHN as an external source of expertise, as they do not have access to formal education and recognition of their negotiation skills within their own cntexts. To create value in the short term and allow for an active role by field practitioners, the CCHN needs to play a substantive role in building their capacity through training modules and the development of new tools.

This situation is evolving quickly, however. The most advanced and active community members seem ready to develop an emerging core group for the CoP and take over the leadership of their activities in some of the countries.

2.3 Visibility

An important role of an organizational initiative is to make communities visible. Here we describe three ways of doing this: a community registry, induction of new employees, and events such as fairs or summits.

Community registry

A useful tool at the initiative level is a simple registry of communities of practice, with community entries and in more sophisticated versions, links to full community webpages. There, people can see which domains are being covered and find contact information. This includes local chapters and other subgroups, so people can find out what is happening locally. With a well-maintained registry, one condition for starting a new community of practice is to create a registry entry and to show that it does not duplicate the domain of an existing community.

Induction of new employees

A useful service to communities of practice is to include an introduction to existing communities in induction programs for new employees. The registry is a helpful artifact for this purpose. Some organizations invite the social learning team, community leaders, or members to explain what they are doing. In some cases, new employees can sign up for membership on the spot. This introduction allows new employees to quickly find group of people they can relate to and who can help them feel at home and become engaged.

Inviting new colleagues into our communities

JPMorgan Chase hires thousands of new people into technology roles every year. Part of the onboarding process includes a short overview of the benefits of *Ignite* communities, with a call to action to browse the list of communities and join those of interest.

We also invite new graduates and apprentices into *Ignite* communities, as the next generation of technology talent. We find that they often join several communities, and over time, many will volunteer as community leads or members of their local core teams. The benefits to them can be significant—including developing new skills, networking, developing their leadership, and finding new career opportunities within the firm.

Deb is a User Interface (UI) developer, based in Bournemouth, UK. He has been with the company for over seven years and started as a graduate in the Software Engineer Program (SEP). He benefited from participating in his local User Experience (UX) design community and testified at an induction meeting:

“While I initially joined the firm in a non-UX focused role, I have always had an interest in UX and wanted to join a community of practice where I could share design ideas and learn from a team. Through my *Ignite* community’s monthly meetups, I have been able to network with people from across the Bournemouth campus, whom I wouldn’t have had any contact with through my regular day-to-day job activities. This network helped me increase my knowledge and gain the confidence I needed to seamlessly transition into my current UX-focused role. Just recently, I stepped up to help co-lead the community to contribute back and keep learning with others.”

Offering training to sponsoring organizations

The CCHN has collaborated with the training department of multiple humanitarian agencies in facilitating access to CCHN material and information about its CoP activities. The ICRC has integrated CCHN workshops as part of its institutional development schemes. UNHCR has opened a webpage to draw attention to the CCHN and its community activities. However, most newcomers have learned about the CCHN through word of mouth, including recommendations from other CoP members within their teams. This connection is particularly important in remote field locations where field staff have very limited access to formal education opportunities. The digitalization of CCHN workshops and the development of internet services as part of humanitarian operations speeded up during the pandemic. This increased and facilitated access for many practitioners to CCHN activities, tools, and methods.

Events: fairs, conferences, and summits

Holding regular conferences, fairs, or summits of various formats is a good way to integrate communities of practice into organizations and give them visibility. To maximize practice-based learning, there is a natural tendency to be in communities with people who have the same practice. But often people in organizations are not very aware of what other communities or subgroups are doing. These fairs can be a real eye-opener. Members—as well as other employees—appreciate the value of interacting with people in different practices. Fairs help resolve this double aspiration between focused communities and the need to connect more broadly.

Face to face, communities can build physical booths to display what they are doing. Online they create a webpage. These physical or online booths contain visual representations of their work together (see Figure 2.3). Perhaps they even organize an activity to involve visitors. At the fairs we have seen, communities were extremely imaginative about their booths and activities for visitors. These fairs have been great fun as well as instructive.

Fairs can require a substantial investment as they take effort to organize, for both the social learning team and community members. But they are a worthwhile opportunity to recognize the work of communities, to make it visible, and to address the challenge of communities becoming silos.

Sometimes members discover useful opportunities to collaborate on cross-boundary projects or innovations. When executives are invited, such events are also an opportunity to renew the overall strategic commitment and to recognize high contributors.

Not all organizations who run communities of practice initiatives hold these types of overarching events, but those that have found them immensely useful, productive, and appreciated.

Figure 2.3

Example of scenes from annual fairs with booths

Showcasing communities

From the outset, it has been invaluable for us to take advantage of opportunities to promote our communities broadly and to new audiences.

Since the beginning, we have leveraged company-wide events and conferences, as well as organizing our own larger events. This has a dual benefit of raising awareness of the communities to new audiences and for existing communities to learn about each other and their activities. This has helped our members to feel part of a larger global community of communities.

These activities have been a key driver in the growth of the initiative. As mentioned earlier, an executive visit at such an event provided a pivotal moment in our story. Broadly speaking, there are various means of showcasing communities at the initiative level:

Local *Ignite*: We encourage our location core teams to organize 'showcase events' for their local communities and activities. For example, sometimes they will host a series of 'lightning talks' (quick introductory talks by community leads that are designed to inspire and invite people to join their communities), and on other occasions they will organize 'community stalls' in prominent office locations where colleagues can learn about local communities through networking and visually seeing what the communities have been doing. To further increase awareness and visibility, *Ignite* communities are regularly featured in new-hire induction / orientation sessions and at local office-wide events such as 'Town Halls'.There is no centrally-set format or schedule for local events, and we encourage the teams to adapt to local context, culture, and customs.

Global *Ignite*: With communities located across the globe, each year we celebrate the global nature of our community ecosystem with an event called *Ignite 24*. It is a follow-the-sun event that moves from time zone to time zone, with 24 hours of community-driven content in a single workday. Each time this takes place, we are amazed by the variety of sessions!

Firm-wide: *Ignite* communities regularly feature at the company's internal tech conferences. Visiting locations around the globe throughout the year, these conferences command large audiences and are a key channel for JPMorgan Chase to share technology strategy with employees, and to invite them and their teams to get involved by learning about new tools, technologies, or organizational changes. With such high numbers of people in attendance, this is an ideal mechanism for raising awareness of our communities of practice. Particularly in the early years, we held *Ignite community showcases* at several of these in-person events to give our communities an outlet to demonstrate what they had been doing together, the value they had generated, and to attract new members.

World summit

Every year, the CCHN has organized an Annual Meeting of the members of the CCHN community of practice (with the exception of 2020 due to the pandemic). These gatherings have been an opportunity both to connect members across regions and to promote the CoP externally. In particular, the CCHN has convened executive sponsors and various agency leaders, for a chance to see the community of practice in action and discuss the perspectives of its members. Most notably, the 2021 World Summit on Frontline Humanitarian Negotiation and Fifth Community Assembly was one of the largest virtual gatherings of humanitarian professionals, with 1,400 field practitioners participating onsite and online. This weeklong hybrid meeting was designed to provide an open and safe space for practitioners to discuss current themes related to humanitarian negotiation, find practical solutions to complex problems, engage with peers and other professional networks, and learn new techniques. Participants joined in their personal capacity as field practitioners seeking to explore new possibilities, compare notes, promote diversity, and celebrate their differences as a source of value.

2.4 Capacity building

One of the roles of the social learning team is to build capacity for cultivating communities of practice. This includes the social learning team itself, as well as community sponsors, leaders, and even members.

Sponsoring relationships

The role of sponsors in communities of practice initiatives may not be familiar to organizational executives or to community leaders. One of the key roles of the social learning team is to help communities and sponsors develop productive relationships. This often involves informing management about the role of the sponsor and suggesting useful executive actions. It may even involve working with functions like HR to promote recognition of community contributions. In many cases, the social learning team also helps communities find strategically chosen domain sponsors, inform candidates on the nature of the role, and negotiate expectations on both sides.

In addition, the social learning team is often responsible for ensuring that the value created by communities of practice is made visible to sponsors in various ways, as addressed further in Chapter 6.

Training for community leaders

The practice of leading a community is not something that will be familiar in most contexts, especially to people with technical roles. Social learning teams have found that a little training can go a long way.

Social learning education

Despite the growing prevalence of communities of practice over several years, social learning would still be considered an emerging discipline within JPMorgan Chase, and at the time of writing, there are only three people leading the initiative at the global level.

To achieve our goal of nurturing active and vibrant communities of practice, we needed help to scale our social learning leadership capabilities across the global "community of communities."

To that end, we launched *Ignite Academy* to share social learning practices, activities, and tools, including "learning journeys," for the key personas within the initiative. This includes general modules such as "The Value Creation Cycle," "Why You Should Develop Your Community Charter," and more activity-oriented training sessions that support our events or activities (such as *Ignite 24* or our 30-Day Challenges).

Creating more training materials is great, but we really needed to scale the effort through additional community help and coaching. Recently, we were glad to welcome a global cohort of *Ignite Faculty*, emerging social learning leaders to facilitate social learning education sessions and share good practices with our communities worldwide. We operate the *Faculty* as a global, virtual community of practice and our domain of choice is social learning!

Training facilitators

In view of the rising demand for peer workshops, the CCHN opted to train members of the community of practice to fulfill the role of facilitators in peer-to-peer events. The Training of Facilitators introduces participants to techniques for guiding peers through the CCHN negotiation methodology. It prepares them to facilitate modules specifically designed to create a safe space for the exchange of experiences as a way to help humanitarian professionals conduct humanitarian negotiations in the field. Participants also learn how to use case studies and simulation exercises. The training is available both online and onsite. Once participants have completed it, they are invited to join practice-oriented peer workshops as facilitators. At the end of 2021, over 400 members of the CCHN CoP completed this training. The majority of them continue to engage regularly with their peers in various workshops and events. The CCHN is now preparing a series of short video sessions to systematize/standardize the instruction/facilitation of the CCHN methodology and focus meetings more on peer exchanges.

Community of community leaders

In very mature initiatives, a useful role of the social learning team is to convene a community for community leaders, through which they help each other, develop their practice, manage cross-community issues, and gain a collective voice in the organization. Because leading a community is often a volunteer role, belonging to an additional community of practice can be an additional burden. In particular, one should not assume that being a community leader automatically makes you want to belong to yet another community. But if the role is well recognized and with the right rhythm to fit in people's time, it can be more effective than mere training.

'Meta-communities' of social learning leaders

In addition to our structured training offerings, our core teams host local 'community of community leads' meetings, where they share details of upcoming initiatives, events, and proven solutions to local logistical challenges. This opens a forum for community leads to discuss challenges they're facing.

In addition, the same type of collaboration is held across locations at our 'community of core teams,' following the 'fractal model' of *Ignite*. This opens a channel for alignment between all levels of the initiative.

2.5 The phases of an organizational initiative

Unlike other organizational change initiatives, a communities-of-practice initiative does not have to proceed in lockstep. It can start small and grow organically as more people are inspired to form their own communities. Even when it starts in a top-down fashion, the fact that it does not have to proceed in lockstep can result in an initiative that is better received, longer-lasting, and self-sustaining.

Keeping true to the primary objective of *Ignite*

At the beginning, we didn't know a great deal about communities of practice initiatives, but we knew that genuine success would require grassroots engagement from our technology practitioner colleagues.

We needed to appeal to colleagues' intrinsic motivations (e.g., passion for their craft, sense of curiosity, and motivation to learn and grow) and create a strong "pull" towards *Ignite* communities, rather than any "push" from above.

To retain that bottom-up approach, from the outset we identified several anti-patterns we wanted to avoid. To name just a few of these, we agreed we would not try to force new communities of practice into existence (or allow others to do the same). Rather, we operated *Ignite* like an internal start-up, which benefited from high levels of autonomy, purpose, and alignment around a simple vision statement:

> "*People connected through collaboration and practice*"

Ignite simply creates the conditions for generative, member-directed communities to spring up and thrive.

A communities of practice initiative typically goes through six overlapping phases as illustrated in figure 2.4. We'll now describe each phase briefly

Preparation. The purpose of the preparation phase is to be clear on what problem you are attempting to solve, and to generate enough understanding of communities of practice and their role among key players to get started. It is also important to get the commitment of relevant stakeholders and put the initial structures in place, including some idea about how to introduce—and possibly brand—your initiative. Perhaps the most important structure is an initial social learning team, even if this consists of only one person at first. The team needs to decide how much top-down support the initiative should have at the outset. Many initiatives have started as "skunkworks," but even when starting with a pilot bottom-up approach, it can be beneficial to have the support of at least one senior stakeholder who can provide the start-up resources needed. While it can be advantageous to have high-level commitment before starting, in some cases, it is easier to do this at the end of the pilot phase after some initial success can be demonstrated. The main point is to get some communities started, not have a whole structure in place. This structure will happen progressively in response to the demand of the growing initiative.

Pilot(s). In this phase, some communities get started in areas where there is readiness. Even when the initiative begins mostly top-down, it is good to start small, with one community of practice or a few. This allows the organization to learn how to create an environment in which communities of practice can prosper and create value, and to learn what tools or support they require. It provides a model to inspire others—or help reveal what not to do. Working examples also help gain or increase top-down support if this support was not achieved in the preparation phase.

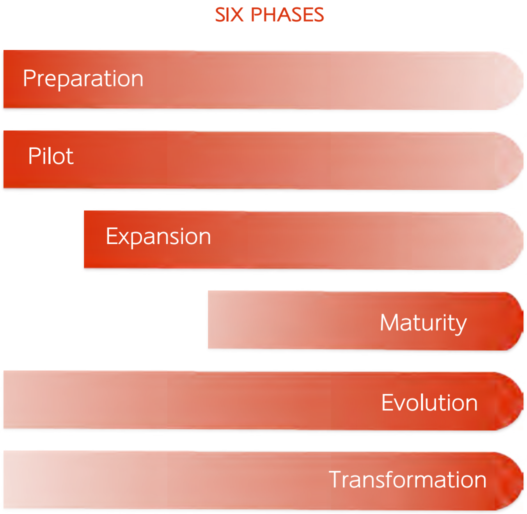


Figure 2.4

Typical phases of an initiative

Expansion. Once the pilots have demonstrated the relevance and value of the approach, their work should be publicized in newsletters, websites, meetings, and other means of communication. Then other communities can be initiated, either on demand or through gentle encouragement. They can be inspired by the pilots, but they should not be exact replicas: each community of practice is unique and needs to find its own *modus operandi*. Some areas may turn out to be too broad for a single community of practice, and problems can also arise when the community's focus is too narrow. The challenge of the expansion phase will be to define relevant domains that are strategic for the organization and for which some people are inspired to take the lead in convening a community. For many organizations, social learning and communities of practice represent a new discipline, so it should be expected that some education, training, and coaching will be required from the social learning team.

Defining domains

We adopted a bottom-up approach to the definition of domains. Domains are selected by crowdsourcing proposals, openly inviting votes, and launching the new communities selected as most viable by this inclusive process of expressing interest.

However, we found that the process still requires some degree of curation—ensuring that community domains focus on professional topics and relate at least tangentially to the current or future strategy of the organization. This turned out to be a key function for our social learning team, informed by our constant engagement with employees as well as our conversations with initiative sponsors.

Maturity. The initiative matures progressively. Communities of practice become part of life, and over time new benefits and innovations emerge. The sponsorship structure and the assessment system are functioning. The regular communities of practice fairs punctuate the life of the organization. There are efforts to weave across communities to maximize organizational learning. Time spent on communities of practice is considered integral part of work and contributions are recognized and rewarded. There are career opportunities for people who take leadership. Communities of practice are recognized as strategic partners; managers turn to communities of practice when they need advice related to their domain. They see the strategic value of having communities started by practitioners on issues that are not yet on the radar of the formal organizational strategy, like emerging technologies that practitioners have heard about through their own networks. This encourages practitioners to explore future possibilities ahead of the formal organization. And when all this is in place, the social learning team can focus more on looking for new opportunities rather than struggling for small wins or acceptance.

Evolution. At its core, an initiative has to be and remain a learning process. As the initiative grows and gains more momentum and as the organization develops its 'social learning muscle,'new opportunities will emerge. It is of vital importance to keep ongoing learning loops between all involved. This includes regularly inspecting what is working well and what is not; and adapting the approach by always seeking ways to improve. Being intentional about these learning loops will keep the initiative alive and relevant.

The importance of learning as you go

We didn't know what to expect when our initiative started, especially since at first, we were simply aiming to solve a local problem. One thing we were certain of was that as a bottom-up, grassroots approach it was never our plan to commit to a timeline or to try to scale up without experimenting first.

Evolving to suit local context and culture. From the outset, we understood that no single "cookie cutter" approach would work everywhere. As people stepped forward to form a new core team and help launch communities in a new location, we were intentional about research and adaptation, partnering with and empowering the new core team to drive the launch process. They knew their local people and culture better than us, so the core team would take the lead. We have found that this approach helps provide them with autonomy, purpose, and to create important connections for local sponsorship and resources.

Continuous learning at the initiative level. Even with a well-established network of communities globally, the learning frontier is never reached. With passionate practitioners come innovation and new opportunities. Every day brings an opportunity to learn something new!

Transformation. For most organizations, even having self-governed communities of practice at all is a transformation. So, this may not be strictly a phase. But over time, the transformative potential can reach beyond simply tolerating a few communities. A communities of practice initiative can slowly engender a transformation of the culture and ways of working, and a corresponding transformation of identities for those who work there. Organizations start all kinds of change initiatives, with various degrees of success. What sets a community of practice initiative apart is that it does not seek transformation as an organizational act. If it achieves a transformative effect, it is through the vehicle of local learning—focusing on practice and giving practitioners spaces of agency, voice, and identity. There are few more powerful ways to inspire people than this.

These six phases can be somewhat chronological, but they are not strictly sequential and to some extent cyclical. In other words, even at the evolution phase, elements of the earlier phases continue to be relevant: the organization still needs educating and preparing; new communities of practice may start; it may be useful to pilot new approaches; and commitments, understanding, and the environment still need to be improved.

We are often asked about expected timelines for such initiatives. There is so much variety that even vague answers can be misleading. So much depends on the scale of your initiative, on the speed at which commitments can be secured, and on how fast staff are ready to engage. A bottom-up initiative can take more time, but it can place more control and ownership in members. The preparation phase can be done quite rapidly. It may take a while to discover good areas for pilots and to get the communities of practice up and running. It is worth spending as much time as is required in the pilot phase to be able to demonstrate initial success to stakeholders before seeking resources to expand. Depending on the size of your organization and growth of the initiative, expansion will likely take a few years for the major areas of practice to be covered. Aspects of the maturity phase may start as early as the pilot phase, but full maturity is usually not reached until well after the expansion has covered much of the territory. The evolution and transformation phases do not have a time limit.

2.6 Success and risk factors at the initiative level

Why some communities succeed where others fail keeps surprising us, but the cause is often related to the context of the initiative. We have identified some of the key success factors and sources of difficulty at the level of the initiative.

Key success factors

Let us start with a few factors that contribute to the success of communities of practice initiatives.

Adequate resources. Communities of practice require very few resources compared to other types of organizational initiatives. But the organization must ensure that resources are adequate. This includes dedicated time for community leadership and participation as well as budget for a social learning team.

High expectations. Even though communities of practice are often categorized as informal, it does not mean that they are unfocused or unstructured. The ones that are most energized are the ones where members (and other stakeholders) have high expectations about the difference the community is going to make.

Voice. Few things are more frustrating for community members than coming up with great ideas only to have them ignored. It is important to engage with communities, listen to their ideas and questions, and even consult them on key decisions related to their practice.

Strategic conversations. When communities of practice gain a voice, they can be treated as strategic partners who bring the perspective of practice into conversation about optimizing organizational performance, driving key capabilities, and fostering innovation.

Learning culture. Communities of practice thrive in a culture that visibly values ongoing learning as a key to success. This entails systematically promoting and assessing the value of learning, including out-of-the-box thinking, innovative ideas, constructive criticisms, and reflecting on things that don’t work or don’t turn out as expected.

Recognition and appreciation. Another way to show that the organization values learning is to regularly recognize the contributions of communities and active members through public gestures.

A bottom-up initiative takes time

It took a few years for the *Ignite* initiative to grow and mature to the point where it was possible for us to demonstrate meaningful achievements such as the success factors and indicators listed in section 2.6. This was partly due to the time it took for momentum to gather pace and communities of different types to grow. It was also partly due to the time it took for sufficient social learning capabilities to develop within the organization.

At certain moments, it was tempting to try to push for these success factors early in the life of the initiative. But we found it important to invest sufficient time in its organic growth, managing our own expectations and those of members and stakeholders. In our case, it was helpful to keep the success factors listed as desired visionary outcomes rather than driving targets. We could then strive towards achieving them as emergent outcomes over time.

Challenges and risks

It is also worth considering some risks that can pose a challenge for an initiative, along with some suggestions for mitigating these risks.

Challenges and risks	Mitigation
Fad. Once communities of practice seem popular with management, everything gets called a community of practice and their distinctive characteristics and potential get lost. Sometimes communities of practice will be mandated into existence as part of the fad, resulting in limited long-term viability for the community.	Have a well-trained social learning team act as a one-stop shop for people wanting to start a community of practice. Only when there is a good case for a community of practice does it appear on the registry, specifying its domain, its membership, and the practice it intends to improve. The social learning team should have a strong sense of integrity in the face of challenges from those in senior positions to protect the safe, generative culture of the initiative.
Perfunctory. Participation in communities of practice is monitored and becomes just another box to tick.	While it is important to see participation in communities of practice as part of people's jobs, the organization should avoid making it compulsory in a bureaucratic way.
Channel from above. The community of practice becomes a channel to spread information or try to get members to implement an organizational agenda.	Communities of practice exist to provide a special space where the perspectives of practitioners drive the process and the content. Let communities define their own agenda. Unless you are seeking a candid response from a practitioner's perspective, use other structures or channels to roll-out unrelated initiatives or broadcast information. Avoid making a community of practice itself accountable (either directly or implicitly) for implementing organizational imperatives..
Burden. Communities of practice are given all sorts of de-energizing tasks. They devolve into another kind of team—just more work.	The point is not to completely avoid suggesting a task for a community. Some tasks can be inspiring, for instance, seeking an opinion. But when suggesting a task, always make sure that it is an energizing task from the community's perspective and let members decide whether to take it on.
Micromanagement. Managers become so involved in controlling different aspects of the community that members can't gain the sense of ownership that makes their participation inspiring and different from business as usual. **Neglect.** The organization does not engage with communities of practice, and they become marginalized.	These two risks are the mirror of each other. Communities should have a lot of autonomy in structuring themselves and driving their learning. Prescriptions should be minimal and based on principles rather than detailed requirements. However, this does not mean that managers should leave communities alone—this would actually end up marginalizing them. Engagement is essential to give them a voice and ensure alignment, but this engagement must be mutual rather than hierarchical, respecting and valuing the perspectives of practitioners as contributions to the organization. Again, the social learning team has a key role here in protecting communities of practice from interferences, coaching managers, and facilitating productive engagement with communities of practice.
Shifting priorities. Communities of practice require continuity, but short-term attitudes tend to make organizations fickle. Reactions to temporary budget pressures or changes in leadership can make the initiative come and go—discouraging commitment and generating cynicism. This is probably the most common source of organizational problems for communities of practice that we have observed in all kinds of organizations across sectors.	A key requirement for a successful initiative is a long-term commitment at the highest level that will protect the communities from changes in management personnel and priorities. This strategic futureproofing includes baking the existence of and support for communities of practice in the relevant institutional policies and structures (e.g., HR recognition of roles for community leaders, social learning team, and sponsors, IT infrastructure, and strategic consultation processes).

Figure 2.5

Challenges and risks for a community initiative

A fine art: applying a social learning lens

We find that it takes great skill to successfully convene symbiotic relationships between those driving the strategy of the organization and communities of practice, always being aware that we are engaging in art, not science.

Across this and many other dimensions, a guiding principle of ours is to apply a social learning lens and encourage strategic partners to advocate for communities and engage in conversations and collaboration, not control.

An example can explain what we mean by "partners" here. Over the course of *Ignite*, we have been approached several times by people and teams who would like to tap into the high level of "opt-in" engagement our communities enjoy. For example, a team may wish to test their new Machine Learning software product on an engaged group of practitioners to get feedback or to encourage them to try the new tool in their teams. In such situations, we must share some guiding principles for how to best engage with communities, emphasizing that they are essentially groups of volunteers and that each community is different, and therefore somewhat unpredictable.

Social learning and organizational control

Controlling access to community activities. At first, humanitarian organizations insisted on controlling access by their staff to community activities. While we did not think this was necessary, the CCHN felt it was important to let managers come to a conclusion on their own rather than challenge their authority. Senior managers soon realized that they were unable to maintain the required level of control over the expanding number of peer-to-peer activities and participants.

From technical training to experiential learning. While community members have developed a strong sense of ownership over CCHN tools and methods, their role in generating a professional domain remains largely misunderstood outside the CCHN Community. For many outside actors—in particular humanitarian organizations and agencies—CCHN peer workshops are mostly perceived as technical training events where participants learn exogenous negotiation tools and techniques and discuss practical cases. They do not see that these workshops are the actual sharing of experience on endogenous practices and learning from peers. As a result, the CCHN is often seen as one training supplier among others and therefore easily substituted with other training from commercial or academic outfits. The idea that participants are engaged in social learning and co-own the resulting methods remains mostly foreign. As mentioned, the high degree of control that humanitarian organizations seek to maintain over their policy tools and narrative leaves little space for learning from field practices.

Good practices, not standards. To alleviate concerns about the CoP setting new standards independently from established organizations, the CCHN emphasized that the community was not engaged in the identification of "best practices" but rather focuses on the sharing of "good practices" across contexts and agencies.

2.7 Indicators of a successful initiative

In summary, the success of a communities of practice initiative is reflected in the following indicators:

- Staff can find and join a community of practice (or more than one) where they can get help for their role in the organization and contribute to developing the capability of the organization in this domain. They are encouraged to participate in these communities and recognized for their contributions.

- Communities of practice act as a mentoring context for newcomers, who are directed to relevant communities.
- Cross-community fairs and events are well attended, inspiring, and relevant.
- Community leaders receive the help they need when they encounter challenges.
- The various communities of practice taken together act as a coherent learning system. Important learning taking place somewhere finds its way into all the places where it is relevant.
- As stewards of key capabilities, communities of practice are invited into strategic conversations that relate to their domain.
- The social learning team coordinates with executive sponsors to sustain the initiative over the long term.
- The initiative has a good reputation among staff and management for doing something that really makes a difference.

Branding brings alignment and engagement

From the beginning it was a priority for us to develop a compelling brand and vision for the *Ignite* initiative. We wanted it to be one that our technology colleagues would engage with and align behind, and that would help differentiate us from the other internal brands used at JPMorgan Chase.

To that end, we share our vision and mission at every opportunity, to try to build a sense of unity behind our common purpose of nurturing a global community of communities, and we make our brand accessible and easy to use.

As shown in the pictures, we provide *Ignite*-branded posters and pop-up banners. We distribute custom merchandise, including apparel, stickers, notebooks, and other items. At one point, we even had limited edition *Ignite* socks—these proved to be very popular!

As part of our web-based “brand toolbox,” all *Ignite* members can access presentation material, emails, and event templates, as well as Zoom backgrounds that feature local landmarks for each of the places where we have active *Ignite* communities.

When we see our brand being used by our members—whether it’s in their presentation slides, community email bulletins, or when email signatures include the *Ignite* logo and the name of their community—we are encouraged because it’s a sign that people are excited by our communities and that they do feel a sense of belonging.

To illustrate, one day when leaving the office to head home, I saw one of our newer graduate software engineers getting onto his bike with an *Ignite* sticker on his messenger bag, placed alongside stickers for other technology brands. Someone in Columbus even wrote an *Ignite* song. And there have been occasional pictures of community members who have gifted *Ignite* baby clothes to new parent colleagues!


IGNITE
IGNITE
Thank you!


Ignite
Ignite
ecoffee cup


Ignite

3

CULTIVATING COMMUNITIES OF PRACTICE?

3 Cultivating communities of practice

> There are few things as inspiring as a deep, sustained learning partnership around making a difference that matters.

In this chapter, we focus on the cultivation of individual communities of practice. Communities of practice are as old as humankind. They are living, self-governed social structures that thrive on the passion and care members bring to their engagement. This section will be most immediately relevant to (aspiring) community leaders, managers, or social learning team.

There is no recipe for a successful community of practice, no single approach that will guarantee a successful outcome. In this sense, there are no correct or incorrect ways to convene a community of practice. The point is to form a sustained learning partnership that creates value for members and their organization and is responsive to their needs and aspirations; it is not to comply with a formula. Each community of practice will be unique and reflect all at once the DNA of the organization, the specificity of the domain, and the participation of its members.

Still, it is useful to have some guiding principles and frameworks, which we outline in this chapter. The essential ingredient of a community's success is the active participation of members, who find value in the activities of the community. Their community is a place to "talk shop" and learn from each other's experience. They contribute to and benefit from its collective learning because it helps them address real challenges they face in their day-to-day lives. All cultivation activities are oriented toward this basic principle. As a result, perhaps the most important cultivation principle is an evolutionary and participatory stance. You don't design a community on your own and then invite people into your design. You work with members to design it as you go, together, as a way to take the next step. The idea is to design a little, experiment some, do a lot. And repeat.

3.1 A community of practice or something else?

There are several ways to form learning partnerships in and across organizations:

- **A community of practice:** for a long-term commitment to developing a practice
- **A chapter:** for a geographically local version of a broader community of practice

- **A practice group:** for a specialized concern within the domain of the broader community of practice
- **A social learning space:** for a more flexible way to enable social learning, without the requirement of a shared practice or the long-term commitment to develop one

Forming a community of practice

We have defined a community of practice as a sustained learning partnership among practitioners who are ready to interact regularly over time to get better, collectively and individually, at a practice they share. It is useful to translate this definition into a set of more concrete questions.

Do you have a good domain?

- There is an area of capability that enough people can identify with as a significant part of their work and identity.
- It is easy for people to know if they belong, and the domain does not duplicate other communities or organizational units.
- The domain is not so general that everyone could belong; but it is not so specific that people would need to join too many communities to do their job.

Can you see the community dimension?

- There is a clear group of people who want to form a community.
- The companionship is likely to become a valued experience.
- There are (potential) members committed enough to take some leadership.

Will the practice piece be meaningful?

- The practice is dynamic; it gives rise to emerging challenges that push learning and make ongoing community participation useful.
- Members are free to disclose enough of their experience of practice for learning to be driven by the challenges and opportunities they face.

What will they do together?

- Members interact regularly to help each other and make progress together in ways that they couldn't do alone—they work on shared problems, create documents, benchmark their practices, and help each other through difficult times or to take advantage of opportunities.

- Meetings dovetail with each other; they are not discrete events. Members revisit issues to assess progress. They follow up their advice to know what worked or not and to learn from the outcome.
- Sometimes the community brings in an outside expert to help them think through sticky issues, but this is not the mainstay of the community.

What will the conversations look like?

- They share a language; they love to engage in "shop talk."
- When someone brings up a problem of practice, other members can hardly stop themselves from chipping in with their own experience.

What will the group dynamics feel like?

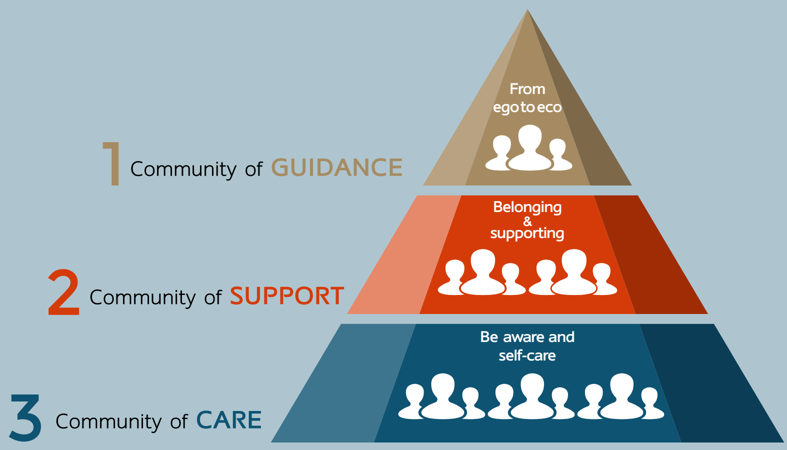
- Members are excited to see each other; they respect the experience of mature practitioners and want to help newcomers.
- Members feel comfortable sharing what's not working for them.
- It is a welcoming space for people to take initiative.
- There is respect for different levels of engagement.
- Power relationships inevitably exist, but they do not come in the way of learning by, with, and from everyone.

Caring for the capability of other members to operate safely

Initially identified as "informal peer groups," participants recognized themselves as members of a community once they realized the importance of investing in each other's ability to negotiate safe access in conflict zone—from both a practical and an ethical perspective. Sharing stories of hazardous negotiations mobilized not only the interest of other participants but also their sympathy and solidarity. If a colleague was put under pressure in a given context, for example, other practitioners knew that they were probably as vulnerable in their own context. Defending the integrity of one operation quickly became a duty for all participants, especially when the life and safety of fellow practitioners were at risk.

This connection and sense of interdependence is singularly relevant to practitioners on the frontline. The same does not necessarily apply to the relationship between humanitarian organizations operating in the same context, where for the most part they tend to see each other as competitors. If one agency's reputation suffers from corruption allegations, it means one less organization to compete with. Nonetheless, humanitarian negotiation remains one of the most dangerous jobs in the world with several hundred humanitarian practitioners losing their lives on duty every year. Peer participants in the community of practice quickly realize that their joint efforts to perfect this domain of negotiation may contribute to the safe return of colleagues operating in conflict zones around the world.

In 2019, some members further systematized this vision by drawing the community of practice as a pyramid, underlining the specific functions of community of care for all members, community of support as a shared goal for those in needs, and community of guidance from the most experienced members of the CCHN Community (see graph).



Forming a chapter

When a community of practice is large and dispersed, it is sometimes more practical to have distinct chapters in different locations. This allows for close engagement and a focus on local challenges, while still belonging and feeling accountable to a larger community. Separate groups are often convenient for reasons of travel, language, or time-zone differences. They may also motivate more people to join when it feels easier to identify with a local group than globally dispersed group. Whatever the reasons, a chapter is not a separate community of practice, but part of a broader one. Locally, it acts as a community of practice as described above, but at least some members are also aware that there are other chapters working on the same domain. They understand that they need to communicate regularly (or even come together occasionally) to share what they are doing in their chapter with the rest of the community.

Community networks by domain

Due to the in-person and location-centric nature of *Ignite*, we have regularly seen communities spring up in different places that focus on the same domain. Each one was launched separately by local practitioners who wanted to make a positive difference.

We have experienced some success from building “collaboration networks” between these communities, with the idea that they share ideas, conduct joint events, and align themselves with the strategic direction of JPMorgan. There were great benefits to this, but a major drawback was that it took a lot of convening of such connections by the social learning team at the initiative level—thus limiting scalability.

One aspect to this challenge is that even though local community leaders have a desire to share ideas and learn from other leads within the shared domain, we find that there can sometimes be a reluctance to step up and lead such a “community of communities.” Perhaps they prefer to focus on their own local community. Either way, this compounds the scalability issue.

Undeterred, we are working to develop a scalable, flexible pattern for such communities operating within shared domains to work closely together and collaborate with senior “domain sponsors.” We keep centralized involvement to a minimum, again remembering this is “art, not science.” It could be said that our approach to this is something of a “twist” in the general domain sponsorship concept, where in *Ignite*, a domain sponsor would collaborate with several communities situated across different global locations.

CCHN chapters

The CCHN community already has regional and local activities. Now the possibility of establishing more formal chapters is being considered. This has led to questions about having a systematic and universal approach to the governance of the CoP. If one were to adopt a federated model with local chapters, it could require the development of a unifying governance structure to bring these chapters together. Questions have emerged on how to organize this overarching structure, who should be part of it, how to select the members who will manage the structure, and who is to select these members.

This is especially delicate because, if we are not careful, national chapters could easily parallel the structures of agencies with their national offices. In addition, the CCHN opted to be cautious and avoid a piecemeal approach that could trigger misperceptions among members and their agencies regarding potential political or labor union ambitions. This is particularly sensitive as there are already grievances among field staff about significant inequities in salary and insurance coverage between local and international staff. While an increasing number of members are initiating local activities, the formalization of chapters remains a work in progress.

Forming a practice group

Sometimes a group of members feel inspired to focus on a subtheme within the domain of a community of practice they all belong to; they need some time to work on this subtheme on their own before bringing the results to the broader community. This is what we call a practice group. Unlike a chapter, it is not defined by geography, but by a specific learning challenge. The table in figure 3.1 provides examples of reasons why *practice groups* form.

