

Leadership groups

distributed leadership in social learning

by

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chapter introduction

This chapter on leadership groups is aimed at facilitators, conveners, or coordinators who want to develop the social learning capability of a community of practice or other type of learning partnership.

We developed the practice of leadership groups in our work with communities of practice and other groups in a range of different contexts and languages, including education, business, government, and international development.

This chapter is the first in a series of chapters that will be collated into a handbook and published on our website.

We hope you find it useful.

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leadership groups

We have found that the learning capability inherent in social groups such as communities of practice greatly depends on internal leadership. The leadership needs of these groups are diverse, from thought leadership, to social weaving, to facilitation, to logistics, to institutional connections.

It is not unusual for one person or a small subgroup to provide such leadership in the early phases. But as a community matures, leadership ideally becomes more distributed: more members understand the range of needs and step up to fulfill them.

Over the years, we have developed a useful practice to foster and distribute such internal leadership more rapidly and systematically. We call this practice “leadership groups.”

The idea behind this practice is to identify distinct leadership tasks that are key to social learning in a given context - and to form groups to take on these tasks on behalf of the community.

Forming such leadership groups is a way to distribute leadership and encourage people to take shared ownership of their collective learning process.

We find that participation in leadership groups deepens people’s commitment to the process in a very concrete way. It leads to insights and recommendations that greatly improve the ongoing design of the group. We believe that the sense of ownership and the collective reflection involved increase the group’s capability for social learning.

leadership tasks

In this document we describe seven different leadership groups we have found useful for developing the social learning capability of a community. The list is not closed and we are still identifying new ones.

We have given them evocative names to suggest that the process can be playful and inventive:

- **Agenda activists:** driving the learning forward
- **Community keepers:** weaving the social fabric
- **Critical friends:** reflecting on the process
- **Social reporters:** creating a shared memory
- **External messengers:** communicating with external audiences
- **Value detectives:** making value-creation visible
- **Organizational brokers:** connecting with organizational stakeholders

Each leadership group is responsible for stewarding one of these processes on behalf of the community. In each case we choose the leadership groups that are most relevant for the context. Sometimes we combine two tasks into one group.

broad relevance

We originally developed the practice of leadership groups as part of the cultivation of communities of practice. Often we form these groups right at the start when we facilitate the launch of a community. However, we have found that they work well in any kind of learning partnership, including various types of meetings, workshops, conferences, and even university courses.

In our descriptions in this document we still talk about community as the context, but this is only to keep the text simpler. We don't want to repeat every time the list of relevant contexts. If you are using this text for another context, you will need to change that to fit the type of group you are working with.

We call these "leadership groups" to emphasize that they are a vehicle for people to take leadership in developing their collective learning capability. But we have found that not everyone feels comfortable with the use of the term "leadership". We've worked in places where leadership connotes a top-down, no-questions-asked approach or another layer of hierarchy. This is quite the opposite of what we intend.

We see leadership as an act of service with leadership groups acting as custodians of one part of a learning process on behalf of the community. When the term was a problem we have called them "Design groups" or "Community leadership groups".

the practice of leadership groups

In the following pages we describe the seven leadership groups we have identified so far and have been using in various permutations.

For each we first provide with a simple description. Then to make the role more concrete and as a resource for the facilitator, we also include a sample “instruction sheet” of the type we would distribute to members of each group for a meeting. This includes the general task, a list of typical questions the group should focus on, and some details about how to do the work. When relevant we also include some facilitation tips.

But first we start with some general approaches to the practice of leadership groups using the example of a community meeting.

introducing leadership groups

It is important for participants to be clear about the purpose of leadership groups. We normally introduce leadership groups toward the beginning of a meeting. But it is better not to do it before people have a sense of the agenda and direction of the meeting so they have some context for understanding their leadership role.

Sometimes, however, we have set up the leadership groups in advance of a meeting, especially if people are already familiar with the practice. We have even held pre-meeting telephone conferences with each group to discuss the role and to start the planning process.

assigning people to leadership groups

We have assigned people to leadership groups in a number of different ways depending on the context, objectives, and preexisting relationships:

- Self-selection: have a sign-up sheet (at the meeting or in advance) where people choose the group they want to belong to. We assign those who don't sign up.
- Careful assignment: select the people who seem appropriate to each group
- Random assignment: arbitrary assignment (based on alphabetical order, for example), which seems to work reasonably well
- Careful and random assignment: selecting some people who seem right for the task and randomly assigning others.

