



Pan American
Health
Organization



World Health
Organization

Regional Office for the Americas

*PAHO/WHO
Methodologies for
Information Sharing
and Knowledge
Management in
Health*

1. BUILDING COMMUNITIES OF PRACTICE

Communities of practice are groups of people, networks, or institutions sharing interests, exchanging information or discussing ideas on a specific topic of common interest by interacting on an ongoing basis

Title	Building Communities of Practice (CoP)
Version	6 th Revision, May 17, 2015
Definition	Communities of practice are groups of people, networks, or institutions sharing a concern, exchanging information or discussing ideas on a specific topic of common interest by interacting on an ongoing basis.
Objective	Building specialized knowledge by sharing lessons learned and tacit knowledge based on collective reflection of the experience of its members.
Expected results	<ul style="list-style-type: none">• Problem solving• Generation of ideas• Knowledge dissemination• Development of best practices• Lessons learned• Collective reflections
Premises	<ul style="list-style-type: none">• Motivation: An open and free environment should be created to encourage creativity and the free exchange of information and knowledge with strong personal commitment and freedom of speech• Definition of rules: they should promote the exchange of ideas without limitations or restrictions but rather promoting creativity and judgment building• Productivity: perceived as a secondary effect rather than as a primary objective since the purpose is to learn from experience• Group self-assessment: There should be mechanisms that enable the group to perform an informal self-assessment of the critical path that will make possible to achieve the intended results

Procedure

Phase I

Design

This phase involves definition and planning of the Community of Practice to be created. It consists of 6 stages:

1. **Name or title designation:** It is advisable that the title should include information on the objective and the specific product expected from the CoP in order to generate a sense of belonging and identification with the reason that brings the group together.

<i>Good examples</i>	<ul style="list-style-type: none">• CoPs to <u>define indicators</u> for the assessment of telemedicine projects• CoPs to <u>select the platform</u> to record open access documents
<i>Bad examples</i>	<ul style="list-style-type: none">• CoPs to coordinate the implementation of the institutional memory work program• CoPs to monitor the development of the project for maternal mortality reduction in South America

2. **Identification of the problem:** It consists of a brief description of the problem to be solved with this community. Occasionally, CoPs will be used to build new knowledge as well as to develop a baseline on the topic intended for analysis.
3. **Definition of the objective:** The objectives of a CoP may be oriented towards:

Problem solving: These communities may enable members to pose questions or problems and get answers from their peers within the framework of professional experience. Besides, the “just in time” question and answer system between members of a shared environment allows for the faster solution of any topic.

Generation of ideas: These communities enable their members to contact people external to their common workplace but who share the same area of knowledge (e.g., people from other offices). This practice allows community members to work in a more creative fashion, sharing ideas that may result in greater innovation.

Sharing knowledge between institutions: These communities create a favorable environment which helps to identify and produce additional ideas and areas of

work since it facilitates communication and collaboration processes between institutions.

Developing best practices: These communities enable selected people to develop problem solving-based best practice models submitted to the CoP. Although these communities are not specifically designed to automatically get the best practices, they can provide relevant details on best practices within the Organization and enable their members to improve them even further.

Lessons learned: These communities enable selected people to analyze situations and provide recommendations that institutions or projects should incorporate from items identified as “learned”. Conducting an exercise of “lessons learned” will be successful when these lessons are translated into institutional standards, policies, products, or services.

Post-action reviews: These communities allow analyzing and reflecting on the implementation of a project, activity, or event, to learn from that experience so as to improve in the following stage or in the future.

4. Definition of expected results: The CoP should define one to three expected results that will be checked during evaluation. Each activity should be oriented towards these results and each member is responsible for monitoring and assessing these activities and accountable for their achievement.
5. Member selection: This step involves selecting the people who will participate in the CoP, including role and responsibility assignment to each member. In addition, this step includes deciding if the call will be public or restricted to a specific group of people. The main roles are:

Leader: The leader provides guide and managerial support but does not need to be directly involved in CoP routine activities. He/she can help to promote the CoP and provide orientation and motivation to its members, as required.

Moderator: The moderator plays a critical role in fostering community activity and participation by sending information, promoting discussions, posing problems, and identifying new related topics than can help out in the development and growth of the community. He/she is involved in activities such as moderating discussions, evaluating comments and information and drawing up conclusions to be shared with the whole community. The leader guarantees that the CoP is aligned with the set objectives.

Facilitator: The facilitator coordinates and supports the CoP's activities using asynchronous and synchronous tools. He/she also provides the CoP with updates and promotes it by sharing its purpose and mission inside and outside the organization, as needed.

