A GUIDEBOOK FOR

Developing Public Health Communities of Practice

National Network
of Public Health Institutes

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The National Network of Public Health Institutes (NNPHI) is an active network comprised of over 40 member public health institutes in over 30 states spanning all ten Department of Health and Human Services regions. Public health institutes are nonprofit organizations that improve the public's health by fostering innovation, leveraging resources, and building partnerships across sectors, including government agencies, communities, the health care delivery system, media, and academia. NNPHI and its member institutes work together to implement public health policy and program initiatives throughout all 50 states. NNPHI also serves as the National Coordinating Center for Public Health Training – NCCPHT.

The Institute for Public Health Innovation is the public health institute for Maryland, Virginia, and Washington DC. IPHI creates partnerships across sectors and cultivates innovative solutions that improve health and well-being for populations and communities across the District of Columbia, Maryland, and Virginia, with a particular focus on those most affected by health inequities. Their work enhances the environments and conditions in which people live, age, work, learn, and play; strengthens health service systems and public policy, and builds organizational and community capacity to sustain progress. IPHI is a member of the National Network of Public Health Institutes.

I. Introduction

Within recent decades, leaders across different sectors have turned to social learning models to foster the innovation and collaboration needed to tackle some of the largest challenges in their fields. One of the most well-known models is the Community of Practice (CoP). This model assists professionals engaged in a discipline, field, or area of practice with building a dynamic relationship with one another to share and expand practical "know-how."

The National Network of Public Health Institutes (NNPHI) has applied CoP strategies to support the ongoing training of public health professionals and the improvement of public health practice. Through this guidebook, NNPHI will layout the basic framework for establishing a CoP, as well as provide practical tools and templates to get a CoP up and running.

Defining Community of Practice

The term 'Community of Practice' was first coined by Lave and Wenger in 1991, formalizing theories and strategies based on innate **human tendencies to collaboratively solve problems**.[1] Communities of Practice are "...groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly". The term was born out of studies in apprenticeship.[2] The terms, theories behind it, and methods to implement it have evolved over the years and have been adopted by disciplines ranging from businesses, engineers, educators, and the medical field.

Social scientists Etienne and Beverly Wenger-Trayner developed the conceptual framework for a CoP, including these three defining characteristics:

1. Domain: A shared topic or issue of interest among participants, with members having an implied competence that distinguishes them from others who may hold a passing interest in relevant ideas and concepts. Members demonstrate a commitment to and passion for this domain and are dedicated to improving knowledge in this domain.
2. Community: Through the pursuit of building competency in this domain, members build trusting relationships with one another that allow them to engage in social learning activities to help one another. There is mutual understanding, respect, and sustained interaction that leads to collaborative learning.
3. Practice: The members of the group are practitioners that have tacit and/or explicit experience or knowledge to benefit the group. They actively problem-solve together and develop a shared repertoire of resources.[3]

The healthcare and medical sector adopted CoPs as a tool to improve performance and share knowledge. While research shows there has been variance in the form and structure of CoPs, successful examples indicate this model is an effective strategy to create, disseminate and implement new knowledge to address the complex health issues of our time.[4]

Rationale

The recent federal report, *Public Health 3.0: A Call to Action to Create a 21st Century Public Health Infrastructure,* draws attention to the need for fundamental shifts in the practice of public health in

order to further advance the field to the next level of public health improvement and the attain the elimination of persistent health inequities.[5] Further, the CDC's National Public Health Workforce Strategy Roadmap calls for increasing capacity of the workforce through: 1) definition of target skills and competencies across disciplines, 2) expansion of training for the identified skills, and 3) use of technology for ongoing and just in time training.[6]

While traditional educational opportunities like trainings or workshops have responded to this need by helping professionals learn new information and develop new skills, continuous and collaborative problem-solving and information sharing is necessary to advance beyond the classroom into practical application and solutions. The CoP model shows great promise in deepening strategic public health skills and building expertise to address complex public health and social issues. Several current trends and contextual factors further underscore the need for the public health field to invest more substantially in creating and maintaining communities of practice:

- **The scope of public health is expanding.** The current public health workforce comes from diverse professional backgrounds, with only an estimated 17% of the workforce having a degree in public health.[7] Composed of both generalists and specialized experts in distinct scientific disciplines, the public health workforce of the future must think and act from a systems perspective, meet new population health challenges, be skilled at building multi-sector partnerships, and harness the power of new data types.[8]

- **Persistent health inequities create an urgency for more rapid development, sharing, and implementation of best practices.** The public health field has been focused on health inequities for several decades but has been slow to move beyond rhetoric to concrete, evidence-based solutions that are widely shared and understood. Domain 8 of the Public Health Accreditation Standards and Measures emphasizes the need for a multidisciplinary approach to improve population health and health equity.[9]

- **Uneven workforce capacity nationally and regionally creates opportunities for peer support.** Many public health professionals, particularly those working in rural areas, have limited access to professional development beyond web-based courses and are unable to regularly attend in-person conferences or trainings that are more accessible in metropolitan areas. Moreover, it is not unusual for local health departments and community partners in such areas to have few, if any, employees with formal public health training.

- **Rapid public health response requires networks for sharing information and knowledge.** Public health can involve rapidly unfolding situations that necessitate efficient dissemination of information, knowledge transfer, and proliferation of effective solutions on a local, regional, national or global basis. Established communities of practice can provide a network for rapid public health response that stretches beyond the more traditional public health infrastructure.

- **Traditional, didactic classroom and web-based training are often not sufficient for continuous professional learning.** The public health field currently builds the capacity of its workers largely

through "one-off" training events (e.g., single online or in-person training), which generally do not include ongoing interaction or intentional structure to test new skills in real settings with follow-up support and reinforcement. Traditional training is often point-in-time, individual, and conceptual, while COPs are continuous, collective, and practical.

- **New technology and evolving communication norms are making "virtual communities" more accessible.** Since the onset of Covid-19, the use of video-based communication and web-based meeting and collaboration tools are quickly becoming more necessary and accessible to workers in public health and related fields.

II. Establishing a Community of Practice

A CoP might be initiated by public health leader(s), a group of professionals tackling a similar problem, or a funder invested in a certain issue. It starts by identifying a topic or issue of importance to the field. These topics or issues often emerge from dialogue or discussion across the field. This may come after the release of new research on significant public health trends, white papers identifying needs and gaps in public health programming, discussion from grantees that are encountering the same issue, or through comments and feedback from events like conferences or webinars. For example, after the release of new findings related to persistent and severe racial disparities in maternal health care, organizations may collectively start exploring new ways of integrating an equity lens into their programming and policies to address this long-standing issue. Another example may be a cohort of grantees across the nation struggling to develop Standard Operating Practices across rural and urban settings to implement a new health care model. They may naturally start sharing tools and resources and provide one another with informal support as they explore previously unchartered territory.

As these examples suggest, CoPs are often initiated from a desire to solve a common problem. Topics of urgency and significance to the intended audience are essential to achieve the engagement necessary for the community to flourish. It is important that members see immediate and long-term value. Active participation and growth will depend on the benefit members perceive from the group.

Once a priority issue or topic has been identified, a small group of pioneering leaders can help formally establish the group. This typically starts with a few essential documents outlined in this section.

Audience Research

It is important to conduct formative research to build a strong foundation for the CoP. Survey potential members of the community to establish a better understanding of what members want from a community, including their preferences for how to engage and share information. Ask questions about what problems and challenges they face and the knowledge, skills, and abilities they can contribute to the community. This information can be used to encourage participation and networking down the road. It will also help develop a work plan around the needs and desires of community members.

Alternatively, conduct a member survey shortly after launching the community. The initial member survey should include questions on the following topics:

- Existing resources the community can leverage (expertise, materials, resources, etc.)
- Input on how the community can support the field at large as well as individual members (develop networks, increase communication among experts, provide a forum for sharing and discussing knowledge, etc.)
- How members would like to engage with the community (frequency of communications, events, format of events, etc.)

Charter

The charter is the foundational governance document that defines what the CoP is and how it functions. It is often used to articulate structure and expectations as part of the CoP's development. A typical charter will provide background information and context as to why the CoP was created. It helps foster common understanding of the purpose and atmosphere of the CoP for members.. The core elements of this document can be created by a group of founding CoP members or leaders in the CoP before it is officially launched to ensure the structure is in place to attract members. However, it is recommended that the founding members complete some portions of the charter in early meetings in collaboration with early members.

