**Getting Started with a Community of Practice (CoP)**

*We hope this guide will give you the tools to establish, plan, and produce a CoP!*

**Getting to know your community**

* Gather input from your team to hear what they would like to have as part of their CoP (e.g. hold listening sessions, send out surveys, or use of a “steering committee” to guide content development).
* Identify a planning team and assign roles and responsibilities ([see Annex 1 for template](#Roles_Responsibilities)) - some of the best content and speakers come from within the CoP community—having Team Leaders, Tracers, or someone in leadership committed to making connections to speakers on board makes a HUGE difference!

**Materials and templates**

***We recommend you save all your materials in a dedicated folder for your CoP and provide access to your team. This will help you get organized moving forward. Consider creating subfolders to file various materials, e.g.***

* Email list- keep a spreadsheet with emails of all recipients and update as workforce changes
* Weekly Flyers
* Recordings
* Run of Show (i.e. agenda)
* Slide Decks
* Survey Feedback

**Where to store CoP materials?**

* Each LHJ/Community should decide what works best for them. We have teams that use Dropbox, Google, Box, TEAMS, and internal servers. We can provide pros/cons to various platforms, but in general, you should think about your storage needs (videos take up a lot of space), cost implications, and what platform will allow you to collaborate easily with your team.

**Pre-production (Planning and Preparation)**

**Overview:** Your planning team should meet or collaborate online to determine the “run of show,” including any guest speakers or special segments you would like for the week. Generally, our CoPs tend to be build around the categories listed below. Each week will look different depending on what the community says they would like to do/learn. We’ve learned that less is more and it’s better to have more time for questions/conversation than an overpacked agenda!

1. Epidemiological Update
2. Science/Clinical Corner
3. Guest Speaker
   1. Request bio for presenters
4. Wellness Corner
5. Skills Share/ Case Conferencing
6. Poolside chat/fireside chat speakers (you can download and share this [infographic](https://pandemic.ucsf.edu/sites/g/files/tkssra5776/f/wysiwyg/PoolSide%20Chat%20Guide.pdf) with participants to help explain the intended purpose and give them some ideas for creating a personalized slide).

**Speakers/Guests**: Someone from the team will need to coordinate with speakers in advance to ensure their availability, ask for their bio for an introduction, prepare any polls (if wanted), and get any materials they will share (e.g. power point slides).

**Poll Questions. If one of your presenters asks to poll the audience, make sure you:**

* Create poll questions in Zoom prior to the meeting ([instructional video from zoom](https://support.zoom.us/hc/en-us/articles/213756303-Polling-for-meetings))
* Be sure to make responses anonymous

**Flyer:**

* Some CoPs create a flyer highlighting information about the upcoming CoP in advance and send out with an invitation.
* An example flyer can be found [here](https://pandemic.ucsf.edu/sites/g/files/tkssra5776/f/wysiwyg/Sample%20Flyer_CaConnected-What-a-week_.pdf). Please contact us if you’d like us to send you an editable file.

**Zoom event link:**

* When you create the reoccurring Zoom link, make sure that it has following settings:
  + Enable waiting room
  + Mute participants upon entry
  + Allow participants to unmute themselves
  + Allow participants to rename themselves

**Calendar Invite/ Email:**

* Send a calendar invite or email to all participants in advance of your session.
* Keep an updated list of email addresses in a spreadsheet. This may include CIs, CTs, supervisors, vaccination or testing support, and any other special guests.
* If applicable, embed flyer in the body of the email and/or include as an attachment.
* If using a tiny URL, be sure to also include the direct Zoom link in the body of the email since curated URLs may not work.

**PPT Slide Deck: (Template available** [**here**](https://pandemic.ucsf.edu/sites/g/files/tkssra5776/f/wysiwyg/Sample%20Slides.pptx)**)**

* As slide decks begin coming in, consolidate and save all slides in your team folder. Be sure to do a final review and formatting to make sure the presentation is ready to go live!
* Send final slide deck hyperlink to the team and presenters along with the Run of Show.

**Run of Show (**[See Annex 2 for template](#RunofShow)**)**

* Update your Run of Show information each week and copy and paste into the body of the email you send to your team, along with the hyperlink to the slide deck.
* Send this email to guest and internal presenters, along with any other planning team members the day before your CoP.

**Production—Show time!**

**Overview:** *Coordinate with your team on who will do which parts of the production and facilitation. If possible, we recommend identifying a production assistant to assist with activities such as monitoring the waiting room/providing meeting access, recording, enabling captions, advancing slides, etc.*

**Present Slides**

* If sharing from your computer, make sure to select power point application rather than entire desktop. If any videos are embedded, ensure you select “share computer sound” on the bottom left-hand corner of the share screen option.
* Be sure to enable closed captioning.

