



Communities of Practice

Guidance and Best Practices Based on MEOPAR's CoP Program

Report prepared by Alison Maunder and Ron Pelot, July 2017

Updated by Jia Yi Fan, Alexa Goodman and Rodrigo Menafrá, November 2022

MEOPAR

Steele Ocean Sciences Building, 2nd Floor Halifax, Nova Scotia B3H 4J1

(902) 494-4384

info@meopar.ca

www.meopar.ca/knowledge-mobilization/communities-of-practice/

Table of Contents

<i>I. Introduction</i>	3
<i>II. Governance Structure</i>	3
<i>III. Establishing a CoP: MEOPAR's CoP Program Application Process</i>	5
<i>IV. MEOPAR's CoP Program Eligibility</i>	5
<i>V. Suggested CoP Activities</i>	6
<i>VI. MEOPAR's Annual Reporting Requirements</i>	6
<i>VII. Resources</i>	7
General CoP	7
Marine-Focused CoP	8
<i>VIII. References</i>	9

I. Introduction

The Marine Environmental Observation, Prediction and Response Network (MEOPAR)'s Communities of Practice (CoPs) bring together researchers, highly-qualified personnel (HQP) and partners, in addition to other external individuals and organizations, to share expertise, to learn, and to provide a place for discussions and co-production of knowledge. CoPs are working groups used to exchange and mobilize knowledge, technical training, and provide an opportunity to disseminate findings and enrich research with the interactions among researchers, practitioners, policy-makers, and community members and groups (Wenger, 2011). They are also an ideal forum for informing the MEOPAR network, as well as individual researchers, about leading-edge developments in the CoP topic area, and identifying gaps and opportunities for new research and knowledge mobilization (KM) opportunities.

This document outlines MEOPAR's CoP governance structure and its CoP Program. This report intends to provide guidance for other individuals and organizations looking to establish CoPs based on their existing Program structure.

For a list of current MEOPAR-supported CoPs, please visit: <https://meopar.ca/communities-of-practice/>

II. Governance Structure

MEOPAR-supported CoPs are typically overseen by designated Lead(s) with direction from a steering committee and are operated by a coordinator (Figure 1). MEOPAR's Administrative Centre assists in providing support, for example, during initiation of new CoPs and growing their governance capacity (Figure 1). Each CoP is expected to have a designated lead (or co-Leads) who is responsible for reporting requirements. Leads are responsible for overall management for their respective CoPs, and for guiding CoP activities. This typically includes: developing workplans, ensuring sufficient personnel support is identified, managing respective budgets and partnerships, and reviewing the annual progress report in collaboration with the MEOPAR Administrative Centre.

Other CoPs external to MEOPAR's Program (i.e., coalitions or working groups) may have slight variances in governance structure, however the roles and functionalities would remain similar. For example, some CoPs may operate more similarly to a not-for-profit organization, with a Board of Directors rather than a steering committee.