There are several components a charter should include:

- **Background & Rationale:** This section is brief and will include a description of the background to the specific topic or issue the CoP will focus on. It will also describe the story of how the CoP was developed and why, citing specific data points that support the need for the CoP when available.
- **Mission:** A mission statement is a vital component of the charter. It is what will initially attract members and keep them energized around a common purpose over time. While the core leadership group may take the first step in developing this, other contributing members should have the opportunity to provide feedback on how well this statement reflects the mission of the group at strategic intervals in the first and following years.
- **Values:** The CoP's values should describe fundamental qualities or principles of the CoP that unite and motivate its members, such as transparency, equity, or accountability. The values are a foundational component in unifying diverse stakeholders, developing norms and setting a tone for how the CoP will function. It will also be a compass to return to when the CoP is faced with challenges that could disrupt the fundamental practices. The core group can propose a starting point for values at the beginning of the CoP's development, but it is recommended that values are agreed upon by all members through a discussion and consensus building process.
- **Membership/Community Management:** This section should define what criteria or expectations there are for participation, if any. If there are none, it might describe the shared qualities of members of the community to provide clarity on who the ideal participants in the group are. This section should also state if there are any fees, costs, or requirements to participate.
- **Member Benefits & Expectations:** The charter may also include an explanation of the benefits to members and their organizations. By defining the intended benefits, the CoP provides a

process measure for future evaluation to gauge the CoP's ability to effectively serve its members.

- **Rules of Engagement:** The rules of engagement, or community norms, help ensure that all members feel comfortable contributing and give the leadership team grounds for action if any member violates them. Rules should be established by the official launch of the CoP.

See Appendix A for a template of a CoP charter that can be adapted based on your community's needs.

Workplan

An annual CoP workplan should establish goals and objectives, describe action steps and/or deliverables, and determine measures for monitoring progress and evaluating the utility of the CoP. Clear goals and objectives will guide the direction of the CoP as it grows and evolves. The action steps and/or deliverables will bring clarity to all members about how the CoP will accomplish their goals. A section on quality management and evaluation will help ensure the CoP is monitoring progress toward meeting goals, adjusting plans as needed, and helping members understand the impact of the CoP. Again, a core group of founding members will likely create and revise the workplan at regular intervals, but input from the larger community should be collected to continually inform the development of the plan.

See Appendix B for a template with key considerations to help your CoP develop a workplan.

Branding

Strong branding is a great way to establish an identity for the community. Logos, taglines, images, and consistent messaging can help reinforce the values of the community and create a sense of pride for members. Some CoPs have created official templates for advertisement, slogans or taglines for email and social media use, standards for logo usage, and guidance on colors, type styles, and image styles to ensure consistency and strength in their branding. These are often developed prior to the launch of the CoP to avoid brand confusion later.

See Appendix C for examples of branding guidelines that were developed for one of NNPHI's CoPs.

Launch

The launch of the CoP should catch people's attention and generate interest and enthusiasm for the CoP. As such, an in-person launch is recommended whenever possible. This could be at a conference, summit, meeting or other event where founding members and candidates for the community will likely be present. Although in-person events are a great way to gain momentum and motivate members, many communities will want to utilize other engagement strategies to supplement an in-person event.

See NNPHI's Marketing Toolkit in Appendix D to review templates of email and social media communications that can be used to advertise the launch of a CoP.

III. Community Management

An overarching goal of community management is creating a welcoming environment that fosters trust and encourages participation among members. The tone for the community is often set through the charter and other CoP infrastructure, but it is demonstrated through the interactions among members. Creating an environment that strengthens connections among members is key to increasing participation and value for members, and a community manager is a critical strategy in this. A community manager can help build the infrastructure for a positive environment and model the values and norms of members through their interactions and leadership.

Roles & Responsibilities

There are a number of responsibilities that are important to the success of a CoP. [10]

- **Knowledge Management**: Monitor the CoP's repository of information, ensuring all members have access to information created or referenced by the community. Identify and curate content to share through the CoP's dissemination mechanisms.
- **Relationship Management** — Build relationships among the CoP's members to strengthen the group's membership. Moderate or facilitate interactions through the CoP's engagement mechanisms.
- **Subject Matter Expertise** — Conduct desk research and provide expertise to ensure the group doesn't get stalled or stray from its focus and the community continues to seek out new and innovative solutions.
- **Technology Management** — Select, manage, and maintain the right technology to ensure that members, regardless of geographical location, have the opportunity to interact, participate, and benefit from the community.
- **Performance Management** – Monitor the CoP's performance and measure its impact. Lead performance improvement activities to ensure the CoP continues to deliver the intended value to the members.

Responsibilities from these areas of work may be spread across different positions. While voluntary contributions in each of these areas are critical to the health of the CoP, NNPHI's experience supports the need to have a designated person(s) and/or support team to manage the community. To ensure the necessary time and resources are set aside to advance the work of the CoP, this person or team should ideally be compensated.

At NNPHI, typical staffing for a CoP looks like this.

Position	Description	Recommended Staffing
Manager or Administrator	Responsible for managing recruitment and engagement efforts, ensuring projects are on track, and coordinating events and activities, managing design and branding, etc.	Compensated staff
Coordinator or Program Assistant	Reporting on performance metrics and managing logistical and technical aspects of the community	Compensated staff

Facilitator or Moderator	Individuals or groups with subject matter expertise that can facilitate or moderate discussions, panels, webinars, or other CoP activities. They can also play an important role in recruiting members and managing or developing resources.	Determined by time expectations
Specialist	These individuals usually have a specific or narrowly defined role to support the CoP. Examples may include an instructional design, communication, or technical support.	Services are contracted or donated in-kind
Leadership or Executive Team	A group (such as a Board, Advisory Group, or Steering Committee) responsible for general governance and leadership. This group should have regular check-ins on activities, plan evaluations, and monitor progress of the strategic plan. Facilitators/Moderators or Specialists may serve on this team.	Voluntary

Table Reference: Gotto, GS., Turnbull, A., Summers, JA. & Blue-Banning, M. *Community of practice development manual*. The Beach Center on Disability.

While a successful CoP should be fairly self-sustaining and low touch for staff, newer communities or communities with less activity may require more staff engagement. Examples of this may include:

- Responding to discussion questions with resources or tagging relevant members to encourage replies to questions
- Populating the events calendar with relevant events and training opportunities
- Encouraging members to post discussion questions by soliciting and posting seed questions through email outreach to community members

It's important to remember that community management will be more involved and time intensive at the frontend when establishing and launching a new CoP, but as your community grows, staff management can shift to meet the changing needs of the CoP.

IV. Membership

For NNPHI-managed CoPs, membership is most often free, and participation is voluntary. However, there are some CoPs that provide stipends or funding to members to ensure its members have the resources and staff time to dedicate to the CoP.

There are generally two types of membership for CoPs: *Open or Private*.

- **Open:** The group will typically define the ideal user based on shared interest, expertise, and occasionally geography, but leave the community open to anyone.

- **Private (closed):** Membership is by invitation or at the request of the candidate. This structure can be beneficial to control the size of the group or if the discussion may surround sensitive topics.

The levels of engagement below were developed by *Scaled Agile* to describe how members participate in a CoP. These definitions can be helpful in understanding participation patterns and making plans for recruitment and engagement.

- **Core:** This is the leadership team that has designated responsibilities to manage and grow the community.
- **Active:** These are members who actively participate in discussion and activities regularly
- **Occasional:** These are members who engage with the group irregularly or on a limited basis. They may only engage when their schedules allow or when a topic of particular interest is introduced.
- **Peripheral:** These are members who rarely engage in the discussions and activities. They may be newcomers or individuals who only have a casual interest.[11]

Creating a structure that allows flexibility in participation is important as people's ability to commit and participate may ebb and flow with other work responsibilities. Movement across different levels of participation can help keep new voices and fresh ideas continually circulating throughout the community. It is also helpful to note that even those who participate peripherally can be gaining and adding value to the community. For example, a member of an online community may read the posts of others, and learn from these, but not actually create original posts.

Membership Composition

One of the features of a CoP that distinguishes it from other learning communities is the emphasis placed on tacit knowledge and experience. **A CoP that includes members with different backgrounds, positions, and perspectives on the topic will generate more effective results. As such, it is important to recruit members representing diverse stakeholders.** Many CoPs approach this by mapping potential members in terms of their affiliation, the value they bring to the group, and the value they derive to the group. Using a tool like a membership grid can help a CoP conceptualize the values and assets of each potential stakeholder group and target recruitment efforts.

