

A Family Engagement Community of Practice

A Case Study of a Collaboration Model

Naava Frank and Lara Nicolson

How can you take a group of local federated agencies working in a similar field—some competing, some working in synergy, some unaware of the others' existence—and bring them together to have a profound impact on a critical sector of the Jewish community? This article tells the story of 12 months in the life of a Community of Practice (CoP) that shaped a collaborative culture among seven agencies of THE ASSOCIATED: Associated Jewish Community Federation of Baltimore and led to a shared grant for a project maximizing the impact of their work with Jewish families with young children.

This article shares the successes, challenges, and learning from the perspective of the community facilitators and members. We hope that it will help other Jewish organizations use the CoP model of collaboration to strengthen professional networks. Although work with human systems may not always be replicable, the CoP model described here can be adapted with thoughtful consideration to differences in context.

CONTEXT

In 2010, The Associated commissioned the Greater Baltimore Jewish Community Study, which found that a significant proportion of families with young children did not see the Jewish community's institutions and services as relevant to them. In response to these findings, the Louise D. and Morton J. Macks Center for Jewish Education (CJE) proposed and received a start-up grant from the JEEP (Jewish Education Enhancement Projects) Fund to create a CoP for Jewish communal professionals working with families with young children.

A Community of Practice (CoP) brings together professionals with a common set of interests to share knowledge, expertise, and tools to improve their practice and organizational performance. The term "Community of Practice" was coined by Etienne Wenger and Jean Lave in 1991 (Lave & Wenger 1991). Over the past two decades CoPs have become increasingly important in very diverse fields, from medicine to government and from insurance sales to early childhood education. Yet these forums for sharing stories in order to learn how to make our work better likely go back as far as human history itself. Did not the camel owners

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at the well where Rivka met Eliezer exchange information about how to care for their animals? Medieval guilds are also examples of CoPs. Research on contemporary CoPs has focused on how these learning exchanges can increase organizational performance through increased communication among professional peers, leading to greater efficiencies and the generation of new knowledge (Ardichvilli, Page, & Wentling, 2003; Lesser & Storck, 2001; Mason, Castleman, & Parker, 2006).

The Baltimore Family Engagement CoP aims to shape Jewish communal professionals working with families with young children into a more collaborative group and cross-train them in best practices to create more successful programming for this disconnected Jewish population. Its first 12 months included three phases: (1) the planning phase, which focused on discovering the needs of participants; (2) the formation phase, during which members created a charter with clear goals; and (3) the implementation phase, in which members met on an ongoing basis to work and learn together. Toward the end of the year the CoP secured additional grant funding for a second year of work together on a joint collaborative project.

A participant in the CoP articulated this community's success as follows: "The opportunity to gather with others doing the same thing as you are, with the same goals, and learning together, is tremendous. Each organization learned what the other is doing and were able to market together, which makes so much sense since they had similar audiences, they thought about ways to collaborate and not duplicate, all of which only strengthened each program, organization and professional."

PHASE I: PLANNING PHASE

The planning phase focused on preparing the community structures: finding a sponsor, selecting members, and conducting member interviews to assess each one's experience, needs, and interests. The CJE assumed the role of community sponsor, hiring Lara Nicolson in March 2011 as the community facilitator. Because CoPs were a new concept for CJE and for the facilitator, the sponsors decided to hire a consultant, Dr. Naava Frank, in July 2011 to bring in specific CoP expertise. During the year, Lara and Naava worked together remotely once a week to develop and implement the CoP, and Naava attended two of the five meetings of the CoP.

Selecting the members of the CoP is an important element in creating a viable community. The consultant recommended a stakeholder analysis to explore potential members' assets (intellectual, political, economic, geographic, etc.), liabilities, readiness, and possible leadership roles within the CoP.

The decision was made to start the project with a small group of ASSOCIATED communal professionals and to consider inviting local synagogues to participate in the future. Identifying 7 agencies and 12 professionals under the Federation umbrella who worked on the ground with families with young children and shared similar values and vision helped foster trust and collaboration. CoP members agencies are the CJE, JCC, Jewish Community Services; Jewish Volunteer Connection; Pearlstone Center, a retreat center with a sustainable farm; Jewish Museum of Maryland; and the Darrell Friedman Institute, which provides professional continuing education.