Members of a practice group focus on an area of particular interest or urgency to them, but it is not a separate community because their learning is relevant to other members of the broader community. Some communities are very intentional about initiating—and in some cases even chartering—practice groups to foster deep engagement while preserving a sense of identity with the whole community.

Like community members more generally, participants in practice groups use their own experience and challenges of practice to drive the learning, but they do so on behalf of the whole community. They regularly report on their progress to the rest of the community for endorsement, critique, and refinement.

Note that these groups may need some support from the social learning team. Members who take the initiative can easily lose motivation, if they feel their time is going into logistical and practical arrangements rather than working on issues of interest.

Reason	What the practice group is for	Activities
Subtopic	Come together to explore an aspect of the practice of special interest to members who join, but also of general interest to the community	Discussion, reading group, debates, learning expeditions
Project	Team chartered by the community to achieve something specific that will serve the community's learning agenda	Project team, working group
Better together	Join forces with other members who have to accomplish something similar in their own work and decide they can get it done better and faster by working on it together	Collaboration group
State of the art	Take a systematic look at what the community (or the world) knows about an area of practice	Documentation, mutual benchmark, systematization
Out of the box	Seek radically innovative solutions for a sticky problem or a promising opportunity	Brainstorming, learning expeditions
Cross-boundary	Look to connect, interact, or form coalitions with other practices to address a broader issue	Boundary engagement, visits, field trips
Advisory group	Help one or more members make progress on a specific challenge over time	For instance, help implement some advice or solution proposed by the community
Contextual subset	Address the domain from the perspective of a subset of members or stakeholders	Sharing perspectives and stories

Figure 3.1

Some reasons to form a practice group

Growing the community: thematic workgroups

As the CCHN Community is entering a more sustained phase of its development, a new focus is devoted to deepening experiential learning, sharing activities, and developing the relationship among members at the regional level. The CCHN launched new series of thematic workgroups on negotiation practices at the regional level (e.g., the Balkans, Syria, Colombia, Oman) and on new themes such as migration or negotiating with interpreters. We have found, however, that these groups are hard to maintain in view of competing agendas of participants. While members are keen to contribute to the development of new tools or cases, the quality of the contributions varies. Overall, the CCHN hopes to integrate a mosaic of experiences and perspectives in its forum while continuing to systematize its negotiation tools and methods as community standards.

Convening social learning spaces

Some challenges warrant some serious learning together, but they are not worth a sustained community of practice. When such a need arises, it is time to open a *social learning space.*

A social learning space is very much like a vibrant community of practice: people are there because they want to make a difference that matters; they engage their uncertainties in the group as a way to drive learning, and they pay attention to what others are suggesting. However, they do all this without the expectations of continuity and ongoing commitment to a shared practice.

Some social learning spaces may become communities of practice over time, but most do not and don't need to. Opening a social learning space can be a good way to start a potential community of practice by first exploring an issue with limited initial commitment and then seeing if a more sustained commitment is warranted. In this sense, a social learning space can act as a "soft launch" of a community by which potential members can experience a learning partnership and assess engagement and vitality before committing to a community of practice.

In the rest of this section, we focus on cultivating communities of practice, but a lot of what we discuss applies to these other structures.

3.2 How to draw community boundaries

Because involvement can produce learning in multiple ways, the boundaries of a community of practice are more flexible than those of organizational units or teams. It is not so much a matter of who is in and who is out than a matter of seeing how various forms of participation enable learning.

Ideal community size

A common question is how big a community should be. It is a bit like asking how long a piece of string is: there is no magic number. We have seen successful communities of practice with just a few members and very large ones with hundreds of members. A small community with ongoing and difficult challenges can be very dynamic. A large community can bring a wide diversity of voices and perspectives to bear and legitimize its domain in the broader context. *Ignite* and CCHN take completely different approaches to this question, with *Ignite* preferring the intimacy of small local communities, and CCHN seeking to legitimize the domain with one large, worldwide community.

More important than absolute size is how the community is structured to allow people to engage in ways that make sense to them. Some large communities have an active, engaged core group with many onlookers. Others scale engagement with chapters and practice groups, with designed ways to connect these subgroups into a broader learning partnership.

Face-to-face meetings place some limitations on numbers of participants and large meetings require good design if you want to avoid the pitfall of endless presentations. But we have seen successful face-to-face meetings with a few hundred people. Online interactions have changed these parameters. For instance, engineers in the same discipline in a multinational have a well-defined shared practice and an understanding of each other's contexts. They easily recognize each other as learning partners. Most of their communications are calls for help: Does anyone know how to do this? Has anyone faced this situation? These regular calls for help trigger debates about suggestions, discussions of different approaches, and storytelling about local experience.

Bigger isn't always better

Often, we find that the default inclination is to desire to try to have as large a community as possible, which is understandable as the goal is to help many people benefit. However, we have found that it is much more impactful for the community to deliver value to its actively participating members, regardless how large or small the group is.

Time and again, we find that trying to attract a broad and shallow membership does not positively impact the viability of the community when compared to seeking value for regular participants and "growing through success" by sharing value creation stories within and outside the community.

Size and the experience of practice

The CCHN community's growing role in the humanitarian sector brings in new challenges. Agencies have now, for the most part, welcomed the creation of the community of practice as a primary source of tools and methods to develop their negotiation capabilities. Some private training centers have expanded their offering to include humanitarian negotiation courses, but none have the capacity or scale to respond to the needs of thousands of professionals who are eager to frame their negotiation practices across field operations. With the expansion of the CoP, some new tensions emerge:

- **Staying true versus growing.** How do we maintain the spirit and vision of the community in the context of an expanding membership?
- **Beginners versus experienced members.** How do we maintain the ongoing experiential learning mission of the CoP while hundreds of

practitioners simply need basic training and tools to engage in frontline negotiation?

- **Maintaining versus releasing our authority over the domain.** What role should training centers have in building the capacity of frontline negotiators? How can we generate interest in the adoption of the CCHN tools and methods as a framework of reference?
- **Member interests versus funding agencies' interests.** How do we reconcile the interests of the members for informal experiential exchanges with the need for agencies to promote their negotiation experience and position their know-how in a competitive environment?

Open or closed

Another question we often hear debated is whether a community should be open for anyone to join or whether it should be closed—open only to specific members. Again, there is no right or wrong answer. It depends on the kinds of conversations that will most support the learning. If conversations are likely to be enriched by unexpected perspectives or useful to a large audience, then make it open. If, on the other hand, the prospect of these exchanges being heard by unknown participants or people in positions of power prevents candid reflections on practice, then it makes sense to keep them closed. A closed community can always use a public channel to communicate selected information for broader consumption.

Open and inclusive by default

A key guiding principle of the *Ignite* initiative has always been the "open-door policy." Every community is open to every colleague in the company—regardless of which team, department, line of business they're in, or of their level of seniority or location.

To date, most of our activity and membership is focused within the Global Technology organization. However, particularly in locations where technology is co-located with business functions, the communities have proved to be a valuable means of enhancing collaboration and opening new communications channels between these areas of the company.

Levels of engagement

While member engagement is important, the level of participation need not be equal among all members. Some will participate more actively than others because the domain is more directly relevant to them. Figure 3.2 shows the typical levels of participation often found in communities of practice:

- **Core group:** a small group of people whose passion and engagement energize the community and who often take on some tasks to help nurture the community
- **Active participants:** practitioners who are engaged and committed to the ongoing progress of the community (though they may not be of one mind as to what the community is about or where it should go)
- **Occasional participants:** members who participate selectively when something is of special interest to them
- **Peripheral participants:** people who belong to the community lightly, either because they are still newcomers or because they do not have as much personal commitment to the practice, but want to keep informed
- **Transactional participants:** outsiders who interact with the community occasionally to receive or contribute something without being members themselves

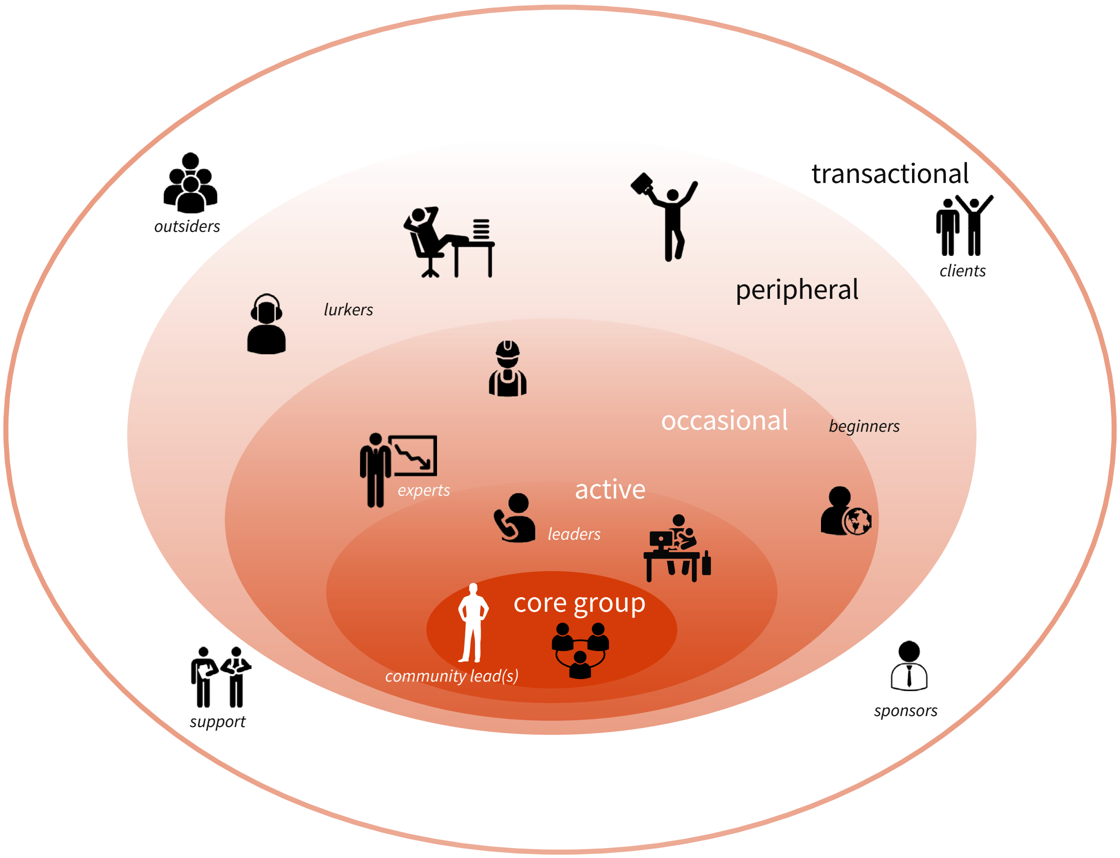


Figure 3.2

Differents levels of participation in a community of practice

Different types of participants in a community of practice may have different perspectives, needs, and ambitions. Therefore, a community needs to be flexible. In general, however, it is more important to focus on the advanced and exciting challenges through which the core group and active members receive value than to worry about engaging the more peripheral participants. This is what will generate energy for the community and this energy is what will draw people in over time.

Who is a member?

The determination of the status of the member of the CoP has always been a sensitive issue. Historically, all participants to the introductory peer workshops since 2017 have been considered equal members of the CCHN Community. As this category grew to over 4,000 in 2022, the question arises as to how many consider themselves a member of the CoP and what that means practically. There was an attempt in 2021 to define membership based on someone's activity over a more restricted and more recent period (i.e., the last two years). This would create a gap of about 2,000 "members" in the accounts of the CCHN and may frustrate some members who wish to stay part of the CoP despite their absence from any activity over the last two years. CCHN staff are also inclined to keep as many people as possible in the community (at times referred to as a "family") as it provides larger numbers to donors and stakeholders. This has led us for now to keep the question of membership open enough that people can engage to the level they consider beneficial at any given time.

When are different levels a problem?

Usually, a layered structure with various levels of participation is not a problem. It is a natural state for a community as long as there is a good balance: peripheral members don't feel marginalized and core members don't feel distracted by the demands of a wider periphery.

There are cases where this situation can be a red flag and require active intervention, for instance, if the core group never changes and the community becomes stagnant. Likewise, if the distinction between levels of participation reflects a distinction that comes from outside the community: for example, if the core group is entirely from central office and people in the field are peripheral participants, this is usually a situation that is going to require some corrective action, such as giving more leadership roles to people in the field.

Levels of participation

One of the most common concerns we hear is about inconsistency in levels of participation. In a corporate environment where the default paradigm can be to use the number of attendees at an event as a measure of success, it is understandable that people feel this way.

Some of our communities have spent too much time on activities such as tracking attendance, marketing the community as broadly as possible—sometimes forgetting to pay attention to the active members they already have and missing opportunities to celebrate the value already generated within the community.

We take every opportunity to encourage celebration of those who do participate, the enjoyment those people derive from the community. Rather than leaning on one-dimensional measures of success, we recommend that community leads look for stories of value creation to reinforce the success of the community and its activities.

3.3 Leadership, roles, and responsibilities

The success of communities of practice depends on members taking initiative. Members can take a variety of roles and participate in various ways in the leadership of their community.

Key roles in a community of practice

No matter how much external support they receive, all communities of practice ultimately depend on internal initiative for their development. All successful communities of practice have some members who take a "nurturing" stance toward their community. Not only do they participate as members, contributing and benefiting like everyone else, they value the existence of the community and are willing to invest themselves actively in enabling it. Community leaders take such a stance, but they are rarely successful over the long run unless they are joined by a core group of others who in their own ways contribute to nurturing the community.

Leadership in a community of practice is not of the leader/follower type. It is diverse and distributed. Rather than think in terms of leaders and followers, it is more useful to think of roles in a community of practice in terms of an ecology of leadership. In this ecology, everyone can potentially take a different type of leadership role.

Some roles correspond to clear functions in the cultivation and support of the community. These include:

- **Community leader:** running the day-to-day functions of keeping the community going, connecting with members, and making sure they are engaged and receiving value
- **Core group member:** dedicated to the development of the community, helping leaders with various tasks
- **Chapter leader:** acting as a community leader for a local chapter and connecting it to the broader community
- **Practice group leader:** leading a practice group can take different forms depending on the type of group it is, ranging from lightly facilitating discussions to project management
- **Mentor:** taking newer members under their wing
- **Welcome wagon:** welcoming and inducting new members

These types of roles are usually assigned explicitly to a member or a group. The process of assigning roles can be more or less formal, reflecting the spirit of the community and the culture of the organization:

- **Tacit.** Members take on a role as part of their participation in the community, whether recognized or unrecognized.
- **Self-selection.** Members volunteer for roles, either because the role interests them or out of "good citizenship."
- **Nomination.** Members are often asked to take on a role by other members who think they would be good at it.
- **Rotation.** In some communities, people take turn assuming roles that involve extra work.
- **Election.** Some communities organize elections, with candidates "running for office" with proposals about where to take the community.

- **Mandate.** In some organizations, key roles are assigned to people as an organizational mandate. While this process usually ensures that the person will have enough time formally assigned to the role, it is still important to ensure the legitimacy of the person for their role in the eyes of the community.

In addition to these assignable roles, there are lots of unassigned or emergent roles in communities of practice. These include someone with expertise in an area, someone who provides a connection to another practice, someone who always sees the positive side, someone who is always very critical, someone who tend to bring in wild ideas, etc.

Social learning leadership is a delicate art that entails balancing demands in tension: managing the process in a focused way while also taking advantage of emerging opportunities; being forceful about driving the community forward while also inviting others to contribute; and performing visible tasks while also building relationships and keeping the pulse of things in the background. People who take on such roles are often volunteers who do it out of personal passion, and it is therefore important that they be valued for what they contribute.

Generative culture, emergent leadership

We find that opportunities for people to take leadership within the community helps to build confidence in their professional role.

We shared Ajanta's story at the start of the book. As a software engineering graduate with a passion for artificial intelligence and machine learning, she wasn't sure how to immerse herself in that field when she first started working at JPMorgan Chase. She found that joining the *Ignite* AI/ML community in Mumbai helped her get used to working life while learning about topics that fascinated her. In time, she developed her skills to the point where she won first prize in a "ML Mayhem" contest sponsored by the community. This gave her the opportunity to help others learn in a safe, inclusive environment, and benefit in the ways she enjoyed at the start of her journey.

On the identification of the members of a core group

In a first phase, the CCHN did a lot to keep agencies out of the governance of the CoP with a view to maintaining the independent identity of the members. Pushing the agencies out of the CoP equation has given a strong role and strategic position to the CCHN to control all the levers of the CoP; it can decide where and when it will organize activities, decide on the selection of participants, select the facilitators, and choose the themes of the research. While this was an important move to free the community, it leaves little space for decision by the members of the CoP.

The CCHN is now working toward a more distributed leadership in the CCHN community. It faces a number of obstacles, however. The regional distribution of the membership as well as various ethnic and gender-based dynamics has largely prevented the emergence of a true consensus for a clear path to create a coherent global core group structure. In addition, CCHN staff tend to hang to their role as facilitators/mediators within the CoP to maintain the relevance of their work. While they truly encourage members to take an active role in the CoP, they seem reluctant to give up their control as managers of CoP activities in a given region. The creation of the core group will require significant attention by the CCHN. It needs to start defining the role of its staff as members of the social learning team in support of the core group and less as facilitators seeking the support of CoP members in the production of peer activities by the CCHN.

Distributing leadership: leadership tasks

In the previous section we described roles assigned to specific members, but it is also good to distribute different leadership tasks across all members. We have developed a model of community-based leadership tasks (also called enabling tasks) that members can take on. Examples of these leadership groups include:

- **Agenda activists:** drive the "learning agenda" of the community by making sure it remains relevant to the domain and useful to practitioners, and by noticing issues and questions that arise and proposing ways to address them
- **Community keepers:** pay attention to the social dynamics of the community—whose voices dominate or are silenced, how introverts, visual thinkers, and other types of learners can find a way to participate, or when issues of power and politics come in the way
- **Critical friends:** keep an eye on process, agendas, rhythms, and activity design to make sure that time is well used
- **Social reporters:** keep the memory of the community—summaries of insights, photos, documents, FAQs
- **External messengers:** make sure that the community communicates well with outsiders, including colleagues and institutional stakeholders
- **Value detectives:** ferret out the value the community is creating in people's practice and see to it that this value gets reported back to the community to create learning loops
- **Technology stewards:** ensure that the community is making optimal use of technology

Generally, we encourage all members to be part of one leadership group focused on one of the tasks. If the community is small, we only use a few tasks or combine them. The tasks can be assigned randomly, or members might sign up for one of them. Leadership groups may take on the tasks for the duration of a meeting or over a period of time.

Leadership groups have an opportunity to get together at times during, just before, or immediately after a meeting. They confer and collaborate to do these tasks between them. They reflect on the working of the community from the perspective of their task, intervene when something is not right, and make suggestions for the future development of the community. We have found that distributing leadership this way generates an experience of ownership and agency that accelerates the development of the community. For more about these leadership groups and the tasks they perform, see the link to the article in the references.

Design for sustainability and viability

One of the problems we were determined to solve with *Ignite* was that communities with a dependency on just one or two people tended not to last very long and eventually the fire would burn out.

From the outset, we have always required that each *Ignite* community has at least two community leads, and that they actively devise a succession plan, always trying to encourage as much contribution from the community as possible.

This helps to reinforce the social learning nature of the community and steer us away from the default "teacher–student" paradigm. It creates an improved sense of teamwork within the community. It also allows people to vary their level of engagement with the community as their time allows, safe in the knowledge that if they have to spend more time on their core organizational responsibilities, the community will continue to operate.

3.4 Community lifecycle and phases of development

Communities of practice have a lifecycle with different phases. A pattern is recognizable, even though each community evolves in its own way, with its unique experience. As figure 3.3 suggests, the development of a learning partnership is not unlike the development of a relationship, starting with the tentativeness of mutual discovery through dating and growing into commitment and maturity. As in a relationship, the process is not simply sequential or linear. An arranged marriage may start with a wedding and develop the relationship from there. Just as a married couple might rekindle the relationship by going on a date, revisiting earlier phases is part of the ongoing renewal of the community. Indeed, like a successful relationship, a community of practice persists by constantly renewing itself rather than implementing a well-defined plan.

Lifecycle

With these caveats, we can describe typical moments that shape the development of a community of practice:

- **Potential.** A community of practice does not come about out of thin air. People are already involved in practice, with successes and struggles. There are already pockets of conversation. The point is for the community to discover itself and see a value proposition in moving ahead. This includes finding people who are willing to take leadership in starting the community.
- **Coalescing.** Once the idea resonates, members need to see in action if there is a viable community—through some initial experience of learning together, accomplishing something, and creating some value.

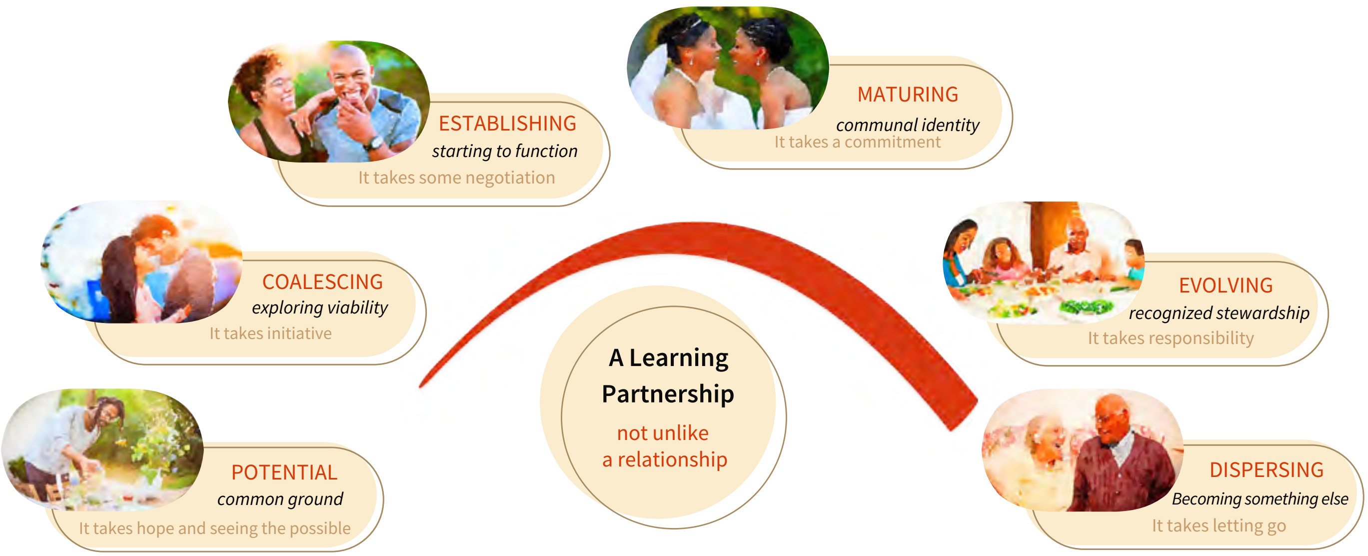


Figure 3.3

Community of practice lifecycle - analogy to a relationship

- **Establishing.** The community is functioning as a container for social learning. It is establishing a rhythm of interaction that works for members. More people are joining. Members discover what types of activities create value and what kind of leadership is required.
- **Committing.** Based on actual experience of value, members are ready to commit to a sustained learning partnership. They become more strategic about driving their learning agenda. People are ready to take on some responsibility for making it happen. All this gives the community an identity.
- **Evolving.** Longevity requires constant renewal with possible periods of lower energy and rediscovery. This entails new members, new topics and challenges, and accumulation of a repertoire of stories, practices, and documents. It also calls for a productive relationship with organizational stakeholders, who recognize and engage with the community as stewarding its domain.
- **Dispersing.** A community of practice should not persist beyond its usefulness. When it is no longer needed, it may just disperse, merge with another, or become an informal network. Or it may be so needed that it becomes a formal department. In any case, it leaves a legacy, in relationships, artifacts, and the practice and identities of members.

In the table in figure 3.4, we try to articulate the main developmental themes that characterize each of these moments.

Cultivation questions at each phase

The process of cultivation is to move the community through these phases by addressing the types of questions suggested in the table in figure 3.5. We are further exploring cultivation processes in the next three sections on community launch, sustaining, and maturing.

Phase	Theme	Domain	Community	Practice
Potential	Discovering common ground	Seeing your real passion as a worthy domain	Finding enough potential members to imagine a community	Recognizing shared struggles and potential help
Coalescing	Finding value	Discovering how others experience the domain and what they need to learn	Getting to know each other	Helping each other, sharing stories and tips, solving problems
Establishing	Getting organized	Negotiating a shared learning agenda	Establishing a rhythm and a way of working, building relationships and trust	Finding activities that create the most learning value
Committing	Building an identity	Establishing the value of the domain in the world	Expanding the membership to include all concerned	Developing and pushing a communal regime of competence
Evolving	Taking stewardship	Achieving influence and recognition as the steward of the domain	Balancing intimacy and openness; welcoming newcomers	Renewing relevance; establishing standards, seeking innovations; advancing the practice to be world-class
Dispersing	Moving on	Responding to new circumstances	Keeping in touch	Leaving a legacy

Figure 3.4

Developmental challenges typical of the evolution of communities of practice

Phase	Typical questions to address
Potential	■ What is the strategic value? ■ Who cares? Who else is out there? In what ways are their issues similar? ■ Do we share enough to benefit from forming a community? ■ What would that mean to us and to the organization?
Coalescing	■ How do we get to know each other and what we each do or are good at? ■ What can we each gain and contribute? ■ Are there low-hanging fruits? ■ Can we produce something useful?
Establishing	■ If we find value in learning together, how can we function? ■ What activities produce the most learning value? ■ What exactly is our domain? What do we include or exclude? ■ Does forming a community open possibilities no one saw before?
Committing	■ Who else cares about our domain? What is our complete membership? ■ What will it take to grow into a sustainable community? ■ What will constitute success? How will we know we are creating value? ■ How do we establish our legitimacy as stewards of the domain? ■ What is our relationship with organizational stakeholders? What responsibilities are we ready to take on?
Evolving	■ How do we sustain ongoing learning loops about our practice and our community? ■ What new issues are arising? Where are gaps in our performance? ■ What external sources of innovation, research, or benchmark should we tap? ■ How should we include newcomers and new generations?
Dispersing	■ Is the community in a temporary slump or has it outlived its usefulness? ■ Should it take a new form? ■ What is our legacy?

Figure 3.5

Typical questions to ask at each phase of community development

Time is a key dimension of communities of practice. People often ask us how long it takes for one to form. If the question refers to creating value, we say that it can do so from the very start. If the question refers to some definition of maturity, there is great variety (see also section 3.7 on dimensions of maturing). Each community of practice will find its own rhythm of development. Much depends on the size and complexity of the community. Some will just stay at early phases and be satisfied; others will push forward. Still, it is useful to have realistic expectations. For a simple, small community the early phases can be traversed in a matter of months. For large, more complex communities, it can take years. Moving fast can be inspiring, but it is not necessarily a sign of greater health, value creation, viability, or longevity.

Patterns and heuristics, not a recipe for guaranteed success

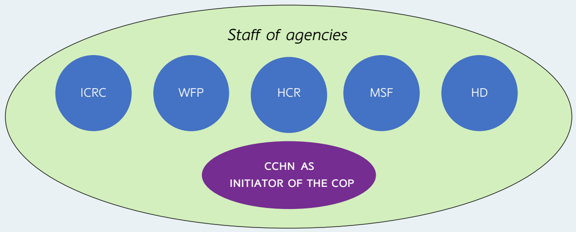
Our "*Ignite* Community Lifecycle" guide is intended to help navigate the community design, launch, and sustain phases, and what to do when a community faces retirement (including tips and ideas to "re-*Ignite*"). The guide is broadly similar to the lifecycle phases described here but is adapted to suit our organizational context and the grassroots nature of *Ignite*, where the communities with the most interest are prioritized for launch.

We do not claim our lifecycle guide to be a "silver bullet," but rather it is a heuristic reflecting our learning over the years. It suggests points to consider and a few specific actions to take that others have found helpful as they prepare to launch a new community or seek ideas to retain momentum. The steps are intended to flex and bend to suit the individual community, and we seek feedback on ways to keep improving this guide.

Three phases in the development of the CCHN community of practice so far

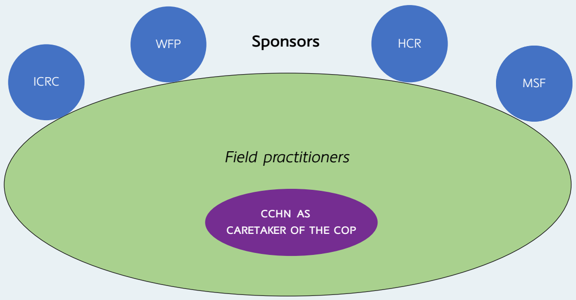
Initial Stage: Agencies and the CCHN as operating inside the ring of the community of practice.

Agencies see themselves as main stakeholders of the CoP. The Strategic Partnership and the CCHN overshadow the emerging social learning network. Their interactions take much of the space of discussion on the orientation of the activities of the CoP.



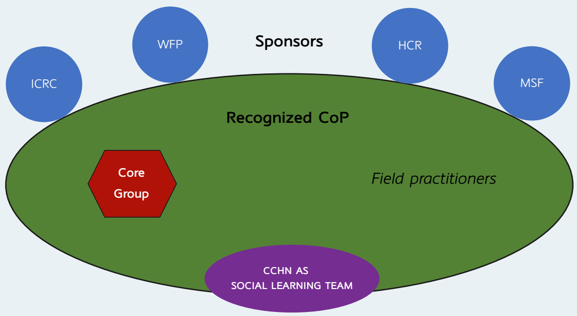
Current State: The Centre of Competence operating as the main player inside the ring of the community of practice.

Agencies have taken a back seat role as contributing partners with a more limited ambition to set the priorities of the CCHN Community. The CCHN continue to play a central role in setting the agenda of the CoP with a stronger and more consistent representation of the most active field practitioners.



Future Stage: A Core Group of members take over the orientation of the community of practice.

The CCHN takes a step aside to let a Core Group of members of the CoP take over the orientation of the CoP. Agencies maintain their sponsorship and develop their own relationship with the Core Group. The CCHN continue to play a central role in chartering the competences and domain of frontline humanitarian negotiation as well as support experiential learning within the CoP.



3.5 Launching a community of practice

The "launch" of a community is often thought of as an event—the initial event that starts the community. In fact, community building usually starts much earlier and may or may not include an event depending on the situation. This section describes three approaches:

- "Non-launch": starting by simply doing something and learning together without a formal launch
- Launch event: preparation and a typical agenda for an event—big or small
- Online launch: some considerations for starting online

Value proposition

As a start, it is worth thinking about an initial value proposition—if only for yourself at this point—by wondering if there is a case for a community of practice. For example:

- Are there people who would benefit from connecting but do not interact much (across organizations, countries, departments, projects)?
- Is there an informal network or a budding community that would become more valuable if supported more formally?
- Are there gaps in the strategic capabilities of the organization that could be best addressed by bringing practitioners together?
- Is there a new development in the world (whether an opportunity or a threat) that requires a learning partnership among the relevant people?

If there is a case, then your initial value proposition should deal with questions such as these:

- What is the problem with the current situation?
- What difference would a community make? What could happen if there is no community?
- Why would people want to invest their time? What's in it for them?
- What would success look like?
- Is there an existing strategic commitment, organizational initiative, or shared value to build on in inviting others?
- Am I (or are we) ready to take some leadership to make it happen?

It is worth noting that all three elements of a community of practice can serve as entry points to inspire potential members, sometimes one more that the others:

- Domain: I am passionate about it, and it needs people to develop it
- Community: I am the only one doing this on my team and some companionship would be nice
- Practice: This stuff is hard, and we could all use some help

It takes one person to start a movement

Anyone can launch a new *Ignite* community of practice; it just requires gaining enough momentum by capturing the imagination of others.

Someone who wishes to launch a new community simply proposes it on our website by giving it a name and a punchy description of why they think others should join. Then with a single click, others can indicate their interest in joining the community or even volunteering to help launch it. The direct link to the web page can be shared with others so that through social networks and word of mouth, momentum can grow quickly.

This is how *Ignite* started in the beginning. And it is also the mechanism for launching communities at a new location—still ensuring that the most popular and viable communities launch first.

The local core team monitors the list of proposed communities, with the most popular shown at the top of the list. From there, plans can be set out for new communities to launch and be given the support and resources they need for long-term viability.

We have seen new communities go from “seed idea to launch” in a matter of a few days by quickly capturing the imagination of others. For example, a proposed community on Augmented and Virtual Reality was immediately recognized by many as an area of growing relevance and importance and a new community in New York became active right away after gathering lots of grassroots interest.

The "non-launch"

One very simple way to launch a community of practice is not to launch a community at all. Rather you convene an informal social learning space to give people an experience of learning together—and see if they want more.

You may have an urgent question that you personally want to discuss with some peers. Another effective strategy is to find a potential member with an urgent challenge who is ready to submit it to a broader group for some peer advice. You can then invite people to a join the conversation by saying that that person urgently needs help, and that it might be more interesting to do this together. A good format to adopt is to run a *case clinic* with that person's challenge (see description in chapter 4).

You can do this a number of times. At some point, you propose a reflection to see what participants think. If it seems right, you ask whether it would make sense to keep the group going, sharing your ideas about the value proposition, but remaining open to what people express.

Launch event

Even if you decide to have a launch event, community building starts much earlier, and the launch event is merely the culmination of these efforts. This is not to say that the more formal launch event is unimportant. It creates identity and commitment. But the launch event is a rite of passage or public statement of intent, reflecting a process that has already started; it is not the start of the process.

Pre-launch homework: talk, talk, talk

Much of the work in a launch process takes place in conversations with potential members and relevant stakeholders. These conversations require a subtle dance of expectations. You need to convey a good sense of your value proposition to arouse interest; at the same time the vision of what is possible needs to be open enough that potential members want to shape it and make it their own.

It is better to focus on the challenges people face rather than generalized topics of interest:

- What practicalities get in the way of doing the best job possible?
- What kind of help could you get by talking to other people who experience similar challenges?

- Who do you currently turn to for help?
- Who do you see as potential learning partners?
- Do you have a current case or challenge that you would like to submit to the community for discussion?

At the same time, look out for anyone who could take some leadership in the community and perhaps become part of the core group, people who need this community badly enough for themselves to be ready to go the extra mile to make sure it happens.

These conversations are a significant part of building the community: people are already starting to imagine what the community could be like, what it could do for them, and who else should be there—or should not be there. They build their own value proposition and explore how they see themselves in this community—their hopes as well as their concerns.

Invitation strategies

The invitation to a launch event can drive toward a big or a small event (with variations in between):

- **A big launch.** One approach is to invite all concerned to a big event. Even if not all participants end up joining the community as members, they are aware of its existence. This approach works best when there is already a clear identity associated with the domain (e.g., a role, a profession, a type of service).
- **A small launch.** The other approach is to invite a small group of committed people without a lot of publicity. They form a core group, and the community then grows as they start making progress and attracting others. This approach minimizes the risk of overblowing expectations but runs the risk that someone will feel left out. It works best when the domain and the relevant community are more tentative.

Whatever approach is chosen, we always try to involve potential core-group members in the design of the agenda. They can also take enabling roles during the event, such as doing audience polls, hosting specific conversations, taking photos, or managing aspects of the technology. Recognizing their contributions publicly and drawing some applause shows how many people are already committed to seeing the community come to life.

Typical agenda

The launch event has a double purpose. On the one hand, participants should experience learning together and ideally leave the meeting with some useful insights. On the other hand, they should start to imagine and design their community together, gaining a concrete sense of how they could operate and create value. This suggests a mix of activities.

A launch event can last from a few hours to a few days. Depending on the time available, our launch agendas have included different combinations and variations of the following types of activities, each aimed at to addressing a key launch question.

Why are we here?

To set the stage, it is a good idea for the launch convener(s) to explain the context of the meeting, preferably in personal terms. In some formal communities, the sponsor can also say something brief. We are often asked to give a presentation on communities of practice, but we rarely spend much time on that. It is better for members to gain a deeper understanding of what a community is experientially, by doing it.

Who is here?

Depending on the size of the group and whether people already know each other, we have an activity to get a picture of who is here and why. If there is enough time, the very best has been the *booth and gallery walk* (see chapter 4). It is a very effective way to get people talking; we find it is usually difficult to stop.

How can we help each other?

In some cases, we have done a *case clinic* on a challenge (either found during the gallery walk or selected in advance). It gives people a direct experience of working as a community of practice.