See Appendix E for an example of a membership grid.

While many communities remain open and some recruitment may be targeted towards a broad audience through social media, public announcements or events, being intentional in recruiting members who can provide a specific 'value add' is an important way to grow and sustain the community. These members may be leaders, facilitators, moderators, or simply well-known voices in the field that can provide invaluable experience or expertise to stimulate or advance knowledge collection in the community.

New Membership Recruitment Strategies

The following activities can be used to identify and recruit potential members:

- Advertise in relevant industry/trade publications

- Advertise through social media
- Leverage connections with other relevant membership groups or organizations
- Host an event at regional and national conferences
- Sponsor or co-sponsor professional development opportunities
- Encourage members to mention the community when they present on relevant work
- Encourage members give talks at other networks of which they are a part
- Hold joint events with other groups
- Mention the network at meetings of other organizations during announcements
- Publish testimonials from members
- Offer incentives to members for referrals (often most effective when promoted as a campaign at certain times of the year, such as a spring recruitment challenge)

All members of a CoP act as ambassadors and can participate in recruiting informally or formally. Best practices for a broad recruitment approach include:

- Clearly communicate what benefits members will receive. These should be prominently displayed in the homepage for the community as well as in recruitment materials.
- Make general recruitment materials accessible for any member to distribute.
- Utilize a social networking approach to capitalize on the power of 'word of mouth'. Ask existing members to make introductions to those in their network who would be a good fit for the community.
- Ask for member feedback. Feeling like they have a voice encourages engagement and growth (a win/win for recruitment and retention).
- Personalize interactions, like phone calls and emails, to make all feel welcomed and part of the community.

New Member Onboarding Process

The onboarding process plays a critical role in helping establish a welcoming environment for all members. It will set the tone for future engagement. How the onboarding process occurs will vary depending on the size of the community and the mediums they are using.

All communities that use an online platform to host the community will likely have an automated welcome email that is sent to new members when they join. It typically includes instructions on how to create a member profile and how to use the online community tools. It may also contain other important documents the members should be aware of when they join, such as the charter and member agreement.

For communities entirely based online, the welcome email can also play a critical role in facilitating introductions and networking. It should encourage new members to create a profile with a bio and photo to personalize their interactions. The email should also ask them to introduce themselves to the community via whichever platform is commonly used for discussion (i.e., a discussion board or email listserv). A strategy to help facilitate the networking process further is to include a question for new members to answer to in their introductory post. This can help break the ice and create connections with other members. Examples of these kinds of questions are 'How did you get involved in this field' or 'What do you hope to learn from this community'? Once posted, community managers can pin these threads to the top of the forum to stay visible to all.

See Appendix F for an example of a welcome email.

Another other important aspect of setting the tone during onboarding is orienting new members to the rules of engagement and norms of the community. Although CoPs tend to be informal in nature, those that have a more formal structure or are confidential in nature may consider asking members to complete a membership agreement. The agreement should include:

- Mission, vision, and/or values: This will help establish group norms and environment.
- Expectations surrounding appropriate language and civil dialogue
- Instructions for how to report problematic behaviors and the consequences of violating group norms
- Rules regarding property rights and licensing for what is shared, and the confidentiality of information shared.
- Policies defining who has the right to view what content and the use of the community to advertise or promote commercial products.
- Policy prohibiting the sharing of personal health information.
- A waiver or release to participate (optional).

See Appendix G for an example Member Agreement.

Communicating these norms, policies, and rules will help ensure all in the community feel welcome and able to participate. It will also give community leadership grounds and a process to remove or reprimand a member if their dialogue or actions are inappropriate.

Depending on capacity and resources, communities may also consider providing a brief orientation to members either in-person or online through video conferencing. For smaller communities this may happen on an individual basis when members join the community. For larger communities, a time for a monthly orientation may be scheduled each month for new members to join. The orientation might also be recorded for on-demand viewing. During this orientation, the facilitator may review the charter, membership agreements, provide a demonstration on how to setup and utilize any online features of the community (if applicable), and facilitate networking activities.

V. Community Elements & Activities

While each CoP should be developed around the unique needs of the members, there are standard elements of a CoP that provide the structure for members to engage and store collective experience and knowledge. The following are examples of community elements and activities that NNPHI has used in the past to help CoPs accomplish their goals. It is worth noting that some strategies may lend themselves better to CoPs whose chosen medium is either online or in-person. Although some of the elements included may not be feasible for every CoP based on their chosen medium, communities should consider a blended approach using in-person and virtual convenings and synchronous and asynchronous interactions to help increase accessibility and effectiveness of the CoP whenever possible.

The table below describes engagement activities offered previous CoPs.

Activity	Description	Frequency	Medium
Case-Based Learning	Originally designed for medical providers, the ECHO model uses a combination of multi-point video-conferencing technology, case-based learning, promotion of best practices and the monitoring of outcomes to create and support CoPs. Its potential in public health has not yet been fully explored, but there are some initial successes with prisoner peer education programs, opioid treatment programs and community health worker initiatives.	Determined by participants and scope of project.	Web-based video conferencing
Collaborative Site Visits	Site administrators and leaders can work together to coordinate opportunities for members to visit each other's sites for shared learning opportunities.	Dependent on funding and member availability.	In-person
Curated email or newsletter	Emails with information tailored to the individual (such as summaries or discussion board topics) or a regular newsletter keeps members informed of events, activities, emerging issues, and spotlights resources and/or members. They are a quick and cost-effective way to keep members in the loop. See Appendix H for an example of a newsletter.	A recommended schedule will range from monthly to quarterly, depending on the community's preferences and resources.	Email Listserv
Discussion Forum	This online tool allows members to interact with each other around any topics of interest at any time. Discussions are reflections of the interests of the CoP and are an effective way of sharing knowledge. As discussion evolves, the topics raised and responses can be used to develop new tools, materials, or guide the strategic development of the CoP.	Available to members at all times. A best practice for engagement is to send members a weekly or semi-monthly summary of activity.	Online Exchange – The platform used to host these exchanges should be easy for members to use. Many platforms will also allow moderators or managers to manage the site on the back end and use analytics to understand how members are engaging, which is critical to support evaluation efforts.

Live Office Hours	During live office hours a subject matter expert will be available for 30 minutes to an hour for members to pose questions and participate in discussion.	Once a month or after a webinar or event.	Web-based video conferencing
Meetups	These are in-person events or meetings. CoPs that are primarily conducted in-person may rely on these to keep members engaged. CoPs based online will often schedule these in conjunction with bigger events, like conferences or other summits or meetings. These events are a great way for members to make connections and build the trust that drives engagement.	Depending on the geographic spread and time commitment of participants, these can be offered as frequently as member schedules will allow (monthly, quarterly, bi-annually). For national or larger networks, once a year is more realistic.	In-Person
One-On-One Coaching or Mentorship	Where needed, CoP administrators or leadership teams can provide on-on-one coaching to specific members to troubleshoot rough spots. Some CoPs will also assign a mentor to new members who will periodically check-in on the new member.	Determined on needs of mentee. For a new member mentorship program, there may be a standard timeline with recommendations for weekly and monthly checkpoints, gradually phasing out over time.	Mixed – Could utilize one or more of the following: • In-person meetings • Emails • Phone Calls • Video conference
Pilot Projects	Pilot projects may develop as a result of strategic planning or organically through discussions among members. They are typically driven by a team within the community to test an intervention, resource, or other concept developed by the community.	Varies based on project.	Varies based on project.
Reference or Resource Library	An online library of tools and resources for members. This is also where content and materials created by the CoP, like webinar recordings, will be stored. A community manager will often monitor submissions and help organize materials, so they are easy to find.	Members can access or submit at any time. If resources or materials are needed to fill emerging needs or gaps, the CoP leadership team can plan a resource drive to encourage submissions.	If using an online platform to host your community, this may be integrated into a member portal. Some CoPs may find a simple cloud-based shared folder more manageable and suitable for member needs.

Webinars	Webinars provide members with the opportunity to learn about topical issues and pose questions to subject matter experts. They are cost effective, accessible, and can even be used as a recruitment tool if made available to a broader audience. Webinar recordings should be saved in the reference library. See Appendix I for a sample webinar moderator script.	Recommended to be offered on a quarterly basis.	Webinar hosting platform

See Appendix J for a document that provides posting guidance to members to help them effectively share content online through various mediums.