**Other Tips:**

* If using Zoom, make sure all speakers are co-hosts so that they are able to share screen and/or can take over if there are internet or other technical issues.
* Announce that the session will be recorded so that people can turn off camera if they do not want to be seen prior to starting recording.
* Coordinate with a team member who will be hitting the record button. This person will receive the file with the recording.
* When a community member or presenter is speaking, select spotlight to highlight them for the group.

**For more information on how to use virtual meeting spaces effectively, please download our user tips and tricks guide on** [**Zoom**](https://pandemic.ucsf.edu/sites/g/files/tkssra5776/f/wysiwyg/Zoom%20Function%20Instructions_2.26.pdf) **and** [**Teams**](https://pandemic.ucsf.edu/sites/g/files/tkssra5776/f/wysiwyg/TEAMS_PPT.pdf)**.**

**Post-production**

* Upload the recording to your CoP folder (remember, the person that hit record will be getting the recorded file along with the chat notes).
* Review chat notes and pull out any unanswered questions to answer during the next CoP. You can also consider pulling out shout-outs and sharing with the team.
* Send a link to slides/recording, as well as any reference materials shared with your wider audience.

**Annex 1: ROLES & RESPONSIBILITIES for Developing/Managing COVID Communities of Practice**

|  |  |  |
| --- | --- | --- |
| **What** | **Who** | **Role(s)** |
| Planning team | Planning teams should include representation from the community to ensure the content is aligned with what team needs/wants.  A respresentative from VTA team may also attend to help identify guest speakers and share what resources have been developed. | * Debriefs each CoP * Plans weekly agenda * Recruits speakers, and request their bios * Identifies content of polls, send to admin support person for advance prep * Reviews any needs assessment or evaluation data to modify agendas |
| Project Manager/Lead | Ideally from LHJ(s) with initial support from UCLA/UCSF/CDPH | * Confirms that all tasks are being completed on a weekly basis * Follows up regarding outstanding tasks * Recruits speakers |
| CoP Facilitator(s) | One or two facilitators per CoP   * Ideally this is someone who is a “known entity” of the community who can help with unifiying the team. | * Facilitate the hour long meeting * Set the tone * Introduce speakers, using bios provided * Provide continuity among agenda items * Cheerlead speakers and participants |
| Pool/Fireside Chat | This can be the main host/facilitator or another member of the team. This could also be rotated with community member interviewing one another. | * Identify and recruit interviews for weekly CoPs * Schedule/hold 1:1 telephone meetings in advance of CoP (optional) * Provide support for creating PPT slide (optional) |
| Admin support team | Each CoP may identify someone to support the various administrative tasks involved. | * Support planning team with communication with recruited speakers * Create poll questions in Zoom prior to meeting, make responses anonymous * Create weekly CoP flyer (optional) * Send weekly announcements and f/u items, eg, slide decks, recordings, etc TBD * Compile slides * Support CoP evaluation efforts, survey development, summaries, etc. * Files all CoP related documents on appropriate shared network |
| Production team | Identify team member who can handle all production tasks | * Make sure the CoP Zoom room has all necessary settings * Make all speakers co-hosts to enable screen sharing, etc. * Announce session is being recorded * Provide support throughout the CoP session * Upload CoP recording and send to appropriate person * Review chat notes and highlight any unanswered questions to answer during next CoP |

Note: all of these are suggested roles / division of tasks. There are many ways to organize and put on a CoP.

**Annex 2: Sample Community of Practice Run of Show**

*Purpose: to outline the presenters and activities of the event.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Topic** | **# mins** | **Facilitator/ Presenter** | **Suggested Content** |
| Introduction, CoP purpose |  |  | Welcome; discuss purpose of Community of Practice; Community pulse check |
| Epi (statewide)/metrics (local) |  |  | Present COVID-19 data for your county, CA, or region |
| Featured CI/CT (optional) |  |  | Opportunity for management to recognize a star CT or CI |
| Clinical/Science Corner (topic TBD) |  |  | Presentation on a COVID-related clinical or science topic e.g. transmission; use the poll feature to test knowledge |
| Special guest or featured presentation |  |  | Examples: Interview of local hero or local personality; presentation on topic of interest like handling burnout or self-care; presentation or discussion with a person doing COVID-related work from another unit or department |
| Fireside Chat |  |  | Feature conversations with team members |
| Shout Outs |  |  | Use the chat feature for CI/CTs to recognize one another |
| Closing *include zoom poll or other method to ask participants what topics/activities they would like in future sessions* |  |  | Wrap-up; Will use chat function to ask what content they would like to see in future sessions. |