What keeps you up at night?

Discussing this question is a good way for people to discover each other as learning partners because it starts with what members are struggling with in their practice (rather than a list of topics they are interested in). We always encourage people to share stories rather than general statements. You can use any conversational format that puts people in rotating small groups, either around tables at in-person meetings or in breakout rooms for online ones. The *café conversation* format has worked very well for groups larger than, say, ten or twelve (see chapter 4). For smaller groups, we have used a *pair-share* format, where people talk in pairs for a few minutes and then move to someone else, in a kind of speed-dating process. We have also used the *community matrix* for a most structured activity to arrive at a view of the community's potential (see chapter 4).

Do we have a shared learning agenda?

After the conversations, we discuss the patterns people have seen as they moved through the different groups. Sometimes we let individuals brainstorm things "popcorn" style. Sometimes we do it table by table first: an initial table discussion makes it more likely that patterns will be brought up rather than individual pet ideas. We write each key challenge on individual flip chart papers on the wall or on a separate sticky note on the shared online workspace. Then, we give people a set of physical or virtual colored dots to express how urgent a given issue is for them. They can put all their dots on one or distribute them across multiple challenges. (To force people to make choices, we give them a number of dots lower than the number of issues, ideally about half.) The resulting set of prioritized challenges provides a visual first cut at the community's joint learning agenda.

What could we do about our priorities?

With a small group, we can discuss all prioritized issues, but when the group is large enough, we invite volunteers to choose a prioritized challenge they are keen to explore and ask them to make a pitch that invites others to join them for a conversation.

These self-organized groups then explore how this community of practice could help them make progress on their chosen challenge. In a first phase, we suggest that group members reach a shared understanding of the challenge with stories of how it manifests in their practice. Then they can think of where the community could help make progress. Finally, the group discusses what it would take, possible activities, who else should be involved, and resources needed.

The groups base their discussions on their own experience, but they explore possibilities on behalf of the whole community. They report their findings to the rest of the community for endorsement, critique, and refinement. In many cases, these groups continue as practice groups after the launch.

How do we move forward?

A good way to end is with a timeline. You draw a line for a year (or whatever timeframe seems reasonable) either on a big piece of butcher paper on the wall or on an online white board. Then the groups suggest some activities they write on sticky notes and place them on the timeline. We have sometimes asked people to also put their names by some activities they were willing to lead or roles they were willing to take.

The construction of a timeline is useful: the visual aspect makes it memorable, and the collective production creates joint ownership. The point is not to have a finished plan, but to leave with a concrete sense of what can come next and some pointers for follow-up: possible dates for next meetings, good activities to organize, people to take responsibilities.

Note that members often overestimate what they can accomplish after an exciting meeting. It is a good discipline to think of small next steps in an iterative process while maintaining an ambitious overall vision.

Online launch

The “non-launch” approach is an initial version of a community of practice meeting and thus can easily be done online, especially if that is the way the community will be functioning.

For an online launch event, all the activities we have suggested, from initial conversations to the launch agenda can have online versions. A limiting factor is time as it is unrealistic to keep people engaged online for more than two hours at most. It is always possible to have a series of launch events, but it is rarely realistic.

If the group is small and it seems useful to get people to know each other, we often start with an activity like a joint past timeline (see chapter 4).

In addition to the general suggestions for online events in chapter 5, here are a few guidelines we have for ourselves:

- Make sure you get everyone’s name and contact information so you can follow up with them.
- Be ready to be uncomfortable; it can take time for people to get used to experiencing each other online and outside a formal work meeting.
- Treat the meeting as if you are convening a first online date—create the conditions, but don’t hover and worry that it’s all going according to plan. You are there simply to see if and how this can work, not to do the work.

Effective design may lead to longer term viability

If we could start over, we would encourage more time to be spent on the design stage of each new community, because when intentional design is neglected, it always comes at a cost: “Invest the time now, or your community will pay the price later.”

In the early days, when people were very keen to get started and explosive growth saw dozens of new communities launching simultaneously, some spent too much time on logistical concerns and not enough on intentional community design.

After several years of experience, we now see a clear correlation between community longevity and viability and careful planning and nurturing through regular moments of reflection and inspection.

To help with this, we provide a “Community Design” guide to new community leads to consider how their community will function, and to pay attention to the three core elements of *domain*, *community*, and *practice*. Our guide emphasizes that in a vibrant community, they all fit together and overlap, with the “sweet spot” in the middle.

In addition, we encourage leads to think in advance about the types of activity the community could try out, what resources they might need, and how they’ll promote the community and help to ensure it remains open and inclusive. Developing the community charter described below is an important activity that can be done when the time is right.

Charter the way ahead

One of our *Ignite Academy* learning modules focuses on the community charter, using intentional design to be very deliberate about the nature, goals, and operation of the community.

It is a single-page document that can be easily shared. The charter is produced by the community, owned by the community, and is made visible to everyone, whether they're a member or not.

Some of the benefits our communities have seen from developing their charter:

- Attracting new members by helping people to understand the basics of the community and why they should join and contribute
- Improved engagement and alignment
- The charter can be useful in discussions with manager about why participation is beneficial to the individual and to the firm

After completing their community charter, one community lead from Columbus said: "Having gone through this exercise, we feel we are more attuned to our community needs and are better positioned to execute. Looking forward to many great things ahead!"

We recommend that charters be kept "evergreen" and revisited regularly. Figure 3.6 provides an example of a filled-out charter.

IGNITE

Glasgow *Ignite* Product Management | Community Charter

"Helping great people to produte grest products"

DOMAIN

Why we care about this topic

Our purpose

Our community welcomes all colleagues who have an interest in Product Management and its associated practices.

Our vision is to explore the domain of Product Management and work together to develop te qualities, skills and behaviors we need in order to build products that our customers will love. We´ll do this by sharing experiences from our teams and seeking opportunities to bring knowledge into the firm by attending conferences, sharing online resources and inviting external speakears.

We try to foster a community of shared learning and participation where regardless of experience, members can insights from different lines of businesses and good practices - and make a difference to the practices we care about.

Our chosen domain

Product Management and its associated practices.

COMMUNITY

What you can expect as a member

Membership

. Our community is open for anyone to join, regardless of location, level of experience or seniority
. If you´re considering a move into a Product role, we´re here to help and guide you as best we can!

Guiding Principles

. All ideas are welcome
. Active participation is a requirement
. We promote a culture of trust, respect, collaboration, reciprocity, network/idea/resource sharing, goal alignment, listening, open & honest discussion

PRACTICE

How we will make a difference together

Objectives

. Driven by the community, provide regular, stuctured sessions which focus on certain areas to enable the community to explore different aspects of the domain we care about.
. Act as stewards for the domain of Product Management within our location, looking for opportunities to drive improvements betwen people and teams, regardless of LOB alignment.
. Encourage mambers to bring specific challenges or problems from their team or context that the community can solve together, federating the knowledge broadly.
. Foster knowledge exchanges and best practice sharing across teams, lines of business and locations through our community interactions for better product operation roll out

Activities and events

We try meet at least once per month and maintain a good variety of different types of activities, including:
. Internal and external speakers
. Practical PM exercises to operate the community as a product in itself!
. Monthly challenge
. Guided conversations
. Conference attendee report-in-brings new knowledge into the community
. Welcome wagons
. Lightning talks
. Product demos
. Feedback sessions
...and we´re always open to ideas from the community!

Figure 3.6 An example of an *Ignite* community charter

3.6 Sustaining a community: rhythm and newcomers

There are several key factors to consider for growing and sustaining a community of practice. In this section, we consider the rhythm of events and the treatment of newcomers. In the next section, we look at dimensions along which a community can mature. Later chapters will address other factors, such as the design and facilitation of activities, the use of technology, and evaluation.

Community rhythm: meetings and in between

Communities differ considerably in how and how often they interact. Some only meet annually face to face, with few or no interactions in between. Others meet quarterly, monthly, or even more frequently. Some only meet on demand. Some interact entirely asynchronously online.

There is no right or wrong answer about how often to meet or in what mode; it depends on the rhythm of the practice, what they want to accomplish, and how often issues arise that call for new learning.

Periodicity. More important than frequency of meetings is their periodicity. A regular rhythm that fits with members' schedules helps to maintain continuity, as does a meeting format with consistent elements.

Quality. Synchronous meetings—face to face or online—are precious opportunities for interacting, helping each other, negotiating understanding, collaborating closely, or brainstorming. They should not be wasted with one-way presentations (which could be recorded) or communication of information (best done through asynchronous channels).

Attendance. An easy trap to fall into is to be overly concerned with the number of attendees at a given community meeting. The rhythm of a community usually has peak times (often around an important event) and lulls when participants are very busy with their regular jobs. This is normal. If few people are there, celebrate the members in the room and tune that particular occasion to meet their needs. There are many reasons why attendance varies, and if word goes out that the meeting went well, members who did not attend for one reason or another will usually be grateful to receive a summary of the event. They will feel more ready and able to attend and contribute next time. If a lull continues, don't jump to conclusions but do some back-channel work to see if there is an underlying problem causing the nonparticipation of some folk.

Recognizing the ebbs and flows of participation

To help the community remain viable, sustainable, and inclusive, community leads are encouraged, where possible, to record their sessions, and to share those along with supporting materials, notes, and outcomes. This provides immediate value to those who couldn't attend a particular session, but it also helps occasional or transactional members to feel a part of the community. Perhaps if they find themselves with more time or interest, they will engage with the community more actively. Along these lines, we have published a "Ways to Share" guide for community leads to give them ideas and inspiration.

In-between meetings. We have also seen community leaders who believe that members of a true community of practice would spontaneously interact between meetings and worry that they do not. Often, they organize topics for discussion and try to "get people to talk" to generate buzz. Our experience is that this rarely works as a way to build the community. Members have busy lives with competing priorities, which do not allow the luxury of talking about topics, however interesting, unless they contribute to work at hand. What happens in-between regular meetings depends on the culture of the community, but it is mostly in response to specific needs. For example, someone may face an urgent question that cannot wait for a regular meeting: their need for just-in-time help may trigger an online conversation, a video call, or an impromptu gathering. Someone trying out a suggestion from the community may invite some members to act as advisors and follow what they do between meetings. Members of a practice group may want to work on a specific challenge before coming back to the whole community for input. In general, it is better to let learning needs drive engagement than to try to be a cheerleader eager to artificially animate quiet times. Figure 3.7 summarizes these observations in the form of do's and don'ts.

Do	Don't
Develop a regular rhythm of events based on what the community wants to accomplish	Worry about frequency of events as an indicator of the health of the community
Treat community events as a continuous flow of discussions with feedback loops from practice	Run community events as a series of one-offs
Focus on challenges in practice and invite members to work collectively on them over time	Propose topics of possible interest and try and get members to engage in them
Use synchronous meetings to brainstorm, negotiate, or problem-solve as part of an ongoing process	Waste time in synchronous meetings to give out information or hold a presentation
Make sure that urgent asynchronous requests get a timely response	Generate activity between meetings for its own sake or to make the community seem active

Figure 3.7
The do's and don'ts of keeping up a community rhythm

Welcoming newcomers

One sign of a healthy community is the way that it treats its newcomers while meeting the need of existing members. Newcomers bring fresh perspectives and question taken-for-granted assumptions; but they can also bring the conversation to a lower level. Old-timers need to find value in the community for themselves. You do not want people who have been there for a long time to feel that they are only revisiting old themes or known issues. The community must address cutting-edge issues that excite them. If they lose interest, the community will likely lose its legitimacy. Some communities have set minimum "entry levels" for community members, for instance by requiring people to who have, say, completed the basic training course in the domain. Other communities make a point of calling on members with deep expertise only when there is something of specific interest they can contribute to, without expecting them to participate in everything.

Different ways to ensure that newcomers find their way into a community without distracting it include:

- Establish a "welcome wagon," a group of members whose role is to welcome newcomers. They make sure newcomers understand how the community work and how to fully benefit from and contribute to it—and they make sure the community is responsive.

- Create a buddy system pairing newcomers with existing members. This will help newcomers become part of the community and will answer their questions so that the community can focus on cutting-edge issues.
- Hold special sessions before a meeting where newcomers hear the history and defining of the community.
- Generate a "Frequently Asked Questions" section about the issues the community has addressed so far.

All aboard the Welcome Wagon!

Each of our communities are encouraged to hold Welcome Wagon events at least twice a year, either as part of our broader awareness campaign or at any time they choose.

At these exciting events, the community pauses their regular activities and helps new members orient themselves in the community, going "back to basics," helping people understand what to expect from being involved and ways they can contribute. It's a powerful way to help people to "find a home," especially given the remote or hybrid working environment that prevails in the post-COVID world.

The event itself is informal in nature, and we provide a structured community lead training module and guide to follow, to make it easier to understand both the principles and practices of the Welcome Wagon.

The benefits of intentionally opening the doors to welcome new members to the community are not to be underestimated. Often it results in an injection of new momentum, ideas, and volunteerism that sustain its vibrancy.

Twice each year, we issue a call to action for all of our communities to consider hosting a Welcome Wagon, so that we can open the doors to many communities at once!

3.7 Maturing

We are often asked to provide a maturity model for communities of practice. Sometimes they seek a way to grade themselves; sometimes they want to see where they can make progress. This section is our offering in response to that request—but with caveats.

First, while most communities evolve and improve their ability to learn over time, our experience suggests that they do so in a great variety of ways, which doesn't lend itself to a single, linear model.

Second, a community of practice does not necessarily need to seek any kind of "maturity." If members are happy with learning from occasional meetings or asynchronous interactions, there is nothing wrong with that. To pick up our earlier metaphor, two people may be happy to go on occasional dates without ever wanting to commit to a serious relationship. If participants find value, there are good arguments for keeping things uncomplicated.

Even when it seeks to develop its learning capability, a community rarely goes in just one direction, and rarely on a linear path. It is more often a series of growth spurts in various directions than a consistent trajectory. Still, it is useful to have a framework for assessing where you are and where you could go—or even for telling a story about the community's development in retrospect.

Talking about vibrancy rather than maturity

As technologists, we're a little bruised by the term "maturity," because it sometimes has negative connotations in our industry. It can trigger the default mindset of trying to measure success in the wrong ways (such as one-dimensional metrics, Key Performance Indicators (KPIs), or "maturity models" used for Agile or DevOps implementations). "There are no straight lines or sharp corners in nature," Antonio Gaudí used to say.

With all of this in mind, we always knew that we needed to encourage a mindset that "feels different" and aligns to the grassroots nature of our communities, recognizing the fact that value is expressed using feelings, anecdotes, and stories rather than dollars, cents, or hours.

Therefore, we encourage *Ignite* communities to strive towards community *vibrancy* which we like to think suggests the idea of more of a living thing than something static or manufactured.

Put simply, we believe that vibrancy can be seen when a community is meeting regularly, delivering value to its members and to the organization, when people are interacting in various ways, and when the community innovates across various dimensions to advance its own purpose and the development of the domain.

We have been bringing community leads together using various forums recently, and it's inspiring to see and hear how engaged they are, how passionate they are about their communities, and *Ignite* as a whole. Vibrancy is a good term to capture that.

This has the effect of continually renewing our own enthusiasm and optimism for what we're doing!

Seven dimensions for intentional development

While most maturing comes about through evolving circumstances, the mix of people who join, and which opportunities and challenges members take up, some communities are intentional about their maturing. Rather than a single direction, we find it more useful to consider a framework with multiple dimensions along which maturing can occur. Think of these dimensions as a set of distinct sliders increasing the brightness level of different settings, as illustrated in figure 3.8. Some communities may try and turn up some dimensions while ignoring others. Even in a given community, some members may be more interested in pushing some dimensions than others. Not everyone has the same view of the ideal setting. That's the nature of the beast.

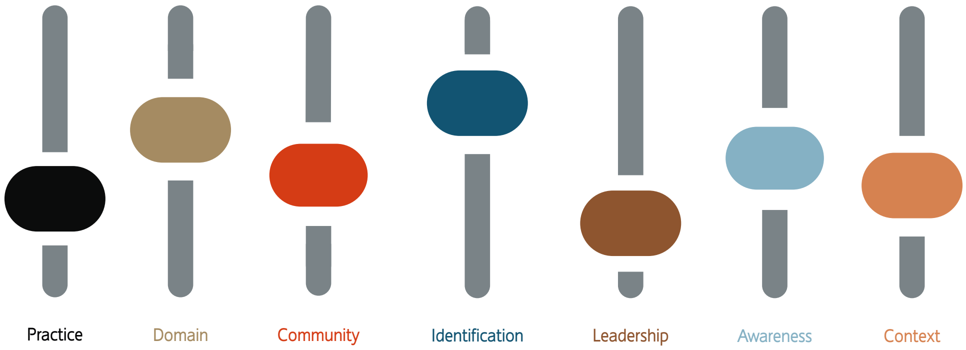


Figure 3.8

Dimensions of intentional maturing

Structure of the section

In this section, we describe seven dimensions that reflect our experience. We see communities mature by:

1. Helping each other push the *practice*
2. Stewarding the *domain*
3. Structuring the *community* to support practice and domain
4. Nurturing *identification* with the community
5. Clarifying and distributing *leadership*
6. Cultivating *self-awareness* regarding design and value creation
7. Working strategically with the broader *context*

For each dimension, the respective subsections have the same structure, covering the following topics:

- A broad definition of that dimension with illustrative mini stories
- Three examples we have seen of communities making intentional efforts to push maturing along that dimension
- Effects that developing that dimension can have on things like driving the learning agenda, creating value, building trust, fostering innovativeness, and shaping identity
- Potential upsides and possible downsides of focusing on that dimension

We cannot insist enough that these dimensions are neither recommendations nor a necessary developmental model. They are a set of possible paths for those interested in taking their community on a journey. While the seven dimensions are interrelated and overlapping—each reinforcing the others—they still represent distinct areas for intentional development.

Dimension 1. Pushing the practice

Some communities primarily develop their ability to serve the immediate needs of practice. They endeavor to make sure that members are successful in projects for their day jobs and use the focus on these projects as a driver for everyone's learning.

> We have seen successful global technical communities that are mostly driven by members' requests for help on the community's online platform. Learning arises out of the ensuing discussions of possible approaches, solutions, and pitfalls.

Intentional developmental efforts in this direction include:

- **Helping each other.** Community activities are those that encourage members to bring their problems and ask for advice. Their peers appreciate the subtleties of practical challenges and jump in to work out what to do. Over time, these communities become good at learning this way and develop protocols for making it efficient and useful. For example, some make a commitment to respond within a given timeframe. They develop a sense of accountability to discussing advice they don't agree with or have reservations about. Members find a generally sympathetic audience for their challenges and difficulties, but they also share stories about good approaches and congratulate each other on successes.
- **Ensuring learning loops.** Communities maturing in this direction make sure that they create learning loops out of the discussions they have. For instance, if they help a fellow member with advice, they follow up later to see how things turned out, what worked and what did not. They don't merely jump from one issue to the next, but they are intentional about learning from the experience of what has or hasn't worked in practice.
- **Capturing emergent learning.** Some communities also create summaries to document their conversations and to capture what they are learning from their focus on problems of practice. This communal memory can take the form of frequently asked questions, summaries and highlights, stories about cases, reflections on failures, or important

insights. All these artifacts can create continuity in the community's learning about practice. It helps people who could not participate, participants who want to remember key points, and newcomers who need to come up to speed.

Some effects of practice-oriented development:

- The learning agenda is driven by the issues that members face in practice; it is emergent, shaped dynamically by the changing needs of practice. This is true even if a community ends up calling on external expertise to help address an issue.
- Value derives from knowledgeable advice and the ongoing improvement of practice that results over time.
- Trust develops from being able to talk candidly about practice and to bring in for discussion your worst problems, challenges, and even failures. The willingness to engage with each other's challenges reflects a commitment to each other's success.
- Innovativeness comes from seeking new solutions to new problems as they inevitably arise in practice. A trusted community is also a good forum to discuss new, perhaps untested ideas with people who can appreciate their potential.
- Identity is anchored in acting and being recognized as a practitioner with real experience of practice (even if one is still a beginner).

Potential upsides	Possible downsides
▪ The discussions are directly relevant to members' practice ▪ The community is responsive to new challenges ▪ Members' experience is one of mutual support ▪ Belonging to the community provides an opportunity to explore novel ideas before implementing them	▪ The focus on local practice is too narrow ▪ Learning is mostly reactive ▪ This might not be sufficient for changing circumstances that require radical transformations of practices rather than ongoing improvements

Community memory

Those taking the lead in *Ignite* have limited free time and we find that varying levels of time is spent on curating each community's shared memory.

We have published guides to provide ideas and inspiration on how to do this, but unfortunately it is an aspect of community operation that is often neglected.

For example, some will always keep notes and send an email summary in order to include those who could not attend their meetings and to create learning loops, while others don't. We find that time and again, the communities with a shared memory are more successful.

However, it seems unlikely that this correlation is directly due to the presence of the shared memory, but rather that community leads who pay enough attention to the needs of the community are more likely to sustain a long-lasting, vibrant community.

Capturing the experience of practice

In its efforts to create a productive community of practice, the CCHN needs to determine how knowledge will be created, managed, and stored. The CCHN Community is attracting hundreds of new members per year sharing their individual field experience for the benefit of other members. As the community develops, members acquire new understandings of negotiation practices in an informal and casual manner.

The challenge is to see how this knowledge can be captured, distilled, and disseminated without being detached from its authentic sources. Beyond the acquisition of some conceptual frameworks, practitioners essentially learn to negotiate through field experiences and through listening to stories from other practitioners. The core mission of the CCHN Community is to create a safe space to facilitate these exchanges of negotiation stories and experiences. The community is constantly working on how to systematize the management of these stories into cases that can become opportunities for more advanced reflections—through the recording of interviews, the production of podcasts, and the elaboration of case studies with the members.

Dimension 2. Stewarding the domain

Some communities are intentional about developing and establishing the domain as a recognized area of excellence. They argue that the domain represents a strategic capability, and they stake a claim for being its legitimate steward.

For a group of technical writers in a pharmaceutical company, the purpose of becoming a community of practice was not only to improve their practice, but to change the way their domain was viewed. As a community, they were able to argue that their skills and contributions needed to be integrated into project teams from the start, rather than as an afterthought when the project was to be submitted for government approval.

Intentional developmental efforts in this direction include:

- **Establishing the domain.** Some communities strive to put the domain on the map and advocate for its strategic value to stakeholders. Claiming to be its legitimate steward, they want to act as strategic partner for anyone who has to deal with the domain. They develop a collective voice that members expect to be included in organizational decisions related to their domain.
- **Advancing the capability strategically.** A domain-driven community becomes more intentional about developing the capability that its domain represents. It takes a strategic approach to improving the practice. It reflects systematically on successes and failures to understand the factors at play. Members engage in mutual benchmarking to discover models to emulate. The community looks for gaps in its competence and explores how to fill them—perhaps doing some research or inviting guests. It is conscious of where innovation is required and imagines future scenarios that will require transformations.
- **Building a repertoire for the practice.** Domain-driven communities become more systematic about producing useful resources and documenting key elements of the practice, whether successful approaches or lessons learned from failures. This does not mean that everything is documented and codified—that would be neither realistic nor desirable. But it means that documentation is not just in the form of an emerging communal memory. Instead, members build and curate a repertoire that is organized, systematic, and researched. Some communities demand that new approaches be successful a minimum number of times in different contexts before inclusion into the formal repertoire. Some have protocols for reviewing documents and ensuring validity.

Some effects of domain-oriented development:

- The learning agenda is driven by the restless pursuit of excellence reflecting the strategic importance of the domain.
- Value derives from systematically setting and pursuing high aspirations and from gaining a voice.
- Trust comes from the shared commitment to the domain and identification with it.
- Innovativeness comes from pushing the domain into new directions and from intentionally and proactively seeking to address perceived gaps in capability—current and even future.
- Member identities inherit the reputation and legitimacy of the domain.

Potential upsides	Possible downsides
▪ Members are inspired by their proactive quest for excellence ▪ Needs for innovation can be anticipated ▪ Authority in the domain derives from a reputation for excellence ▪ Belonging to the community provides members with a valued identity within their organizations, and beyond	▪ The learning agenda can feel detached from practice and day-to-day concerns ▪ The practice can become ossified through overly prescriptive documentation ▪ Hubris can lead to blindness or resistance to change ▪ Members can develop a conservative sense of territoriality toward the domain

On the recognition of the humanitarian negotiation domain

One of the main drivers of the creation of the CCHN and the support to its emerging community of practice was a lack of recognition of its domain. Senior management underestimated the importance of humanitarian negotiation as a personal and institutional capability that should be cultivated and developed over time.

The practice itself is not new. For decades, humanitarians have been negotiating access to populations in need in a very discreet manner based on their individual inclination and field experience with limited exchanges with, or support from, colleagues. Yet, as mentioned earlier, the experience of negotiating with belligerents was perceived by senior management as a source of liability rather than an asset. As a result, there was no training on negotiation or any sort of systematic planning to support negotiation processes in the field. In practice, the personal ability of individual practitioners to engage in frontline negotiation relied essentially on their exposure to experienced frontline professionals at the early stage of their career. For those who had the opportunity to follow such practitioners, negotiation became a natural part of their work. For the others, frontline negotiation remained an obscure and irregular domain of activities encompassing significant risks of compromising the mission of the organization.

Over its history, the CCHN Community has endeavored to legitimize the domain by anchoring it in increasingly recognized and systematic peer-to-peer learning processes. Indeed, the story of the CCHN Community as recounted so far can be seen as the progressive legitimation of the domain of humanitarian negotiation, along with a community of practice acting as the steward of this domain.

The early research started the process of recognizing the domain through some initial reflections on the practice. It uncovered a latent community with a desire on the part of practitioners to connect more broadly. The launch of the CCHN gave the process institutional sponsorship. The gatherings of practitioners showed how much there was to gain from peer-to-peer learning in developing the practice. This was further consolidated in the elaboration of the *CCHN Field Manual on Frontline Humanitarian Negotiation* in 2018, which was a first attempt to capture this bottom-up learning into a more formal repertoire. Today, the domain is widely recognized as a strategic capability for humanitarian organizations.

Dimension 3. Structuring the community

Some communities of practice develop by making sure that the community is well structured for the domain: who belongs and how belonging translates into good practice.

A large company recognizes three types of communities of practice, each structured a bit differently for its domain. Professional communities gather people with the same professional background. They structure themselves to help people in a profession develop their skills and craft a meaningful career. This includes providing professional training, especially to newcomers. Technology communities support the use of a specific technology. They bring together people who specialize in this technology, advocate for it, keep up with its developments internally and externally, offer training about it, and help projects use it. Business-oriented communities focus on a recurring business problem, working with both employees and external stakeholders to make progress across contexts.

Intentional developmental efforts in this direction include:

- **Defining the community.** The membership of early-stage communities often reflects personal relationships, networks, geographical proximity, or word of mouth. This is fine to start with, but a maturing community is not a group of friends; it defines membership in terms of covering the domain and structures activities to enable participation by all concerned. Note that growth is not always easy for communities. It requires a balance between on the one hand, inviting all the people who can benefit from membership, and on the other, maintaining the learning intimacy that often spurs a community's initial development. Chapters and practice groups can often help in this regard, as can offering mentorship.

- **Shaping a regime of competence.** Over time, a community of practice gives rise to what we call a *regime of competence*. This refers to the behaviors through which members recognize each other because they share a sense of what it means to be a practitioner in good standing. A regime of competence shapes the experience of community membership in subtle ways:

  - It is not a complete consensus about good practices, but it reflects a set of criteria—often tacit and sometimes explicit—for recognizing a legitimate practitioner, even in the face of serious disagreements.

  - It is not a fixed set of prescriptions or a conservative system of control, but it does create formal or informal standards to which members in good standing feel some accountability. Not adhering to the regime of competence—perhaps with a new insight or an innovative approach—requires an account, even if just to oneself, of why this deviation from established practice makes sense. And when a novelty seems promising, this accountability entails the need to negotiate with the community as to why the novelty should be integrated into the regime of competence.

  - It is not a simple hierarchy, but it defines a gradient for learning, by which competence ranges from novice to masterful, from acceptable to excellent. Some communities even recognize explicit levels of competence, for instance, by authorizing engagement in certain procedures or having designated experts in certain areas.

Maintaining a strong regime of competence requires a delicate balance as the practice evolves. On one side is the need to honor the history of learning of the community. For this, new ideas and proposals will have to pass a high bar before being integrated into the regime of competence. On the other side is the need to be open: you don't want this process to be so stilted that it kills innovation.

- **Offering paths to mastery.** Establishing the regime of competence entails ways to bring members up to speed. This is especially true for newcomers, who need a path into the regime of competence if they are to ensure the continuity of the community across generations. But a community may also support various paths to mastery or specialization for different members. Paths to mastery often take place through direct participation, even if peripheral at first. But they can include more intentional processes such the formal transfer of successful approaches from one context to another, induction sessions for newcomers, the development of curricula, the delivery of different types of training, mentoring programs, guided practice, simulations, and manuals.

Some effects of community-structuring development include:

- The learning agenda is driven by the aspiration to spread excellence across the community.
- Value derives from expecting, recognizing, enabling, and promoting high-quality performance.
- Trust develops from the mutual ability to assess competence and to know what to expect from each other.
- Innovativeness involves a discipline arising out of the negotiated process by which new ideas and deviant approaches interact with, reshape, or are rejected by the established regime of competence.
- Individual identity reflects the level of competence as recognized by the community (formally or informally).

Potential upsides	Possible downsides
▪ There is a degree of clarity about learning paths toward improved competence ▪ The community is committed to spreading excellence among all members ▪ People know who is good at what and where to turn for advice	▪ Growth in membership disrupts the initial experience of intimacy ▪ The definition of competence becomes political and creates hierarchy ▪ The community becomes a training service ▪ Diverging voices are marginalized ▪ Truly innovative ideas are ignored or rejected out of hand

On the role of senior management

As a steward of its domain, the CCHN Community faced the additional complication of addressing the role of senior managers of humanitarian organizations in the community. While many would easily fit the criteria of having negotiation experience to join the CoP, they remained reluctant to engage in peer workshops with their staff and of exposing some of their personal limitations. As a result, most senior managers have kept a safe distance from community activities, but with a loss to themselves and to the community. In mid-2022, the CCHN developed an Executive Program for senior managers to allow them to engage with selected tools and methods developed by the CCHN without necessarily becoming regular members of the Community.

It is still unclear how being part of the Community will affect the career progression of members, or how members gaining senior management responsibilities will adjust their relationship with the Community. What is already clear is that by structuring itself as a “multiagency space,” the Community has carved a highly valued network across organizations that benefits frontliners and senior managers alike.

Dimension 4. Nurturing identification

Some communities mature by deepening the personal dimensions of membership. They build strong bonds. They value friendship and relationships. They embrace the whole person. They cultivate identity—both for members and for the community. They do all that, not just as a social club might, but as a foundation for learning.

> One community organizes dinners with music and dance. Members have even created a community anthem they sing at each event.
>
> Another community spends the whole morning of the first day of their quarterly two-day meetings listening to each other's stories about what has happened to them since the last meeting. For them, this time is not some lighter social moment separate from their learning, but an integral part of it.
>
> An engineer in a big technical firm once told us: "I used to have two relationships to this company: I was on project or on the available list. With my community of practice, there is a place for me as an *engineer*."

Intentional developmental efforts in this direction include:

- **Building relationships.** Members take an interest in each other's background and experience. Because they value knowing each other, they take time to hear each other's personal stories. They may celebrate each other's accomplishments or birthdays. They empathize with struggles or loss. The community is an invitation for members to bring in who they are in personal ways. It embraces a broader part of their identity than the part defined strictly within the domain. They consider this depth of personal engagement and relationships a key to their ability to learn together. In their attempt to become better learning partners, they touch each other's humanity; and that becomes a key strength of their learning partnership.

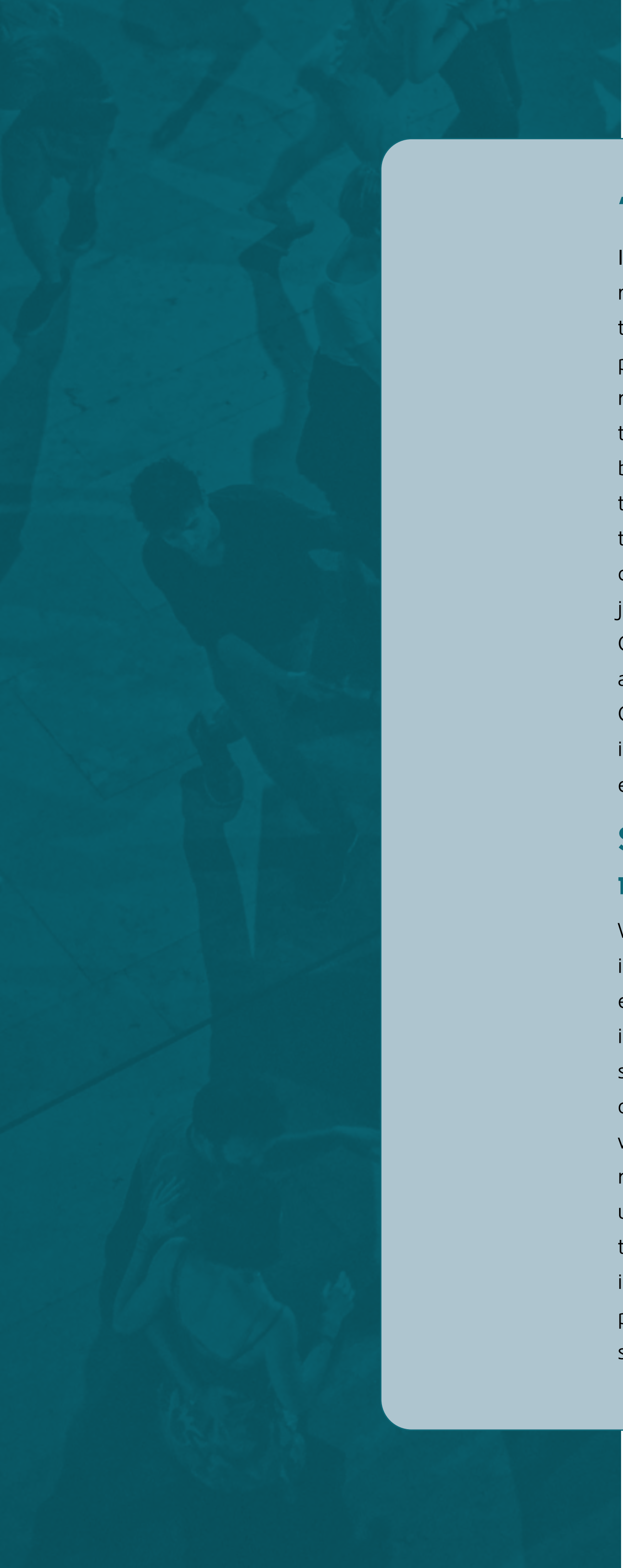
- **Promoting an identity for the community**. Moves in this direction include rituals such as dinners or outings, and community artifacts such as songs, mascots, t-shirts, or other signs of membership. (See the end of chapter 2 for examples of such artifacts created by the *Ignite* initiative.) When the community builds a shared memory, it includes souvenirs of events, such as photos and videos from memorable moments. Capturing the highlights of this shared history contributes to a sense of identity for the community.

- **Fostering an experience of agency.** A community of practice can become something special when it is a space for expressing individual identities. This can be especially precious when a large part of members' experience is working on projects where they are told what to do and where what matters is only that part of their professional identity that serves the project directly. Then their community is different because their full professional identity matters; their perspective matters; their experience matters; what they think matters. There is room for them as a practitioner interested in the future of the craft. They are invited to follow their personal interests and steer the community that way. They can take action towards a difference they personally care to make. When this happens, the community is strengthened by the identification members feel toward it from such a personal experience of agency.

Some effects of identification-oriented development include:

- The learning agenda is driven by the developmental aspirations of members for themselves and for the practice.
- Value derives from the heightened commitment to the community that identification brings.
- Trust develops from the strength of relationships and the invitation to be yourself.
- Innovativeness comes from valuing the full diversity of views and inviting members to bring in ideas and perspectives from the rest of their lives.
- Identity is nurtured from participating as a whole person.