VI. Engagement & Retention

There are three overarching factors that will influence member engagement and retention: *Quality, Connection, and Need*.

- **Quality:** It is the quality, not quantity, of the content that creates value for members and is a significant and overarching factor in sustaining membership and engagement.
- **Connection:** The desire to participate in a community stems from the strengths of the connection among members. Trusting relationships among members encourages participation and implicit accountability.
- **Need:** The need for information and growth surrounding a topic is a significant factor in sustaining engagement. Over time it is possible the need for the community has been met or dissolved, especially in response to an emergency. This is a natural part of the CoP lifecycle.

This section will outline strategies that ensure quality and create connections that drive engagement and help advance the CoP's goals.

Design & Organization

While quality of content is the most important factor in engaging and retaining members, members must be able to access the community's resources efficiently. If the members can't easily find the information, the quality will be irrelevant, making the design an important feature. Any tools used to engage members should be convenient and easy to use. If using a website or storing resources online, communities have found a '3 click rule' to be effective. This means that contributing and accessing content shouldn't take more than 3 clicks.[12] Additionally, over time a CoP may amass numerous discussion threads, resources, and tools. Creating a well-organized shared resource library can help manage this.

Accessibility

If the community's meetings and business are primarily handled in-person, where shared resources are stored should be clear and easy to access for all members. Accessibility of meeting spaces should also be considered if members will be expected to engage regularly in in-person events.

Member Recognition or Incentives

Giving kudos to active members for their contributions can help encourage engagement and create a supportive and welcoming atmosphere. Active members or member accomplishments can be acknowledged in a meeting or event or highlighted in newsletters or other regular communications. Active members can also be given a badge or other recognition in online forums or community publications. **Additionally, asking members to facilitate webinars, events, or other activities recognizes their leadership and helps gain buy-in for certain events.**

Collecting Input and Feedback

All CoPs should engage in regular evaluation, a topic which is covered in more detail in a later section. Seeing growth come from these evaluations can be motivating to members. In addition to these formal evaluations, collecting regular input from members on topics or activities of interest ensures the CoP stays relevant and adds benefit to all members. Asking for member's input will also help all members take a role in shaping the community, creating a sense of ownership and pride.

Seed Questions

Consult content specialists, members, or other stakeholders to identify topics of interest or commonly asked questions in the field. Use this information to develop seed questions to start discussion on forums, panels, events, etc.

Leverage Industry Events

Harness the momentum that naturally surrounds big industry events by generating relevant discussion starters for CoP members prior to or after the event. This may include conference, summits, forums, panels, or the release of significant reports or other publications.

Schedule Emails

If using an online platform that allows automation rules, automated emails can be scheduled surrounding a variety of topics to engage members, including orientation and re-engagement. If a member does not log into the platform over a designated period of time, an automated email can be sent to them to check-in. Additionally, some online platforms will send a curated email summary of any discussion board a member has contributed to at regular intervals to keep them in the loop. If this resource is not available, a calendar of regular touch points for new or disengaged members may be used.

Content Calendar

Creating a content calendar can help organize a team and ensure there are not gaps in activities to keep the CoP running. The calendar doesn't need to be limited to just when content will be posted. It can also

include regularly occurring activities that drive content creation, such as reports and scheduled preparation for planned events. While there is typically a CoP events calendar available to all members, the content calendar will usually only be visible to community managers and others who are involved with the regular maintenance activities of the CoP.

Evolution

As the CoP grows and the participation of various members waxes and wanes, the interest of the community may change. This kind of evolution is natural, and the leadership team should be flexible and adaptable to ensure the community can grow with the needs of the community. Ensuring strategic plans and goals are created in a way that allows for this evolution is important.

VII. Evaluation

Evaluation of CoPs should help track progress towards the goals and objectives outlined in the workplan, analyze the efficiency and effectiveness of the community and their output, measure the value to members, and identify improvement opportunities. Many online platforms are now equipped with the ability to generate sophisticated reports to help measure outcomes and benefit.

There are several types of evaluation to consider:

- **Formative Evaluation** examines how feasible, appropriate, and acceptable an activity or program is before fully implementing it.
- **Process Evaluation** evaluates the fidelity of a program, or in other words whether the program activities have been implemented as intended.
- **Outcome Evaluation** assesses progress towards a specific goal or objective.
- **Impact Evaluation** measures the ultimate impact or effectiveness of a program or community in achieving its goals.[13]

Type of Evaluation	Measures	Methods	Sample Questions
Formative	• Funding • Staff • Partners	Needs Assessment Focus Group Stakeholder Interviews	What is the need or demand for this project? What resources exist that could support this project?
Process	• Ease of use (ranking) • Satisfaction	Member surveys Member profiles, database	How easy did members find it to access our materials?

	• # of Complete and Incomplete submissions • # of events • # of participants • # of downloads • Quantity of information disseminated • Demographics of participants	Event or activity evaluations Click or download rates (web-based analytics)	How easy did members find it to utilize online platforms? Did we reach out target population?
Outcome	• Knowledge gain • Goals in strategic plan	Pre and/or Post tests Member surveys Event or activity evaluation feedback	Has the community achieved goals outlined in the strategic plan? Was there an increase in knowledge after a community event or certain amount of time participating in the community?
Impact	• Changes to thinking • Changes to practice or behaviors • Changes to system condition	Member surveys Focus Group Stakeholder interviews	Do members report changing their thoughts or perspective as a result of participating in this community? Have members of this community made a change to their practice or in their behavior based on what they learned in this community?

The CDC's Public Health Professionals Gateway has produced a number of templates for CoP evaluation through their Communities of Practice Resource Kit that could be used to help track these metrics and conduct a comprehensive evaluation. These additional resources adapted from NNPHI's own evaluations are also available to review:

- Appendix K - Annual Member Survey Template
- Appendix L - Example of Online Analytic Monthly Reports

Through evaluation, it may become evident that the CoP has achieved its mission. This could be apparent through the outputs and/or the level of engagement. Input from members also can help determine if it's time to retire the community or a certain project the community engaged in. If so, it is important to celebrate the success to reinforce the value of the work and time each member put in.[14]

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Appendix A – Charter Template

This Charter Template was adapted from CDC's Public Health Professionals Gateway's 'CoP Charter Template' from their [Communities of Practice Resource Kit](#).

[Insert CoP Logo or Letter Head]

[CoP Name] Charter

Approved [Date] by [Governing Body, such as a Steering or Executive Committee]

Version 1.0

I. Introduction

1a) Charter Purpose

Explains what this document is, how it is used, and who the intended audience is.

This charter establishes the purpose, function, membership and essential governing practices of the [CoP Name]. It identifies the mission, values, and ground rules, defines the roles of the leadership team and outlines essential governance policies to be used by decision makers to manage this community. The charter will be used by sponsors or funders, contributors, the leadership team, and community members.

1b) Community Background & Justification

Explains how and why this CoP was developed. It should also identify the specific public health topic area or need.

[CoP Name] was developed in 2020 by state health officials and public health leaders who sought to identify national best practices in improving HPV vaccination rates. While states have made significant efforts to raise HPV immunization rates through the development of HPV Taskforces, national rates remained under national goals. As a national clearinghouse, the [Partner Organization], with financial support from the [Funder], launched this Community of Practice with 35 members representing HPV Taskforces in 27 states.

1c) Mission

State the CoP's mission. While developed and finalized by a steering committee, community members should be given the opportunity to provide input on this annually.

The mission of the [Name of CoP] is to identify best practices, emerging trends, and build new knowledge to improve HPV immunization rates statewide through an active and engaged community of HPV Taskforce stakeholders.

1d) Goals

State the CoP's goals. Typically, 3-4 goals are sufficient in defining the activities and deliverables of the CoP. Like the mission, this should be updated regularly to reflect the evolving goals of the

community over time. The key areas all CoPs address that could be reflected in goals include connection with peers, resource sharing, access to expertise and professional guidance, professional development and capacity building.

In order to fulfill this mission, the [CoP Name] will:

1. Develop a forum for members to discuss, analyze, and generate new knowledge.
2. Facilitate collaboration and strengthen a network of HPV providers.
3. Identify best practices by exploring tacit knowledge across stakeholders.
4. Continually evaluate the success of the CoP.

1e) Member Values

State the values that unite members to work on the previously stated goals and mission.