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To facilitate a Community of Practice requires sensitivity to group and individual dynamics, including relationships of trust, power dynamics, and egos. Among the 12 participants there were a number of preexisting positive relationships, which allowed people to feel comfortable quickly. The CoP helped deepen and extend existing relationships and also expanded social networks by introducing people who had never met before. One member related, “My relationship with the other agencies ranged from strong to weak to nonexistent. The creation of the CoP has forced the agencies to create the time to work together and helped all agencies to understand what each other is all about.”

Before the first group meeting Lara conducted one-on-one interviews with each participant to learn about them, the work they do, and their interrelationships. This maximized her ability to work effectively in future meetings. The interview findings were presented to the group at the first meeting in a confidential format.

The interviews confirmed that among these agencies were overlapping services, competition, isolation, lack of awareness of others’ work, and limited collaboration. It also indicated that participants wanted a structure for collaboration and communication, ways to identify synergies, and a common approach to marketing and knowledge sharing. Though some professionals were concerned about the time commitment and their agency’s place in the CoP, they were willing to try it.

From the interviews, Lara identified a pool of resources that the members had that would enhance the work of the CoP and provide mutual benefit. Members brought resources such as space (the Jewish Museum), expertise (social work or Jewish education), or connections to outside experts.

Starting at the interview phase, Lara helped members understand that there was value they could gain from working with other members of the CoP. That knowledge helped them overcome their hesitations and motivated them to attend the first meeting and to be predisposed to seeing the CoP as a successful endeavor. One member shared the following observation: “The Community of Practice began with a face-to-face interview with Lara Nicolson. This was a great way to begin the process, as it was an opportunity to examine my own professional role as well as the strengths and weaknesses of my department. It was also Lara’s opportunity to explain the concept of the CoP and answer any questions that I have.”

PHASE II: FORMATION PHASE

Entering any collaboration entails risk. Although participation in the CoP was voluntary, Lara realized that members might be reluctant to share their experience because it could lead to exposing their vulnerabilities or mistakes to people whom they did not know or trust. They might start off feeling skeptical or defensive about others’ ideas that might challenge the way they had always worked or imply they should adapt or change their programs or services, or they might fear that collaboration could lead to their losing members and dollars to other organizations.

It was critically important to build a trusting environment that would enhance the work of CoP members and lead to benefits such as broader exposure and an increased audience for their programs or new programmatic ideas. Four programmatic elements helped build the working relationships and trust that the community needed to collaborate successfully.

Time Together

Through regular face-to-face meetings members spent time with colleagues they had not previously known or worked with. One member said, “I think the relationships have been strengthened.. more meetings, more face time...working towards the same goals.”

According to another member, being exposed to the programs and best practices of others and seeing the big picture led to a realization of the value of the community and collaboration: “I think all members of our CoP were surprised by how much programming was already taking place and by how little we really knew what other agencies were doing. It was a ‘light bulb’ or ‘aha’ moment and a turning point in our CoP when we collectively realized that working together rather than individually would benefit all of us.”

Task-Focused Work

Research shows that successful task-focused work builds trust (Becton et al., 2004; Erickson & Gratton, 2007). The community facilitator, consultant, and members planned five meetings during the first year of the CoP. Each meeting had a different focus, such as sharing programs and practices, cross-marketing of events, developing a group project, and engaging with expert speakers. One member said, “Each meeting was crucial, whether it was an opportunity to share and dream together, or to learn collectively from an expert.... It’s so important to the collective work [we] do every day.”

As members worked together they began to accrue benefits. As one member articulated, “The agencies in the CoP are now more aware of our programming offerings and have helped us market our upcoming events,” and “I have been in conversation regarding a number of new programmatic partnerships.”

Distributed Leadership

Distributed leadership in a CoP is the intentional process of engaging every individual CoP member in working collaboratively toward the achievement of a common goal. It taps the expertise, ideas, and effort of members, providing opportunities for leading at different times and in different ways. When distributed leadership is implemented it creates an atmosphere of trust, ownership, and mutual support (Bennett et al., 2003; Tschannen-Moran & Hoy, 2000). For example, in this CoP, there were members with wide ranges of experience and length of tenure. Providing a newer member with the leadership opportunity of giving a Dvar Torah (a talk about the Torah portion) at a meeting created a culture that recognized everyone’s ability to contribute.