Potential upsides	Possible downsides
▪ Personal relationships enable deeper learning ▪ The inquiry is richer from including the whole person ▪ Identification with the community strengthens member commitment	▪ The group becomes a friendship clique ▪ Outsiders are excluded ▪ Belonging and identity become more important than learning



"We are not a cult"

In its early stages, members of the CCHN Community were reluctant to recognize their role and identity as members of a CoP. At first, most of them were comfortable with an informal and timebound role of "peers" participating in an informal workshop to share negotiation experience. As members acquired more skills and responsibilities as facilitators or mentors, they became amenable to a more committed affiliation and sense of belonging as "members" of a community. Some are particularly proud of this affiliation. In some contexts, however, there is still some nervousness that they will be "caught" being overly committed to an identity that is too clearly emergent, as compared to more established identities such as their job title and employer. Various attempts to brand the membership of the CoP through the use of notebooks, pens, sweatshirts, and bags have been a success as artifacts of meetings rather than a sign of belonging to the CoP. Overall, members feel much more comfortable as a collective, than as individual members, especially when confronting other identities, such as employer, non-member colleagues, hierarchy, etc.

Surprise community experience in the mountains of Afghanistan

While it is true that many participants have been reluctant to express their identity as members of the CoP outside CCHN events—for fear of being exposed by nonmembers in their organization as disloyal to the institutional identity—in some cultures, belonging to the CCHN Community has been seen as a real asset, and even a sign of professional excellence. Two members of the CoP, both Afghan nationals but living in different parts of the country, were engaging with local Taliban authorities but were unaware of the membership of the other. It is only when they realized that each of them was using a CCHN pen collected at different workshops that they realized that they both were part of the CCHN Community. The situation became almost immediately more convivial, and smiles appeared on the faces of many of the people present. They took the initiative to take a selfie of this meeting and send the picture to the CCHN.

Dimension 5. Clarifying and distributing leadership

In the early days, it is not uncommon for a community of practice to depend on the leadership of one or two people or even on external facilitation. As they mature, some communities develop more complex models of leadership that invite broader initiative.

> In one community, members take turns in facilitating the online conversation in pairs. That community also has a core group meeting once a month, to which they invite any member as an observer.
>
> In another, members of the core group each take on a leadership task (see section on roles) and convene a subgroup of members to attend to that task together.

Intentional developmental efforts in this direction include:

- **Articulating leadership roles.** To make sure that things are taken care of and that someone keeps the community space open, many communities of practice have designated leaders who agree to take an active role in cultivating the community. Clear leadership roles make it easier to clarify expectations—both inside the community and outside. As mentioned earlier, many organizations provide support and training to people who take leadership in their communities.
- **Distributing leadership.** Moving toward more distributed leadership is a good sign of maturing. Members take on tasks that help the community function and develop, from the menial to the complex. They lead activities or host meetings. They may even initiate and lead a practice group, organize a local event, or start a local chapter. To accelerate the distribution of leadership, the leadership tasks described in the earlier section on roles can be explicitly assigned to groups of members. This encourages them to take more ownership of their community.
- **An engaged core group.** An early sign of maturation is the formation of a *core group* dedicated to the development of the community and representative of its membership. Note that a core group is not a governance structure; it often remains very informal and rarely has decision authority. It consists of members who so value the community that they are willing to take some extra steps to make it more valuable for themselves and for others. They reflect on their experience of the community and work with others to make it healthy and useful. Chapters may each have their own core groups. Ideally, the core group is not static but, over time, keeps attracting new members. While rarely

viewed officially as part of leadership, an energized core group does take on a type of leadership. Their commitment inspires other members and is a key factor in ensuring the community's ongoing relevance and long-term viability.

Some effects of leadership-oriented development:

- The learning agenda is driven by committed members whose leadership can provide more strategic coherence, more demanding challenges, and more consistent follow up.
- Value derives from a well-run community that provides "high value for time."
- Trust comes from expecting specific commitments to get things done.
- Innovativeness can be sharpened by the dynamism and strategic focus of members who take on the challenge of recognizing and encouraging innovative developments whose full potential may not be apparent, even to members who report them.
- Identity reflects one's role in the community and the ability to help shape it.

Potential upsides	Possible downsides
▪ Efficiency increases	▪ Strong leadership engenders passivity
▪ There are well-defined ways to contribute to the community	▪ An expectation develops that leaders are providing a service (which can be evaluated by fellow members who are the consumers of that service)
▪ Expectations of who takes a lead, where, and for what are clear	▪ Members become critical instead of helping, complaining about something others do as volunteers
▪ Members develop a sense of mutual accountability	▪ The core group becomes an exclusive elite without renewed membership
▪ Even new members can take on leadership roles and experience a sense of ownership over the learning process	▪ Too many decisions are made behind closed doors
	▪ Members engage in politicking around their roles, clinging onto them for too long
	▪ Leadership becomes a platform for narcissists or loud mouths

Dimension 6. Cultivating self-awareness

In all the ways that a community evolves, a key developmental component is self-awareness in functioning as a community of practice. This does not entail an understanding of the underlying learning theory—or even of the concept of community of practice as such. Rather it involves an attention to the quality of learning processes and value created.

> One large community of practice has translated its domain into a series of practice groups. The community meets face to face once a year. During this meeting, the various practice groups lead sessions; some end, some continue for the coming year, and some new ones form. This continuous reflection on the domain and attendant redesign keeps the community focused and alive.
>
> In a social service agency, all communities of practice collect stories about their effect on members' work. They share these stories in booklets and on posters at regular communities of practice fairs.

Intentional developmental efforts in this direction include:

- **Self-design.** As we mentioned in the section on launching, some communities intentionally frame their learning. They discuss their challenges and aspirations and imagine how their community could help them. They often set aside time in the agenda for "process" reflections. They may hold occasional renewal sessions where they review their progress, set up new aspirations, and redesign the process.

- **Awareness of value creation.** Any community of practice can create value for members and their organizations. But a more intentional community seeks awareness of the value it creates. This does not require a full evaluation project, though some well-funded communities have done that. But more simply, it means that members in general seek an awareness of the difference they are making—to their own practice and to the world collectively. Practically, it means that they bring back stories of the value that the community has contributed to their projects. In some cases, they may even develop some indicators that they follow. All this reflects a joint commitment to creating maximal value. (See chapter 6 on value creation.)

- **Learning-to-learn loops.** Learning as a community of practice is itself a learning process. Being aware of value creation provides an opportunity to reflect on what creates most value, and to adapt activities and processes accordingly. Through these reflective loops, adapting and reframing its learning strategy and process over time.

Some effects of awareness-oriented development:

- The learning agenda is driven by the inspiration that stories of value creation provide.
- Value derives from a desire to optimize the functioning and contributions of the community.
- Trust comes from the shared commitment to understand how the group functions as a community of practice (or not) and how it can be responsive to each member.
- Innovativeness can be built into the design of the community and be guided by the awareness of value creation, even if it's only potential value.
- Identity is affirmed by the recognition of the difference the community is making in the world.

Potential upsides	Possible downsides
▪ The community improves its ability to engage stakeholders ▪ An awareness of what creates value excites members' imagination about possibilities ▪ Learning becomes more intentional ▪ People who are drawn toward process have a chance to contribute	▪ Some members feel that process and reflection occupy too much of the precious time together ▪ The community becomes too rigid about established processes and rituals ▪ Emerging opportunities that do not quite fit that frame are missed ▪ Functioning well according to some image of the ideal community becomes an end in itself

Dimension 7. Orienting to the context

The maturing of a community of practice is not solely an internal affair. It also has to do with the community's place in its broader context. Questions driving development in this direction include: How do we fit in our organization(s) and our wider discipline? Where are there relevant developments or transformations we may need to respond to?

We have seen communities dismantling the competition's products, going on learning expeditions, sending members to different conferences in their field, or publishing their findings.

One community about early project assessment came to realize that its practice would not be able to contribute fully unless the organizational culture stopped stigmatizing the timely cancellation of projects, once found risky.

Intentional developmental efforts in this direction include:

- **Navigating organizational waters.** The most common form of context orientation is the relation to one or more organizations. Maturing here entails learning to navigate organizational expectations, resources, hierarchies, politics, and culture. This can require learning to better articulate the difference the community is making. In some cases, the community can gain support and sponsorship through alignment with strategies, policies, and related initiatives. In other cases, proceeding with integrity as a community of practice entails resisting, challenging, or transforming the organizational context.
- **Belonging to a broader field.** The domain of many communities of practice is part of a broader field or discipline. Leveraging a broader field usually increases the legitimacy of the community with organizational stakeholders because the community is seen as accountable to a broader, usually more formal, regime of competence. The community needs to make a case for the value it brings in acting as a local door to this field, with its resources, expertise, and networks; this entails arguing for the time and resources to participate in external activities such as conferences, trainings, or online conversations. Publishing in their field's journals and trade magazines is another way members increase the community's legitimacy.
- **Understanding the wider landscape.** A community of peers is a good forum for making sense of how the world affects one's practice. What are significant trends? What is happening elsewhere, including new developments, research, and innovations? What is the competition doing? Where are there potential partners? What societal goals are we contributing to? These are the kinds of questions that a community of practice will address if it attempts to mature toward a strategic orientation to its broader context.

Some effects of context-oriented development include:

- The learning agenda is influenced by and responsive to what is happening outside the community.
- Value derives from working together to make sense of the broader context and explore its implications for practice.
- Trust can come from belonging to the same organization, sharing an educational background and an allegiance to a field, or contributing to the same broader agenda. Trust also comes from negotiating a shared view of the relevant aspects of the wider world—whether it is to join or resist broader trends.
- Innovativeness comes interactions with other perspectives and from responding to, seeking, adopting, remixing, and repurposing ideas from a variety of sources.
- Identity can build on external reputation and the ability to broker access to information and relationships.

Potential upsides	Possible downsides
▪ Organizations provide support ▪ Projects provide concrete contexts to learn from practice ▪ The community gains legitimacy from outside recognition and reputation ▪ Members develop an expanded horizon ▪ Community learning is relevant to a broader set of stakeholders	▪ Outside forces remove some agency from the community ▪ External differences, allegiances, and conflicts seep into the community, potentially splitting it into factions ▪ Belonging becomes defined in terms of “us versus them”

Connecting with the broader landscape

As it enters the new phase of its development as a social learning team, a key challenge for the CCHN is to continue engaging practitioners in the development of their domain, while also capitalizing on the accumulated knowledge to engage with the broader landscape.

Indeed, humanitarian negotiation is not only a domain of practice, but also an arena of social, political, and philosophical inquiries that contribute to the design of international relations. There is an inherent relation of mutual relevance—and of tension—between the endogenous development of humanitarian field practices and the larger exploration of the role of negotiation, communication, and diplomacy on the frontlines. There are also numerous practices from commercial, political, or climate negotiation that can enrich the development of new and robust humanitarian practices on the frontlines. It will be critical that the CCHN Community find various ways to look beyond the predicaments of frontline operations and reach out towards other forms of negotiation and angles of inquiry to keep their practice fresh and critical.

A common mistake: the community of your dreams

One reason we present developmental dimensions here as "optional options" and not as recommendations for maturity is that one common mistake we have seen community leaders make is to try to "mature" the community of their dreams. With all the features of their ideal community in mind, they work hard to bring them about. With the best of intentions, they do it for the good of everyone. The problem is that members for the most part don't care about forming an ideal community of practice according to some standards of maturity. They just want to get value from their participation and get along with their lives. Striving for a standard of maturity as a leadership goal can be frustrating, exhausting, and in the end, lonely.

It is essential to help members build the community *they* need. This is why we tend to think of community leadership as "leadership with" rather than "leadership for."

Communities learn as they grow

We encourage our community leads not to become disheartened if their communities do not always exhibit the desired traits of a vibrant community of practice.

Rather, we emphasize that from inception, each community forges its own path and displays attributes that reflect its membership, leadership, and the social learning experience available in its context.

We found that given time, experience, and dedication, a community can reach a stage in its life where more of these positive aspects can be seen—ongoing vibrancy and viability are healthy goals of our communities at all phases in their lifecycle.

3.8 Key factors at the community level

With again the caveat that each community is unique, we summarize this chapter with some common community-level success factors to keep in mind. And then, as we did for the initiative level, we explore the most common risks and challenges in the cultivation of communities of practice, along with some mitigation strategies.

Community-level success factors

High value for time. Every time people engage with the community, they feel that it was a worthwhile use of their time and that they had agency in making it so—their participation mattered, it was interesting, useful, and fun, with the prospect of making make a difference to them and their practice. This *value for time* criterion may well be the highest principle.

Passion for domain. A community of practice can't survive unless members feel a strong connection to the domain, because of personal interest or because it is critical to their job. Their own learning is developing the domain at the same time.

Focus on practice. Learning interactions must address real issues of practice—the way things "really" are rather than how they ought to be. Remaining at a more superficial level of "formal knowledge" and "ought to be" will not make the community as useful as it can be.

Trust. Members need to trust each other enough to talk about real practice. But talking about real practice is also the best way to develop the trust. Someone who is well respected can start this process by asking for help on a challenge or failure.

Community rhythm. Each community needs to find the rhythm that will work for members. Not enough and it feels like the community is not alive. Too much and people will just drop out. Being in a community is almost never a person's first job.

Internal leadership. The dedication, skills, and legitimacy of people who take internal leadership in nurturing the community is one of the most important factors in determining the quality and longevity of the community.

Member ownership. A strong sense that the community is *their* community will foster engagement and initiative. Exercise light-handed leadership and protect this sense of ownership from external pressures.

Energized core group. Community leaders are well advised to build a core group of dedicated members around them. Having the community depend on just one or two people may be okay in the beginning but it is not a good idea over time.

Personal touch. Successful leaders keep in personal contact with members. This way they are aware of the issue that members face, which the community can address, and of the things they do well and should be shared with the community.

Persistence with innovations. New learning modes and novel activities may not work the first time. Be patient and fine-tune them before deciding to give up and revert to what is familiar.

Shine a light. Make visible things that can easily remain invisible, such as all the side activities and interactions, the appreciation of silent members, or the value that the community is creating in various parts of the organization and beyond.

Challenges and risks at the community level

Like all good things, communities of practice are both useful and risky. The table in figure 3.9 lists typical challenges and risks, along with suggestion for mitigation strategies.

Challenges and risks	Mitigation
Silos. A risk of a community of practice is that the very things that lead to its success can also turn it into a silo. Members become inward looking and forget to reach out across their boundaries for new members, new perspectives, and alignments.	The social learning team has an important role in identifying potential silos and looking for opportunities to create boundary encounters. A silo often means a strong identity. Respecting while also extending that identity can take sensitivity and persistence.
Groupthink. Another danger is that members stop questioning the "truths" that have been generated by the community. It becomes more comfortable to continue existing story lines than to challenge the consensus.	Make sure that newcomers are welcome, in particular when they question the unquestioned. Encourage interactions with people outside the community, including other practices, but also customers, stakeholders, researchers, etc.
A few dominant voices. If a few people constantly dominate, some members might leave the community, even if they have a lot to offer and a lot to gain.	Through the task of the community keepers, members can reflect on how their community functions as a learning partnership. They can draw attention to other voices that are silenced. Sometimes, community leaders need to talk to a dominant person in the back channel to avoid wasting precious community time.
Lack of continuity. If there is little or no continuity through shared storytelling about past events and what people have done with the learning since then, members will start treating meetings as discrete events rather than an ongoing learning partnership.	Make sure that check-in and check-out times creates continuity across meetings. Always build on past activities and follow up in due time for collective reflection, feedback, and refinement.
Too much transmission. People are so accustomed to presentations as the main learning mode that it can quickly become the default, if not enough thought is being given to activity design. Then meeting agendas start looking like a list of topics rather than activities to make progress on real challenges.	Keep presentation mode to an absolute minimum. When used, presentation should be a prelude to engagement rather than the main learning mode. Be imaginative in designing learning opportunities (see next chapter for ideas).
Community of practice as a service. The downside of having strong community leaders and social learning team is that members may start to see the community as a service rather than an opportunity to shape or steer the learning partnership themselves.	Avoid feedback forms that take responsibility for the community away from members, e.g., do not ask for a rating of how well organizers did their job. Rather, use questions that focus more on what people can do to take ownership of their community.
Operating like a project. A community is led in a project management style, perhaps by people who know how to get things done but lack the artistry needed to stimulate the imagination, inspire, seize the moment, and take risks in the interests of the learning agenda.	Not everyone is a born community leader, but everyone can learn. It is good for organizations to offer some training to those who want to develop these skills.

Figure 3.9 Challenges and risks at the community level

4

FACILITATING MEETINGS AND ACTIVITIES

4 Facilitating meetings and activities

> Communities of practice learn how to learn by developing activity structures and facilitation processes that work for them.

This chapter digs one level down into the details of cultivating communities of practice. It is written for people playing an active role in the design and facilitation of community meetings and activities that provide spaces for social learning. Facilitation is an important contribution to the development of a community and a factor in members' finding value in it. The chapter will discuss principles of facilitation, meeting design, and numerous activity structures. But we start our discussion by locating design and facilitation in the context of tacit learning theories.

4.1 Social learning design and learning theory

Most people's experience of designed learning activities comes from schooling or from training contexts. In both cases, learning is aimed at the transmission of knowledge from an expert or teacher. This generates a tacit "learning theory" and shapes what people do and expect. Community members and leaders may bring this tacit learning theory to their design and expectations of the community. But a key element of cultivating a community of practice is for members and leaders to switch their tacit learning theory from a familiar transmission mode to one in which practitioners thrive on learning from and with each other in conversations of the "shop talk" variety.

Note that social learning activities as we use the term are not contrived pedagogical activities—the kind intended to lead people to discover a known answer with a bit of interactivity. Neither are they friendly transmission in the guise of an active facilitator with recipes for interaction. The intention of social learning activities is to create spaces for deeper and more meaningful conversations about all the nuances and uncertainties of actual practice.

Unless the tacit learning theory changes, communities of practice can easily become series of presentations or webinars. These are not necessarily useless, but they miss the true learning potential of a community of practice. Expert contributions can also be part of a community's activities, but these contributions need to be carefully designed. Experts should not simply be presenting their "expertise" in their terms. Rather, they should be drawn into the learning agenda of the community and what matters to members. Learning is fundamentally different when it is community members who drive the learning—when they draw from an expert what they know they need to learn from their experience of practice.

There is an art to designing and facilitating meetings and social learning activities. To make this more concrete in this chapter, we propose numerous examples of social learning activities we have used. We discuss what they are good for and how we have organized them to create social learning spaces. But unless the underlying learning theory changes, we don't think that mere activity descriptions will do the trick. With the right learning theory and a bit of imagination, the possibilities for designing social learning activities are endless. Over time, a community will build up the repertoire of activities that work for members.

4.2 The art of facilitation in communities of practice

This section offers some brief guidelines for facilitation in communities of practice—whether provided by professionals or community members. All facilitators will have their own style, but it is useful to have some general guiding principles. Here, we talk about the purpose of facilitation, the do's and don'ts of back-channel communication, and common facilitator challenges.

The purpose of facilitation

Facilitation in communities of practice is multifaceted and nuanced. It is often a role taken up by community leaders, and as a community matures, increasingly by other community members. Sometimes an outside facilitator or a member of the social learning team can be brought in. Here are some of the many tasks that a facilitator does in a community of practice and the advice we give ourselves as we try to live them:

Hold the space. Your job is not to fill the space but to make sure it is there for the community to fill. If things wander off, lightly clarify and reinforce the purpose of the community. Help ensure all voices are heard, especially the voice of practice. Invite regular reflections and ensure that summaries are created.

Model a spirit of inquiry. Try, as much as possible, to practice appreciative curiosity and positive leadership—focus on strengths more than weaknesses, optimism more than pessimism, support for thoughtfulness more than critique. Welcome questions as much as responses. But first of all, come in as a learner yourself. The best community leaders are the ones who feel an intense need for the community because they are "greedy" for the learning it can offer.

Value experience. Honor people's histories and contexts and give them credit for contributions that reflect their own experience. Crucially, this includes bringing questions and challenges from practice to the community. Look for opportunities to shine a light on member's stories, whether they report successes, challenges, or outright failures.

Support people to make a difference. Guide talk into action whenever the opportunity arises. When the possibility of action raises the energy level, build on it. Always look for opportunities to explore and articulate the potential value of participation for the prospect of making a difference.

Ensure follow-up. In chapter 1, we suggested that a community of practice is a continuous learning loop (figure 1.2). Members have busy lives and may not always remember all that needs follow-up. Keeping track and bringing things back helps complete the loops.

Invite a collective approach to facilitation. Engage people, where possible, in sharing leadership of the community, particularly when dealing with contentious or difficult issues. Share responsibility for the quality of the space with participants. If someone complains, invite them to propose something. Be open to what could happen next, whether it follows your plan or not.

We have already said this in the last chapter, but it is worth repeating here: one of the most frustrating temptations in facilitating a community of practice—whether you are a member or an outsider—is striving to cultivate the ideal community according to some criteria that you have come up with, that you have read about, or that are being imposed on you. The community is not for anyone else; it is for its members. It is the community they need, not the community you or anyone else wants.

Facilitation and back channel

When people think about community leadership, they often have in mind the more public aspects of the community: the meetings, the website, the documents. While "front channel" is undoubtedly important, successful facilitators are generally very good at "back-channel" communication—connecting with people outside the "public arena," for example, by phone, over coffee, or via messaging tools. This back-channel leadership work helps them keep the pulse of the community. Knowing what members are struggling with and what they have accomplished helps them tune the learning agenda. Sometimes members need a little prodding to realize how useful it would be to bring their specific challenges and stories to the community. Starting with a private conversation can open the door. The table in figure 4.1 provides some guidance for back-channel conversations in the form of do's and don'ts.

Do	Don't
▪ Find out the challenges that people are struggling with and probe what is bringing them value ▪ Explore where you can make more of their experience and energy and how they can help ▪ Look for ways to weave an individual's story into group conversations while respecting confidentiality ▪ Understand what keeps them engaged or keeps them from engaging in a nonjudgmental way ▪ Hear what out-of-the-box and realistic suggestions they have for the future	▪ Talk about other people in a negative way or spread rumors ▪ Get bogged down in complaints and negative thinking—listen to complaints and recognize their legitimacy, but then channel them into action points that promote agency ▪ Speak or present yourself as doing things on behalf of members—rather, you are weaving, building on what they have to offer, and proposing ways they can engage with the community directly ▪ Ask them for feedback on whether the community meets their needs as if it was a service—rather ask them how the community can create enough space for them to take initiative on things they would find useful ▪ Make promises you can't keep

Figure 4.1

Get to know your community by talking to members

Dealing with conflict

Conflict can be a sign of some underlying problems, but conflict can also be a healthy sign—both that your community is engaged with difficult issues and that it is not succumbing to groupthink. People rarely fight for what they do not care about. Too much agreement is a red flag in a community of practice. But there is a lot of ambivalence in conflict, as suggested by the table in figure 4.2.

Conflict is productive	Conflict is destructive
▪ The objective in a community of practice is never simply to agree; it is to learn, i.e., to change understanding and actions in productive ways ▪ Conflict can be opportunity for different voices to be heard ▪ Differences of opinion are healthy and diverse perspectives help build new understandings ▪ If you can win over those whose opposition has caused a conflict, they often become your most committed advocates	▪ Conflict that drags on or takes up too much space will lead members not involved in the conflict to feel that they are wasting their time ▪ Conflict that transforms into personal attacks breaks down the trust and the bonds of the community ▪ Conflict that involves someone being undermined is the quickest way to lose participation

Figure 4.2
The ambivalence of conflict

Things to do

- **Probe the source.** See if the conflict has roots in sensemaking, in fixed mindsets, or in personalities. This will reveal whether it is a learning struggle or some other issue. If it is a learning struggle, unearthing its source can be productive for the community.

- **Consider taking it offline.** When conflict becomes obstinate or personal, it is often better to stop the conversation and take it into the back channel—remembering that community time is scarce, hence precious, and should not be spent on things that are not productive for everyone. (Note that this may be different from a team where members spend a lot of time together and where it can be useful to involve everyone in addressing a disruptive conflict.)

- **Involve others.** Talk to key members with different opinions to get a range of views. If you are using "leadership groups," see first whether the Community Keepers can deal with the conflict better than you.

- **Grab an opportunity.** Use collective reflection on a conflict as a learning opportunity for members to strengthen their commitment to joint learning.

- **Protect the community.** In the end, preserving the learning space is the most important goal. Sometimes you have to be firm and expel a member who repeatedly violates the trust or the norms of the group. This is rare, but it should always be an option.

Communities can help people to navigate their roles

Ignite communities are often formed around domains that closely overlap with formal roles in the organization, such as Product Manager, Designer, or Software Engineer.

Unsurprisingly, such communities attract members who are interested in the practices that the respective role entails, whether they're formally aligned to that role or not.

We have found that communities can help people to better understand the current or future expectations that are placed upon people in such roles. The typical activities of networking, conversations, workshops, and occasionally, partnerships with strategic partners who define the skills and expectations, all help members to feel more security and stability in their career.

This can be beneficial for members who may wish to move into a new role in future, as in a safe community setting they can learn from others who are already performing it and who can answer questions, share ideas, and solve problems. As mentioned previously, such a community was what inspired Phil to help start *Ignite* in the first place.

A learning approach to time management

While project or meeting management are useful skills for a facilitator, they can also get in the way. Facilitators often assume that one of their main jobs is to keep the group to the agenda (and participants often expect them to). In a traditional team meeting or training workshop, the agenda is meant to drive the process, because it is the point of the meeting to cover all the items on the agenda or curriculum. With the exception of a few logistical points at the start, the role of the agenda in a community is to give an initial structure so people can engage. It acts more like a road sign than the journey itself. The key question for a community meeting is not whether the meeting is following the agenda to the letter, but rather whether activities are creating value for members. If there is an opportunity for learning (including a promising insight, an animated conversation, a productive conflict, a new challenge, a celebratory moment), then adapt the agenda as you go. Follow the learning energy. This does not mean letting people go off topic; it means taking a more flexible approach. Obviously, facilitation requires finding a balance and using good judgment, but it is usually a mistake (which we have witnessed often) to cut off a high-energy, high-value exchange in the name of the next item on the agenda.

4.3 Designing meeting agendas

Community of practice meetings vary a lot in content and structure. It is important to let each community discover what works best for them. Invite members to be imaginative about how they address their common challenges and make progress together. Figure 4.3 shows the outline of a generic community of practice meeting. It is not an agenda but includes typical sections.

Activity	Description
Check-in	The meeting host invites any new member there for the first time to introduce themselves. Then members share stories about: What did you do with any insights you got from our previous discussions? And what happened? The idea here is to see meetings, not as separate events, but as part of ongoing learning loops. Again, enabling these loops is a key dimension of community facilitation.
Opening activity	This is a space for members to bring up any challenge or topic to other members in the community. If it is short or urgent, the community can deal with it then. If it needs a lengthy discussion or more preparation and designed interaction, it is included in the learning agenda for a further meeting or a subgroup conversation. This opening space could simply be a live poll (online or in-person) or it could be something more elaborate such as a rotating café style conversation. In a small group, it could be an opening routine that is part of the agenda.

Social learning activities	The bulk of the meeting is spent on focused learning activities that further the learning agenda of the community or respond to requests for help by members. Some communities dedicate a good part of this time to practice groups, both for doing their own thing and for engaging the whole community in providing feedback. As mentioned before, synchronous time is precious and needs to be used to interact rather than share information, which is best left to emails, newsletters, or recordings. Examples of activities, which can be done online as well as face to face, are described in the next section. Note that these activities may take place over more than one meeting. It is a good idea to invite members to take the lead in setting and facilitating different activities. The more practiced members are at creating activities for productive conversations on the go, the easier it is to deal successfully with emerging and important issues.
Reflections	Members reflect on the current meeting and the evolution of the community of practice from their perspectives: ▪ What have we accomplished and what should we include in our shared memory? ▪ What challenges are we facing? What should we do next to push our practice forward? ▪ What's working or not in our meetings? ▪ How are we doing as a community? ▪ Who else needs to hear what we are doing? Whether meeting online or face to face, we often open a shared document like a Google doc for these moments of reflection (see *Shared reflection* at the end of section 4.6 below for more detail on process).
Check-out	Before leaving, members share their reflections on: ▪ What are some of the learning highlights? ▪ What are we going to do with what we are learning and what difference do we hope it will make? The idea of this type of check-out is to help push the learning into practice and initiate learning loops to follow up on and feed back into the community over time.

Figure 4.3
Typical elements of a community of practice meeting

Down time. Breaks are a good time for catch up on more personal things, so they shouldn't be too short. All sorts of playful and meaningful moments can come out of down time. In online meetings, breaks are a chance to get away from the screen. We often open the online space a few minutes early for people to join at their leisure and mingle informally, but on the whole few people join for that unless it really becomes part of a community's ongoing routine. It can feel contrived if the group is large. Down time online is more likely to happen if it is organized as a series of quick breakout rooms. More about online meetings in the next chapter.

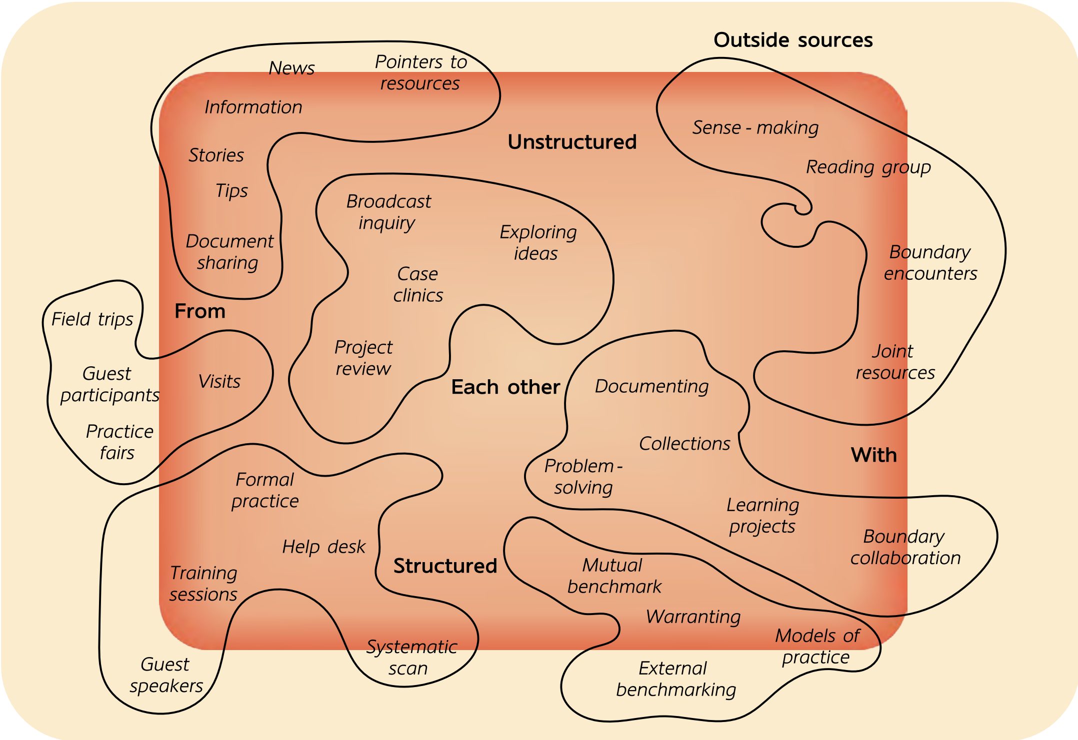


Figure 4.4 Some activities used by communities of practice

4.4 A great variety of learning activities

People often think of social learning as informal conversations around the water cooler. That does happen, but we have seen intentional communities of practice engage in a surprisingly wide variety of learning activities.

Making sense of the variety of activities

Figure 4.4 shows a sample of community activities. The visual groups these activities into families of similar activities (the blobs). It also organizes them along three dimensions:

Horizontally, learning *from* toward the left and learning *with* toward the right.
When members interact, they learn both *from* and *with* each other. They learn from each other's experience of practice through stories—successes and failures; and they learn with each other when they act as learning partners in debating issues, exploring new solutions together, or making sense of new research. While many activities involve both processes, one aspect is usually more salient in defining the basic structure of the activity.

Vertically, *unstructured* toward the top and *structured* toward the bottom.
It is important not to confuse the self-governing nature of communities of practice with an absence of internal structure. Learning activities range from very unstructured to very structured. Like the watercooler conversations, some activities require almost no facilitation or design, such as sharing a piece of information or telling a story. By contrast, some activities are quite structured, requiring preparation, facilitation, design, and even protocols, such as mutual benchmarking, training sessions, or field trips.

Toward the center, learning *among members*, toward the periphery with *external participants*.
Finding sources of learning outside is just as much of a community activity as learning from and with each other. Inviting guests, reading research papers together, or collaborating on a joint project with some other community are ways to broaden the scope of learning about the practice and keep abreast of developments in relevant fields. Such boundary-oriented activities help the community avoid the trap of becoming insular and getting caught in its own limitations.

Social Learning Toolbox

Social learning practices and facilitation techniques are still quite a new discipline to many of our colleagues. With the dual purpose of responding to this need and to help our communities adapt to operating virtually instead of in-person when COVID-19 started, we developed our own social learning toolbox—a screenshot of the main web page is shown in figure 4.5. It contains a library of social learning activities, tools, and techniques that anyone can pick and choose from, based on their needs at the time.

The guides to technology tools were written with a social learning focus, for instance, "*How can you use Zoom effectively for social learning purposes?*"

A key objective is to enable more time to be spent on designing the community activity, rather than trying to figure out what to do next or scratching your head to decide which tool to use or how to use it.

Our *Ignite Faculty* members help us curate the toolbox content. One volunteer took it upon herself to find examples and blog posts from across our wiki that showed our sample activities *in action*, thus showing the practices applied and the learning theory brought to life.

Activity design

Obviously, not all communities engage in all the activities listed in figure 4.4. In most cases, this would not be a good goal to strive for; most communities function very well with a small subset. But having a broad palette of a variety of potential activities is a useful tool. It can open the imagination of members and facilitators. In this chapter, our descriptions of activities we have used most often are grouped in three sections reflecting different purposes:

- activities oriented to helping with and developing the practice
- activities oriented to building an overall picture of the community and its thinking
- activities by which communities engage with external participants

All the activities can be done face to face or online with minimal variation. For the online version, all we assume is that members have the technology to hold interactive video meetings and have access to a shared digital workspace (see next chapter for more on technology).

These activity protocols are only suggestions. They reflect what we have tried, not a theory of how communities learn. There are countless other activities that communities can use (see some references at the end of the book). We invite you to experiment with variations of what we propose here and with entirely new activities that work for your community.

Social learning Toolbox

Created by Hall, Chris, last modified by Reid, Phil on Oct 04, 2022

Want to improve your community meetups?

Struggling to think of what to do next?

Want to learn how to use a specific facilitation technique or tool? We hope you find what you need in this toolbox, but if not then please let us know or leave a comment on this page.

If you're looking for general guidance on the stages and lifecycle of an Ignit community, check out our community lifecycle guide.

Activities
A large variety of social learning activities for you to try!

Tools
A whole set of social learning tools for you to try!

Techniques
A whole page of social learning techniques for you to try!

Social Learning Activities

There are many ways of learning through others, and on this page we've tried to capture and document some of the more interesting ones.

- How To: Case Clinic
- How To: Collider
- How To: Community Charter
- How To: Community Health Monitor
- How To: Core Team Recruitment Event
- How To: Design a Community Meet-Up
- How To: Design Studio
- How To: Guided Conversation
- How To: Ignite Practice Circle
- How To: Ignite Talks
- How To: Launch Ignite
- How To: Lean Coffee
- How To: Lightning Talks
- How To: Obtain Ignite Funding for Your Location
- How To: Presentation And Conversation
- How To: TED Talk
- How To: Virtual Facilitation
- How To: Welcome Wagon

Social Learning Tools

On these pages we've tried to capture what we know about using the various tools at our disposal for social learning, whether your social learning activity is on-line or in-person.

- Adobe Connect
- Agile Central
- Bitbucket
- Confluence
- Excalidraw whiteboarding tool
- MeetMe
- Scheduling a Meetup with Outlook, Lync and Zoom
- SeeMe
- Skype
- Symphony
- This tool helped us to Ignite
- Webcasting
- Zoom
- Zurvey

Social Learning Techniques

There are many techniques to master to create good social learning opportunities, and we've tried to capture some of them here so we can practice them together.

- How To: Community Covenant
- How To: Do A Check-In
- How To: Do A Check-Out
- How To: Gather feedback and ideas from your community
- How To: Get Value From Videocalls
- How to: Launch Ignite in Your Location
- How To: Retain Community Memory
- How To: Share a Community Event using a GO link

Figure 4.5 The activity toolbox of the *Ignite* initiative

4.5 Activities oriented to developing the practice

Learning about the practice can easily be done by sharing a tip, a document, or a quick story, or by simply "taking shop" during lunch. But here we propose some ideas for more structured activities aimed at learning together about practice.