Members of [CoP NAME] ascribe to the following values
1. De-monopolization of knowledge and research
2. Integrity
3. Accountability

II. Membership

This section should state who the intended members for this community are, how they can become a member, what the requirements and expectations of members are, and if there is a cost to become a member. Depending on the size and complexity of the CoP, this may vary.

This Community of Practice is intended for members of an HPV Taskforce, although it is open to all stakeholders working to improve HPV immunization rates. There is no cost to join and membership is open, but the community is private. Members must submit a request to join the community via the [Name] webpage. All requests will be reviewed and approved by the Community Manager.

Members are not required to contribute to any CoP discussions or activities but are encouraged to engage through various incentives. For example, benefits such as discounted conference rates or scholarships to attend events or trainings may be available for members who meet a minimum threshold of engagement as defined by the CoP leadership.

III. Community Participation and Activities

This section should provide a brief description of the benefits of participation to the members and to the community. If applicable, it may also outline the types of activities the community will sponsor or coordinate. Finally, it should include the community norms and/or ground rules.

3a) Member and Community Benefits

Through sustained discussion and interactions, this community enables members to:

- Share experiences and knowledge
- Access tools, resources, and expertise from public health professionals in the field
- Receive professional development opportunities
- Tap into a network of informal support and coaching from peers
- Collaboratively solve pressing industry issues or questions
- Connect with peers in the same field to expand your professional network
- Enhance professional reputation

The community will benefit from its members by:
- Improving or developing information sharing pathways
- Reduce duplication in efforts
- Streamline and standardize public health practices
- Facilitate coordination and collaboration that can lead to innovative problem-solving
- Develop new practices, skills, resources, and tools to advance a specific public health field
- Unify public health professionals tackling similar problems across the country

3b) Ground Rules

Members of [NAME] are encouraged to openly discuss and share relevant resources and materials that will advance understanding of statewide HPV responses. The inclusion of all diverse members perspectives is critical for community growth. Members of this community will:
1. Be courteous, respectful, and considerate of fellow community members
2. Encourage a collaborative environment that welcomes diversity and inclusion through open and thoughtful discourse
3. Refrain from harassing, discriminatory, or derogatory speech, conduct, and materials
4. Respectfully challenge one another, but refrain from personal attacks
5. Try on new ideas and perspectives and approach new ideas with an open mind
6. Commit to finding consensus and creative solutions
7. Discussions and resources shared using [Name]'s platforms, such as the discussion board, will remain relevant to the community's public health focus and mission
8. Obtain approval before distributing materials or promoting services from which the member could financially or politically gain.
9. Disclose any personal or professional conflicts of interest that may impact participation in the community.
10. Keep confidential any information or experiences of a sensitive or personal nature shared by members

IV. Leadership Committee

This section should identify the roles and/or commitments of organizations supporting the CoP, as well as the leadership team. It should also describe how the leadership team is formed, and if applicable, any requirements for eligibility to join the leadership team.

[Organization name], fiscal sponsor of this group will staff a Community Manager for [CoP Name] to manage the day-to-day coordination, administration, and management of the community.

A leadership team will work in close partnership with the Community Manager to provide general oversight of all [CoP Name] activities and direct the progress of the community towards reaching and developing strategic goals and outputs. The leadership team will be elected for a 1-year term through an annual open voting process.

The roles and responsibilities of the leadership team are as follows:

Role	Responsibilities
Community Leader	- Responsible for the [CoP Name] leadership team - Lead the leadership team's strategic planning process - Develop agendas and facilitate leadership team meetings - Follow up on deliverables and action items from team meetings - Represent the community in an official capacity when necessary - Lead and/or preside over coalition events
Knowledge Leader	Working in partnership with the Coalition Manager: - Monitor discussion forums - Designate moderators and encourage participation in discussions and events - Manage the development of the resource libraries and any new resources or tools developed by community - Take the lead in proposing new ideas to support knowledge development and translation for the community
Communications Leader	Working in partnership with the Coalition Manager: - Moderate website content - Oversee the development of content and language for [Name] communications, including newsletters - Review proposed communications to ensure they align with [Name]'s brand - Manage social media accounts
Member Leader	- Demonstrate leadership in recruitment - Develop and oversee progress on a member recruitment and retention plan - Working in partnership with the Coalition Manager, facilitate on-boarding for new members - Respond to member suggestions or concerns
Evaluation Leader	- Lead the strategic planning of evaluation activities - Track and monitor progress of evaluation activities - Work in partnership with the Coalition Manager, implement evaluation, including the distribution of surveys, event evaluations, and review of website analytics - Analyze and compile evaluation results

Appendix B – Workplan Template

The following workplan template contains suggestions of the types of goals a CoP may consider based on standard CoP measures. This template is meant to be a starting point used to help develop a more comprehensive plan. Goals should be updated annually to keep the CoP on track.

Goal: Membership, Strength of Connection with Peers				
Objective	**Activity**	**Timeline**	**Evaluation & Data Measures**	**Person Responsible**
• Recruitment (depth/breadth) • Engagement (participation rates) • Network (social events, dialogue, diversity of members)	✓ Announcements in professional publications ✓ Curated emails or newsletters, member awards ✓ Coordinate social events, orientation, member mentorship	Weekly, monthly, and quarterly deliverables	• # of active and/or new members • # of posts • Click rates • # of events • # of participants • Qualitative member feedback • Demographics of participants	Member Manager Support from: Community Manager Evaluation manager Communications Manager Community Leader

Goal: Resource Sharing				
Objective	**Activity**	**Timeline**	**Evaluation & Data Measures**	**Person Responsible**
• Discussion Board • Resource Library	✓ Testimonials, responses, seeded questions ✓ Resources added to library	Weekly, monthly, and quarterly deliverables	• Click and/or download rates • # of posts • # of discussion board topics	Knowledge Manager Support from: Community Manager Evaluation Manager Community Leader

Goal: Access to expertise and professional guidance				
Objective	**Activity**	**Timeline**	**Evaluation & Data Measures**	**Person Responsible**
• Events • Mentorship	✓ Webinars ✓ Office Hours ✓ Assignment of mentors to new members ✓ Conduct satisfaction surveys	Monthly and quarterly deliverables	• # of events • # of participants • Feedback from members • # of mentorship partnerships	Knowledge Manager Support from: Community Manager Member Manager Communications Manager Evaluation Manager Community Leader

Goal: Professional development and capacity building				
Objective	**Activity**	**Timeline**	**Evaluation & Data Measures**	**Person Responsible**
• Opportunities to practice new skills • New knowledge or tools developed	✓ Implement satisfaction and knowledge gain evaluations	Quarterly deliverables	• Pre/Post knowledge gain • # of tools, resources, or publications developed • Member feedback	Evaluation Manager Support from: Member Manager Community Leader

Appendix C – Brand Guidelines Example

The following Brand Guidelines were developed for one of NNPHI's largest and most successful CoPs, phPIN. Brand guidelines are a foundational internal document for any CoP to ensure consistency in the brand from the beginning of the CoP.

PRIMARY IDENTITY

The Public Health Performance Improvement Network identity consists of the Logo Mark (A), the Acronym (B), and the Full Name (C). With its bright color, palette, dynamic visual presence and friendly typeface, the identity expresses the positive flow and movement of resources and communications at the heart of the Public Health Performance Improvement Network process of growth through self-discovery and social connection.

All the elements have been carefully crafted and should never be altered beyond the specifications outlined in this manual.

The Logo Mark can live on its own or with the Acronym. However, the Acronym and Full Name should never appear without the Logo Mark.
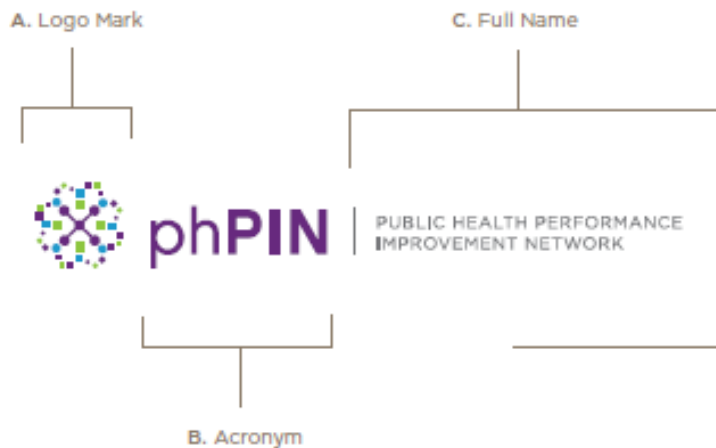
Appendix D – Marketing Kit Example

The following Marketing Kit was used by NNPHI as a recruiting tool for a national CoP called the Public Health Performance Improvement Network. The materials can be adjusted to promote a CoP to funders or partner organizations who have access to networks or members of interests. When sending these emails, it is best practice to attach the toolkit to the email and include some key action items in the email itself, such as sharing information in their newsletter, posting on social media, or sending email to other key partners.