A critical tool in the development of distributed leadership is the use of a design team, a representative subgroup that works together to plan and design opportunities to learn with and from one another. The design team allows community members to fully take charge of the community learning agenda and to access individual and collective wisdom, thereby creating their own learning rather than having learning imposed on the group.

At the first meeting, members were given the opportunity to vote on the five key topics they wanted to cover for the upcoming year. This voting process gave the predetermined meeting plan for the year a democratic process and structure that allowed members to voice their interests and find a role to play at each meeting.

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For example, at the second meeting, one member presented the Dvar Torah, another member ran a chartering activity, a third member introduced and thanked the speaker, and a fourth member hosted the event in her space.

The realities of a busy group of professionals created challenges in implementing the ideal process of distributed leadership. Rather than convening a separate design team for every meeting, the facilitator asked members individually to contribute to the design of specific meetings that matched their interests, resources, and availability. This flexibility from the facilitator and members created many varied opportunities for leadership.

Chartering Process

Before the first face-to-face meeting it was assumed that the group shared a common vision of family engagement, understood the purpose for collaborating, and would be ready to commit time and resources to participating in the CoP. Indeed for many participants this was the case. However, we were caught by surprise that some members pushed back on committing their efforts until they had more clarity on the vision and direction for the CoP.

Therefore the planning for the second meeting focused on the creation of a community charter. The charter document exercise, provided by the consultant, asked members to create a mission statement, goals, and measurable learning outcomes that would guide the CoP's work. Although creating a charter and visioning may occur later in the life of a community, the facilitator decided that the optimal time to introduce the chartering process based on the needs of this group was early in its development.

The chartering process was powerful and challenging but ultimately rewarding. In the course of the charter conversation the large group discovered that the members used two different terms representing two different paradigms for describing their work. One set of members called their work "outreach," whereas another called it "engagement." This use of different language represented fundamental differences in how they thought about the relationship between young families and Jewish organizations. In the end, the group compromised and included both terms in the charter. This moment of challenge and resolution was an important moment of bonding and learning for the community. The tension in the room during the discussion was palpable, but once the language issues were explored and resolved, the issue did not come up again.

CoP members remarked on the importance of the charter in creating the conditions for collaboration, saying the charter "laid the foundation for working with the other agencies" and "helped us see where we are the same as others and where we are different."

In a midyear survey, members affirmed they felt comfortable talking about their work with others and receiving feedback that could help improve their practice. Under these conditions real learning and collaboration can and did occur.

PHASE III: IMPLEMENTATION PHASE

During the first 12 months, five meetings were held and played an important role in building continuity and a trusting relationship among members of the CoP. Along with creating a trusting environment and community ownership,

the facilitator also needed to provide practical value in each meeting. Professionals are so busy that if the CoP does not provide value, members will not want to commit the time and will not attend meetings, much less give of themselves to volunteer for additional distributed leadership opportunities. Each CoP meeting included a Dvar Torah, family engagement content, sharing of best practices, and some informal networking time to help members reinforce trusting relationships.

It appeared that these efforts were successful: In the midyear survey members noted that they were learning new things from their colleagues and had gained practical information to use in their work. These learnings included information about the best practices and programs that other CoP members were doing, which resulted in new programming ideas, as well as opportunities to jointly sponsor programs. The members also looked for new ways to jointly market and use social media to share their programs with a wider audience.

Lara also discovered that the role of a CoP facilitator is very different from that of a training professional who designs or delivers standardized training material and programs. A CoP facilitator needs to be much more flexible and to release control to the group. He or she is also more of a network weaver (see the article by Deborah Fishman in this issue) and negotiator, dealing with both the professional and relationship issues that come up in the course of the group's development. In addition, although she worked for the CJE, Lara was able to establish her role as a neutral facilitator, which was critical in balancing the power dynamics in the group. As a member stated in the midyear evaluation: "Relationships and support are important to have success. I believe that our CoP would not have formed, grown or survived without a strong, knowledgeable facilitator such as Lara. A facilitator that is not representing any one agency is essential."

The CoP meetings encouraged both formal partnerships and informal networking among professionals who had before competed for the same clients. Three agency professionals had a particularly tense relationship at the start of the CoP. They had attempted to collaborate on previous programs, but had not succeeded because of a feeling of lack of equality among the organizations. After several meetings, these three professionals and, through them, their agencies found multiple opportunities for partnership, which was encouraged by the facilitator and supported by their executives.