Case clinic

> A member brings a real-life challenge to the community and members struggle with it together

Because it is triggered by a need emerging from practice, the case clinic is the quintessential social learning activity.

What it is good for

The goal is to engage the collective experience of the group in the challenge of a member's case. The member benefits from the brainpower of the whole community, but everyone learns from the clarification of the challenge, the sharing of stories, and the discussion of advice.

Key success factors

- We recommend that the challenge be an actual one, and if possible one with urgency. This energizes the community.
- An important piece of prework is for case presenters to be very clear about the question they want to pose the group. The more precise the question, the easier it is for the group to provide useful and relevant assistance.
- We usually don't recommend a slide presentation about the case, which takes too long and can be boring. The member bringing the case is involved in all the details of the situation and they can easily overwhelm the group. It is important to limit the amount they impose on others. We often recommend creating a single visual, however basic, to represent the context in a synoptic way, with just the facts relevant to the case. The idea of the single visual is to help the community keep in mind the relevant dimensions of the situation during the whole activity.

Process

Figure 4.6 shows a typical case clinic protocol. It is indicative only and needs to be adjusted dynamically to move the process along. This protocol assumes that the community has about one hour, which is a reasonable time for a difficult challenge. The time actually required will depend on the complexity of the case, but the proportions will remain approximately the same.

Follow-up

All activities in this chapter can benefit from follow-up to provide continuity, but it is specially the case when receiving help on a personal challenge from a community that has an ongoing commitment to learning together. A few weeks or months after a case clinic, the community can ask the case presenter to report on what actually happened.

There is a lot of value in such following-up. It shows a sustained commitment to the success of the member receiving help. The community is not just giving glib advice or brainstorming ideas; it is ready to see its suggestions through to implementation. The community also learns a lot from seeing how its advice does or doesn't work out in practice.

Steps	Action	Time	Hints
1. Context	Presenter gives just enough context to frame the challenge, then poses a specific question to the group.	5–10	A simple visual can be helpful, but avoid slide presentation or lengthy descriptions at this stage.
2. Understanding	Group asks clarification questions to get a better understanding of the context and the nature of the challenge. Responding to these questions, not the initial introduction, is the main vehicle to convey the nature of the challenge.	15	Refrain from offering advice at this stage. But good clarification questions often shed a new light on the challenge.
3. Sharing related experience	Group members share related experiences and stories.	0–15	This timing depends on the number of members with related experiences.
4. Advice	Group members give advice and discuss each other's advice from the perspective of their own experience.	15	To keep things grounded in experience, encourage members to provide their advice in the form of stories, saying what they did when in a similar position.
5. Summary	Presenter summarizes insights and advice they are taking away.	5	This is something to follow up on at a later meeting.

Figure 4.6 Typical process for a case clinic

Format options

- **Whole group.** The entire case clinic takes place as a whole-group discussion and brainstorm. This works well for smaller groups, face to face or online.
- **Consolidated advice.** Before giving advice (i.e., step 4) the group huddles (in a different room) to consolidate their advice while the presenter reflects on stories they heard. When they come back together, the presenter gives their reflections and others offer their collective advice.
- **Fishbowl.** For larger groups, a fishbowl format can work well (see next section for a description of the process).
- **Small groups.** After the initial introduction and questions, breakout groups go off to discuss the challenge and come back to compare their ideas.
- **Separate questions.** The presenter creates a set of different questions and the group divides into subgroups to discuss each question. They come back together and bring the outcome of their conversations to the whole group.
- **Roles.** Different members of the group take different roles, such as supportive advisor, skeptical critic, or out-of-the-box proposer. When giving and discussing advice they do this through their different roles.

Variations

Rotating clinics. Multiple presenters bring their respective challenges, and the community divides into the same number of groups. The presenters move from one group to the next for mini-clinics, then presenting to the whole group what they have learned from the process.

Delayed response. The presenter only listens to advice and to members' discussions of each other's advice, but does not respond or comment until after the entire advice phase. While this variation can deprive the discussions of the presenter's perspective, it can avoid the situation where the presenter feels a need to push back on every piece of advice defensively.

Exploring a new idea. A case clinic can also be triggered by a new idea, which a member is not quite sure about. The request is for the community to debate the potential of the idea from the standpoint of its practice. A community can provide a good context for such "wild exploration." Unlike a team, which is under pressure to accomplish a task and may not have the patience to consider something that is not ready for prime time, a community convenes a group of peers who can appreciate the promise of an idea and be willing to discuss it, even if it is half-baked. In the process, the idea can be refined, its practical implications explored, and its potential downsides noted. The idea can also gain legitimacy: running an idea by your community in a case clinic can give you more credibility when you propose it to your team or your manager.

Case clinics

Our technology organization regularly develops new tools and processes for our technologists. This rapidly evolving landscape can be confusing, so the Mumbai *Ignite* DevOps community conducted "bring your app" sessions, where they would work together to solve real problems and to help onboard the member's application to new strategic tools.

This delivered value directly to the members, who develop highly relevant new skills and knowledge of strategic tools, and to the business by addressing the problem brought to the group. These clinics also provided an excellent focus for the community: people enjoy helping each other to solve real, tangible issues.

"The opportunities we've gained as part of the DevOps *Ignite* Community have been tremendous, not just technically but also from a leadership standpoint. We enjoyed collaborating with leads from various teams to explore some of the upcoming and latest topics in the field of DevOps."

Design clinic

Our colleagues at the Center for Community Learning at Western Washington University have created a shorter adaptation of the case clinic format, which they call a *design clinic*. Besides being shorter, it is also less demanding. The case clinic format pushes a community to get deeply into the case and discuss possible ways forward to get to some kind of agreement on promising options. By contrast, the design clinic merely attempts to broaden the thinking and open the horizon of ideas. It invites brainstorming without seeking convergence. It is therefore well suited when time is short and when people come from a diversity of backgrounds and contexts.

The idea of a design clinic is to follow a series of prompts on a strict timeframe tightly managed by a facilitator who moves things along. Prompts encourage people to give very short contributions by simply completing the sentence, rather than answering a whole question. Usually someone volunteers to take notes. The process is outlined in the table in figure 4.7. For the full protocol, check the document of the Center for Communitylearning: https://docs.google.com/document/d/1yv6fxRz-9k660XdcIm4_WPVqjkMP41FtvIiPUalwXyg/edit

Prompt	purpose	speaker	minutes
Could you help me with ...	Introducing the challenge	Presenter	2
Share more about ...	Clarifying the nature and context of the challenge	Group asks and presenter answers	4–6
This makes me think of ...	Opening the thinking by sharing relevant experiences and stories	Group shares, presenter is silent	4–6
You might try ...	Brief suggestions about next steps	Group suggests, presenter is silent	4–6
What struck me ...	Just a few highlights	Presenter	2

Figure 4.7 Outline of the design clinic protocol

Storytelling

Sharing stories of practice as a way to convey or trigger learning

Storytelling is often part of another activity, but it can be an activity on its own. It is such an important way for practitioners to recognize each other and learn together that we describe it on its own.

What it is good for

Practitioners love to hear each other's stories of practice. Stories convey learning through vicarious experience. Their experiential nature makes them real. Their dramatic element makes them interesting and memorable. The existence of a protagonist, especially someone who is a peer, invites identification, and therefore relevance. Some communities do most of their learning through such stories.[1] Stories can be prompted by all sorts of triggers, and it is good to be attuned to occasions for storytelling. If a discussion is getting too abstract, a personal story can bring it back down to earth.

Process

A good story conveys the challenges someone faced, what happened, who did what, how it felt, what worked and what did not, and how the issue was or was not resolved. It is often in the concrete details of a story that practitioners find most value.

Unlike more prescriptive instructions, like a best practice or a procedure, a story does not impose its learning. The implications are for the listeners to draw. But a story's ability to invite identification pulls listeners in and allows them to imagine the story in their own context and get from it just what has relevance to them.

Storytelling need not be a one-way communication. In a community of practice, it is often an interactive process with the group pulling out details and explanations that will increase the story's relevance to them. With large groups, we have sometimes used the fishbowl format for this interactive storytelling (see below).

After a good story, it is useful to hear what others are getting from it. This can trigger the imagination of everyone.

Variations

Interview. A good way to tell a story, especially in a large group, is to have a member act as an interviewer, pulling out details, and pointing to some important elements that the storyteller alluded to without realizing their importance.

[1] In an ethnography of a community of practice of technicians, Julian Orr shows how the knowledge of the communities about fixing machines lives in stories, which he calls war stories of combat with a recalcitrant machine (Orr, 1983).

Storytelling and sense of community

The CCHN Community is first and foremost a social network. As participants share frontline stories, there is an immediate level of intimacy. Most of them have been exposed to traumatic experiences, several have lost colleagues. Members of the CCHN Community have lost their lives on the battlefield since its creation. There is always a close sense of interdependence and proximity among members of the CoP, even for those who are actually meeting for the very first time. Much like army veterans, this sense of shared experience is particularly true when participants recount stories from their context. The listeners understand the story at a different level than other lay persons would; the stories make them relive some of their own experiences that have marked them.

While the mutual recognition and empathy create immediate bonds, it is important in this environment to limit the risk of “re-traumatizing” participants in peer engagements. The workshops need to set limits to the storytelling and frame the conversation around the application of specific tools, giving it an educational purpose that contains to some extent the emotional discharge. The CCHN has also developed a series of five-day retreats tailored to the needs of members seeking support to manage post-traumatic stress. These retreats are offered in partnership and under the supervision of mental health professionals who help set the right background and limits for these exercises.

Hot topic conversations

> Discussing something that is of current concern to all members

Well-functioning communities have lively discussions of all sorts of topics relevant to their domain—the definition of a key concept or term, the implications of a policy, the usefulness of a new tool, the significance of a new research finding. Domains are not static. Topics come and go (and come back), new issues emerge, new policies are created. When the community discusses such topics, members develop their understanding of their domain and the context in which their practice operates.

What it is good for

Hot topic conversations are a chance to hear a variety of opinions on a topic of shared interest. The point of collective sensemaking efforts is not about achieving consensus. On the contrary, members of healthy communities have a diversity of opinions on various topics of importance to the domain. Exploring these opinions with or without resolution will raise the level of awareness of the domain for everyone.

Process

Most of these conversations require minimum structure. The most important is to ensure that specific voices are not ignored or silenced, inadvertently or intentionally.

You also need to look out for soap boxes. Some communities become hostage to people with strong opinions or who tend to bring up the same gripes. These types of rants distract from a focus on practice and turn members off. Cutting the debate may be necessary. And focusing on issues of practice with concrete stories can give the conversation a more productive turn.

Variations

Rapid fire. Some communities invite members to select a topic and they are given 5–10 minutes to introduce the topic and engage the group. This rhythm can be energizing and give everyone who cares to a chance to introduce a topic. This technique can also be a good way to promote a series of communities to potential new members, perhaps at an organization-wide event.

Hot topics discussions in *Ignite*

We have adopted several techniques for hot topic discussions in *Ignite* communities of practice. Here are three that we have found particularly useful (with the reference for more detail):

Lean Coffee (leancoffee.org). To set the community's direction democratically and generate ideas to cover in future sessions, many *Ignite* communities regularly host "Lean Coffee" meetings. These are agenda-less meetings that invite the participants to rapidly build, vote on, and discuss a list of topics in a controlled, democratic, and time-boxed manner. For example, a community in Buenos Aires took the name literally and facilitated a lean coffee that included coffee and croissants. The goal was to come up with techniques on how to bring agile methodologies to life for community members. "If you want something good, bring food," they said!

Guided Conversations (guidedconversations.org). The facilitator comes up with a starting set of questions around a single topic. Members then discuss these questions with a strict time limit of, say, 8 minutes. New questions that seem important can then be added to the list. The format is based primarily on informal conversation and requires little up-front preparation from the facilitators. It allows all participants to share their opinions and experiences. "The guided conversation enables a more collaborative environment where a message can be transmitted more effectively, because people engage with the session and improve it as they actively participate."—Mateo, Buenos Aires

Lightning or *Ignite* Talks (*ignite*talks.io—the name is a coincidence!). These are for rapid-fire sessions. *A Lightning talk* is a 3–5-minute presentation, where slides are *optional*. An *Ignite talk* is 5 minutes long and it must include 20 slides which advance automatically! These are fun because they move quickly and keep the audience's attention, with a lot of variety and engagement throughout. They can be daunting for presenters, but they're a great way to practice public speaking skills.

Project review or postmortem

Doing an in-depth review of a current project, a success, or a failure

Sometimes a member would like to engage the community in an overall review of a project. This can be in preparation for a new phase, at the completion of a project, or as a postmortem for a project that did not go as planned.

What it is good for

Using the complexity of a full project to learn together by reflecting on the whole thing.

Process

This activity has many of the characteristics of case clinics, but it is driven by a request for an informed opinion on the state of a project rather than specific challenge with which a member needs help. This requires more time in presenting and inspecting the project, interspersed with moments of reflection in whole or breakout groups.

Variations

Mock review. Many technical communities exist in organizations that have a formal process of reviews, with gates at which projects must receive approval before proceeding. A good way to increase the chances of a successful review is to present a dry run of your project review to your community, followed by a discussion of what you did well and what should be improved. As for case clinics, it can make the discussion easier to give people explicit reflection roles, like appreciating the positive, being critical friends, and suggesting out-of-the-box ideas.

Actual project reviews. In addition to helping each other prepare for project reviews, some communities make it a habit to attend each other's actual project reviews, if it is allowed. They find that it provides a good way to learn about the process, to understand what help is needed or what issues they share, as well as to build commitment to each other.

Role-play and hands-on activities

Doing the practice together or something that simulates it

Depending on the domain, a community may prefer activities that involve learning by doing.

What it is good for

Learning by doing is often highly engaging for members and its embodied character leads to "sticky learning," which is more likely to be used in their day jobs. Real or simulated activities help members prepare for difficult or unfamiliar situations. They get a feel for approaches that are likely to work and those that are counterproductive. Learning by doing in a community context can help build up experience and self-confidence in a safe environment.

Process

Sometimes it is possible to engage in actual practice together, especially if there are online tools that enable this type of joint practice. For example, software engineers may enjoy honing their coding skills by practicing together using mob programming or screen-sharing activities.

Often, however, participants have to role-play the kind of challenge they face in practice, taking up different roles. A role-play is a semi-structured and semi-improvised activity that can help members practice a challenging situation they are likely to face in their work. The community identifies the situation, sets up a scenario that feels real, assigns roles, and then acts out the scenario. Sometimes, participants take it in turns to play the protagonist, trying different ways to change the situation or the course of events. This can be done online as well as face to face.

After each role-play there is a general discussion about what the protagonists did that "worked" or what others would have done differently. Community members then acts as peer coaches to reflect on what was done well and what could be improved in a member's response or "performance" during the role-play.

We have seen communities do this for a member preparing for an important meeting or presenting a value proposition. We have seen communities help prepare new members for an important practice in their profession, for which they have had no experience.

Variations

Antagonistic situations. We have found that a role-play can be especially useful—and fun—when some members act as devil's advocates or difficult interlocutor, for instance, as angry customers, resistant buyers, skeptical managers, demanding clients, or aggressive negotiators. Often, the most animated conversations arise around role-plays that highlight "wrong" practices as this can more readily provoke opinions and lively debate.

Live demos. Practitioners are very interested in tools of the trade. A good way to introduce a tool or a piece of technology is to include a live demo where members can try the tool themselves. This can be followed by discussions of how the tool can affect the practice, what new doors it opens, and possible downsides.

Working out loud. Sometimes it is best to witness a practitioner engage in typical activities of the practice while verbalizing their thoughts during the performance of the activity. This can be done as an ongoing commentary on a video. It gives member insight into the complex but largely invisible reasoning, uncertainties, and continuous decision-making underlying what can appear to be seamless masterful performance.

Technologists like to get hands-on

Many of our communities tend to prioritize hands-on activities because that's what their members want.

Some communities focus on programming languages such as Python, Java, or JavaScript; others explore methodologies such as Test-Driven Development; and others, like our "Coding for Non-Coders" communities, help people learn the basics of software development.

By including hands-on activities such as pair or mob programming, simple coding katas, or even project development over a series of meetups, they find that the relaxed, social nature of the community is an ideal place to learn.

These communities have provided a home for new technology talent, supporting people who move from other roles into software engineering—transformational value in action.

Wrong to be right. An Agile community in Delaware acted out "the wrong way to run a team retrospective." Their goal was to showcase obvious anti-patterns in an engaging, funny way that captures the attention of the audience, as they are asked to call out the issues by typing in a chat pod on the side. It proved to be so popular that the text scrolled so quickly it was impossible to keep up! In the end, this activity was adopted into our tech conference because it was said "more people need to see this!"

Demos. Live demonstrations of new tools and software packages are popular, especially when the participants can subsequently try them for themselves. But even simple demos can be inspiring. At an *Ignite 24* session, a member of the *Ignite* Internet of Things (IoT) community showed us his garden irrigation system. It is controlled remotely by custom Python software he wrote to run on a tiny computer called a Raspberry Pi. We have found that if we give people an outlet for their creativity, they come up with things that can amaze you!

Documenting practice

> Reflecting together on an aspect of practice systematically enough to be able to produce guidelines about it

Some communities make it a collective activity to document their practice. They produce a toolkit or a guidebook for practitioners or for beginners. Sections may include procedures, tip sheets, examples of good practice, lessons learned, or case studies.

What it is good for

The purpose of documenting practice is twofold. The most obvious value is the production of the document and the guidance it provides. But community members often reflect that more than the final product itself, which tends to be most useful for junior members, the value lies in the focused and sometimes intense conversations, disagreements, and reflections engendered by the goal of producing a joint document.

Process

In a face-to-face or online meeting, community members discuss the topic to address and its various components, creating an agreed outline. Then typically, a member takes responsibility for producing a first draft of a section about a specific aspect of the practice. The community then discusses this draft and refines it until there is agreement that it is ready for inclusion into the community's repository. Often the person who authored the section remains associated with it and is expected to keep it up to date over time.

Variations

Group writing. Shared writing tools, including wikis, now enable a more collaborative authorship by letting all members or a designated group to contribute to the writing until sections stabilize to represent the perspective of the community.

Outsourcing the writing. Most practitioners love to talk shop, but many hate writing. Some organizations have hired journalists or experts to write on behalf of the community.

The process of producing the document is still under the control of the community, but someone else takes care of producing drafts, keeping a list of issues to address, and perhaps interviewing some members about specific topics.

Solving a recurring problem. While helping each other and reflecting on their practice, members often recognize a recurring problem they all face. Being a community gives them an opportunity to try to address it once and for all and documenting a shared approach by combining their collective wisdom and their experience of a variety of contexts. Typically, such problem-solving activities involve the following phases:

- Recognize the problem and the various forms it takes
- Analyze the causes of the problem in its various forms
- Inspect or devise one or more solutions that seem to cover most cases
- If necessary, recommend changes in factors that are not directly under the practitioners' control
- Create the necessary tools and documents to implement solutions in the members' respective contexts, using the authority derived from the collective voice of the practitioners
- Over time, members report on their use of solutions and the community refines its product accordingly

Addressing recurring problems this way is important for a community. From a practical standpoint, bringing the community's collective wisdom to bear increases the likelihood of good solutions. From a community standpoint, it creates a sense of accomplishment and even a relief because revisiting the same problems over and over can be rather de-energizing.

Launching CCHN Frontline Negotiation Labs

In 2021, the CCHN launched a series of monthly "labs" convening members of the community of practice to engage in the co-design and testing of new tools and methods based on their field experience. One of the first tools under consideration was an "Access Barometer" designed to facilitate the analysis of the degree of trust toward an organization in a particular context. It provides a systematic process to capture, review and compare over time various sources of data that show the extent to which individual organizations are trusted by their counterparts in any given context. Such an analysis can be instrumental in preventing security incidents in unstable environments.

Members of the community in contexts such as Myanmar, Congo, or Niger were first invited to a briefing session on the proposed tool and were provided with a template to work with. A second invitation was sent two to three weeks later to regroup and compare notes on the implementation of the new tool.

While the level of sustained participation can vary significantly in particular contexts due to competing priorities, several labs can be organized in parallel collecting observations across contexts on the relevance and mechanics of the proposed tools.

Once the relevance and robustness of the proposed tool is confirmed, the result is integrated into the next iteration of the CCHN Field Manual, which is updated once every two to three years.

Mutual benchmarking

> Understanding the key components of a practice and seeing how each member is doing along each dimension

Members are usually curious about what others do and how well they do it. Mutual benchmarking is a way to formalize this curiosity and possibly even to use it as a baseline for tracking the value the community is creating, often over a longer period.

What it is good for

To bring the overall performance of the community to the level of the best.

Process

The simplest way for a community to develop standards of practice is to compare member performance across situations, teams, sites, business units, or geographical regions. This seemingly obvious activity is not all that common because it requires a lot of trust, a mature community committed to collective learning, and a supportive environment. It is important to view this activity as a learning activity rather than an assessment so that no one is tempted to “play the numbers” or otherwise try to look good.

Variations

Dimensions of practice. One way to help keep the focus on learning is to assess performance along more than one dimension of the practice. This defines multiple learning areas. Dimensions with a large performance gap between the strongest and the weakest are likely indicators of high learning potential. Multiple dimensions also tend to create more reciprocal learning relationships. Organizations that have adopted multidimensional mutual benchmarking have found that units are almost never good at everything and that most units are good at something.[2] So everyone has something to learn from someone else.

Models of practice. Some communities have taken the process even further. They have established a model of practice that describes what performance looks like in each dimension of the practice on a spectrum from beginner to advanced, to world class. Models of practice can be useful tools for mutual benchmarking because they provide a language for discussing and comparing performance. They also enable self-assessment, which can seem less threatening—with a good sense of what their learning trajectory from there is going to look like. These models of practice include maturity scales and delineate fairly clear developmental paths. They are most suitable to practices that are well established and slow to change because the assumption of stable maturity scales can miss important innovations.

Practice-development projects

> Chartering a project to make progress on a specific issue of the practice on behalf of the community

Some challenges are too big for a community of practice to address in the context of its regular activities or volunteer participation.

[2] See p.186 of *Learning to Fly* by Collison and Parcell (2004).

What it is good for

To address an issue that requires focused work and commitment

Process

Many of the activities in this book could be undertaken by a focused practice group rather than by the whole community—documenting an aspect of practice, responding to a request for an opinion, or exploring a new idea. But sometimes, the scope of the tasks required for practice development goes beyond what most members can commit to through their regular participation. These include intensive tasks such as doing research, analyzing big datasets, surveying the competition, systematically exploring the potential of a new methodology, or doing a structured learning expedition. In these situations, the community needs to initiative a project.

The difference between such a project and any regular project in organizations is that it is chartered by the community—either because a group of members propose that they form a team to explore something they are interested in on behalf of the community, or because the community decides that a challenge or opportunity is worth doing some focused work and asks for volunteers to form a project team.

The first step is the chartering process by which the community defines the goal and scope of the project, who is going to work on it, how it is going to be resourced, including the time of members, and how the project will interact with the community.

For the time they form such a chartered practice group, the members who participate act more as a project team than as a community, managing the task, dividing the work, and coordinating activities. For its part, the community at large acts as a kind of "learning sponsor" for the project (and in some cases, when it has a budget, as the funding sponsor as well). In either case, the team regularly reports to the community, receives feedback, and brings back its findings or products to the whole community upon completion of the project.

Variations

Existing project. A project involving members is initiated for some other purpose and the community adopts it as a case study for its learning.

Doing something useful for someone. Sometimes the best way to push the boundaries of a practice is to do something useful together, for instance doing some *pro bono* work together as a way to improve the practice or take it in new directions. While the situation needs to be carefully chosen to serve this purpose, it is a more open-ended learning process than a practice-development process driven by a specific issue. But having an actual task to accomplish, which is meant to be useful to someone, focuses attention and grounds the learning is action.

30 days to become a better practitioner

One of our communities recently undertook a “Thirty-day challenge”, where community members worked alongside each other as “accountability partners” to learn something new, practice a tool or technique, or even practice techniques for life–work balance each day.

The challenge followed the mantra of “No matter what stage you’re at in your career, there’s always something new to learn.” It was designed for people at all levels, whether they were just getting started or had been involved in the field for years.

Each day, a new challenge activity was posted, with participants keeping a journal throughout to record their progress. After the month was up, the community held a meetup in which the group could report back on highlights and experiences from completing the challenge.

“This has been a great exercise, and I have found it even more beneficial than I thought before I started. It’s been fun to challenge myself and take the “JPMorgan Chase goggles” off, remembering there’s a big world out there to be explored.”

Not everyone in the community took part, but it inspired self-driven learning and created some extra buzz and excitement for those who did!

Not only that, but this partly inspired a global *Ignite 30-Day challenge* for community leads to explore social learning practices as well as to consider how they could design a further set of challenges for their own community domain (Blockchain, DevOps, Public Speaking, etc.).

4.6 Activities oriented to an overall view of the community

While still focused on practice, many activities attempt to create a broad view of the community's take on an issue. This can easily be done with simple tools like polls, surveys, or analytics. But sometimes a more involved activity is required for this purpose. Again, the point is to achieve an overall view of the community rather than achieve consensus. But consensus or not, it is often useful to create an overall picture of all the perspectives involved.

Fishbowl

Involving a large group in an intimate, small-group conversation

The fishbowl is essentially a leaderless process that stimulates active participation by a large group in a focused conversation.

What it is good for

This is a well-known conversation format, known by different names, which we have used often to create an engaged conversation when the group is too large for a conversation among everyone and when the fragmentation of going into small groups is an obstacle to a shared experience. We have used it for various types of conversations, case clinics, and storytelling. It is also used to give a voice to diverse opinions on controversial subjects. The largest group we worked with included over 200 people.

Process

The format is to form a small inner circle for the active conversation and a large outer circle for witnessing it. The idea is to create a constant exchange of people between the two circles, so that it is not a panel with an audience, but a flow potentially involving everyone.

In physical settings, a small number of chairs (usually 4–6) form the inner circle in the middle of the room and everyone else sits in an outer circle. Online, we have used turning video on to create the inner circle and video off for others.

At first, a few people sit in the inner circle to initiate the conversation, usually the people who asked a question, presented a problem, or proposed a topic. It is also useful to include an initial interlocutor. They start talking. If someone else wants to say something, they have to join the conversation in the inner circle. They get up physically and join the inner circle. If the inner circle is already full, they tap on someone's shoulder in the inner circle to ask them to leave and go back to the outer circle. Online they turn their video on, asking someone to turn theirs off. In most versions of the activity, there is no limit to how many times you can join the inner circle.

There are two important and strict rules, which many people are tempted to break and which may need to be enforced by a facilitator:

- You cannot shout from the outer circle. The only way to say something is to join the inner circle.
- Once you are in the inner circle, you stay there until someone asks you to leave. The idea is to engage in a conversation, not to say your bit and get out (which some people seem to want to do).

And obviously, people should not tap the shoulder of someone in the inner circle who has not yet had a chance to speak.

Note that if there is a facilitator, their role is to enforce these rules and not "facilitate" the conversation. People in the inner circle do that. Sometimes it is helpful to use a talking stick to manage taking turns in the inner circle. We have used a microphone as a talking stick when the group is large. It is important that people can hear well in the whole room, especially because people in the inner circle have their backs to those behind them in the outer circle. You do not want people to have to turn to the outer circle to make their contribution to the conversation audible. The conversation should be happening in the inner circle and people should be talking to each other there.

Variations

Half circles. There can be some discomfort with the idea of being in the inner circle and turning your back to the "audience." But they are not an audience, they are part of the conversation. So, we have always pushed for the format of two concentric circles, which we find works best in creating the joint focus we want and making the flow of people easy. However, if the discomfort seemed culturally too high, we have relented and also done it in the form of a half inner circle with the outer circle in front. It feels more like an audience and does not quite have the same feeling of everyone together in conversation.

And it is important to set the chairs so that it is easy for people to quickly get up and join the conversation.

World café conversations

> An ongoing series of small conversations with changing groups so that everyone talks with everyone

What it's good for

Exploring the take of the whole community on a specific question. We have used this format for groups of various sizes ranging from a dozen to a few hundred people.[3]

Process

The first step is to clearly define the question for the groups to discuss, so that it will engage participants and focus the conversations. For this purpose, it is usually best to have a single question. But in some cases, it is necessary to have two or three to cover a topic.

Groups of 4—6 sit at café-style tables or in online breakout rooms. They elect or are assigned a host. Paper tablecloths or an online whiteboard serve as a shared sketch pad for people to doodle, jot down key words and ideas, or even draw. The groups start to discuss the driving question(s). We encourage them to share stories rather than just engage in general statements or abstract arguments.

After 15—20 minutes everyone moves to other tables or breakout rooms. They do not move together but try to disperse maximally, since the idea is to continue the same conversation, but with different people. The host stays at the table or in the breakout room.

The table hosts welcome new people to their table, give a quick sense of what happened so far, and invite them to add to what has been discussed, weaving together what they bring from other tables. Depending on the size of the group, we do 3—5 rounds of this. The idea is to have everyone engage around the same question with as many other members as possible.

After the café conversations, we ask people to report patterns they have seen as they discussed the question in different groups.

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[3] The café conversation format was initially proposed by Juanita Brown in her dissertation (2001). Since then, it has been used widely for helping groups address a key shared question in a wide range of contexts. The approach has given rise to an international community of World Café practitioners who published a book about it 2005. See References.

Variations

Introductions. Café conversations can be a way to make group introductions. Introductions with a smaller subset of people are more meaningful and by rotating round the tables people get to introduce themselves to all or most of the larger group.

Individual versus group reporting. Sometimes we do the reporting at the end of the table discussions with the whole group "popcorn" style, letting anyone volunteer something. But sometimes we do it table by table from the last group they were sitting at. First discussing their reflections and ideas at the table before presenting them to the whole group avoids participants throwing up their personal pet peeves, ideas, and issues.

Dot voting. As people report on their conversation, we write each emerging idea or theme on individual flipchart papers. We then post them on the wall in the room or online on sticky notes that go on a whiteboard. We give everyone a small number of dots that they can spend on the ideas or themes that are most significant to them (many digital whiteboards support this kind of voting online). The result creates a visual, prioritized representation of the "mind of the room."

Word cloud. Another way to create a collective picture of the outcome is to use a polling software that can create a word cloud. We invite participants to enter 3–5 words or phrases that reflect their experience of the café. Those that come up more often are in bigger fonts.

Building a learning agenda. As mentioned under the launch section, a specific use of this café format is to build a synoptic view of how a community could be useful. Members are invited to talk about the challenges they are struggling with, with the driving question something like what keeps you up at night. This is a good launch activity for a community, and it can be used (again) at various points in a community's lifecycle.

Debates

> A formal debate between two teams arguing the pros and cons of an issue

Most people are familiar with high school debates, in which participants have to defend a position independently of what they believe personally. This forms the basis of this activity.

What it is good for

Debates are good to explore the thinking of a whole community when there is a choice between two options regarding a contentious issue. The debate format turns the discussion into a game, which allows people to explore various opinions, arguments, and doubts without getting too personal. One danger of a tight community is groupthink: people may find it hard to disagree when the majority seems to believe one thing. They don't want to rock the boat or appear negative. Making disagreeing the point of a game allows doubts and skepticism to be expressed.

Process

After presenting the two sides of the question, we split the community into two groups. We usually do it at random, for instance by getting people to count 1-2-1-2-1. Making the side assignment random makes it clear that people are not there to defend their own opinion.

Then we assign each group to one side of the issue, usually the pros and the cons. We ask the con group to try to not only be against the proposition, but also to argue for better alternatives. Each group goes to opposite sides of the room or to a separate breakout room if online. Each side develops its argument and selects three people to join the debate table.

In a physical room, we have a debate table in the middle of the room, with three chairs on each side. Online we ask everyone but the debating teams to turn off their video.

Keeping things playful, we make the debate itself very formal: one minute for each person. We start with the first pro person, then a con person, switching side each time.

After the first round, we usually have a second round. The sides go back to their group or breakout room and prepare a final counterargument, having heard the arguments of the other side. They choose one person to join the round two of the debate. Again, one minute per person, but this time we start with the cons representative and let the pros person have the last word.

There are often lots of laughs and clapping (and boos) as the sides spar at the debate table. But we do not declare a winner because we do not use the debate to make decisions. This would infuse the process with a weight that would work against its value as a game. Instead, once it is over, we invite the community to reflect on the debate out of role, expressing their own opinions after having heard both sides of the argument.

Booths and gallery walk

> Creating visuals about each member's contexts and achievements, then using these visuals to engage in conversations

Moving around a "gallery" of displays to engage in conversations about each other's practice creates a fair-like atmosphere that is conducive to interesting conversations.

What it is good for

This is a way for people to take a deep dive into each other's contexts and challenges. It can be used both within a community for people to understand each other's context, and across communities at a fair or other broader event.

Process

We invite participants to create a "booth" representing who they are and what they need or can offer. They can use graphics, pictures, text, and existing artifacts, either on large physical pieces of paper or on a section of a shared online whiteboard.

We then give them time to visit each other, discuss their contexts, and ask questions to understand the relevance of what they are doing and where they want to go.

In some communities, this simple activity has generated the liveliest conversations of all activities we have tried. Be ready to spend plenty of time on it.

Variations

Priming the pump. Sometimes we precede the design of booths with a discussion of what members would like to know about each other. It is useful in guiding the design of booths that will be relevant to fellow members. If you do that, it is important to point out that the booth is not a list of bullets answering the questions; the purpose of the questions is only to help take into account what people are curious about. The display should be an imaginative and ideally visual representation of projects and their contexts.

Ignite community booths

In November 2017, word had spread and *Ignite* communities were active in Glasgow, London, and Chicago.

At that time, we heard that the Global Technology leadership team were visiting us in Glasgow.

We saw this as an opportunity for our communities to demonstrate who they are, what topics they care about, and what they had been doing together to advance the practice.

A community showcase was arranged, to take place right outside the meeting room where the leadership were holding a briefing. Each community had a booth set up and all our local colleagues were invited.

The booths generated such noise, such a vibrant atmosphere, and such activity that the visitors could not resist coming out to see what was going on and take a tour of the communities.

Ultimately, this event resulted in our leadership aligning behind the vision of what we were trying to achieve, and a few weeks later I found myself being asked to “do *Ignite* full time”—which was (and still is) a dream come true.

Practice matrix

> Exploring systematically each member's take on a series of questions and developing an overall view of the state of practice in the community

In some ways, a practice matrix is a more disciplined and systematic version of a booth gallery. It is a way to share what everyone is doing and how well.

What it is good for

To systematically get a synoptic view of how everyone in a community or across communities approaches a particular challenge and explore what to do about it.

Process

We start by brainstorming specific questions that participants have about each other's contexts, projects, challenges, and aspirations: What do you need to know about each other systematically in regard to the issue at hand? This initial brainstorming can be done as a whole group, in affinity breakout groups, as a café, or even in advance by a small group.

Questions for each other	Project 1 answers	Project 2 answers	Project 3 answers	... Project X answers	Row analysis across projects
Question 1					
Question 2					
Question 3					
... Question Y					

Figure 4.8 Sample format for a practice matrix

Figure 4.9 Using colors on a practice matrix

After this discussion, we create a big matrix on a wall or on an online spreadsheet, as shown in figure 4.8. In the first column, we write the questions that came out of the brainstorm. The rows thus represent each question. The other columns represent each participant or their team/organization. All participants fill in their own column, answering the question(s) on each row.

Once the matrix is filled out, we invite the community to reflect on the synoptic view it offers. First, if participants are not very familiar with each other's context, we ask each of them to comment on their own column, so people gain a coherent sense of each context. Then we put people in pairs or small groups to analyze rows. They inspect the row they are given and look for patterns, overlaps, or gaps. They report back how the community as a whole currently addresses that particular question, where there are gaps and opportunities, and what new joint learning is possible. We often include an extra column in the matrix to post the results of this row analysis right on the matrix.

Reflecting on the row analysis often leads to the creation of small practice groups to explore how the community could make progress on the issue.

Variations

Colored responses. Sometimes, we have used different color paper (or cell background online) to represent the type of answer, for example: green for something you do well, blue for something you would like to learn how to do, and red for something you don't do at all, as in figure 4.9. This makes learning opportunities more immediately visible even without having to read the entries.

Shared timeline

> Creating a visual timeline that combines the histories, perspectives, and hopes of all members into one picture

This is a way to create a joint artifact to visualize people's stories about the past or the future.

What it is good for

To create a collective sense of history among the people involved.