Email Campaigns

Email Campaign A: Launch Announcement	Subject line: New and Improved: phPIN Introduces Online Portal
Send-by date: February 1, 2017	Preheader: Helping connect performance improvement professionals nationally

Audience: Already aware of phPIN

Copy:

The Public Health Performance Improvement Network (phPIN) is growing. Over the past year, the 400+ members of the phPIN listserv have shared resources, ideas, and emerging practices to help network members better serve their communities. As our network ballooned, our members voiced a need for an accessible and efficient online home for the listserv.

About phPIN Online

To meet growing demand from performance improvement professionals and their partners, phPIN is rolling out an all-new online portal for our learning community and peer exchange network. Browse our online resource library, connect with other members through our member directory, and use a host of other exciting features to navigate the challenges and opportunities in the field of public health performance improvement.

How to encourage others to join phPIN

First, have them fill out the short application form [guidance for communications kit use: if the embedded link isn't working, use the following: https://nnphi.org/relatedarticle/public-health-performance-improvement-network-phpin/#joinphpin] at nnphi.org/phPIN. Our staff members will review their application and add them to the phPIN online community and listserv.

They are an ideal candidate for this online community if they:

- Are a member of a state, tribal, local, or territorial health department whose responsibilities includes quality improvement or accreditation activities
- Play a role in advancing performance improvement efforts in public health organizations

- Are committed to ensuring that your organization's processes and programs run more efficiently and effectively
- Are developing tools and resources to help your organization meet its full potential

Spread the Word

The strength of the phPIN network is its grassroots, collaborative culture. Please invite colleagues who would be interested in joining to fill out the [form](#).

Share news about the online portal on any social media platforms you might be on (Twitter, LinkedIn) and help continue to grow the national network of public health performance improvement professionals linked together by phPIN today!

Appendix E – Example Membership Grid

The following membership grid was created by the Private Water Network, a CoP whose mission is to build a sustainable community of professionals working to protect the public's health from contaminants in private water sources.

Membership Type	What value they provide?	What value do they derive?
State, tribal, local, and territorial governmental public health agencies	- Expertise - Resources - Ideas	- Expertise - Shared resources - Connection with peers - Ideas
Other state agencies (environmental health, wells, permitting, natural resources, agriculture, health, ecology, land, water conservation, transportation, geology, building codes, permits, flood plains, emergency management)	- Access to other experts that deal with wells and have access to data and information - Subject matter expertise - Insights into new legislation and laws	- They know who to refer individuals for health – so their primary contact would be their state/local health agencies - Question: Would members from this group care about what's going on in the other states?
Federal agencies (EPA, ATSDR, FEMA, CDC, UGUS, ASPR, Army Corps of Engineers)	- Authority - Credibility - Funding	- See what is emerging in other states – is there a common theme going - Get an on-the-ground perspective
National organizations (NEHA, ASTHO, NGWA, NACCHO, NSF, WQA)	- Objective, independent technical expertise - Funding	- See what is emerging in other states – is there a common theme going - Get an on-the-ground perspective
Certified laboratories	Answer questions about what they do or do not offer	To learn how STLT public health agencies are interacting with labs and the types of services they need. To learn how to coordinate around consistent public health messaging related to well water contaminants in their jurisdictions.
Academic/Extension Partners	- Access to research and evidence - connections to broader networks	- Research opportunities - A place/opportunity for interns

Appendix F – Welcome Email Example

The following example of a welcome email is intended for communities that will have an online discussion board. It can be adapted as needed.

Hi <NEW MEMBER NAME>,

Welcome to the Public Health Performance Improvement Network (phPIN). We're so happy to have you in our community! phPIN is a great place to connect with your public health peers and get answers to your performance improvement questions.

Here are some tips for starting off in the new phPIN system. Log in today and check off our top four easy tasks (don't worry - there are no penalties, only perks) to help you get started. To email the entire phPIN list serve, address emails to <EMAIL>.

1. Click here to confirm your email and choose a new password
2. View the Guide to the phPIN Online Community file and Posting Guide files in the Library (phPIN_Online_User_Guide.pdf)
3. Visit the member directory to look up your colleagues
4. Find the "Introduce Yourself" thread and post a hello

If you'd like to see a recorded demo of the new site's functionality and an overview of phPIN from our January webinar, the recording is included in the Library for you to view at your convenience.

Please let me know if you have any questions that pop up along the way. We're always happy to help out!

<COMMUNITY MANAGER CONTACT INFO>

Appendix G – Membership Agreement Template

The following document is an adaptable template of a Member Agreement for an online community. The language can be adapted for a community using any medium or format to facilitate the community. As this document has legal implications, *it is important that it is reviewed by your community's legal counsel before distribution*.

Community Rules & Etiquette and Privacy Guidelines

Welcome to <COMMUNITY NAME>! To ensure the best possible experience for all members, we have established some basic guidelines for your participation.

By joining and using this community, you agree that you have read and will follow the rules and guidelines set forth in this agreement. You also agree to reserve discussions and shared files and content to that best suited to the medium. This is a great medium with which to solicit the advice of your peers, benefit from their experience, and participate in an ongoing conversation.
Please take a moment to acquaint yourself with these important guidelines. If you have questions, contact <INSERT NAME OR DEPARTMENT>. In order to preserve an environment that encourages both civil and fruitful dialogue, we reserve the right to suspend or terminate membership in this community for anyone who violates these rules.

Rules
<INSERT GROUND RULES, EXAMPLES INCLUDED>
- Respect others. Focus on the content of posts and not on the people making them. Please extend the benefit of the doubt to newer guests and members; there's no such thing as a stupid question.
- Respect the purpose of the community. Use the community to share successes, challenges, constructive feedback, questions, and goals instead of products or services that you provide. If you've found a product or service helpful, please share your experience with the group in a respectful way.

- Use caution when discussing products. Information posted on the discussion groups and in the libraries is available for all to see, and comments are subject to libel, slander, and antitrust laws.

- All defamatory, abusive, profane, threatening, offensive, or illegal materials are strictly prohibited. Do not post anything that you would not want the world to see or that you would not want anyone to know came from you.

- Respect intellectual property. Post content that you have personally created or have permission to use and have properly attributed to the content creator.

- When posting items in our collaborative environment, please indicate if the item is not available for reuse. It's also advisable to contact the owner of any material if you would like to reuse it.

- Post your message or documents only to the most appropriate communities. This helps ensure all messages receive the best response by eliminating "noise".

- <COMMUNITY NAME> may not be used in a manner that violates applicable federal, state or local laws.

Discussion Group Etiquette

- State concisely and clearly the topic of your comments in the subject line. This allows members to respond more appropriately to your posting and makes it easier for members to search the archives by subject.
- Send messages such as "thanks for the information" or "me, too" to individuals, not to the entire list. Do this by using the "Reply to Sender" link in every message.
- Do not send administrative messages, such as "remove me from the list," to the group. Instead, use the web interface to change your settings or to remove yourself from a list. If you are changing email addresses, you do not need to remove yourself from the list and rejoin under your new email address. Simply change your settings.

Disclaimer

This site is provided as a service for the members of <COMMUNITY NAME> and is not responsible for the opinions and information posted on this site by others. We disclaim all warranties with regard to information posted on this site, whether posted by <COMMUNITY NAME> or any third party; this disclaimer includes all implied warranties of merchantability and fitness. In no event shall <COMMUNITY NAME> be liable for any special, indirect, or consequential damages or any damages whatsoever resulting from loss of use, data, or profits, arising out of or in connection with the use or performance of any information posted on this site.

Do not post any defamatory, abusive, profane, threatening, offensive, or illegal materials. Do not post any information or other material protected by copyright without the permission of the copyright owner. By posting material, the posting party warrants and represents that he or she owns the copyright with respect to such material or has received permission from the copyright owner. In addition, the posting party grants <COMMUNITY NAME> and users of this site the nonexclusive right and license to display, copy, publish, distribute, transmit, print, and use such information or other material.