Participants: the members of the CoP develop a shared repertoire of resources: experiences, stories, tools, lessons learned, best practices, ways to face recurring problems, etc., i.e., a shared practice. This requires time and sustained interaction. Participants support and motivate one another.

6. Identification of target audiences: the group that the CoP is going to see to and the group that may benefit from the CoP.

Phase II

Implementation

This is the most important phase; it involves the implementation and operation of the CoP and includes 4 key instances:

1. **Knowledge management tools:** For its operation, the CoP requires the previous selection of a set of tools that will facilitate exchange among its members. This step is critical for the members to be properly connected from the start. According to the function they support, different types of technological tools, both synchronous and asynchronous, may be available.
2. **Call for members:** The leader will invite potential members, who should confirm their participation and are advised to register through an electronic registration system (intranet or extranet) to record their information.
3. **Introductory meeting:** The introductory meeting consists of a welcome to all members and the formal introduction of the CoP. Furthermore, the CoP objectives and expected results should be shared to ensure that all members have a clear understanding of the way in which the CoP will operate. The leader or the moderator will submit to the members a recommended action plan aligned with the CoP objectives, which will lay the foundations for the CoP development.
4. **Development process:** It is important to guarantee that the CoP will work according to its objectives. The different roles identified, such as leader, moderator, facilitator and members, all play a major function in the CoP development process. A solid leader acts as an incentive and motivation for the community and creates a general sense of unity. The moderator works as the community backbone by fully engaging in activities and being the driving force that supports the CoP, facilitating its growth and improvement. The facilitator's contribution consists of providing daily support for the conduction, sharing and promotion of the CoP's activities and objectives.

Through their participation, motivated and committed members guarantee that the CoP remains active and focused for the achievement of expected results.

The moderator, and sometimes the facilitator, should consider the following actions in the development process:

Discussion planning	Intervention in the discussion development	Discussion Closing
<ul style="list-style-type: none"> Plan the discussion according to discussion objectives Virtual grouping of participants Specify discursive format, prepare discussion stages, foresee difficult aspects of content Submit questions or an appropriate initial text, and be prepared to provide more insight on the topic Prepare and propose preliminary participation guidelines (language used, quality and length of exposition, way to address other messages, type of message during each phase) Prepare content items to be addressed in the discussion 	<ul style="list-style-type: none"> Explain expectations and objectives of the discussion Start the discussion in a meaningful manner, raising one or more relevant questions or topics Restate the initial question when interventions go in the wrong direction Organize the discussion Coordinate participations and engage offering specific content rather than only messages to run the discussion. Help to focus on the discussion topic Provide feedback and summaries if the debate is long Record information from each participant in order to bear in mind their knowledge, experience and interests Close the discussion or lines of discussion when it extends without producing results related to knowledge building 	<ul style="list-style-type: none"> Provide an articulated summary of interventions Close the discussion overtly Assess interventions publicly and, if appropriate, personally or privately Relate the theme of the discussion with subsequent topic-related educational actions (articles, web addresses, lists of interest, discussion groups, etc.)

Phase III

Conclusion

This phase allows evaluating, recording and communicating achieved results. When the CoP achieves the expected results it reaches its maturity stage. At this point, it completes its life cycle and needs to be assessed. The following three aspects should be considered in this phase:

1. **Assessment:** It is necessary to conduct periodic assessments and a last assessment of the CoP. A simple satisfaction survey to members is advised in order to assess the community performance according to the objectives and expected results. Based on the survey results, conclusions, lessons learned, post-action reviews and recommendations will be put forward. In addition to sharing CoP's findings and results – such as its achievements, major events, challenges and difficulties inside and outside the organization – assessment is a critical step to promote and preserve the exchange of lessons learned and knowledge gained.

-
2. **Results/work recording:** Organizing the information is primarily a moderator's task, and he/she should manage the information and knowledge the CoP is producing as a result of transforming tacit knowledge into explicit knowledge. All the information should be prepared for incorporation in an institutional repository. Preserving the community contents is essential to facilitate future retrieval and use.

 3. **Communication and feedback:** It is relevant to communicate the results achieved by the community, both to its members and to the different audiences primarily related to them. According to the type of CoP, it is advisable to assess the possibility of publishing results in the following means and formats: 1) a communication on the Intranet for institutional staff, 2) a communication on the Internet for the general public, 3) short messages to be used in social networks, 4) PowerPoint presentations for events related to the CoP's topics, 5) specific messages for thematic networks conceptually related to the CoP's topics, 6) virtual seminar to introduce and disseminate results, and, 7) scientific article, If CoP's contribution is considered original in relation to a relevant topic of Public Health.