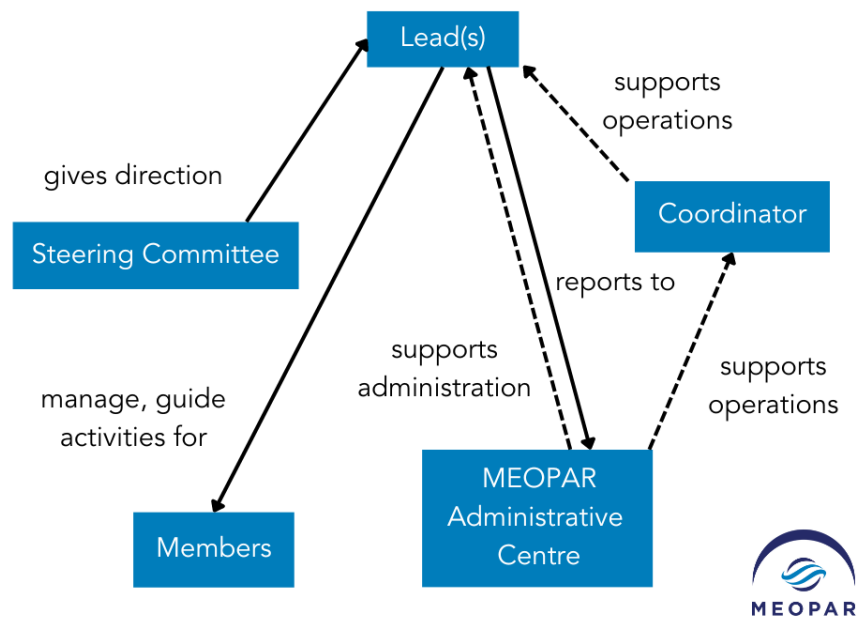


Figure 1. MEOPAR's community of practice governance structure

CoP Leads are encouraged to set up a steering committee of approximately 5-8 people to help recruit members, draft CoP's applications, and guide overall development of the CoP. No more than half of the steering committee can be current MEOPAR investigators. This is meant to encourage partner and end-user involvement in the planning and development of the CoP. Coordinators provide administrative support for CoP activities and help with annual reporting requirements. Depending on the scope of activities, sometimes Research Associates (RAs) may be hired for specific projects.

MEOPAR's Administrative Centre provides guidance and logistical support to CoP Leads and coordinators. The Administrative Centre works closely with CoP Leads and steering committees to support their activities and ensure they align and engage with Network members. In the past, MEOPAR provided funding for first-year activities (initial operations) and on a project-to-project basis on various calls for proposals (see Section VI below). MEOPAR recognizes that CoPs will have a number of supporting organizations and is interested in leveraging other relevant efforts whenever possible. Application and reporting requirements (outlined below) are used by MEOPAR for its own internal financial and governance requirements, however, similar methods could be replicated and applied for other CoPs.

III. Establishing a CoP: MEOPAR's CoP Program Application Process

NOTE: MEOPAR CoP Program is not currently accepting new applications, however, their application process aid in developing new CoPs.

Before applying for applications of any kind, Leads should discuss their workplans with relevant leaders and stakeholders within the respective fields to ensure the Community's domain and objectives aligns with emergent needs and MEOPAR's strategic plan, and activities can be supported by the Network.

After the Lead has sanctioned the CoP, CoP Leads should begin recruiting an initial steering committee to develop a workplan and Terms of Reference (ToR) and help prepare an application (template will be provided) to MEOPAR's Administrative Centre.

The Terms of Reference document should include:

- Outline of the governance structure with a breakdown of roles and responsibilities, including an appendix list of steering committee members with short biographies to be updated continually based on the steering committee member term;
- Definition of "domain" or area/issue to be addressed;
- Outline of goal, scope, and objective(s);
- List of outcomes or deliverables (both short-term and long-term);
- List of partners/end-users that will be targeted (sectors and disciplines);
- Workplan of activities for the first 3-5 years, including a preliminary communications strategy;
- 3 to 5-year budget (including expected cash and in-kind contributions).

Applications and workplans should be reviewed by committee. MEOPAR's Administrative Staff and Research Management Committee (RMC) reviews CoP applications and provides feedback to applicants.

Once feedback has been incorporated, and approved plans are underway, CoPs have the opportunity to be integrated into MEOPAR's network. By working with the Administrative Centre to communicate its launch, including promotion on MEOPAR's social network channels and website, MEOPAR's CoP Program aids recruiting CoP members.

IV. MEOPAR's CoP Program Eligibility

MEOPAR supports CoPs in several ways. As mentioned above, CoPs will be able to work with Core Research Associates and MEOPAR's Administrative Center to help with administrative activities (e.g., event planning, monitoring of discussion threads and contact databases, annual reporting). Core Leads and MEOPAR's Associate Scientific Director provide additional scientific leadership to the CoPs.

MEOPAR's Administrative Centre provides seed funding to eligible CoPs to help support initial activities including face-to-face meetings or workshops. Funding in subsequent years may be considered. However, MEOPAR is not currently accepting new applications.

Funding can flow in two ways: (1) to an eligible investigator on the CoP Steering Committee whose university has signed MEOPAR's Network Agreement and who agrees to receive the grant and

process necessary invoices and travels claims associated with the workshop; and (2) to an organization with incorporated status that can invoice MEOPAR for workshop-related expenses.