Process

We draw a timeline on a big piece of butcher paper, either on the wall or on a table. For online, we use a whiteboard that supports the use of notes. The process is slightly different for the three purposes for which we have used these shared timelines—at the start to understand who is here, to reflect on the life of a community, or to capture ideas about envisioning the life of a community:

- **At the start for in-depth introductions.** In this case, we go back a few decades. Sometimes we also extend the timeline a bit into the future to see where people would like to be at some time in the future. We invite people to select three or some other small number of life events that brought them here. They create (physical or digital) sticky notes with their name, the year, and key words or a drawing to represent those experiences and place them on the timeline. Then we work through the timeline chronologically, inviting each person to narrate their posting when the conversation reaches their date on the timeline. This seems to work better than having each person go through all their postings at once because the turn-taking weaves their stories into the passing of time.
- **For reflecting on the history of a community.** In this case, the timeline represents the relevant lifespan of the community—and sometimes a little bit into the future. We ask participants to select a small number of moments in the life of the community that were particularly significant to them. Again, they place sticky notes on the community timeline

and recount their experience of the event. If the group has been through difficult periods, we sometimes divide the timeline into two regions: above the line are positive experiences and below are negative experiences.

- **At the end of a launch or renewal session.** We have already described this use of the shared timeline when describing a launch event in chapter 3. In this case, we draw a line into the relevant future, usually about a year, and invite people or working groups to post their ideas about future events or their commitments to undertake something on behalf of the community.

Building this type of visual overview of the group over time has always generated useful conversations, both in the process of developing the timeline and during reflections on it.

Variations

Color coding. We sometimes use different colors to identify a person or a group. This makes it easier to quickly see individual trajectories or group work.

Shared event planning with milestones. Members from different groups, departments or countries mark upcoming events they are involved in that could be interesting for fellow members. Sometimes the community can work backwards from those events to plan milestones or joint activities that could lead up to that event.

Joint-individual reflection

> Pauses for moments of reflection—individual and shared with the group.

We have found it useful to pause every so often in meetings for a moment of "joint-individual" reflection.

What it is good for

Reflection—both individual and collective—is an important part of social learning. Pausing to reflect helps the learning seep in and spread among participants.

Process

For this activity, we open a shared space in a joint editor like Google doc. Sometimes we have prepared some questions about what insights people are taking away and what it means for their practice; but often the heading is just the date and time.

First, we reflect individually in silence. Everyone writes their takeaways, their insights, their favorite quotes, or their emerging questions. We leave it to individuals to decide whether to include their names or write anonymously. Working in a shared document allows everyone to see in real time what others are writing.

When the writing slows down, we invite people to reflect on other's reflections and comment on what they see—what other people are thinking or feeling, what insights are being generated for them, and how this affects what they are doing. These conversations are a simple way to generate quick learning loops in the group, which spread and deepen the learning. People can be surprised by others' takeaways and learn a lot from discussing each other's reflections.

The process also generates an immediate documentation of the meeting. Of course, it is a bit disorganized. If we have a *social reporters* leadership group, they can use this joint document as raw material to create a more organized summary of the learning.

These moments of joint-individual reflection in a shared document are a useful practice for both online and face-to-face meetings.

Variations

Sometimes, we also use this process for reflections on the unfolding of the meeting from the perspectives of the different leadership tasks described in chapter 3. Each leadership group can reflect on its task in a separate subspace, which can then be shared with the whole group. Or we take the whole group through each task sequentially, reflecting all together.

4.7 Activities oriented to the outside

An ongoing community always runs the risk of falling victim to its own blindness. When members build a shared repertoire of practice, groupthink always lurks as a danger. Dealing with real-world problems can be a counterweight, but sometimes it is important to orient to the outside as we mentioned in the section on community maturing in chapter 3. There are many informal ways to do this, such as reading or searching the web. But some activities can be geared explicitly to this outside orientation.

Inspiring the next generation

Starting during the COVID-19 lockdown, a small practice group from the Glasgow *Ignite* STEM (Science, Technology, Engineering, and Mathematics) Advocacy community ran a project called "AstroPi Mission Zero," for children of JPMorgan Chase employees.

Over the course of three weeks, ten children learned how to write code in Python to capture the humidity in the International Space Station (ISS) and relay a message to astronauts.

Later, their code was sent into space and executed on real hardware on the ISS, after which the children received a framed certificate of completion.

This small community regularly contributes to the external tech community by sharing their skills and passion for inspiring children to choose a career in technology. It is just one example of many!

Guest presentation

Inviting someone to bring a new perspective to the community

This involves careful selection and onboarding of a guest who will participate in some of the community's activities.

What it is good for

Sometimes a community can benefit from the contribution of a guest, such as an expert, a supplier, a member of a "neighboring" community, or a researcher on a given topic. These guests connect the community to its broader field, bring new ideas, and infuse new energy and perspectives not available in the community. In addition to the traditional plenary session, some communities also arrange for the guest to work with subgroups or meet with individuals. Hosting guests can be a good development opportunity for more junior community members.

Process

Experts are used to setting the agenda. Many have their ready-made presentation and are not used to—or even comfortable with—engaging with a group beyond some short question–answer session at the end. But the idea of a community of practice is that practitioners set the agenda. As a result, a guest expert may need a bit of coaching and facilitation to prepare them to be engaged interactively with the community in the driver seat. They should be encouraged to bring stories from their own experience of practice. If an expert-led session is introduced, the core of the activity should not be the expert's presentation, but time for members to interact, ask questions, and draw the expert into their challenges. The outcome of the expert contribution should enable the community to *do something* from the perspective of their practice.

Guest presentations should not be a substitute for other community activities more focused on peer-to-peer interactions. A lecture series does not constitute a community of practice. We have seen organizations where communities were experiencing "low energy" in good part because their activities consisted almost exclusively of presentation events or webinars, like "brown bag" lunch speaker series (which are not bad things, but are simply not communities of practice).

Variations

Ramp-up and ramp-down. In this case, a guest event lasts about a week. It starts with a few days of online "ramp-up" discussion, then a videoconference or a meeting, and a few days of online "wind-down" discussion. The notes and a recording of the teleconference are published on the website for those who could not attend.

Expert at the end. In one community, experts were expected to join the full community meeting and talk at the end to discuss observations and suggestions that could help the community move forward. This means that experts cannot simply come with their usual spiel but have to use their perspective to shed some light on what they have observed through the lens of their outside expertise.

Ignite masterclass

External speakers are regularly invited by *Ignite* communities to facilitate what we term “masterclass” events.

Typically, masterclasses start with a talk with a broad audience which is “beamed’ to rooms in multiple locations (or held virtually). But they also must feature a hands-on element, where along with a smaller group, the speaker delves deeper into the practice and shares new techniques for their day-to-day use and application back in their respective teams.

This format constitutes something of a blend of traditional training and social learning. It is something we always try to encourage as a way to make a larger impact when considering the cost of external speaker events (in terms of funding and time spent organizing).

Workshops and training sessions

> Using the experience of practice to shape some tightly structured learning opportunities

Workshops and training sessions are not a main staple of a community’s activities, but some strategic, targeted training can give some members a useful boost or make the community useful to nonmembers.

What it is good for

Providing an entry into aspects of the practice to people who need it, whether they are members or outsiders.

We are often asked about how to expand a community of practice across an organization because the domain is potentially relevant to everyone, if tangentially. Domain like this may include things like digitalization, negotiation skills, or public relations. We usually recommend limiting the community of practice to people for whom the domain is key to their practice. For others, even if the domain is at times relevant, it is often not worth the commitment of a community of practice. For them, the community of practice can organize informative sessions and trainings open to everyone. The community acts as the main steward of the capability and decides how to give others enough understanding and experience to weave the capability across the organization.

Process

Organizing training sessions is a tricky role for communities of practice. On the one hand, they are in the best position to know what people should learn about their practice. On the other hand, time is always scarce, and what excites members is usually advanced conversations about what nobody knows rather than doing training about what is already known. When we have seen it work well, communities have received funding from their organization(s) to cover the time of members involved in training.

Variations

Outsourcing training. Some communities prepare training sessions in collaboration with a training unit, with the community providing the domain expertise and the training department taking care of the logistics. The community uses its learning over time to devise a training curriculum, but they hand it over to the training department to deliver.

Certification. Some communities have aligned with outside certification organizations so that membership includes a trajectory into becoming officially certified in their domain.

Organizing training

We can often be heard saying “communities of practice are not training” to help colleagues to fully grasp the social, peer-to-peer learning paradigm of *Ignite* communities.

However, on occasions, mature *Ignite* communities have taken advantage of our initiative’s connections with JPMorgan Chase’s learning organization to organize formal training within their chosen domain, giving community members “early access” to in-demand training and certification courses.

This provides opportunities to use the community of practice to demonstrate the "lifelong learning" impact of the training, by organizing follow-up sessions where participants share what they learned, and crucially *how they applied the knowledge*. Enabling these learning loops is a valuable contribution of communities to training formats.

Joint response

> Developing a joint position on an external development relevant to the practice

Communities often need to negotiate the meaning of an external development—a new policy, a new technology, a change in management—for the practice of members.

What it is good for

The goal may be to develop this joint response for members themselves to adapt their practice or for providing an informed opinion to an external actor.

Process

Communities always have to react to external circumstances. The process of developing a position on an issue of relevance to the domain is an excellent learning opportunity. It can surface all sorts of disagreements and divergences of opinion and force the community to negotiate a response that somehow represents the view of the community. Even if consensus is impossible, the confrontation of a range of opinions deepens the members' understanding of their domain. And finding a collective voice gives a weight to their joint response that mere personal opinions would not have.

Variations

Requests for opinion. Communities of practice are sometimes directly asked to contribute their view on decisions or policies that affect their practice. These requests are usually energizing for community members who have a chance to have their voice heard. Such requests can also be inspiring because they recognize the strategic value of the community.

Boundary engagement

> Working with other communities, through informal encounters, structured sessions, or joint projects

Boundary engagement involves activities that bring together people from different communities and that are designed to explore productive ways the communities can articulate their respective practices. It is particularly useful when the disconnection creates problems or when there is a source of tension between them.

What it is good for

There are times when two or more communities need their respective points of view to understand an issue. It makes sense to have a joint session to address such boundary concerns. Meeting with another community often brings fresh perspectives and new thinking. It can be a source of energy and renewal. Such boundary encounters can even lead to the birth of a new practice at the boundary between existing ones.

Process

Boundary engagement can be difficult because of misunderstandings, clashes of perspectives, suspicion, and conflicts of interest. Often the members of different practices not only have different terminologies that require translation, but they are not sure about their respective motivation or values. Some communities create stereotypes of others as part of their practice. Typical examples include law enforcement and social workers, salespeople and design engineers, or professionals and administrators.

Variations

Breakthrough activities. When two practices are in conflict, we have found that it often requires the discovery of a "breakthrough activity"—an activity that is simple enough to require a light commitment but turns out to be immediately useful to all sides. A simple example we have witnessed was with a group involving psychiatrists and social workers: they were able to go beyond quarreling about approaches when someone proposed the design of guidelines to refer patients from one specialty to the other. The immediate concreteness of such a breakthrough activity can move the encounter beyond ideological discussions and start the process of learning together and building trust across boundaries of practice.

Boundary projects. Community members usually don't have much time and energy to engage at boundaries unless there is a specific task to accomplish or problem to solve. A joint project that requires cross-boundary collaboration can provide this context. As in the breakthrough activities described earlier, the joint and concrete goal of a boundary project can become an overriding force that focuses the energy of participants beyond the clashes in their perspectives and that creates compelling opportunities for cross-boundary learning.

Joint response. As above, but across a boundary. Coordinating a shared position in response to an event or a policy can be a bridging activity between different communities that forces participants to negotiate their perspectives in deep ways but doesn't demand any additional commitment beyond producing the joint response.

Igniting a passion for coding

The Buenos Aires *Ignite* "Coding for Non-Coders" community helps people with no programming background, teaching them the Python programming language. A local team contacted the *Ignite* community for help on a particular task.

They needed to automate a business process, but they didn't have the technology skillset required to do it themselves. "The team asking for help was regularly performing a manual and repetitive process that took several days to complete," explained one member of the *Ignite* community. "That's when we decided to assemble a team of mentors and mentees from the community."

Under the supervision of two mentors and four mentees, everyone started working on the project. "This was a great chance for the mentees to investigate new solutions in Python, and to develop an application while learning new coding skills."

By the end of the project, everyone involved obtained some kind of benefit:

- A team received a new application that reduced a time-consuming task to less than 10 minutes.
- Mentees learned how to develop a new application, further improving their skills.
- Mentors had the opportunity to lead a team of developers, collaborate with stakeholders, and improve their project management and leadership skills.

"As a mentor, it was a great experience to guide a group of people to complete a project. At first, they didn't know how to start. It was challenging, but their willingness to grow and learn was stronger than the obstacles."

Visits, field trips, and learning expeditions

Visiting a location of practice together to learn from it

What it is good for

To gain a concrete sense of a practice by visiting a specific location where it operates.

Process

Field trips are a fun way to learn together. They create good community memories in addition to the practical learning of visiting an organization or site relevant to the practice. We find that it is good to have a local practitioner to act a guide familiar with the location (or the website if it is an online visit). The actual experience of practice and all the connections it involves may not be evident just by visiting a physical or online site.

In some face-to-face but geographically dispersed communities, members take turns hosting meetings at their location. Local members can organize a tour of their place of practice or involve other relevant people from their location in a case clinic. They can even invite a manager for certain sessions and thus gain some legitimacy for the value of their practice. It enriches the conversations and deepens the opportunities for mutual learning when members have seen each other's situations.

One mistake we have seen is to simply have the visitors in one room, with one or two people, often managers, giving presentations about the local practice that could have been given in any hotel room in the world. The art of organizing field trips and visits is to take full advantage of all the learning opportunities afforded by being on site, including seeing the loci of practice in action and interacting with a broader range of practitioners.

Field trips are traditionally done in-person, but we have seen some well-organized trips online. Most comments in this section apply to both. One advantage of online tours is that these visits are easier to organize while still quite effective at giving a good, situated sense of the practice.

Field trips

The Glasgow Cybersecurity and STEM communities have organized trips to schools and universities to give presentations, or to science museums with the goal of inspiring the next generation of technologists at a young age.

In addition, our STEM communities run code clubs at local schools to help children learn programming, train teachers on the effective use of technology, and sometimes even run competitions like the one described earlier, which resulted in children writing Python code that was sent up and run on the International Space Station.

4.8 Learning together

The activities described in this chapter are not always distinct. An actual community activity will combine several of them. For instance, presenting a case for a clinic will often involve some storytelling to set a context. Solving a problem may require reading a paper together or inviting a guest expert. The point of this chapter is to provide the elements of a palette of colors, which can be combined in various ways to create the picture of a living community.

These activities share a number of characteristics. They use the practice of members as the learning curriculum and their experience as a learning resource. We call these activities social learning activities, but the quality of this learning is not defined by the activity structure. It depends on many factors including appropriateness of the topic, trust among participants, and skillful facilitation. In each of these activities, a community can remain on a surface level of sharing tips and voicing opinions, or it can make an effort to go deeper, understand the underlying principles, and reconsider underlying assumptions. Setting the tone for a quality dialogue is an important part of community leadership: surfacing the difference—"individual and collective"—members aspire to make, being ready to ask challenging questions, speaking candidly about what we don't know or what we fear, listening carefully to experience and to hard data, being skeptical of consensus, and paying attention to silenced voices.

Even though innovation is an important function of communities of practice, we do not have a category of innovating activities. This is because innovative thinking is a mindset that applies to all activities. Being engaged with real-world problems and driven by their demands, communities of practice constantly need to refine what they know and push the practice forward. At times, this process leads to a noticeable innovation, but innovativeness is an emerging possibility in each activity rather than a separate activity by itself.

AWS DeepRacer world champions

Two JPMorgan Chase technologists won first and second place in the 2021 AWS DeepRacer Global Finals out of 80,000 people. And they both got started in their local *Ignite* community where they received training and mentoring and found a safe place to practice with others.

AWS DeepRacer is a very popular contest that uses Artificial Intelligence (AI) and Machine Learning (ML) to enable autonomous driving for a real AWS DeepRacer vehicle racing round a track.

DeepRacer was introduced to them through the Hyderabad AI/ML *Ignite* community. The community held a joint session with Amazon experts on DeepRacer which "*ignited*" their interest to start learning. They were given the resources needed to train the DeepRacer model and received mentoring where they discussed and explored new techniques together. In particular, the *Ignite* community organized a DeepRacer Hyderabad League, which was the starting point of their racing and literally gave them a place to practice.

One of the winners said, "Looking back at my journey, I can say without a doubt that I have learned a lot. I have been able to explore my interest, and work on it extensively—and with purpose. I would definitely encourage people to join an *Ignite* community, as the opportunities to learn here are endless! You get to interact and collaborate with people who share the same interests as you and that really helps to motivate you to pursue your interests a lot more."

5 TECHNOLOGY

5 Technology

> Technology? It's not what makes us a community. But we couldn't do what we do without it.

What we have said so far is relevant to all communities of practice, whether they primarily interact face to face or online. But the use of online tools has become so integral to most communities of practice that technology deserves a chapter of its own.

When talking about technology for communities of practice, it is good to start with a few caveats, as obvious as they may seem:

- Build it … and they will not come. Opening an online space does not create a community of practice. The work of community building is always primarily social.
- The online space is not the community. The number of people registered or interactions on the platform are rarely indicators of what members are doing together and how their practice is changing as a result.
- Technology alone is never the answer. Sometimes an obsession with tools and technology can be a distraction from the social process of building a community and learning how to learn together. We have seen organizations focus their financial and human resources on looking for, or even developing, the right tools without spending commensurate resources on community building and designing experiences that will bring value to members.

If there is a good reason for people to be together with the right group for meaningful conversations about the nitty-gritty of practice, then communities will persist with just about any technology. Otherwise, even the best tools are not going to work.

These caveats notwithstanding, the use of technology has vastly improved and expanded the learning of communities of practice over time and space. It has enabled communities to form that may never have existed otherwise. Here, we first describe specific examples of the use of technology for social learning. Then, we discuss the configuration of a set of community tools. And we end with some reflections on the transition online brought about by the COVID pandemic.

Community tools

To raise awareness of each *Ignite* community, to simplify the setup process, and to provide a level of consistency, some tools are provided "out of the box."

As a starting point, each community has its own page on our community registry, a wiki page, and an email distribution list containing the addresses of all its members. Communities can also choose to use ubiquitous and persistent internal instant messaging channels for asynchronous communication between meetups.

If there is a need for any additional tools, technologies, or product licenses, these can be requested on an ad hoc basis. We take requests like this seriously, because when this happens, it's a good sign that the community wants to practice together!

5.1 On the use of technology

Our description of the use of tools is based on our experience. It is not meant to be exhaustive and is certainly not prescriptive. One day, perhaps sooner rather than later, our grandchildren will find it curious that we ever used these tools. We discuss the suitability of certain tools for both asynchronous and synchronous interactions and comment on what we have learned.

In our own workshops, we try to use only free or inexpensive tools in line with the budgets of many communities. Inside organizations, certain tools are readily available and expected to be used. Across organizations, there tends to be a greater range of tools to choose from but more issues regarding access to particular tools for different people. We have not worked with communities where we had to take into consideration members who are visually or hearing impaired, though we know it should become part of the repertoire.

Websites and repositories

As its most basic asynchronous tool, a community usually has a webpage, however rudimentary. It is both symbolic as an identity marker and useful as an entry point for access. It serves as a public face for nonmembers who want to know more about the community or access resources the community has made public. It is also a home space for members with functions like a calendar, a member directory, a repository of documents, and sometimes even a workspace with wiki-like facilities for collaboration on joint projects or agenda design.

Our use of technology

As a passion project, *Ignite* was not started as a funded project with any dedicated staff or technology resources. This meant that we had to make use of the tools we already had available to us.

Since the initiative started life in our technology organization, we were fortunate because we had some firm-wide tools such as our email system, our wiki site where we could build our presence, and video conferencing tools for occasional use to bring remote participants into face-to-face community events.

In addition, we were delighted that one of our technology apprentices volunteered to help develop a custom website for us because he was excited by our vision. He spent a weekend developing it, and at launch, the website contained basic details about our initiative as well as a simple voting system for new communities. It was all we needed to get started. And since then, we have always been careful about adding more tools—only adopting something new when necessary (for example, as COVID-19 hit, Zoom video conferencing became ubiquitous and the tool of choice for all *Ignite* communities).

Several years later, we now have a completely rebuilt site that was created by a dedicated team to the highest standards of quality, and we continue to seek out friction points for our communities and attempt to solve them.

Asynchronous interactions

Countless online tools are available to support asynchronous interactions, including email, distribution lists, discussion boards, SMS, Facebook pages, and chat applications, including text, voice, or video. Since the beginning of the internet (and even before with letter writing), many communities of practice have been able to function using only asynchronous tools.

But even for communities that meet regularly, asynchronous tools serve many purposes, such as announcements and newsletters. Members often use asynchronous tools for conversations outside of meetings. This is especially important when they need just-in-time help with issues that cannot wait for a meeting or involve people in incompatible time zones. As mentioned earlier, it is important to adopt a realistic attitude regarding asynchronous online interactions. We noted that some community leaders complain that members do not interact much between meetings, but people are busy and need a good reason to start interacting asynchronously. If regular meetings give them all they need, this may well be good enough.

A lot of asynchronous online activity can also create too much "noise" for some people, who may need to be reassured that they do not have to be part of everything. Everyone is familiar with being at a conference or a party where multiple conversations are happening. You must select where you want to participate and ask for impressions or summaries for the rest. It is no different online. But since everything is potentially available, making choices can seem more difficult. Most tools have notification rules and filters, and it is worth showing people how to use these rules and filters to tune their participation to fit their lives. We have mentioned that some communities also provide regular summaries of interesting discussions so that members can stay informed.

A note on email. Some communities simply use email for asynchronous interactions. This can be useful when email is the only common mode of connection, for instance, across diverse organizations. But even within some organizations, email is where most people of a certain generation live, so email compatibility ends up being the one key feature you need in your tools. One problem with simple email is that it does not keep a shared archive of the interactions. Another is that the sender of an email gets to make the decision about who is included as a recipient and who is left out—for reasons that can be practical or political. When we use email, we prefer online distribution lists that keep an archive of email interactions organized under topics. In addition, it is the recipients who get to opt into a distribution list—even if entry is moderated—and individuals can choose whether to receive emails instantly, in digest, or by visiting the website occasionally.

Stewarding back-channel communication

Many *Ignite* communities have a dedicated instant messaging channel within our firm's internal communications tools often used to share information about the community and to provide a place to give and get help. For example, one of our Agile communities has a constant stream of people asking questions and quickly receiving help and support. Often people will agree to connect directly and discuss the problem together in more detail. The trick is in encouraging them to report the outcome back to the community! It is interesting to see even nonmembers participate in the community through this type of collaboration.

All *Ignite* community leaders are encouraged to passively monitor such channels, recognizing that they are part of the community's set of activities.

Face-to-face meetings

Many communities make use of online tools even when they meet in-person, without anyone online. Having a shared online space allows members to take joint notes as well as share photos, documents, and time-sensitive work products that others can reuse right away. Online polling software allows members to register comments, questions, and opinions. Finding out what people think creates a shared picture of what's currently on the community's mind. In the last chapter, we have described using a shared Google doc for a process of joint-individual reflection, which can work equally well during both face-to-face and online meetings (see end of section 4.6).

Online meetings

Synchronous online sessions are now very common, whether for regular community meetings or for an impromptu call to discuss something that demands an immediate response.

Videoconferencing

Now that videoconferencing has come of age—at least for communities whose members have enough bandwidth—seeing each other seems to make a difference to interactions and to the sense of togetherness. Unless a meeting is very large, we find that leaving one's video off disrupts this experience.

One feature we have found essential is for participants to be in various configurations of smaller groups at various times during a meeting. When you are with a small group (less than, say, seven) you are much more likely to engage actively. Some tools even reproduce a 3D experience of a physical space with different tables or areas that approximate the experience of moving around a room to join groups.

Chat

Running a chat alongside the video allows participants to quickly insert comments, questions, and links to relevant things without breaking the flow of the main conversation. Some people may find it distracting to have to pay attention to two places at once. Hence, if something significant appears and develops on the chat, it is good to bring it into the main conversation.

We have also used the chat function to take running notes of a conversation. With the chat function, notes are public and multiple people can contribute to the process. This is useful immediately for people who may not have great sound or for whom the language of the meeting is a challenge. Saving the notes then creates a record for later access.

Shared visual workspace

In combination with videoconferencing, we use a shared visual workspace for collaboration, brainstorming, and joint reflection. The workspace also provides continuity across meetings. Text-based workspaces like Google docs work for reflections, as mentioned earlier. But they do not generate quite the same sense of a space for being together as a visual workspace like Mural or Miro.

In the workspace, we create a variety of subspaces for different activities. Sometimes we give everyone a personal space, a reserved area where they can say something about themselves, share some photos or other visuals, or take notes. Participants can then visit each other and say something with a digital sticky note.

We have also started to use the workspace for slides rather than sharing screen in presentation mode. With all the slides laid out in an area of the workspace, participants can see them all at once and move around them freely. We find that slides displayed on the shared workspace tend to become conversation pieces rather than a support for linear one-way presentations. Participants can also place sticky notes with comments or questions. This way the slides area becomes a communal artifact.

Hybrid meetings

We have had positive experiences with hybrid meetings for many years now. They allow members who could not travel to join an in-person meeting. Of course, it is always possible to stream a meeting online, but here we focus on some practices that work for us when we intend to make online people full, active participants in the meeting.

Seeing and hearing each other

In the room it is important to pay attention to what online participants are seeing. Do they see the faces of people or just a shadow against a window? Do they get visual clues on who is talking? Do they get a sense of what the room looks like? We sometimes use a phone as one camera and pass it around as a talking stick, so that online people always have a good view of who is talking.

For online participants, it is also important to be visible, with adequate light and no bright window behind. When practical, we have used a lifelike representation in the room, for instance, with a screen at a space at the table. Sometimes, we even have in-room participants carry online participants around on a device as if they were in the room.

Even more important than the quality of the image is the quality of the sound—on both sides. A grainy picture still works, but if participants have to strain to hear, they will quickly lose focus—especially if the meeting takes place in a language different from their own. How to place mics for best input? Is it worth having a roving mic in the room? What extra sounds "in the room" give a poor experience to online folk? When to use the mute button to create optimal two-way communication?

In general, it is better to have multiple channels for online participants to have their say. A chat function is useful in this regard. It makes for back-channel conversations, passing comments, observations, quips, jokes, as well as "help I'm lost" signals. It can also be very useful for in-person participants to take turn in taking notes in real time on the chat to help online participants keep up with what's happening.

We encourage the use of multiple devices, if possible, both for online and in-room participants—with a plan B or even C for when things go wrong. This requires having everyone's contact info handy, so interactions can quickly move on. It can even be good to have a space for all online folk to be able to talk or message each other directly. It gives a shared identity of comradery to the people online and emboldens them to stick up for themselves when it's not working for them.

Buddies

It often helps for in-person participants to take turns in being buddies with online participants. Sometimes we have paired each online participant with a person in the room, and sometimes people in the room take turn acting as buddy for all online participants. People in the room are responsible for making sure that their buddies can see, hear, and be heard. They make sure online people are fully included and they watch the chat to immediately address something that isn't working, e.g., someone blocking the camera.

The idea here is to fully share responsibility for the use of technology. Face-to-face participants need to be as familiar with technology and technology-related practices as online participants. It is good to provide guidelines to both groups about making the most of remote participation, including things like keeping a playful attitude, making sure everyone knows who is talking, looking into the camera when you speak, and calling for breaks.

Integrating online and face to face

It is easy to assume that the main event is happening in the room and radiates outward—that the endeavor is to bring online participants *in*. But we make an effort not to privilege the room and to view the entire group as a unit making up the meeting.

- It is important that online participants sometimes take the lead on an activity, so that the running of the show does not always start in the room.
- Sometimes, for a change, everyone goes online to do something together, like brainstorming, reflecting, or visiting a location.
- Having online participants also requires more frequent breaks so they can move around and look away from the screen. We have found that a quick break every 45 minutes works well, with a longer one every 90 minutes.
- Candid reflections about the experience as an online or in-person participant can be revealing. For example, when carried around on a device, online participants have expressed their feelings of vulnerability—which they analogized to being in a wheelchair—as well as the experience of being cared for. An in-person participant in one of our workshops has good-humoredly described the experience of being the buddy of an online person as that of having a Tamagotchi, the artificial pet in constant need of attention. Some have been open about their feelings of intrusiveness of the technology. Others have been resolute to avoid the task of buddying with an online participant as a way to resist stereotypes about who takes up caring roles. All have found that they gain insights from these reflections and conversations, triggered by hybrid participation, about the politics of engagement, relationships, and voices, in social learning.

Mixed group formations

While breakout groups in different configurations are good in general, they are particularly desirable for hybrid meetings. Small-group conversations often make it easier and less tiring for online participants to engage fully than the larger group. At first, we had this idea that small groups should always be hybrid to cement the online/in-person integration. But we have learned that sometimes the online participants also like to be in a breakout group just by themselves.

Drawbacks of hybrid meetings

While hybrid meetings can be hugely beneficial for bringing voices to the table that might otherwise be left out, there are some drawbacks:

- The additional costs for good mics, cameras, screens, and extra devices can be substantial.
- Facilitating interactions in both the room and online requires additional multitasking and coordination; it is not easy to do that and engage fully in the content.
- Having to use devices and technology across spaces can be tiring for all participants. There is relief in simply being able to focus on interactions in the room or online.
- Hybrid participation requires additional consideration for others' experience of you. For example, quiet people in the room have to learn to speak more loudly so online participants can hear; online participants have to pay attention to background noise at their end as it can disrupt the atmosphere in the room; a joke or a side comment can make sense to the people in the room but be inappropriate or incomprehensible to the people online (and vice versa).

We have been committed to making our in-person events hybrid because we believe that the future demands it. We have spent more than a decade developing our skills in running them. Still, we confess that hybrid meetings are generally more demanding and that we do enjoy the occasional event completely in-person or online.

Establishing a presence

After running hybrid workshops for more than a decade, one question that has become salient for us is the importance of "presence." We should specify that by "presence" we do not mean becoming the center of attention. That would be contrary to the spirit of a social learning space. Rather, presence here refers to finding a way of participating that includes your voice fully as part of the learning that goes on, individually and collectively.

The question of presence is always an issue in a social learning space—as an individual and a collective concern—but online and especially hybrid formats give it a particular significance.

We often get to experience the same person in multiple workshops. In some cases, this has involved participating online and in person in different workshops. We have observed that online presence and in-person presence can be surprisingly distinct. The same person with a strong presence online can remain marginal face to face. And vice versa.

Given the self-organized nature of communities of practice and the significance of having presence in order to help drive the learning, we are intrigued. And while we are still trying to better articulate what presence means in a social learning space or where it comes from, we do have some initial observations. Our advice to online participants for establishing a presence includes:

- **Full participation.** It can be tempting to see online as an opportunity for dipping in and out. But see yourself as part of the unfolding action as much as anyone else. Remain as protected from distractions as you would be in the room.
- **Angle.** Look into the camera where people will see your full face. If you are using two screens, make sure that most of the time, the camera shows your face rather than your side profile.
- **Expression.** Be ready to express your passion and enjoyment as well as your discomfort. Don't feel like you have less right to express yourself because you are an online participant.
- **Inventiveness.** Thinking out of the box can bring an uplifting twist. For instance, it is not always easy for online participants to break into the conversation; and visual cues can draw attention. One person waved a big cardboard hand. Another made big cardboard signs to indicate what she wanted to say.
- **Playfulness.** Things will go wrong; a spirit of shared playfulness will help make snags into learning opportunities. Don't let worry or anxiety about being online snuff out your enthusiasm and creativity.

Most of these observations apply to all participants. Our focus here has been on how online participants can prepare for establishing a presence in a situation where they can easily be forgotten. In no way does all this allow in-person members to abdicate the work of making sure the event is inclusive and the technology working in everyone's favor.

Time zones

With a geographically distributed community, the time zones become an unavoidable issue for synchronous conversations. There are several ways we have addressed this:

- **Local chapters.** In a large and geographically distributed community local chapters can be organized by time zones. Cross-chapter gatherings can be held less frequently or with representatives of different chapters rather than every member.
- **Visibility.** When subgroups are meeting at different times, it is even more important to produce summaries, recordings, or other artifacts to make conversations visible across groups. Avoiding silos this way helps create the experience of contributing to the overall identity and participating in the learning of the whole community.
- **Rolling meetings across time zones.** As exemplified by the annual *Ignite 24* showcase described in chapter 2, a meeting can continue and be handed over, moving from one time zone to the next over the same day,
- **Shared workspace across groups.** We have had some success in using the same visual workspace to facilitate continuous joint activities across time zones. Different groups can then build on each other's work as the activity moves from one group to the next.

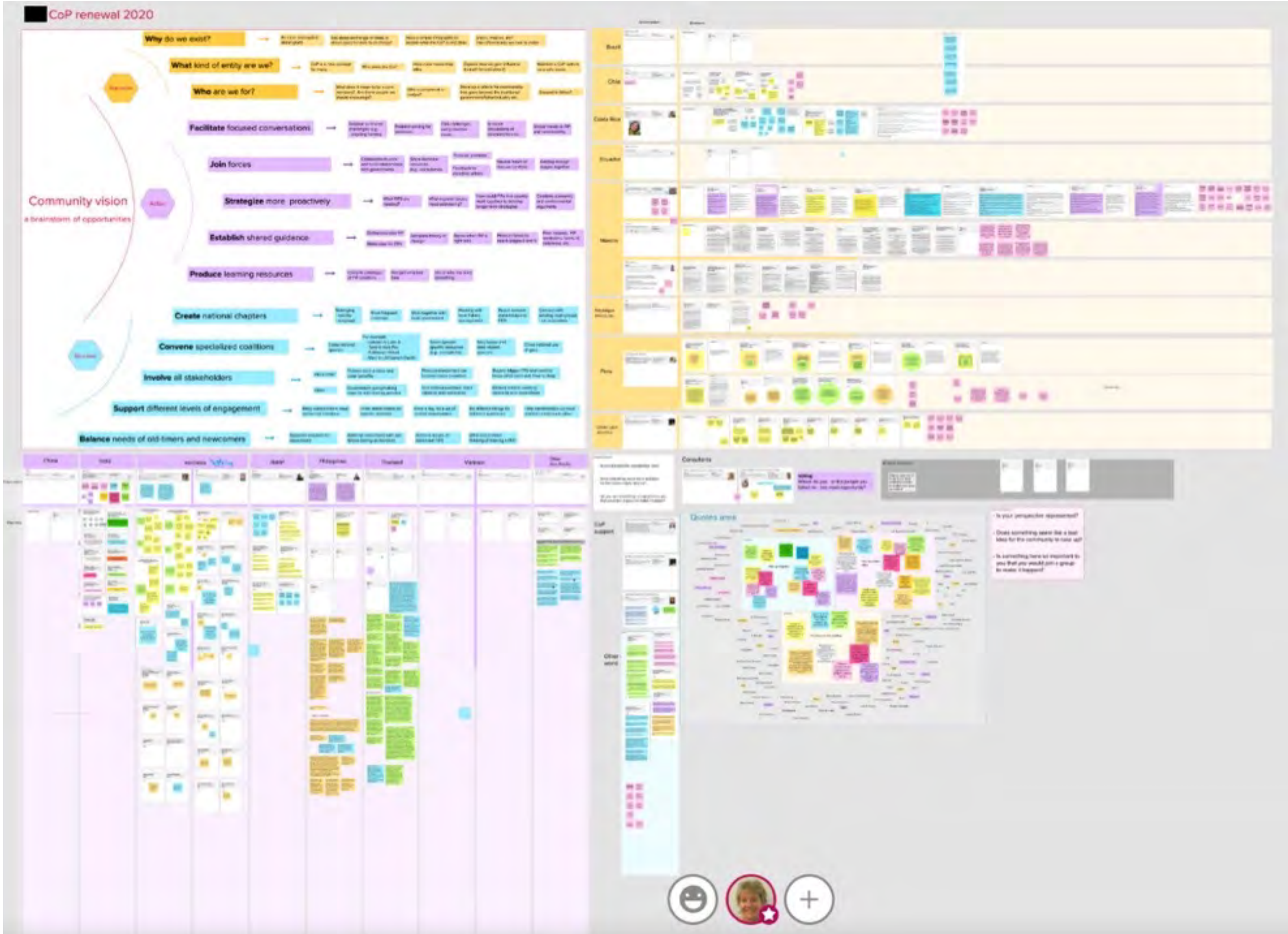


Figure 5.1 A large Mural board used as a shared workspace across time zones

A good example of the use of shared workspace across groups in different time zones was a series of sessions for an international community of practice with two regional chapters in Asia Pacific and Latin America, and with seven countries in each chapter. Members wanted to renew their vision for the next funding period, but it was the start of COVID lockdowns, and they had to cancel their in-person meetings. Instead, local "ambassadors" from each country committed to holding conversations with local stakeholder groups and to participating in a series of online regional meetings. All members were invited to these meetings if they wanted, but only country ambassadors committed to all of them.