The advantage of self-selection is clear: the selection process already initiates a sense of ownership over the task. The advantage of careful assignment is that you can ensure the groups are diverse or based on who you think is right for the job. Besides making things light, the advantage of random assignment is that you will be surprised at how people can excel at a task in ways that you would not have foreseen.

time for leadership groups

Leadership groups need time on the agenda to come together and focus on their task. This should not be too much because you want most of the time spent on content-oriented activities. But when leadership groups have not worked as well as we hoped, it is usually because there was not enough clearly designated time.

- First they need time to work, reflect, and consolidate their findings by themselves. The end of the day is a good time for this. They can prepare for the following day, and people can leave when their leadership group is done. No one is waiting around and enthusiastic groups can continue working.
- Second they need time to make suggestions and possibly engage the wider group in an activity or reflection. The start of the day is usually a suitable moment for brief reporting back or announcements to the whole group.
- Third, they need time at the end of the meeting for a fuller debrief, discussion, and consideration of next steps.

leadership

We generally invite leadership groups to elect one or two leaders to help keep their group on task, make sure notes are taken, and do the time-keeping.

support

When there is resource and support staff at meetings we recruit them into being a support person for one or more leadership groups. Their support can be more hands-on if they have a particular interest in the task of the leadership group, or it can simply be logistical.

the first leadership encounter

There is usually an uncertain moment when the leadership group first comes together, so it can be helpful to have very specific things to do as they assimilate and take up the task. Here are the kinds of things we ask the group to do in that first encounter:

- Make a round of introductions at the table
- Elect one or two leaders of your leadership group who will keep the group on task
- Read the instructions for your leadership group and discuss anything that is not clear
- Go through the agenda and see where your group needs to pay most attention
- Make a plan for how you are going to carry out your leadership group task

After this first encounter, you can give less detailed instructions as people take on ownership of the role. But in some cases we have found it useful to specify some detailed activities for other moments in the agenda.

“full-on” or “lite”

You need to decide how intensely you want to use the leadership groups in your context:

- At one end of the spectrum you can integrate the leadership groups in an intense way, including a terms of reference, a charter, leadership group training, and continuation over a long period.
- At the other end they can be “lite”, with a brief description on the agenda, explained in more detail by the facilitator, and lasting during one meeting.

Whether you run the full-on or the lite version you need to make sure there is enough time in the agenda for people to take ownership over the process and make a difference; they should not be used simply as a perfunctory activity.

leadership group continuity

The work of the leadership groups should be seen to shape the form and substance of the community’s learning. The recommendations from one meeting should influence the design and flow of the next. If they aren’t, they will be seen as a waste of time and distracting to the main business at hand.

agenda activists

description

Any group focused on social learning pursues what we call a joint “learning agenda.” This learning agenda, which may be more or less explicit, includes things like issues, challenges, opportunities, key topics, and aspirations of the community. Agenda activists are guardians of the community’s learning agenda. They are responsible for capturing and driving it. They pay attention to emerging learning needs and opportunities: productive themes and questions, key insights and promising lines of thought, as well as requests and possible action steps. They keep track of this evolving agenda, make sure things don’t fall through the cracks, and think of activities, conversations, and projects that would help the group make progress. They push the inquiry, deepen the thinking, question assumptions, and bring in relevant learning resources. In due time, they may even develop a fuller action plan and propose a timeline to address the learning agenda as a whole.

facilitation tips

Sometimes people misinterpret this role as one of time-keeping or staying on topic for the meeting agenda. If you see signs of this, it is good to clarify early on that the leadership task is much broader - focusing on the learning agenda of the community.

sample instructions

Agenda activists

Take the lead on shaping our joint learning agenda

As the agenda activists, you are the custodians of the learning agenda for our community. You keep track of issues, challenges, and learning opportunities. You invite the community to push the agenda with you. Given the concerns of the members of this community, you focus on the following questions:

- *What key issues facing community members are we surfacing?*
- *Given the time available, what challenges and opportunities are worth pursuing together? At this meeting? In the coming year?*
- *Where is the group stuck? Are some underlying assumptions closing the inquiry?*
- *Where are there resources the group could use to move forward? What kind of training may be necessary to enable progress on various issues?*
- *How well are we doing? What still needs to be done?*
- *Who will take responsibility for making sure it happens? What resources are needed?*

Use your imagination to address these questions productively, keep track of them, and engage others with your task as appropriate:

- During the meeting, you will reflect on how well we are covering the topics and what remains to be done. You may want to keep a running list and a “parking lot” for issues to be taken up later.
- For the longer-term design of the community, you keep track of all the questions and needs that come up, and you guide the community in preparing the agenda for the coming year.