The following criteria are used to assess CoP eligibility:

- Activities clearly align with MEOPAR's Strategic Plan and Core activities;
- There is a demonstrated need within the domain for the CoP;
- The CoP has been discussed with the applicable thought leaders (i.e., field experts) and have co-developed the work plan for future years;
- There is **at least** one current or previously-funded MEOPAR investigator on the CoP's steering committee;
- A person on the steering committee is eligible to receive MEOPAR funding (see Support for CoPs for more information);
- There is a plan to engage the community outside of face-to-face meetings using an online platform (MEOPAR will suggest a platform and provide support to the CoP Leads);
- Partners/end-users are involved in CoP activities and are providing cash and/or in-kind support (Note: an individual's time is considered an in-kind contribution);
- There are clear outcomes/deliverables (recognizing that they may change over time);
- Activities incorporate knowledge mobilization and science communication strategies to facilitate the transfer of knowledge between researchers, partners and end-users.

V. Suggested CoP Activities

CoP Leads, in collaboration with a Core RA, should maintain a member database with contact information for the community. If the community gives permission, this should be searchable to promote relationship-building within the CoP.

Networking activities will differ with each community; however, the following activities should be considered when developing the CoP's annual plan:

- An annual face-to-face meeting with all members (in accordance with public health recommendations)
- Workshops (including regional events when necessary)
- Webinars
- Blog posts/discussion threads (facilitated through the online platform)
- Development of best practices in the CoP's main topic area(s) (in the form of a report or white paper). Resource: Ocean Best Practices (<https://www.oceanbestpractices.org>) (Ocean Best Practices System, n.d.)
- Policy briefs, brochures or other communication materials
- Task groups to take on specific activities within the CoP
- Mentorship/training opportunities and events for students

VI. MEOPAR's Annual Reporting Requirements

MEOPAR's reporting requirements could serve as the basis for other emerging CoPs. Each CoP is required to submit an annual report (time depending on operational requirements) to MEOPAR's Administrative Center, which should be completed by the applicable CoP Lead with support from

the coordinator. A reporting template is provided to the CoP Lead(s) and coordinators, which requires information on the following:

- Steering Committee members / changes of leadership
- Participants and their affiliation
- A summary of the year's activities
- A summary of the CoP's key achievements
- KM activities and outputs relevant to the CoP, such as:
 - a. Identification of research gaps and opportunities in the CoP's domain
 - b. Alignment of effort with other relevant initiatives and organizations within Canada
 - c. Identification of key KM opportunities and developments in the CoP's domain
 - d. Generation of new knowledge to help inform government policy/regulation, community decision making or marine industry operations
 - e. Level of engagement of partners and end-users in CoP activities (e.g., the amount of cash & in-kind funding; number of participants from each sector; etc.)
 - f. Incorporation of multi-disciplinary approaches and dialogue
 - g. Training and mentorship opportunities for students in the CoP
- A financial report (which includes cash & in-kind support from partners)
- A summary of the next year's activities/deliverables and budget

Annual reports should demonstrate progress toward the objectives stated in the original application. Reports must be submitted on time to receive ongoing MEOPAR support.

VII. Resources

General CoP

- Building and Sustaining Communities of Practice: Continuing Success in Knowledge Management (American Productivity & Quality Center (APQC), 2001)
- Communities of practice ("Communities of Practice - Wenger-Trayner" 2021)
- Communities of practice: A brief introduction (Wenger, 2011)
- Communities of practice and social learning systems: the career of a concept (Wenger, 2012)
- Community of Practice Design Guide: A Step-by-Step Guide for Designing & Cultivating Communities of Practice in Higher Education (Cambridge & Suter, 2005)
- Communities of Practice - Ocean Decade (United Nations Decade of Ocean Science for Sustainable Development, n.d.)
- Cultivating Communities of Practice: A Guide to Managing Knowledge (Wenger, McDermott, and Snyder 2002)
- Knowing in action: Beyond communities of practice (Amin & Roberts, 2008)
- Knowledge management as a doughnut (Wenger, 2004)
- The success of virtual communities of practice: The leadership factor (Bourhis et al., 2005)

