



## Community of Practice Meeting Planning Worksheet

*Using this worksheet to plan out the flow of your CoP meeting can help make the planning quicker and easier and will provide an educationally sound flow to the conversation. Be careful to watch the allocation of time; make sure sections like Welcome/Framing, Connection, and Next Steps move quickly so that you can devote the vast majority of meeting time to Core Conversations.*

### Welcome/Framing

Welcoming everyone acknowledges the importance of the group and their participation. It also signals that it's time to begin. Framing the meeting by explaining the topic and the goal of the conversation gives people the "lay of the land" and helps them understand how to participate productively. They also know how to gauge progress and success.

- Who will do the Welcome and Framing? \_\_\_\_\_
- What key points should they touch on?
- How much time will you allocate? \_\_\_\_\_

### Connection

A connection question enables people on the call to know one another and connects to the topic of the day. Responses can be written in a chat box or spoken. Particularly early on in the life of a CoP, or when new people join, connection can be an important way to establish the *community* part of community of practice. A very basic way to build community is to learn more about each other's lives than just names, hometowns, family circumstances, and organizations/jobs. By sharing memories, experiences, perspectives, and opinions about matters of importance to us, we create connection.

It's often a good idea to craft a question that also connects to the topic of the session. For example, if the session topic is about alignment, you might ask people to share a time in their lives when something (their car, their back, their values) felt in or out of alignment.

- Who will facilitate the Connection? \_\_\_\_\_
- What Connection question will you use to connect people to one another and the session topic?
- How much time will you allocate to the Connection? \_\_\_\_\_

## Core Conversation(s)

Generally speaking, each scheduled CoP session will have some content as its "centerpiece" that drives its core conversation. The centerpiece content can take as many forms as your imagination generates. Common types of core content include (but aren't limited to): case studies, articles, research reports, panel discussions, guest experts, shared practice discussions and more. Typically using a structured protocol helps keep the conversation on track and productive.

- Who will facilitate the Core Conversation? \_\_\_\_\_
- What will be the topic?
- What form will the centerpiece of the conversation take (e.g. case study, article, and so on)?
- Who will prepare or provide that centerpiece? \_\_\_\_\_
- What protocol or process will the conversation follow?

- How much time will you allocate to the Core Conversation? \_\_\_\_\_

## Reflection

Saving a few minutes at the end of each session for reflection gives participants time to pause, think more deeply, make meaning for themselves and the group from the conversation, and identify take aways. Oftentimes the real learning comes not in experiencing the core conversation itself but in reflecting on it in order to integrate it into your own practice. Reflection time brings closure to a meeting and its topic. A reflection question also can focus on how people felt or what they thought about the process of the meeting and can yield valuable insights about how people are feeling about their experience in the CoP.

- Who will facilitate the Reflection? \_\_\_\_\_
- What reflection question will you pose to the group? Will it focus primarily on session content or group process?
- What process will you use (e.g. round robin where each person speaks or ask everyone to respond in the chat or something else? How (if at all) will you tie together or comment on what the group can learn from their reflections?

- How much time will you allocate to the Reflection? \_\_\_\_\_

## Next Steps

The final bit of closure and “housekeeping” for each meeting should be an articulation, by one of the co-leaders, of next steps. This can include informing the group of the next session’s topic, any advance preparation needed, and reminding them of the date and time. It also can involve asking for volunteers to take the lead on the centerpiece or facilitation for future sessions, e.g. by presenting a case, leading a shared practice

discussion, suggesting an article or piece of research, or organizing a panel. The person who is tapped to articulate next steps at the end of the meeting should know in advance so they can be prepared and, potentially, keep track of next steps that arise as part of the conversation.

- Who will articulate Next Steps? \_\_\_\_\_
- What key points should they touch on (that you know in advance)?
- How much time will you allocate to Next Steps? \_\_\_\_\_

Congratulations!! You have planned out your next CoP session and set yourself and the group up for a meaningful and worthwhile session!