Messages should not be posted if they encourage or facilitate members to arrive at any agreement that either expressly or impliedly leads to price fixing, a boycott of another's business, or other conduct intended to illegally restrict free trade. Messages that encourage or facilitate an agreement about the following subjects are inappropriate: prices, discounts, or terms or conditions of sale; salaries; profits, profit margins, or cost data; market shares, sales territories, or markets; allocation of customers or territories; or selection, rejection, or termination of customers or suppliers.

<COMMUNITY NAME> does not actively monitor the site for inappropriate postings and does not on its own undertake editorial control of postings. However, in the event that any inappropriate posting is brought to the attention of <GOVERNING BODY OR ORGANIZTAION> we will take all appropriate action.

Privacy Policy

Any personal information you provide to us including and similar to your name, address, telephone number and e-mail address will not be released, sold, or rented to any entities or individuals outside of our organization except as noted below.

With Whom Do We Share the Personal Information We Collect Through This Site:

Our Service Providers
We may share your personal information with companies (including our affiliates) that perform services on our behalf, for example, companies that help process credit card payments. Our service providers are required by contract to protect the confidentiality of the personal information we share with them and to use it only to provide specific services on our behalf.

Business Transfers
Your personal information may be transferred to another entity (either an affiliated entity or an unrelated third party) in connection with a merger, reorganization, dissolution or similar corporate event. If such a transfer were ever to occur, the acquiring entity's use of your personal information will still be subject to this Privacy Policy.

Government and Legal Disclosures
We may disclose the personal information we collect through this Site, when we, in good faith, believe disclosure is appropriate to comply with the law (or a court order or subpoena); to prevent or investigate a possible crime, such as fraud or identity theft; to enforce our Terms and Conditions or other agreements that govern your use of this Site; or to protect the rights, property or safety of our company, our users, or others.

External Sites
We are not responsible for the content of external internet sites. You are advised to read the privacy policy of external sites before disclosing any personal information.

Cookies
A "cookie" is a small data text file that is placed in your browser and allows us to recognize you each time you visit this site (personalization, etc.). Cookies themselves do not contain any personal information, and we do not use cookies to collect personal information. Cookies may also be used by 3rd party content providers such as newsfeeds.

Remember The Risks Whenever You Use The Internet
While we do our best to protect your personal information, we cannot guarantee the security of any information that you transmit to us and you are solely responsible for maintaining the secrecy of any passwords or other account information. In addition, other internet sites or services that may be accessible through our site have separate data and privacy practices independent of us, and therefore we disclaim any responsibility or liability for their policies or actions. Please contact those vendors and others directly if you have any questions about their privacy policies. For any other information please contact <CONTACT INFO>.

Violation of Agreement

<POSITION NAME OR COMMUNITY NAME> will review and report activities or content posted that they believe violates this agreement. The <GOVERNING BODY OR ORGANIZATION> will review all flagged posts or reports of agreement violations.

If it is determined that a member has violated the agreement, the following consequences may be enacted based on recommendations of the <GOVERNING BODY OR ORGANIZATION>

- Removal of content
- Temporary suspension of membership
- Permanent removal from community

Appendix H – Example of a Monthly Curated Email

The following newsletter is an example from NNPHI's Public Health Performance Improvement Network. It adheres to branding guidelines for this community and provides useful information like upcoming events, announcements, community highlights, and quick links to essential community resources. Newsletters that effectively engage readers follow these guidelines:

- Are consistent to format and the type of content included
- Include headlines and by lines rather than full text
- Link resources
- Are concise, including no more than 8 items in a newsletter
- Use minimal but impactful graphics to draw attention to certain items without crowding the email

phPIN | PUBLIC HEALTH PERFORMANCE IMPROVEMENT NETWORK

Monthly Webinar

Join us for our **February phPIN Webinar: Building a Performance Management System to Strengthen Quality Improvement** with Whitney Litzner from the Macomb County Health Department in Michigan. **The webinar is February 24, 2020 at 2:00 pm ET.**

This webinar will address many areas of performance management, including where to start when developing a performance management system, how to define performance management terms (and explain them to others), developing performance measures that are meaningful to your programs, and how to use what you learn from your performance management system to identify quality improvement initiatives for your organization.

Learning Objectives:
1. Define and provide examples of key performance measurement terms, such as indicator, outcome, measure, and action
2. Describe how to use performance data to develop quality improvement activities
3. Formulate ways to establish a system that works for your organization

Register Here

Appendix I – Webinar Moderator Script Template

Note to presenters: All participants will be muted. Questions will be entered into the chat box. A moderator will help direct questions at the end of the presentations.

Moderator will send this message via chat prior to the start the webinar.

Please type in your questions or comments into the Q&A box. We will read your questions out loud at the end of the presentation. For any technical issues, please chat <NAME> directly. We welcome your questions and comments!

WELCOME AND HOUSEKEEPING

Moderator: **[Slide 1]** Welcome everyone! Thank you for joining us today for <WEBINAR NAME>. I'm <NAME & JOB TITLE>. Today we are pleased to have <PRESENTER NAME(S)> join us to discuss <TOPIC>. We have a few housekeeping items before we get started:

1. If you have any technical problems, please type out your question for us.
2. This session is being recorded and will be made available later to people who were not able to participate.
3. Please type in your questions or comments into the question box. We will read your questions out loud throughout the presentation and at the end. We welcome your questions and comments. you may ask your question anonymously. If you have any remaining questions at the end, please follow up with us through email.

[>Next slide, Slide #]

Let's quickly review our agenda for today. We will introduce our presenter, <PRESENTER NAME>, then <PRESENTER NAME> will share learning objectives and begin our presentation. After the presentation, we will have an open question and answer portion with the presenter and a discussion portion with the audience.

[>Next slide, Slide #]

PRESENTATION

Moderator:

Now, it's time to introduce our speaker. ***[read bio & learning objectives]***

[Switch to presenter. Moderator and team will monitor chat box.]

DISCUSSION/MODERATED Q & A

Moderator:

Wonderful, thank you so much for that presentation. Now we're going to move into the Q&A portion. Please type your questions into the Question box.

[>Discussion slide]

We do have a discussion portion for you all today as well. *[If we have more time]* Now these questions are directed towards the audience, *[read discussion Qs]* please feel free to type your response into the question box.

Moderator: Well it looks like our time is wrapping up now, thank you all very much for your discussion and participation today. Before we wrap up, we have a few notes for you all.

CLOSING & REMINDERS

Moderator: *[Last slide:]* Thank you all for joining us today and thank you <PRESENTER NAME(S)> for providing so many good ideas for incorporating internal health equity into our organization. Have a great week everyone, and we're looking forward to seeing you at the February webinar, which will cover <TOPIC>.

Appendix J – Posting Guidance Template

The following document can be adapted and distributed to new members to help orient them to the most effective uses of online CoP tools.

The success of < Community Name > has been directly related to the willingness and openness of peers sharing with each other in a safe space. We strive to uphold that safe environment within our online community. Please review the following guidance to help us continue to serve the community.

SHARING ON THE DISCUSSION FORUM

The discussion forum provides members with a medium to pose questions and receive direct feedback from peers, as well as share knowledge with others. The forum is available through <COMMUNITY NAME>'s website at all times. Once a <FREQUENCY>, members will receive a summary of the activity on the forum.

Please be aware that all information posted on the forum will be visible to the public and is intended for open discussion. Please only share content appropriate for open discussion.

To ensure the discussion forum is streamlined and easy to use for all, please review existing conversation threads to avoid duplicating existing ones. A moderator will regularly review discussion threads and consolidate them as necessary.

Here are a few other tips for sharing that will help others get the most out of the information you've shared:

- Use a concise and clear title or byline for your post that will help others identify the topic or content.
- Generally speaking, keeping the body of your post to 1-2 paragraphs helps others easily keep up with the conversation thread.
- Ensure the post is relevant to the scope of the CoP and discussion thread.

SHARING ON THE LISTSERV

The listserv is for peers to ask questions and share experiences, lessons learned, recommendations, resources, and tools with each. Please note that this is not a place to market goods or services. To email the listserv, address emails to <EMAIL>. Remember these emails will be distributed to all members, so please ensure content is suitable to share with all and keep private conversations separate. Send messages such as "thanks for the information" or "me, too" to individuals, not to the entire list. Do this by using the "Reply to Sender" link in every message.

Do not send administrative messages, such as "remove me from the list," to the group. Instead, use the web interface to change your settings or to remove yourself from a list. If you are changing email addresses, you do not need to remove yourself from the list and rejoin under your new email address. Simply change your settings.