Marine-Focused CoP

- Developing a Community of Practice for Applied Uses of Future PACE Data to Address Food Security Challenges (Schollaert Uz et al., 2018)
- Marine Life 2030: Forecasting Changes to Ocean Biodiversity to Inform Decision-Making: A Critical Role for the Marine Biodiversity Observation Network (MBON) (Muller-Karger et al., 2021)
- The Pole-to-Pole Marine Biodiversity Observation Network (MBON) of the Americas: Building a Regional Community of Practice for Understanding and Conserving Life in the Ocean (Muller-Karger et al., 2021)
- Why people matter in ocean governance: Incorporating human dimensions into large-scale marine protected areas (Christie et al., 2017)

VIII. References

- American Productivity & Quality Center (APQC). (2001). *Building and Sustaining Communities of Practice: Continuing Success in Knowledge Management*. American Productivity & Quality Center.
- Amin, A., & Roberts, J. (2008). Knowing in action: Beyond communities of practice. *Research Policy*, 37(2), 353–369. <https://doi.org/10.1016/j.respol.2007.11.003>
- Bourhis, A., Dubé, L., Jacob, R., Montréal, H., & Canada. (2005). The success of virtual communities of practice: The leadership factor. *E J Knowl Manag*, 3.
- Cambridge, D., & Suter, V. (2005). *Community of Practice Design Guide: A Step-by-Step Guide for Designing & Cultivating Communities of Practice in Higher Education*. EDUCAUSE. <https://library.educause.edu/-/media/files/library/2005/1/nli0531-pdf.pdf>
- Christie, P., Bennett, N. J., Gray, N. J., 'Aulani Wilhelm, T., Lewis, N., Parks, J., Ban, N. C., Gruby, R. L., Gordon, L., Day, J., Taei, S., & Friedlander, A. M. (2017). Why people matter in ocean governance: Incorporating human dimensions into large-scale marine protected areas. *Marine Policy*, 84, 273–284. <https://doi.org/10.1016/j.marpol.2017.08.002>
- Muller-Karger, F., Kavanaugh, M., Iken, K., Montes, E., Chavez, F., Ruhl, H., Miller, R., Runge, J., Grebmeier, J., Cooper, L., Helmuth, B., Escobar-Briones, E., Hammerschlag, N., Estes, M., Pearlman, J., Hestir, E., Duffy, E., Sarri, K. J., Hudson, C., ... Soares, J. (2021). Marine Life 2030: Forecasting Changes to Ocean Biodiversity to Inform Decision-Making: A Critical Role for the Marine Biodiversity Observation Network (MBON). *Marine Technology Society Journal*, 55(3), 84–85. <https://doi.org/10.4031/MTSJ.55.3.28>
- Ocean Best Practices System. (n.d.). OBPS - Ocean Best Practices System. <https://www.oceanbestpractices.org/>
- Schollaert Uz, S., Turner, W., Wilson, C., Werdell, J., Tzortiou, M., & Omar, A. (2018, October 7). *Developing a Community of Practice for Applied Uses of Future PACE Data to Address Food Security Challenges*. <https://ntrs.nasa.gov/citations/20180008520>
- United Nations Decade of Ocean Science for Sustainable Development. (n.d.). *Communities of Practice—Ocean Decade*. <https://www.oceandecade.org/communities-of-practice/>
- Wenger, E. (2004). Knowledge management as a doughnut. *Ivey Business Journal*, January / February 2004. <https://iveybusinessjournal.com/publication/knowledge-management-as-a-doughnut/>

Wenger, E. (2011). *Communities of practice: A brief introduction*.
<https://scholarsbank.uoregon.edu/xmlui/handle/1794/11736>

Wenger, E. (2012). *Communities of practice and social learning systems: The career of a concept* (p. 16). <https://wenger-trayner.com/wp-content/uploads/2012/01/09-10-27-CoPs-and-systems-v2.01.pdf>