To provide continuity across sessions, we created a large Mural board (figure 5.1). In the purple (Asia) and yellow (Latin America) quadrants, each country had a space where the ambassadors kept notes of insights and suggestions from local conversations. In successive meetings alternating between regions, suggestions were discussed, and joint notes were kept in the lower-right quadrant. Finally, they were consolidated into a joint response in the top-left quadrant. Because of time zones, the groups never met synchronously across regions. But they could see the notes on the Mural from countries in both regions. When we moved to the final brainstorm, they could see the other region's contributions to the evolving consolidation in the shared area.

After three rounds of meetings with ambassadors—and two rounds of consultation between ambassadors and local actors, the groups had created a shared visual across both regions with the key ideas and their potential operationalization. The ambassadors then took this visual (often translated into the local language) for a final round of conversations with local actors and returned to regional meetings with country feedback. They refined the visual and prioritized suggestions based on those conversations. The final visual was agreed on and endorsed by all ambassadors across regions. Interestingly the feedback was that this process created an even greater sense of ownership over the vision than an in-person meeting, which many local actors say they could not have attended or where they may not have felt heard quite so accurately.

5.2 Configuring a set of community tools

We are often asked what the best technology is for communities of practice. While there are plenty of useful tools, there is no ideal tool for all communities of practice. Each community's needs and contexts are different. New tools keep coming up and people's expectations are changing—all in real time.

First, we usually find that the best tools are the tools that people are already using—not necessarily the ones with the most desirable features. We avoid tools that require a lot of extra steps or a steep learning curve. In many cases, we have to avoid tools that people cannot use on their work computers. We already mentioned that sometimes the key success factor for a tool is whether it can be accessed via email, without having to login into another site. Likewise, for new generations who live on their mobile device, nothing will work if it isn't in the form of the app used by their peers. We try to be conscious of where active members usually "live" in their technology, and how nomadic or exploratory they are prepared to be in trying out or working across different tools.

More generally, however, the idea of a complete solution may not be helpful to start with. All tools and platforms have a DNA that is rooted in the specific function that prompted their creation (e.g., SharePoint was developed as a file repository, Facebook as an interactive student directory). While designers may add features to provide additional functions, the original DNA tends to remain dominant in spite of those add-ons. For a community, it is usually more helpful to think of a *configuration of tools* to address the diverse and evolving needs of a community.

With a configuration of tools, one concept we find useful is that of a *home base*: designating one tool as the "go to" place to act as a central notice board where members know that key information will always appear. Ideally, a technology for the home base should support embedding other tools, so that discussions and news posted in other tools will also appear in the home base, even if they are not actually posted there.

Some people will usually be more technology savvy than others. Within reason, you can be flexible and encourage initiative regarding tools. As long as some members drive the use of a technology because it works for them, it has the potential of serving the community. The successful use of technology takes time and learning. It is important not to give up a new tool too quickly. Experiment with it in different ways and expect some resistance. Sometimes a tool is simply unfamiliar. After some success for early adopters, the use is likely to spread.

Still, it is important to carefully evaluate the benefits of a new tool before adding it to the configuration. For instance, new tools may require multiple accounts with different passwords. It is rare that a new tool adds enough functionality to justify the inconvenience of a new account—which can bring interactions to a halt. While it is desirable to have a variety of channels to accommodate different styles, each additional tool can change the dynamics of the community—by including and excluding different people. Someone who is the center of attention in meetings may have difficulty using asynchronous technologies. Someone who is quiet in person may gain a more prominent voice when joining online. Someone who does not interact much may be a dynamic contributor of static content online. The community will feel different as different voices are amplified by certain tools. And these changing group dynamics all affect learning.

In certain communities, access to internet can be uneven. Poor internet, power outages, low-bandwidth networks, internet availability in noisy public spaces—these can make a difference for who has a voice at the table. When this is the case, it is generally better to simplify the technology to the lowest common denominator to avoid making some members feel like second-class citizens and making the community miss out on their voices.

It is not being facetious to say that the best tool is the one that works. And the reason a tool works will be, in part, because it does a good job and fits in people's lives. But the more crucial point is that members have developed activities and practices to leverage the use of tool in productive ways. The practices a community develops around the use of the technology are as important as the technology. No amount of interactive online whiteboards, voting systems, and polling mechanisms will ever substitute for good design of social learning processes. Examples we have mentioned include summarizing online discussions and storing the summary; using the chat function to collectively take notes during videoconference conversation; or having in-person buddies for online participants at a face-to-face meeting. Some communities are becoming intentional about leveraging technology with good practices by cultivating the role of *technology steward*—members who explore potential tools, promote practices for the productive use of technology, and bring people up to speed.

5.3 Post-COVID reflections

We started working on this guidebook long before COVID. Meantime, many more communities have moved online. Rather than damping down communities accustomed to meeting face to face, the transformation has often had a positive effect. Connecting with colleagues became a necessity and a relief. We have seen many communities experience renewed commitment and growth. This has brought new opportunities and new challenges.

Going virtual

From day one, our paradigm has been to grow local, organic communities that spring up based on interest. The communities would meet face to face in a meeting room or community space.

When COVID-19 hit, our entire workforce started to work from home, and it was no longer possible to meet in-person. At first, we were worried that this could signal the end of *Ignite* communities, but we were delighted to see that most were determined to continue—all they required was a little help from us to adapt.

In response to moving to a remote working model, we quickly set about creating a new toolbox containing guides that were designed to help facilitators make effective use of technology for social learning purposes, as well as a library of activities and techniques to help get the most of their meetups.

In the end, we found that going virtual unlocked new potential audiences for our communities, and the ones that were active prior to lockdown simply adapted to their new circumstances and continued to operate virtually.

Going online enables new members

The CCHN has had to deal with very different learning styles and capabilities. In many contexts, social class and gender are key determinants of the ability of individuals to have access to a formal education. These determinants also affect access to CCHN workshops. The digitalization of peer exchanges resulting from the travel and meeting restrictions imposed during the COVID-19 pandemic accelerated the expansion and localization of the CCHN Community. In 2021, most peer activities took place online. The demography of these activities evolved with a growing participation by women as well as national staff deployed in deep field locations. Both groups had had more difficulty getting access to onsite activities than online sessions. While the transformative impact of the Community on the work of humanitarian agencies on the frontline is not clear yet, the ever-expanding membership of the Community and its regionalization is filling a cultural and professional gap that is having a clear impact on how practitioners operate in the field and relate with each other.

On the one hand, people have become accustomed to having meetings online. Despite initial hesitations from some members, tools like Zoom or Microsoft Teams have become de facto meeting places for many communities. We used to run regular “tech checks” with members to make sure they knew how to use meeting tools. But now, almost everyone is up to speed, knows how and when to mute, and what it means to share screen or go into a breakout room. This has made online meetings go smoother. In some communities it has also enabled more voices to be included. Suddenly members in far-flung places or without a travel budget have seen new openings for their participation. These are heartening developments.

On the other hand, a community meeting is now often one of a series of organizational meetings in a member’s daily agenda. But community meetings must be a special time, not just work as usual. When people are in online meetings back to back, it becomes imperative to structure community meetings in distinct ways, for example:

- The principle of putting yourself on mute unless you are talking works well for a presentation with questions and answers, but not so well for interactive conversations or storytelling. The umms and ahhs that are distracting in a formal meeting can be a sign of engagement in a community.
- When the purpose of the meeting is to give out information, you can turn off your video and put yourself on mute while you cook, but if you are an active member, people need to see you and know you are engaged.
- A tropical island background may be good for hiding the fact that you are attending a business meeting from a closet, but the closet can be part of your online persona and woven into a playful and authentic narrative of you in the social fabric of a community.
- Your child hanging on your shoulder to see what you are doing might be a nuisance in your team or board meeting, but an expressible part of your context in your community.

In other words, online meetings can take place in different modes, from the slick information-sharing mode of a business meeting to a more interactive and improvisational learning mode in a community. It is important to find a mode that reflects the spirit of your community. And switching between modes is something we need to get better at, even when the technology is ostensibly the same and we are experiencing all meetings from the same seat, at the same desk, with the same view from our window.

Addressing "Zoom video-conferencing fatigue"

With the high number of videoconferencing meetings our colleagues must attend each day in order to do their jobs, it has been challenging to retain the feeling we previously enjoyed, where community events "felt different" and refreshing (sometimes physically refreshing when we provided the ever-popular cakes, coffees, or pizza!).

To that end, it has been an especially important priority for us to take a visible lead in inculcating a culture of appreciation and recognition for community builders who continue to actively participate and sustain our culture of social learning.

This has been done by:

- Seeking opportunities to show senior support and advocacy for *Ignite*, including at "town hall" events where all 55,000 technologists are invited.
- Providing unsolicited feedback and tokens of appreciation to the volunteers who take the lead in the initiative.
- Sending *Ignite*-branded e-Cards like the one shown here to all active contributors that can be redeemed for vouchers at retailers such as Amazon and giving out branded hoodies and t-shirts.

To help online community meetups feel different from normal day-to-day meetings, our checklist for community meeting design includes the effective use of various tools for social learning purposes, where we encourage the use of opening and closing polls, audience interaction and "sidebar chat." We also make *Ignite*-branded Zoom backgrounds available to give some personalization to the experience. It's not easy though, and that's why we still want our communities to meet in-person—for variety, and to benefit from the social, trusting learning environment.

We are still in the process of learning to *do* community online, but we can see the emergence of interesting practices. It is still too early to know what kind of role technology will continue to play in communities once face to face becomes more common again. But there are reasons to believe that things will not be the same. There will likely be more online and hybrid events. This may well put pressure on in-person meetings to be thoughtfully crafted and not taken for granted. As online interactions become more habitual and productive, in-person meetings must provide high value to justify travel. To compete with the convenience of participating online from anywhere, they must take full advantage of in-person affordances to offer meaningful interactions. And if meetings are hybrid, they will need the technological and facilitation know-how to include online people as full participants. All these developments may well push the practice of social learning in useful directions.

A hybrid future

Our corporate working model recently became “hybrid,” with Technology staff working part of the week at the office, and the other days at home. This meant that we needed to evaluate the optimum way of meeting—retaining our inclusivity while also making use of opportunities to gather in-person.

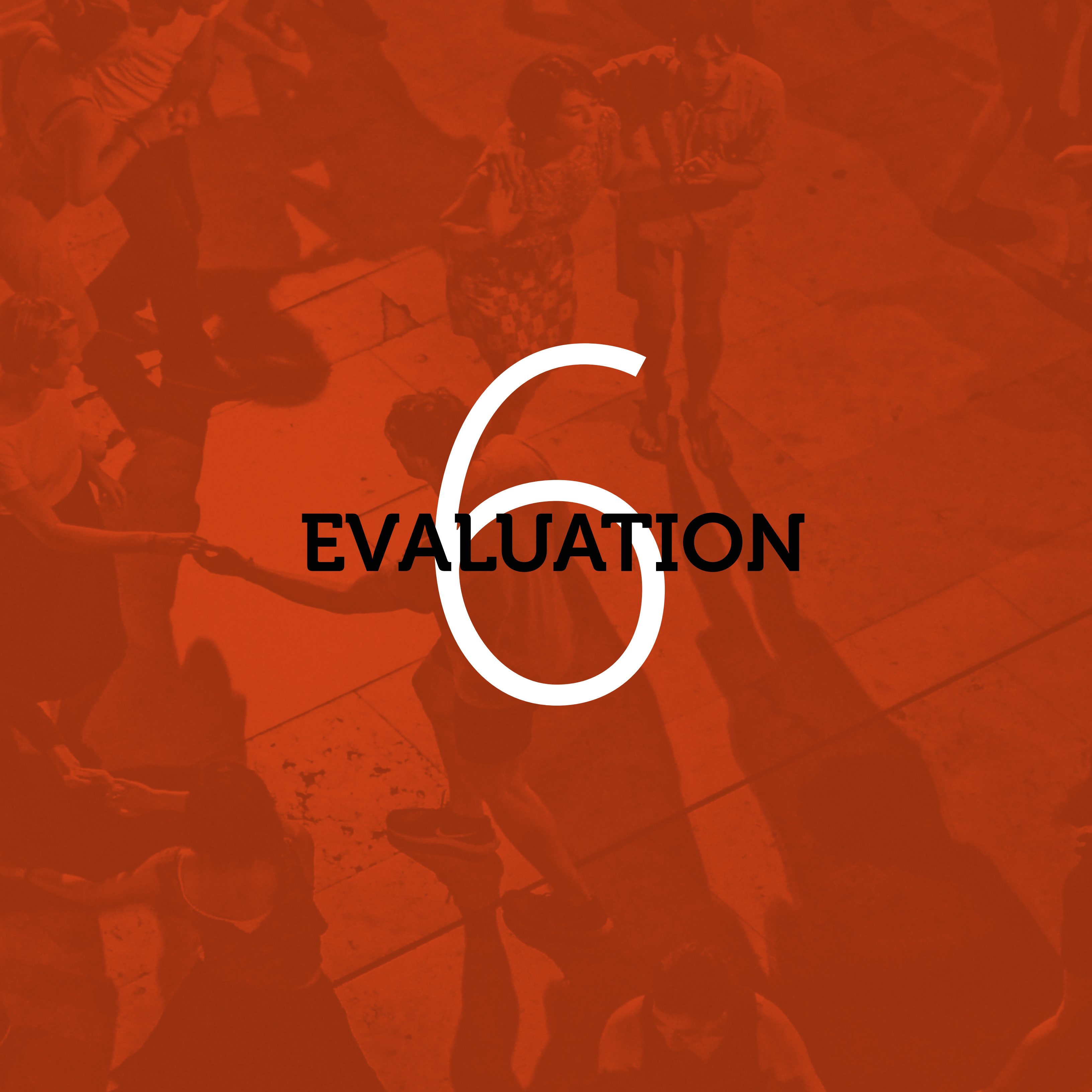
As it stands, with ubiquitous access to Zoom video conferencing (i.e., everyone at home and in the office has Zoom access), our communities of practice are continuing to meet online, but we also encourage them to find opportunities to meet in-person, as circumstances and COVID restrictions allow.

We currently recommend meeting *either* online *or* in-person, but we suggest avoiding attempts at hybrid events unless necessary. Generally, such hybrid events take great care, planning, and consideration to provide an effective experience for everyone, especially when larger groups are involved.

Primarily, we’re finding that in-person activities tend to revolve around more informal settings such as networking, coffee chats, and guided conversations. However, larger events are also being planned where, with enough notice, people will choose to come to the office on a certain day to attend an event.

Through listening and exploring, we continue to learn from our collective experience and to share good practices for effective community meetings and activities. We are planning a new *Ignite Academy* module on how to design effective and inclusive meetups, where we explore this topic further and seek feedback from our members.

6 EVALUATION



6 Evaluation

> We know we create so much value when we are together. But this value usually manifests when we are not together, when we are doing our jobs. How canwe let others know what the community contributed? How do we answer the question of what impact we are having?

Evaluation has been somewhat of a vexing question, both for communities of practice and for organizations supporting them. In this chapter, we outline our approach to this challenge.

We start with a few general principles for evaluation related to communities of practice. Then we introduce value creation as a useful perspective to account for the difference the learning of a community makes in practice. And to make this concrete, we provide the outline of our value-creation framework:

- The four basic *cycles* of value creation
- The genre of *value-creation stories* to capture the flow of value toward making a difference and create learning loops
- Four additional cycles that often contribute to value creation
- The process of integrating indicators and stories to create robust accounts of value creation
- What the framework is useful for

For the reader in a hurry, the first two points will give you the general idea. They are at the beginning of section 6.3.

For the reader who wants more than the cursory overview of our framework presented here, a complete treatment can be found in our recent book *Learning to make a difference: value creation in social learning spaces* (listed under *Further reading* at the end of this guidebook).

6.1 Some evaluation principles for communities of practice

When it comes to communities of practice, it is useful to base evaluation on a few principles that reflect their specific nature and relation to organizations:

- A community stewarding a capability is fundamentally different from a team accomplishing a well-specified project goal or a business unit managing a profit and loss account.
- For the most part, the value of a community of practice manifests outside the community. There can be a substantial time lag between community activities and the full manifestation of their value.
- The ways in which social learning influences members' practice outside the community can be small and nuanced. These small and nuanced changes to practice, particularly across multiple members, can add up to significant and lasting effects. Small stories of progress matter.
- Don't overdo evaluation. Piling up accountability red tape on a voluntary community with little budget is likely to be counterproductive. In other words, evaluation should be proportionate to investment and serve a meaningful rather than bureaucratic purpose.
- Evaluation that truly reflects the community's perspective on its value (or absence of it) can be a form of learning rather than an extra burden. It can be as useful to members as it is to organizational sponsors and stakeholders.
- The purpose of evaluation data—when collected—should be to inform strategic conversations with stakeholders about building capabilities. Formal measures should not be used as an easy way to manage from a distance and sidestep mutual engagement in such conversations.

Highlight Your Ignite

In recognition of the fact that the value generated by communities of practice is often shared by means of anecdotes, experiences, and stories, in 2021 we started Highlight Your *Ignite*, which is where we share impactful stories internally across our Technology organization.

Back in the days when *Ignite* started, we often used this graphic to illustrate the potential value we thought could be gleaned from communities of practice:

Since then, time and again we have seen all these benefits brought to life through interesting and exciting experiences.

The goal of *Highlight Your Ignite* is to consistently curate a diverse and vibrant set of experiences that help to create a virtuous cycle of growth, sustaining the community and *Ignite* through accounts of value.

6.2 The perspective of value creation

The evaluation of communities of practice has been a difficult question for organizations used to predictable and quantifiable measures of output. Because communities of practice deliver a capability rather than a product, simply transferring evaluation methods from a product perspective to a capability perspective can lead to misleading simplifications and unnecessary distortions.

It is surprising how often formal measures of community features have become ends in themselves—numbers of participants, documents produced, posts on a discussion board, and in some cases, an external measure of impact. All these measures can be informative, but they tend to produce inadequate—and often distracting—assessments of the value that a community of practice brings to its members and stakeholders.

This is one reason we sometimes meet the belief that communities of practice cannot or should not be evaluated or measured. However, well-functioning communities of practice can create immense value—for members and for organizations—and it is this value that matters. Accounting for this value, whether easily measurable or not, is what evaluation needs to do. Between reducing everything to simple measures and giving up on evaluation entirely, we propose the perspective of *value creation* as a more balanced approach.

Value creation is a process that unfolds over time and taking different forms. From a value-creation perspective, we find it less productive to start our inquiry with questions about impact and traditional indicators to show impact. Methodologically (and ethically), it is usually difficult, if not impossible, to make a direct causal attribution between a community and its impact in the world. A more realistic approach is to combine multiple types of data to show step by step how a community has contributed to a difference that people and their organizations care about. The point is to use this account of process to build a claim of contribution by the community robust enough to be plausible.

A value-creation approach starts with questions such as:

- Where and in what ways is a given community of practice creating value? For members? For organizations? For other stakeholders?
- How do we know this? How do we find out?
- How can we use different types of data to make a plausible case that the community is making a difference that matters?
- How can we leverage the inspiration and excitement of stories that members tell each other about their evolving practice—not just to deepen each other's learning but also to inform an evaluation?

These are the questions we endeavor to address in the rest of this chapter.

6.3 Value creation in action: cycles and flows

Making a difference through learning—a process happening over time—a community of practice creates in many distinct types of value along the way. To fully appreciate the difference that a community of practice makes, we propose a *value-creation framework* that distinguishes between eight different types of value. We call them value cycles to reflect their dynamic and incremental nature. What these *value cycles* have in common is, in different ways, the promise of increasing the ability of members to make a difference they care to make.

Creating value: four basic cycles

For a community to make a difference, value creation goes through four successive cycles (shown as the inner section of figure 6.1):

- **Immediate value.** Engaging with colleagues produces value in and of itself, such as enjoying the company of like-minded people, doing something exciting, or feeling that you can be truthful about the challenges that you face.
- **Potential value.** This engagement generates new insights, resources, ideas, methods, a shared identity, or social connections, which have the potential to improve practice.
- **Applied value.** Adopting or adapting these new insights, shared identity, resources, or connections to make changes in practice has inherent learning value since it is the test of their relevance and requires clever tweaks to fit the new context.
- **Realized value.** The value of social learning is realized to the extent that changes in practice start to make a difference toward what matters to members and stakeholders.

Making a difference: flows of value

In a community of practice, learning makes a difference by creating *flows* across value types. For instance, the candid nature of a conversation gives rise to an interesting idea: that's a short flow between *immediate* and *potential* value. If someone tries this idea in practice and it produces good results (or not), this extends the process with a short flow between *applied* and *realized* value. Combining all four creates a long flow of value from *immediate* to *realized*. From a value-creation perspective, these flows are how social learning makes a difference in practice.

Value-creation stories

These flows are often captured in stories that members tell each other when they talk about their practice. This is a way they account for how the community has made a difference for them: for instance, how a new insight they gained from a previous interaction led to a change in how they do their job and the effect this had. We call these stories *value-creation stories*.

An important function of our value-creation framework is to provide a structure for the telling of these stories. It suggests a story genre that specifies the steps that the story needs to relay in order to become a plausible account of value creation:

- What was your experience of social learning in community activities?

- What did you get out of it?
- What did you do with it?
- What was the effect?

Note that a story can start in any cycle. For instance, a member might start their story by talking about an innovation they developed in their practice, including how they tried it out and refined it over time. Here we would say that the story starts between the *applied* and *realized* cycles. When it is shared with the community, it creates *immediate* and *potential* value. Perhaps a new flow is started when a fellow member picks up an idea from the story, does something with it in their own context, which helps them to make a difference. And so on.

Following value creation stories

We always try to encourage our members to listen out for value-creation stories, following them through their cycles. It's not easy, but it's worth it when a good story comes to life. We have shared some of these stories in chapter 4 on activities.

We do this in various ways, such as using our *Ignite Academy* learning module on value creation, where we share examples of each type of value (immediate, potential, applied, realized) so members know what they're looking for and can more easily bring back their stories and complete learning loops for their community. We also publish value-creation stories as part of our *Highlight Your Ignite* series and encourage our location core teams and *Ignite Faculty* to listen out for relevant stories.

Encouraging our members to seek and share such value creation stories has had the effect of making it easier to "radiate the value of communities" across the organization, which means these stories don't just nurture individual communities, but the initiative as a whole.

Without having done "value detective" work like this, it would have been difficult to easily share compelling examples with the external news reporters who interviewed us about *Ignite*. (See references in chapter 8 for links to these news articles.)

Four additional cycles

The ability of a community to make a difference through a basic flow often depends on additional processes of value creation. Our framework articulates four additional cycles:

- **Strategic value.** Successful communities engage with key stakeholders to discuss the relevance of their learning and ensure their work is understood. Over time, the quality of these conversations and relationships are crucial to the community's ability to make a difference.
- **Enabling value.** Getting better at social learning also produces value over time. So does the ability to secure necessary resources. This enabling can be done by members themselves or by other actors in supporting roles.
- **Orienting value.** As mentioned in the Maturing section, communities always exist within a broader social landscape. Their learning is enriched by incorporating a sense of that broader landscape—what others are doing, relevant trends and research, as well as possible audience for their learning.
- **Transformative value.** Sometimes engaging in community activities has an effect beyond improving the specific practice of members: it transforms people's identities or the systems and culture of the community's context.

These additional value-creation cycles can enrich a value-creation story with useful information. For instance:

- If the application of an idea also involved conversations with stakeholders that led to financial support, then the flow includes *strategic* and *enabling* values.
- If a good understanding of a policy or market trends informs the learning of the community, it was due to the creation of *orienting* value.
- And if the learning of the community leads to a change in policy, the community will have created *transformative* value, by transforming the environment in which it operates.

All these are important pieces of information to include in a good story.

Figure 6.1 shows the full value-creation framework, which consists of eight value cycles and all the possible flows and loops between them.

Learning loops

Before we turn to evaluation, it is good to note the usefulness of value-creation stories for learning. If a story uses all these cycles to clearly describe the flow by which value is created, it can become a helpful learning resource for the community. When members bring value-creation stories back to their community, they create a *learning loop*—like the one illustrated with arrows in the cartoon of figure 1.2 in the introductory chapter and suggested by arrows in figure 6.1. This is important because if something the community has done has created value, the community needs to know.

Note the importance of including negative value in the feedback, i.e., things that did not work. From a learning perspective, hearing about negative effects is as important as knowing about positive ones. This is why these stories are called value-creation stories and not success stories.

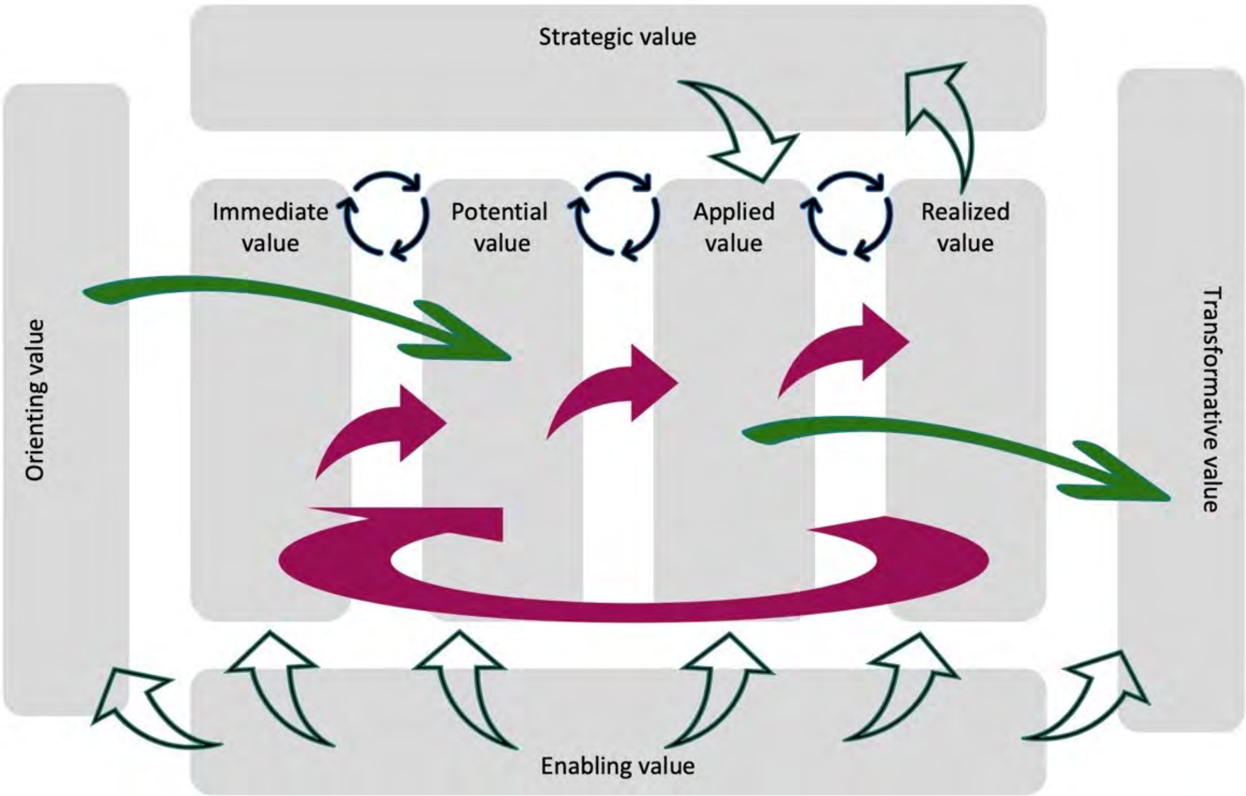


Figure 6.1 The full value-creation framework with cycles and loops

Learning loops contribute to learning in two ways:

- A loop furthers the learning of the community. If the value is positive, it reinforces the conclusions members have reached and can inspire others to try the same. If the value is negative, then the community needs to refine its learning and other members are warned about what not to do.
- In addition, the feedback furthers the learning capability of the community. Members can reflect on the types of value that certain activities create and the conditions under which these activities can have positive or negative learning effects. A loop helps the community learn how to learn—thus creating enabling value.

In these two ways, value-creation stories serve as vehicles to turbocharge the learning of the community. As mentioned in chapter 4, some communities begin and end their meeting with the telling of value creation stories. What have you done with what we learned before? What do you think you can do with what we discussed today?

Value-creation training

In the value-creation module of *Ignite Academy*, we focus on three principles of social learning:

- Spending time together with the deliberate intention of making a positive difference
- Always paying attention, so that we know when we are making a difference
- Being comfortable in uncertainty and seeking knowledge boundaries to explore

By framing post-event feedback loops around the different types of value described in this chapter, we can explain the concepts more easily since the examples we use are of real experiences by *Ignite* community members.

To "practice what we preach" and create actionable value for the training participants, we provide them with tools to design their meetups around value creation—deliberately looking for feedback loops and value-creation stories from community members.

Since this topic introduces many new concepts and ways of thinking, we found it challenging to construct and deliver the module, but results were encouraging, and we will continue to iterate on it and improve.

6.4 Evaluation: articulating value creation

So far, the value-creation framework has been presented primarily as a model of social learning. But for this very reason it can also serve as a foundation for evaluation:

- As a model of learning, it produces accounts of the community's contributions in which members easily recognize their own experience
- As a tool in the service of learning, it integrates learning and evaluation because the same framework can serve both purposes

In other words, evaluation does not have to be an extraneous activity driven by a purpose that members resent because it adds a distracting burden on the community.

For the process of evaluation, the framework combines two types of data: value-creation indicators and value-creation stories.

Monitoring value-creation indicators

The value-creation framework provides some guidance for selecting a set of indicators to monitor in order to account for the full range of ways communities create value. For any value-creation cycle, it is possible to develop one or more indicator of value—if it seems useful. Indicators at the different cycles often require different data collection methods. Here are some simple examples of data sources for the four basic cycles:

- **Immediate value:** collecting feedback at the end of a meeting, numbers of (returning) participants, level of activity
- **Potential value:** counting, categorizing, and collecting feedback on community artifacts, such as documents, tools, and promising practices
- **Applied value:** follow-up on actions people take in their practice, through self-reports or surveys
- **Realized value:** many relevant indicators are likely to be monitored by organizations, for instance, cost of doing business, funder-imposed milestones, client satisfaction, computer-system downtimes, turnaround time on requests, employee turnover, etc.

Some indicators may be nonnegotiable, but most can be defined or interpreted to reflect the perspectives of community members.

Value-creation stories as data

While any one indicator may be useful on its own, you still need to make a plausible case that a community activity contributed to a change in a relevant indicator. For this, you need some value-creation stories. These stories show how the value has flowed from one value cycle to another to affect that indicator.

Value-creation stories thus serve as useful evaluation data as well as a learning resource for members. By following the flow of value across cycles, these stories help to show how community activities have contributed to changes in individual and organizational performance. The community is rarely the sole factor shaping an indicator and stories show what part the community has contributed. A key task in the evaluation is therefore to collect enough value-creation stories from members to provide a robust claim of contribution to monitored effects.

The point here is to give a plausible account of the full process of value creation. As we said before, we are not talking about "success" or "impact" stories, which are often testimonies about how the community has benefited someone. These maybe useful for a specific purpose (e.g., recruiting new members) but they are not value-creation stories. As a data point, a value-creation story accounts for a flow of value: how each type of value along the way was translated into another to make a difference in practice. The clarity of this account makes the contribution of the community plausible.

To provide a good data point, a value-creation story should have the following characteristics:

- **A first-person account.** When members tell their story in their own words, they relate their own experience of carrying value from the community into practice. Being their own experience lends credibility to the data. (And it also provides a recognition that validates their perspective as members as active carriers of that value.)
- **A specific instance**. A good story accounts for specific events, insights, and changes in practice; as a piece of data, a small specific story is better than a big one that remains general and vague, because it shows concretely what the community has done. It also has a better chance of being verifiable.
- **A complete flow.** A good story does not skip over a cycle; without meandering, it provides all the steps in accounting for the flow of value.

- **A plausible account.** A good story provides enough details about the transition between adjacent cycles to make the flow of value understandable and convincing. It provides an account of the community's contribution that is plausible to someone familiar with the context.

It is rare to get a good story right up front. Members can learn this specific story genre, but it may take some effort and follow-up to collect a body of good, complete stories. However, even when stories are unfinished, they give you something to follow up on later, especially if the storyteller is encouraged to project how the story is expected to end. It often makes sense to involve someone who is personally familiar with the context to help collect stories. They can trigger the storyteller's memory and assess the plausibility of any claim.

Integrating stories and indicators

A robust evaluation process combines a few select indicators of value in relevant cycles with stories that show the process of how a community contributes to that value. The two types of data need to be cross-referenced:

- Stories are more convincing if they refer to at least one value-cycle indicator monitored independently. For example, a story is strengthened if it refers to an organizational performance metric whose change is verifiable. Similarly, if a value-creation story refers to an activity that was rated high in feedback forms, the high rating helps corroborate the story. And the fact that many people found value in that activity suggests that there are likely more similar stories out there.

- Indicators are more meaningful when they are tied to the life of the community through a few stories referring to them. A high rating for an activity is good information, but it is just a number. It will be brought to life by just a few stories of what this activity did for some members in terms of changing their practice and the difference this made.

It is this integration of these two types of data that helps deal with the challenge of evaluation in a community of practice. In such complex social contexts, claims of causal attribution cannot be made through the control of variables typical of formal evaluation. Stories must do the job of showing contribution by accounting for process.

The process of integrating stories and indicators is dynamic. An unexpected level for an indicator suggests new stories to be collected. An unexpected value-creation story may point to a type of value that was not foreseen: a new indicator could be considered for monitoring. With this dynamic interaction of stories and indicators, evaluation does not require that all indicators be set up front. Evaluating can start right away—as part of the community's own reflection on its learning—and evolve along with this learning.

6.5 The framework in use

The framework has proved to be intuitive enough for members to use, but also rigorous enough for professional evaluators to work with. Most communities do not have professional evaluators, but even when they do, the framework allows members to be actively involved in articulating the value their community creates. In some communities, a few members take on the role of *value detectives*: watching selected indicators and ferreting out relevant stories to show the community's contribution.

From an organizational perspective, it usually falls to the social learning team to coordinate the process of evaluation across all communities of practice. The team helps communities articulate their value; monitors key indicators that fall outside of the purview of community members; builds a database of stories; publicizes exemplary results and stories; and creates occasional assessment summaries of the contributions of all communities. The value-creation framework is not meant to provide a summative evaluation at the end; it is more useful if it is an integral part of the initiative from the start—in collaboration with community members.

Value-creation data serves multiple purposes and audiences:

- **Ongoing loops.** Community members are the primary audience for feedback about value creation as it serves their learning. (We mentioned, for instance, by reserving a bit time in the agenda for bringing back or projecting stories.)
- **Conversations with sponsors.** Indicators and value-creation stories in tandem are helpful as supporting input for more meaningful and data-rich engagement with sponsors.
- **Learning news.** Quick spot accounts of value-creation in newsletters and websites provide inspiration as well as information about practice.
- **The story of the initiative.** The annual fair, for instance, is a good opportunity for a lively but data-rich account of progress so far.
- **Occasional summative assessments.** Initiative sponsors often want to see the big picture of what communities are doing. Stories play a key role in these assessments as a complement to indicators. Stories not only make it easier to interpret evaluation results; they are good triggers for substantive conversations about strategic capability building. Even if a sponsor only asks for quantitative data about indicators, there is nothing to stop you from sharing one or two value-creation stories to bring life to that data. We have seen sponsors become curious and supportive of community activities on the

strength of a few real-life stories. Some have become champions of collecting value-creation stories once they realized their power to cross-reference with quantitative data and make a more plausible case for the value created by communities.

The value-creation framework does not specify the process of its use. It can accommodate a range of approaches. Its application can be done “lite”—with the collection of a few representative stories, and perhaps one or two straightforward indicators. Or it can be done more comprehensively with a systematic collection of data. Or anything in between. The level of systematicity will depend on the resources available, the extent of investment to account for, and the cultural and organizational context. Without burdening communities with excessive reporting requirements, it is important to involve members in the process. When properly integrated into the initiative, evaluation is a vehicle for broadening learning within communities and with stakeholders.

7 EPILOGUE

7 Epilogue

We are dedicating this guidebook to all those who endeavor to enable learning through communities of practice. People do this delicate work for many reasons. Here is what motivates us.