SHARING VIA THE SHARED CALENDAR

The shared calendar features learning opportunities and in-person events or meetings that are relevant to community members. For the shared Calendar, we look for items that directly relate to the <COMMUNITY NAME> members and are specific to <TOPIC OF INTEREST> (e.g., webinars, conferences, funding opportunities). To request to include an item on the calendar, please send an email to <CONTACT INFO>. To ensure your request is addressed quickly, please include the following in the subject line: FOR <COMMUNTIY NAME> CALENDAR and include the following:

- Headline

- Subject matter detail (250 words or less if possible)

- Links to additional content or registration

- Contact person

SHARING VIA THE NEWSLETTER

Our monthly newsletter features pertinent announcements regarding upcoming events, funding opportunities, highlights from <COMMUNITY NAME> conversations, and other relevant opportunities. To include an item in the newsletter, please send a request to <CONTACT INFO>. To ensure your request is addressed quickly, please include the following in the subject line: FOR <COMMUNITY NAME> NEWSLETTER and include the following:

- Headline

- Subject matter detail (250 words or less if possible)

- Links to additional content or registration

- Contact person

We are here to help make this community valuable to all. If you need help navigating the online community or listserv, please email <CONTACT INFO>.

Appendix K – Annual Member Survey Template

The following template was adapted from the Private Water Network's CoP Guide.

Thank you for participating in our annual member survey. Your feedback helps shape <COMMUNITY NAME> and improve the member experience. The survey should take approximately 10 minutes and your responses will be kept anonymous.

Please indicate the extent to which you agree with the following statements:

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<COMMUNITY NAME> is a valuable resource					
Participating in <COMMUNITY NAME> has improved my knowledge of best practices for <TOPIC 1 ex: conducting water quality surveillance>					
Participating in <COMMUNITY NAME> has improved my knowledge of best practices for <TOPIC 2 ex: improving water policies>					
Participating in <COMMUNITY NAME> has improved my knowledge of best practices for <TOPIC 3 ex: Educating communities>					
Participating in <COMMUNITY NAME> has improved my access to peers working on <CoP TOPIC>					
Participating in <COMMUNITY NAME> has improved my access to experts on topics related to <CoP TOPIC>					
Participating in <COMMUNITY NAME> has improved my access to resources related to <CoP topics>					

Please select all of the <COMMUNITY NAME> activities that you have participated in within the last 12 months.

- ❑ Posted in the discussion forum
- ❑ Downloaded an item from the resource library
- ❑ Submit an item to the resource library
- ❑ Attended a webinar
- ❑ Listened to a previously recorded webinar

- ❏ Attended a live office hours session
- ❏ Listened to a previously recorded live office hours session
- ❏ Participated in the New Member Mentorship program as a mentor
- ❏ Participated in the New Member Mentorship program as a mentee
- ❏ Participated in a site visit at another member's site that was hosted by <COMMUNTIY NAME>
- ❏ Hosted a site visit for other members in coordination with <COMMUNITY NAME>
- ❏ Attended <COMMUNITY NAME>'s annual meeting
- ❏ Read <COMMUNITY NAME>'s monthly newsletter

Briefly explain which activities have been useful and why (250-word limit).

Briefly explain which activities have not been useful and why (250-word limit).

Please provide any suggestions of new activities the <CoP NAME> could offer members (250-word limit).

Please provide any suggestions of improvements or changes you would make to the activities currently offered by the <CoP NAME> (250-word limit).

Our mission is <CoP MISSION>.

To what extent do you agree that the activities in the last year worked towards achieving this mission?

Strongly Agree   Agree   Neutral   Disagree   Strongly Disagree

If you selected Disagree or Strongly Disagree, please briefly explain why (250-word limit).

<CoP NAME>'s goals for the past year were <LIST GOALS>

Please indicate the extent to which you agree with the following statements

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Note: Evaluator should select one of the two options below based on which fits best with the CoP's status of reaching goals. We were successful in achieving <GOAL 1> this year.					

We were successful in making progress towards reaching <GOAL 1>					
We were successful in achieving <GOAL 2> this year. We were successful in making progress towards reaching <GOAL 2>					
We were successful in achieving <GOAL 3> this year. We were successful in making progress towards reaching <GOAL 3>					

If you marked disagree or strongly disagree on any of the goals, please indicate why.

Please provide any suggestions to update existing goals for the upcoming year.

Please provide any suggestions for new goals for the upcoming year.

Appendix L – Example of Online Analytic Monthly Reports

Membership At-A-Glance

This table shows the breakdown of Members by state/territory and by type of organizations represented.

State	Count	State	Count
AK	2	MI	26
AL	4	MN	23
AR	2	MO	7
AZ	23	MS	3
CA	63	MT	12
CO	11	NC	16
CT	3	ND	5
DC	20	NE	6
DE	2	NH	2
FL	16	NJ	10
GA	20	NM	6
GU	2	NV	4
HI	1	NY	11
IA	23	OH	97
ID	1	OK	6
Il	14	ON	3
IN	5	OR	13
KS	20	PA	10
KY	20	PR	3
LA	17	SC	2
MA	8	SD	5
MD	12	TX	12
ME	2	UT	8

| Type of Organization	Count
Board/Advisory Council	1
Federal Agency	35
Foundation	6
Health Department	526
Household	9
National Partner	6
Non-Profit	46
Other Organization	16
Service Provider	1
System Partner	1
University	7

(blank)	11
Grand Total	**665**

Discussion Posts

This table shows discussion post activity broken down by month and year. The numbers of new threads and replies to discussion add up to the total posts. The chart shows trends over time, with each line representing a different year.

To Date	Total Discussion Posts	New Threads	Replies to Discussion
Totals	**2911**	**864**	**2074**
2019	**Total Discussion Posts**	**New Threads**	**Replies to Discussion**
January	80	23	57
February	82	28	54
March	28	3	25
April	38	17	21
May	31	11	20
June	15	6	9
July	33	13	20
August	55	17	38
September	31	18	13
October	41	14	27
November	52	16	36
December	35	9	26
2019 Totals	521	175	346
2018	**Total Discussion Posts**	**New Threads**	**Replies to Discussion**
January	49	15	34
February	75	21	54
March	23	6	17
April	90	21	69
May	126	23	103
June	188	48	140
July	170	45	125
August	97	23	74
September	79	17	62
October	94	26	68
November	48	17	31
December	16	4	12
2018 Totals	1055	266	789

Total Discussion Posts
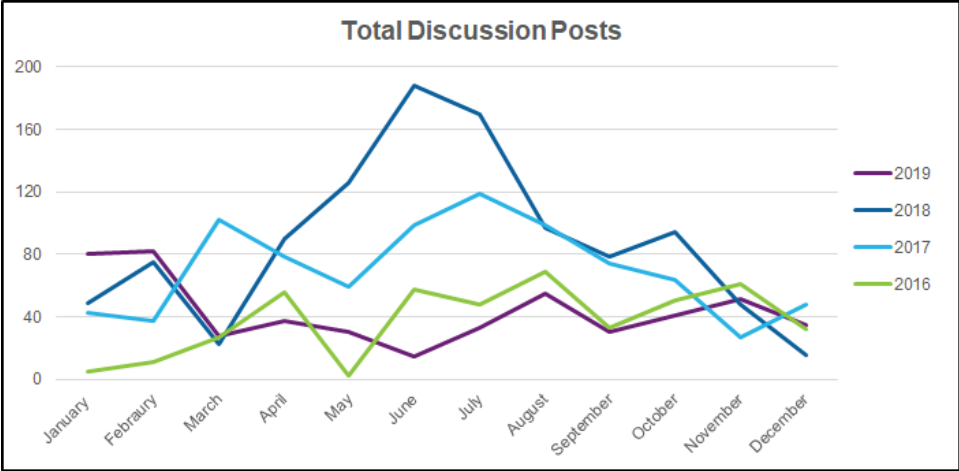
Webinars

This table shows the number of registrants and number of actual attendees for each webinar.

2019	Webinar	Presenter	Number of Registrants	Number of Actual Attendees
January	Title	Name	122	51

Newsletter

This table shows the performance of the newsletter, including engagement through open and click rates.

2020	Open Rate	Click Rate	Total Clicks	Most Clicked Link	Second Most Clicked Link
January	32% (188 members)	14% (82 members)	240	Webinar registration (173 clicks)	Strategic Scholars (28 clicks)