An often overlooked and yet critically important aspect of successful CoPs is the time the facilitator spends working behind the scenes. Communities have public spaces, where they meet, and private spaces, where conversations happen between members or with the facilitator that shape the culture and outcome of the public meetings. Lara found that when the community faced a divisive event she had to work behind the scenes to resolve the challenge and build positive momentum for the community. It was critical for her to follow up directly on the comments given in the written feedback or by participants. For complex issues Lara also felt she could rely on Naava for a supportive and objective perspective.

By midyear an opportunity arose to submit a grant proposal to the Jacob and Hilda Blaustein Fund for the Enrichment of Jewish Education. This was seen as an opportunity to meet another objective of the group's charter: the creation of a collaborative project from scratch. At the first brainstorming session it was

challenging for the group to decide on a project that was mutually beneficial and relevant to all agencies. Given the strict time constraints at the meeting and the absence of some members from the meeting, the collaborative project that emerged left some members feeling dissatisfied and undermined their sense of trust in the community. Lara then needed to work for several weeks behind the scenes in one-on-one conversations with members to regain the trust of members and to collect feedback on a new, more widely accepted project for the grant.

After that behind-the-scenes work, Lara was able to bring the members together again for a participatory decision-making process, which resulted in the proposal called “jOYbaby—Sharing the Joys and Oys of Jewish Parenting.”¹ This program welcomes new parents and their babies into the Baltimore Jewish community and markets the programs and services available to them through welcome packages and an interactive website. This initiative was chosen because the group realized that, although all of the agencies were serving this population, new parents did not have easy access to all of the opportunities available to them. As of today, the CoP members continue meeting regularly as the focus shifts to project mode around the implementation of “jOYbaby.”

CONCLUSION

The Baltimore Family Engagement CoP led members through three phases of collaboration—planning, formation and implementation—that built trust, created a community of shared purpose, and strengthened practice. It worked to strike a balance between finding common ground and maintaining the autonomy and distinctive identity of each agency.

In comparison to other CoPs, the Baltimore Family Engagement CoP seems to have achieved a great deal in record time. However the life-cycle of a community and of relationships is measured in years, not in months, and therefore this community still requires support, facilitation, and resources from the sponsoring agencies and facilitator. One can anticipate that there will continue to be moments of tension and regression among members and that the facilitator will be required to step in to smooth over these moments and continue the forward momentum of the project. As one member explained, “You can’t eliminate competition; it is inherent in every human relationship, but spending time, opening up the dialogue and understanding others makes it better. I will say that there is a fine line between collaboration and competition.”

As the CoP collaborates on its first joint project, “jOYbaby,” there is the realization that new avenues have been created for collaboration, networking, and relationship building. This project will also be a test of how this group can really work together to share resources and make agency commitments that benefit the group over themselves. Even though the community is now in project mode, it will still require community building and continued focus on the goals set out in the charter. There is a plan to convene the directors and members of the Family Engagement CoP agencies to strategize about next steps.

¹An earlier version of this program, “Shalom Baby” had ceased operation in Baltimore, and this provided an opportunity to revive it in a new format.

The CoP is generating some national interest as well as local interest within the ASSOCIATED agencies. According to Dr. Mark Rosen, a member of the faculty at the Brandeis University Hornstein Professional Leadership Program and a leading researcher in the field of young Jewish family engagement, commented that this is the only CoP of “family outreach professionals” he knew of around the country and that it is a model that should be replicated in other cities. Several ASSOCIATED professionals are interested in adapting this model to other areas of the Baltimore Jewish community.

CoPs can be adapted to other local communities and across other areas of communal work, with the cautionary note that this is not an assembly-line product and therefore differences in context need to be thoughtfully considered. We hope that some of the individual processes described here—a stakeholder analysis, creation of a charter, use of design team or distributed leadership—can be utilized by professionals in other communities and in other forums. In addition we hope that other agencies and communities are inspired to make the serious commitment to pulling together all these processes and the human and financial resources necessary to launch a successful CoP. We believe that the return on investment is well worth the investment in developing a CoP. The words of a participant best sum up its impact: “I personally have come around to a new way of thinking. Baltimore is big enough for everyone. One agency cannot do it all. I actually think that it is great that there are other programs and resources that I can invite people to. It creates a variety of ways for families with young children to connect and thus increases engagement, which, after all, is everyone’s goal.”

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