Phil is driven by his passion for making the experience of work more meaningful and a source of personal engagement for people.

> Starting *Ignite* and seeing it flourish into something transformational for so many has been inspiring and literally life changing for those at the heart of it. In July 2018, when I attended my first social learning workshop in California organized by Bev and Etienne, I wrote this in my journal:
>
> > " *People at work are thirsting for context, yearning to know that what they do contributes to a larger whole.*
> >
> > —Daniel Pink
> >
> > *I find it fascinating to try to understand the interests, motivations, and passions of different people—and to try to give them an outlet to be intrinsically motivated and enjoy their work, by providing them with a sense of autonomy, mastery, and purpose. I want to use communities of practice as a means to do this and help to make a genuine difference by improving the culture in our company.* "
>
> As I now reflect on this several years later, I have been satisfied to see time and again how initiating and belonging to communities of practice really does provide employees a new sense of agency and identity that transform their relationships to work. The pragmatist in me sees this dimension of working life as a strategic imperative for an organization to succeed in the 21st century. And the idealist in me sees it as a human imperative—now more than ever we need to feel a sense of belonging, optimism, and purpose at work. What inspires me every day is to realize how these two imperatives are one and the same—and I hope that in the grand scheme of things, I am still near the beginning of this journey of learning to make a difference. The "ignition" remains on, so to speak. Our journey of learning and exploration never seems to end as we keep pushing the boundaries and improve the experience for all our members. We would love to hear from others who would like to talk and share their own experiences.

Claude sees the field of humanitarian negotiation as a promising platform to transform the international response to armed conflicts and communal violence. Yet, it remains inherently limited by the current structure of humanitarian organizations and their self-interested bureaucracies.

> I think that there is a ceiling to what formal organizations can do as operational entities in the humanitarian field. Communities of practice bring practitioners together to learn and find common ground across organizations. The practitioner-driven nature of learning in communities of practice thus opens new fields of action that hold great promise for taking the field to a new level of performance in the service of those in need around the world. I hope that the CCHN community will become a beacon to show what is possible when we build on the dedication of those who work at the forefront of the fight against human suffering.

Etienne and Bev view communities of practice as an important dimension of a broader picture having to do with social learning more generally.

> We believe that learning partnerships at various levels of scale, from the individual to organizational, local or global, is critical to our ability to deal with the challenges we face as a human species. Our inquiry is therefore to uncover and develop ways to increase the "social learning capability" that is ultimately key to our survival. We drive this work under the theme of *learning to make a difference*. We see the central contribution of communities of practice as their ability to act as a container for developing social learning capability around a domain. Under what circumstances does a community contribute to the social learning capability in the broader social landscape in which it exists? When does it get in the way? What other mechanisms and social structures need to be taken into consideration to ensure social learning capability at scale, from conversations, to communities, to organizations, to the broader landscape? Pursuing this inquiry is what prompted us to start writing a book series on the theme of learning to make a difference and recently to launch our Social Learning Lab in Portugal.

For all of us, this guidebook represents a step in our respective stories. We share it with you in the hope that, whatever motivates you, it will inspire you to go ahead and create your own story.

8

APPENDIX
ANOTHER STORY

8 Appendix: another story

After the first edition of this guidebook was published, we decided to create an appendix to include other notable stories that help illustrate that there are many different ways to cultivate communities of practice.

Communities of practice at ABInBev

Monica Ramirez is the Global Corporate Affairs Director at ABInBev (ABI), the world's largest beer brewing company. She is running their communities of practice initiative. The initiative at ABI takes quite a different approach from the one described by Phil at JP Morgan Chase. In contrast to the bottom-up, self-service approach at the bank, the ABI initiative started top-down, through a concerted management effort. The executive sponsor who started the initiative remains closely involved in it and makes clear that managers must view it as a priority for their staff. The social learning team is pro-active and offers direct help in the running of communities. They have integrated elements of the Agile methodology in structuring communities of practice, which may seem somewhat counterintuitive given the methodology's focus on product teams. They have even formalized their approach into a "certification" process to assess a list of rubrics through which communities graduate to official recognition as ABI communities of practice.

In the story that follows, Monica explains what situation they faced, what they did, what they achieved, and what challenges remain. While quite different from the bank's, the initiative seems to be a good fit for ABI. It works well in its own way. Members we have talked to have a sense of ownership of their community. To them, it does not feel like a top-down imposition, but like a bottom-up opportunity.

The contrast between stories should make clear that there are many different ways to run a communities of practice initiative. Much depends on the culture and the history of the organization as well as the personalities involved. What matters is that members experience a sense of agency in driving their own learning. The more structured approach adopted by ABI shows that the question is not whether communities should be structured or unstructured, but rather whether the structure adopted dominates and constrains, or whether the approach provides just enough structure to enable members to experience a productive learning partnership in which they see themselves in the driver's seat.

Monica's story includes many quotes from those involved.

On the left are quotes from management, John, the head of the Legal Corporate Affairs function, and Andres, her boss.

On the right are quotes from community leaders and members.

The ABInBev story

by Monica Ramirez

You are a global brewing company, and you've grown by acquiring local breweries—each with a long and solid tradition of brewing for their local culture and dealing with local regulations. How do you run a global function for legal and corporate affairs? The answer used to be, there is no role for such a function—local subsidiaries are best left to their own devices since they know the local customs and unique regulatory regimes. But then, you notice that there are clusters of countries with similar situations. You also see that issues that seem new to a local team are in fact not new; someone else in another country has faced this issue before. So, a global function makes sense. But a global function still needs to leverage global expertise while letting each country work in its own unique way.

When John Blood moved to HQ to head Legal and Corporate Affairs (LCA), he had spent many years in country offices. Seeing things from both sides made it clear that the relationship between the global function and local offices was not leveraging the potential of the organization:

> As I thought about it, I was like: “Often you’re just one person, in a country, and you have this big, complicated issue, and you have to go out and hire an outside expert – a law firm, a consultant, something like that.” But the more I thought about it, the more I thought “There is no better consulting or law firm that knows more about the beer business than our team. And if I were to take my team—a team of around one hundred legal and corporate affairs experts—we’d be the single largest beer advisory firm in the world. By far. But we’re not really getting the benefit of it across borders.
>
> *— John, head of LCA*

Even when countries sought internal advice, the model was only hub-and-spoke: a local team always came to global with an issue to receive some advice or get connected to some other country that could help them.

> So, I had this call with the Argentine team at 8 o’clock about this issue. And then I had a call about this same issue at 10 o’ clock with the team in Uruguay. And then at 11:30 that day I had the same call with the team in Mexico. I literally stopped at lunch and said “This is crazy, because I just got off the phone with the team in Mexico and they knew all about this issue, and then the team in Uruguay knew all about that issue. And I thought “There’s gotta be a better way to do this. They need to speak to each other.”
>
> *— John, head of LCA*

And in addition, why would the global function always know where the best solutions existed? My boss, Andres Penate, who reports to John, puts it succinctly:

> The global function is not the brain; it needs to be the enabler of the global network that acts as the company's brain.
>
> — *Andres, my boss*

We wanted to change the process so that countries could connect directly, but how do you do that without creating floods of emails across the organization? This is the situation we were facing at ABI.

8.1 Communities of practice

We had heard about communities of practice from a colleague who came from another company. We had read a book about them, and the approach seemed promising in addressing the hub-and-spoke problem. In the end, it was the success of a few concrete experiences that convinced us to proceed.

> When the pandemic hit, the CEO wanted to find a way for the company to contribute to the COVID effort. Andres and I put together an ad-hoc group from across the organization. And within a short time and without hierarchy, they had come up with the brilliant idea that ABI had expertise in extracting alcohol and could help fight the shortage of medical alcohol for disinfection (hand sanitizer). This ad-hoc group put a whole plan into action, including packaging and licenses, in record time.
>
> — *Andres, my boss*

Meanwhile, John decided to try convening an ad-hoc, cross-country group on the common challenge of managing relationships with restaurant operators.

There was nothing formal about the group. But what I started to notice was that the energy level around that group was wildly high. So, you have people who are pressed for time, you have people who you know get another meeting on their calendar invite and you know they are “Ugh do I have to go to this?” But there was no requirement to go to any of this. It was what we call ground-up organic. And the only judgment about whether this group was going to succeed was whether people came. And whether people were getting something out of it.

— *John, head of LCA*

We all reflected on these emerging, ad-hoc, cross-organizational groups: they were a bit like the communities of practice we were reading about—self-managed, highly energized, and creative, with a drive to solve problems in a way that was quickly actionable. The success of these groups in addressing concrete business challenges provided the necessary proof of concept for us to officially launch communities of practice in our function.

What was key was using a pain point, an urgent business challenge that the approach can address. This is not an area where you can start with a presentation and then proceed. You need to approach management with a working example, which has made a clear difference for the business. Otherwise, it sounds too much like a hippie thing. For us, we had strong working examples that made it easy to launch the initiative with full support.

— *Andres, my boss*

To get going, John, Andres, and I had conversations to negotiate a set of operating principles. In particular, participation had to remain voluntary: it would be driven by the value members found in their participation. The aim and structure of the communities had to make clear that they were different from traditional meetings.

It is important to be clear about the approach. If we were to do it again, we would spend a bit more time early on explaining clearly what it's about. For instance, it is not just more frequent "best practice" meetings. We have had meetings with presentations on best practices over the years. If for example, we think that a country had a best practice, then we'd invite people to look at that practice, and they did not always feel it was worth their time. So, they thought that this was, like, more frequent best-practice meetings. It took us a while to explain that a community of practice is not a fancy name for a best practice exercise. We were interested in the bad practices, too. So, it took us a while for people to feel confident enough to bring real problems and to open their kimonos and say, "Can somebody help?"

— *Andres, my boss*

Starting with a pilot

Andres and I were put in charge of starting the initiative. I piloted the approach by launching and leading our first community of practice in a strategic domain. I called it the *Praxis* community to emphasize the focus on making learning immediately practical.

The *Praxis* community is still going strong. It meets online every two weeks for one hour. Participation is voluntary, but we get 30-50 people at each meeting. This is significant given all the responsibilities these people have and the intense focus on targets that the company encourages. Perhaps it is also because membership is by invitation. Being selected for membership instills pride and an opportunity to be exposed to different challenges and to contribute your experience beyond your region.

Expanding the initiative

The *Praxis* community of practice quickly started to demonstrate the value of the approach, both through the sustained engagement of members and through concrete achievements. The success of the *Praxis* experiment convinced us to launch additional communities of practice. We produced a comprehensive CoP toolkit to spread the approach developed with the pilot. And we invited proposals. Soon, about twenty communities were proposed, with varying levels of clarity and relevance. In a thorough review with John, we selected about half of them for formal continuation and support.

8.2 Structuring ABI communities of practice

The experience of the pilot suggested a few ways we could structure our communities of practice to fit the ABI way.

Borrowing roles and processes from Agile

At that time, to avoid bureaucracy after a big merger, the company had started to adopt Agile as a management approach focused on action. So, we thought, why not inject into communities of practice just enough of Agile to crystallize the action-orientation that had driven the earlier ad-hoc groups? The elements of Agile we adopted include two community roles:

- A *product owner* who understands the domain and the issues people are facing in their practice
- A *scrum master* to take care of the day-to-day orchestrating of community activities

> It's good to have both roles. There is a lot of manual work that I normally do to support the community, the materials, organize the content factory where we have all the documents. I also have the meetings to schedule and the documents to prepare—a lot of manual work. Normally the product owner looks for other things, like opportunities or topics that we should bring to discuss or new concerns for the community. She has more knowledge about the topic itself and can have more input during the discussions. I have a role that is more management.
>
> *—Eduarda, community scrum master*

We also included two processes:

- A *product backlog* to keep track of key challenges that need to be addressed
- A *standing meeting*, a frequent, brief meeting of the core group to reflect on the progress and direction of the community and in some cases connect with country members to get a sense of what they are going through.

So, during these meetings, normally we have representative persons from the zones, who manage the countries that are from the zones. We understand during this meeting what are their requirements and then we include those activities in our backlog.

—Eduarda, community scrum master

The point was not to adopt the Agile approach wholesale. That would be too much structure and adherence to strict processes. But including a few elements from the [Agile] Scrum methodology has strengthened our communities of practice by providing just enough structure with familiar concepts. It has made them more intentional about focusing on making a difference and learning through quick iterations with action. It turns out that this is well aligned with the practical focus of communities of practice.

— Andres, my boss

Sensei: a role to recognize local master practitioners

We also established a special community role for experienced practitioners at the country level. We adopted the Japanese honorific term "Sensei" to infuse the role with connotations of an experienced "elder" and respected "teacher," someone who has achieved a high level of mastery in an aspect of the domain. Our goal was to give them an incentive to participate.

One excitement we hadn't anticipated was that the most excited people were the people who were giving the help. It was wildly energizing for them. They were taking expertise that they had honed over years locally, sometimes decades, and applying it to new situations, new regulatory environments, and new cultural environments that were indeed challenging to them. It made them better as they were helping the teams get better. Eventually this transformed into the concept of Sensei.

— *John, head of LCA*

A Sensei we interviewed believes that helping others is a good use of his time:

I have been involved with very different moments and scenarios, and different types of solutions. Some things we are good at, and some things we are not so good. But I am very available to other countries to share about that, and sometimes give some advice, something that is new for them. Many countries contacted me after I shared my experience. And now I am classified as *Sensei* by global. … I think in terms of time, it's 20-25%. …. And it's good for me to be in touch with other countries, to learn what is happening there because it's a source of ideas for me. So, it's something that goes both ways, you know. It's good.

— *Marcus, a Sensei from Brazil*

Beyond a sense of pride, giving Sensei global recognition for their local expertise also opens new avenues for professional advancement beyond one's locale.

The idea was to shine a light on people with practical experience. A formal title gives a global signal of the value of local experts. They have substantial practical experience, but it often remains invisible globally. It might not otherwise be recognized or leveraged.

— *Andres, my boss*

The content factory

We associated a *content factory* with each community—a document repository to capture new insights and solutions selected by the community, either from specific countries or developed collectively. For instance, one community has identified four types of learning activities to structure their meetings, one of which is to create a document for its content factory:

1. Common challenge. Many countries are facing the same challenge, and they need to discuss how others are handling it.
2. Active issue. One country is asking for advice on a particular challenge that they need help with.
3. Voice from the future. Something new is happening in one country, which is likely to become a trend in others.
4. Ready for codifying. We see that we have enough information to codify an issue into a reference document for the content factory.

> You might not even know who reports to whom, right? You just know that you got a really smart guy telling you, "Hey, my experience is we've done it this way or that way. Does that work for you?" And then we started to say, let's capture this in a really meaningful way. As we started to execute this idea, we noted two unexpected effects. One was that countries expressed a sense of pride to have a record of something they had done, selected by the community to be captured in the content factory. And the other was that the database itself started to attract new members. They found things in the content factory, produced by their peers. And they saw an opportunity to meet others and to learn from them.
>
> — *Andres, my boss*

Capturing learning remains a challenge, however. While all our communities have a content factory, we need to become better at codifying and curating the knowledge that comes out of their interactions. Right now, a lot of it is done by someone on my team. But we need to find a non-bureaucratic way to shift more of the responsibility for curating the content factory to the community, without creating a burden for them.

8.3 Creating a supportive structure

If our vision was right, it could not remain a side-show. It had to be taken as seriously as any other strategic initiative. This entailed rigor, widespread support, and sufficient investment.

Certification

To ensure high-functioning communities at scale and give the initiative some gravitas, a key move was to design a certification process. The idea was to create a process by which a community could qualify to be recognized as a formal ABI community of practice. We articulated the criteria that represent the ABI approach to communities of practice, with a scale ranging from "beginner" to "advanced" and with a special mention for "extra mile." The certification process then entails self-evaluation on a series of rubrics about various aspects of a community of practice in the ABI mold, as shown in Figure A.1.

Certification leads to a ceremony celebrating the communities that complete the process. As head of the function, John always makes sure he is there. Such a visible ceremony with the presence of the executive sponsor does two things. It legitimizes the value of communities of practice and recognizes the quality of their work. It also gives members the sense they belong to something significant, something that works well and makes a difference.

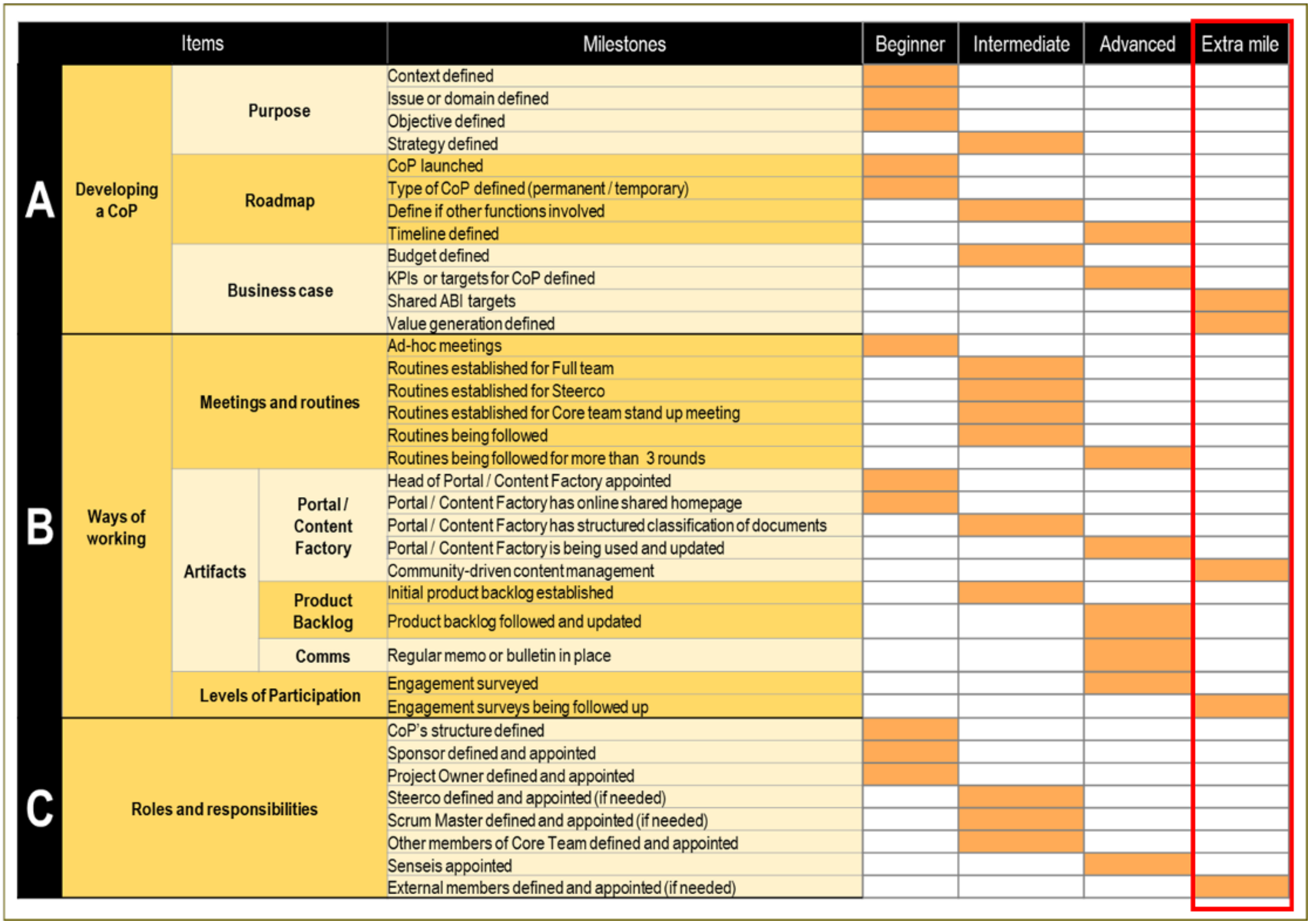


Figure A.1 The ABI CoP certification chart

At the time of writing, twelve communities have competed the certification, ten of them with the extra mile achievement (with another five in the pipeline).

We thought that certification would be a good way to ensure quality, but we were concerned that it would be perceived as a bureaucratic process of compliance and evaluation.

> "Certification" may sound too bureaucratic for communities of practice, but in our case, it has been crucial. Our community leaders have found it useful to consider various avenues for helping their communities of practice evolve. And the formal recognition has been inspiring.
>
> *— Andres, my boss*

The value of certification is recognized by a community product owner, even though she is personally suspicious of bureaucratic processes:

> It can come off a bit cumbersome, but I also think it creates a really good discipline. And again, I think one of the reasons the community of practice has been successful is the sustainability of it. And if you create that structure and you create a bit of rigidity and routine, guidelines, to make sure you are disciplined about the routine, that's how you create that sustainability.
>
> *—Lauren, community product owner*

The scrum master of the same community is more process-oriented and has enjoyed going through certification:

> I like it. Because it was a moment when we stopped our work to analyze what we could improve. So, by the certification process we start doing some things that we didn't do before. That was great. So, this survey I mentioned was something suggested by the certification process in order to achieve the level we would like to achieve. We did the survey, and it was amazing. Not only this, but after the certification process, I started to discuss with other communities, which I didn't do before. And this was a way that the communities in ABI could start to talk to each other to see how we can improve as a community.
>
> *—Eduarda, community scrum master*

As long as it is not perceived as compliance and unduly onerous, I see certification as serving the initiative in several ways:

- It shows that the initiative is taken seriously and that the boss means it
- It suggests that there is a distinctive rigor to a community of practice
- It provides guidance as well as evaluation, giving ideas about things to do that new scrum masters may not have thought of by themselves
- Reflecting on the same certification rubrics also creates a shared frame of reference for scrum masters to talk to each other about what they are doing or not doing

While producing a toolkit was useful to launch the initiative, I believe the certification process is having a more direct effect on the quality, commitment, and sustainability of the initiative.

Sponsorship

As head of our function, John played a crucial role, not only in working with us to conceive and launch the initiative, but to make sure that it was taken seriously by everyone. He helped select the domains we were going to support. He attends the certification ceremonies. And he ensures that local managers support people's participation.

> I called up all the CEOs of the six regional business units and said, "Hey, we're going to have this community of practice, and we're going to be working on this challenge. I'm going to have lots of members of your team participate in it. Just so you know, they're going to do work that has nothing to do with you, your zone, or your country. It's not going to help you deliver a single target. You won't see a single more case of beer in your country.
>
> So, when they tell their boss, 'Hey, I might not be at the meeting you want this week, but I'm going to be helping the team in India even though I work in Ecuador,' the answer is 'Yes, that's a good use of your time.'"
>
> — *John, head of LCA*

He also talked to peers in other functions to ensure that the initiative was not perceived as just a LCA thing, and that participation could cross departmental boundaries.

Communities of practice started from the top as a management decision, but it was important that it not be perceived as another top-down initiative.

> I would say the most important thing we did, and this is sort of strange, but we never tried to make it top-down. We never required anyone to do it. No one gets a demerit if you don't come. And the only reason you attend is you get something. It is 100% driven on what you get out of it.
>
> *— John, head of LCA*

And my team is still very much driving the initiative. But when you ask members, they say they perceive the process as bottom-up. They feel a strong sense of belonging and ownership in how their community runs.

> We have a collaborative, co-creative approach, in the sense that, in this space, we don't make assumptions. We don't impose ideas, but we define together what we see as pain points. And we've marked together what we see are our needs. We assess them together and we propose solutions and prioritize them based on our needs.
>
> *— Georgia, community project owner*

And beyond the certificate, we do not burden the communities with formal assessments.

> We let value drive the process. At this stage, we don't worry about assessing the cost-benefits too formally. The investment is minimal. Word of mouth will spread the news that participation is a valuable use of time. When that happens, it spreads with minimal assessment.
>
> — *Andres, my boss*

Providing close support for the communities

We work with communities, product owners, and scrum masters. We help them with certification. We create tools they can use.

> For example, when I have to prepare some deck or some presentation for the community of practice, it doesn't take me so much time ... because it's very short, clear, straight to the point—what's the landscape, the situation, the actions, the results, and finally always the key learnings.
>
> — *Juan Francisco, member of 3 communities*

More recently we started two communities of practice to bring the various product owners and scrum masters together. These communities help them lead their communities from their respective roles. It is also a chance to connect across communities, recognize shared issues, take advantage of synergies and coordinate activities when useful.

My team also takes the perspective of the ensemble of communities to help ensure that they cover the key strategic areas and they do not become a new kind of silo. For instance, recently, we combined the full team meetings of three related communities of practice with many common issues. The idea was to have more integrated operations, but without merging the communities. Each still maintains its distinct domain and identity. But they share their calendars, invite each other to their meetings, and put common issues on a joint agenda. All this increases cross-boundary participation and learning.

8.4 What we have achieved

We have been working with this methodology for 3 years and I think we have made significant strides and made great progress but there's still a lot to do.

Unlike the best-practice traditional meetings, the communities of practice help each other with their challenges:

> I'm facing this problem, and I just don't know what to do about it. Can any of you help? Have you seen something similar? ... I think there is a great deal of psychological safety to come and say "Hey, we tried this, and it did not work. So, definitely don't try this in your markets if you're facing this in your challenges." This is what we didn't expect, and this is what happened.
>
> — *Lauren, community product owner*

Sometimes they go on a quest together:

> We had a particular point where a couple of countries had to know some of the norms, how regulations were set. We were able to get a good set of information back from our colleagues about what the rules were in these other countries. Something you can't really get easily online, not easy for us to just go and gather it. It's not just the questions, it's that the answers are fuzzy. So, we needed to find a way to discuss the topic a bit more before asking people for what actually goes on in their country or their home. And that was something that helped those two countries. It helped them have more evidence-based content when they actually did the government engagement.
>
> — *Rohan, community member*

Sometimes members gain new perspectives on their work by hearing how others are approaching their work and what new challenges they face that might suggest a more general trend.

> The community of practice brought us a new issue in our daily work: the external multilateral engagements. They were international stakeholders that weren't mapped in our country. We were more focused on local officials. ... And thanks to the community of practice, we began working on that and we began engaging with other organizations. This has helped us a lot to strengthen our local plans.
> ... And in the last years we have seen, through the community of practice, a lot of trends, especially regulatory trends, that were happening in Europe or in the US, for example. And so, we know that in a year or in a few months, they can appear in our countries, in Brazil, in Argentina, in Uruguay. So, the anticipation of this trend via the community of practice and how to handle it with the government, with the different stakeholders, that is one of the most valuable things of the community of practice for me, the anticipation of global trends and the best practices from other countries. ... So, it's like, news from the future from everybody else.
>
> — *Juan Francisco, member of 3 communities*

Participating in our communities of practice also helps people with their professional development.

> I think in my personal profile, it helps me a lot to grow as a public-affairs professional ... If tomorrow I decided to leave the company, I think that one of my best experiences in ABI as a multinational company is all the things, all the plans, all the friends that I learned from the community of practice.
>
> — *Juan Francisco, member of 3 communities*

People can also grow into a role faster:

> One of my favorite stories is about South Africa. It is one of our highest-risk markets. We had some changes on the team locally and we brought in a new woman, a little over a year ago now. And she came from the government side, so she was completely new to our sector, to our company. She's fantastic, but she really didn't know anything about our industry. And so, helping her build those connections within the community, she was able to get up to speed extremely quickly and not feel like she was running uphill by herself. To be able to see the development of her and her strategy and her network and the resources she was able to pull together, it was really validating and encouraging. And we've got a lot of positive feedback from her and from her extended team and line manager saying she's doing an amazing job.
>
> — *Lauren, community product owner*

A global community also creates a talent pipeline by providing broader intellectual stimulation and by opening the prospect of global careers.

> We also began to see that there was some level of frustration of some people with their careers. Because if you are a professional in this area and there is a mindset that this is mostly local, very quickly you become an expert practitioner. But you cannot go and grow intellectually beyond your sandbox. And some of the most intellectually interesting topics happen rarely. So even what you learn, you cannot deploy it again. … You can say that people want a global career because, you know, coming into in New York is fancy. Or because it comes with a higher pay rate. All that is true. But when you check deeper into the request for a global career, it is the intellectual stimulation.
>
> — *Andres, my boss*

Being part of global communities give practitioners a broader sense of what their work is about:

> If you're sitting in India or Mexico or Belgium and working at the country level, you don't necessarily have that level of exposure and familiarity with the other countries in our company. ... People see a lot of value in making these connections and feeling like their work has the ability to cross borders, so I think there's a lot of pride in that. ... I think, in a very specific way one of the biggest benefits I've seen is that the people at the country levels really now feel like they're part of a global company. ... So, if people can feel that more intrinsically, it gets them to think long-term about their life in this company. I think that's really motivating.
>
> *— Lauren, community product owner*

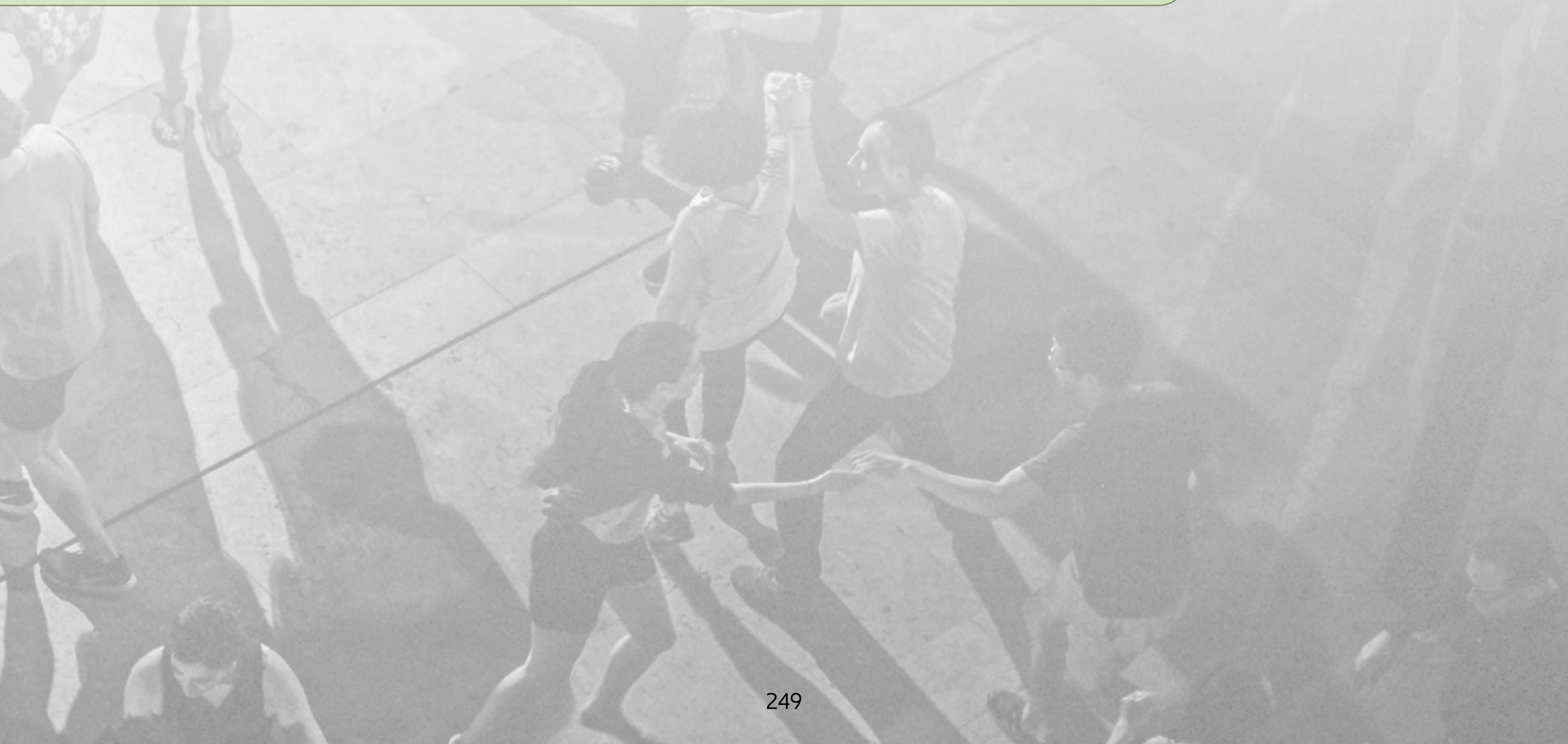
8.5 What challenges remain

We have demonstrated a new way of working, which provides an alternative to address the main drawbacks of the old, hierarchical hub-and-spoke model. Our communities of practice represent a fundamental change on how we operate as a global function—crossing silos, leveraging expertise wherever it may live, enabling collective action, and developing companywide capabilities.

While we have achieved a lot, we see some remaining challenges going forward in order to reach the full potential of this initiative. The initial phase of our initiative has been highly dependent on the understanding and skills of staff in the global function. We need to make the whole process less dependent on the talent and knowledge of a few, so it is sustainable even when people move on. The toolkit and certification process are a good start, but we have to expand the pool of people who can take leadership across the company. We need to persuade HR that this approach is essential for the effective functioning of global operations, not just within a few departments but throughout the entire organization.

You know, it's probably our biggest challenge. I think until we get the People team, our HR team, to fully embrace it, it will probably be more on these specific topics, as opposed to real transformation. It's great in the practice areas that we have, and they're working really well. But it's harder to make it reach its full potential in the organization. If you look at the challenges and the opportunities across the company, we're talking hundreds. It's a tool in our management system, but it's not yet how we're organized and operate. And I expect some communities to fail, while others will do well. The best communities of practice should be like water for fish - just part of our everyday routine. This is how we handle issues and get our work done. It's natural for me to work with others, seek advice, and build relationships. Using the content factory is just part of the routine. The main goal is for these ways of working to become as natural as water is for fish. And that's the ultimate vision. And that's the ultimate test of whether this is going to succeed or not.

— John, head of LCA



9 REFERENCES AND FURTHER READING

9 References and further reading

References for *Ignite* and CCHN

Igniting the News

It was incredibly exciting for us when, in December 2021, *Ignite* was featured on the external news media and also on our corporate careers website (you can just search online for JPMorgan *Ignite*).

Particularly in the context of the "great resignation" and "skills crisis" that beset the technology industry at that time, recognition from the press proves to be an exciting way to promote our company's culture of lifelong learning, innovation, community, and our opportunities to work on cutting-edge technologies.

We were thrilled that the benefits and impact of communities of practice were now being recognized outside of our organization, on publications such as *The Economic Times* which is second only to the *Wall Street Journal* in terms of its readership as a daily business newspaper.

This was a huge milestone for us, and a point of reflection where we could look back on how far we came from our humble beginnings in 2016.

J.P. Morgan technologists *Ignite* careers with Communities of Practice—Economic Times, India

Communities of Practice—a Foil for the Skills Crisis in Tech?—DIGIT, UK

Grassroots effort helps JPMorgan Chase ease the tech skills crisis—SiliconANGLE—United States

Developers: When it comes to tech jobs, banking is booming—ZDNet—United States

More about the CCHN community of practice

The CCHN website is at: http://frontline-negotiations.org

There you can see the CCHN Field Manual on Frontline Humanitarian Negotiation as the first iteration of establishing the domain with a systematic repertoire of practice for the CCHN Community.

Work by Etienne and Bev

A brief introduction

Wenger-Trayner, E. and Wenger-Trayner, B. (2015) *An introduction to communities of practice: a brief overview of the concept and its uses.* Available from authors at http://wenger-trayner.com/introduction-to-communities-of-practice.

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The practice of cultivation

Wenger, E., McDermott, R., and Snyder, W. (2002). *Cultivating communities of practice: a guide to managing knowledge*. Cambridge, MA: Harvard Business School Press.

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What does it take to launch and sustain a community of practice initiative? This book helps guide individuals, teams, and organizations through the process. It is for organizational leaders creating a conducive environment, community leaders launching and sustaining their communities, people in various roles facilitating meetings, activities, and the use of technology, and evaluators accounting for the value communities create. It reflects the combined experiences of the authors in cultivating communities of practice within and across organizations.

Etienne and Beverly Wenger-Trayner have been launching and accompanying communities of practice and organizational initiatives for more than three decades. They have recently founded the Social Learning Lab in Sesimbra, Portugal, where they run workshops for social learning leaders across sectors.

Phil Reid is an experienced technologist who is leading an initiative to launch and support communities of practice at JPMorgan Chase. What started as a small experiment in 2016 is now a worldwide initiative intrinsic to the strategy and culture of the company's global technology organization.

Claude Bruderlein is a frontline negotiator turned researcher at Harvard University. He led the creation of a global, cross-organizational community of practice of frontline humanitarian negotiators under the auspices of the Centre of Competence on Humanitarian Negotiation.

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