While you are custodians of these questions through all activities, there are some key moments when you will come together and reflect on them in your leadership group, and when you will be invited to engage the rest of the group with your findings. You will also present your final reflections and recommendations on the timeline at the end of the meeting.

community keepers

description

The quality of social learning is sensitive to issues of social dynamics. This includes relationships of trust, power dynamics, egos, and the voices that are present or absent, being heard or ignored. All this affects the ability to inspect actual practice, to dissect mistakes, and to question assumptions, as well as opportunities to express personal experience and diverging thoughts.

Community keepers are custodians of the dynamics of the community and their effects on its learning capability. They think about the nature of the community that is being built, what brings it together, and what prevents its development. They pay particular attention to voices, levels of participation, and issues of power. They are the guardians of trust and relationships in the group. They are aware of constituencies, boundaries between them, and diverging perspectives and learning needs. They make sure that the voice of newcomers is heard and the voice of old-timers is not lost. If necessary, they should be encouraged to intervene at any time if they see an issue that needs addressing or ways to improve the dynamics.

facilitation tips

- Sometimes we combine this role with that of the critical friends.
- If some people are participating online and others face-to-face, this role becomes critical in making sure that both types of participation are well integrated.
- It is also an important role for surfacing issues related to language and culture.

sample instructions

Community keepers

Take the lead in ensuring that all voices are at the table

As community keepers you are paying attention to the different voices being heard - or not - during community interactions. Pay particular attention to the voice of practice. Focus on the following questions, intervening in the process where necessary, and making recommendations at the end:

- *Who are the key constituencies in the community? Is it one big community, a community with subgroups, or multiple communities?*
- *Are we managing community boundaries properly? Can newcomers find a way in?*
- *Who is here at this event? Who is not? Do we have the right people at the meeting? Are some people missing?*
- *Are we developing the right kinds of relationships? Is the community building enough trust and commitment?*
- *How well are we grounding conversations in stories of practice?*
- *Whose voices are being heard? Whose are not? Why? What can be done about it?*
- *Are issues of power coming in the way of learning?*
- *Is language an issue?*

During the meeting, you pay attention to dynamics and voices. You can intervene creatively or strategically to bring voices in or improve the dynamics of the group.

For the longer-term design of the community you consider what should be done in the future about its development in terms of constituencies, membership, boundaries, and newcomers. You propose processes and milestones for tracking how you are doing.

While you are keepers of the community throughout the meeting you will have key moments for reflection in your leadership group and time to engage the rest of the community in a discussion about your reflections. At the end of the meeting you will make recommendations based on your observations and reflections.

critical friends

description

Social learning during a face-to-face or online event depends on the quality of the process, including a variety of appropriate, well-designed, and well-conducted activities, good pacing, smooth logistics, and adequate infrastructure.

Critical friends pay attention to the process and capture feedback about what's working well and what's not. They monitor the level of engagement, the response to activities, and the general atmosphere. This is an important part of the self-design of the community. Their role is not simply to give feedback, but to collect it from all participants, collate it, present it, and make sure it is somewhere that can be referred to over time. Where relevant they should also review the feedback from critical friends in previous events to make sure that the community design is an evolving one. They should also be encouraged to intervene during the event if they feel that things are not going well and if they have any suggestions about how to improve the process.

facilitation tips

- Sometimes we combine this role with that of the community keepers
- Strategies from critical friends we have seen working well include:
 - passing round different colored post-it notes and inviting people to record something that is going well and something to be improved
 - collecting small group reflections and feedback rather than individual ones
 - instantly keeping comments and suggestions in the shared wiki so they can be referred to or added to as the event progresses

sample instructions

Critical friends

Take the lead on noticing what's working and what's not

As critical friends you are custodians of the process, the rhythms, the logistics, and the structure of the meeting. You reflect on what is working well - and not. You collect and provide feedback and suggestions. The kinds of questions you care about include:

- *What feedback should we be collecting from members? How?*
- *What is working well? What is not?*
- *What kinds of learning activities and innovations seem to engage people?*
- *How could we do some things better to make best use of our time together?*
- *Are we learning from past events and implementing past recommendations?*
- *How should the feedback be consolidated and presented? Who should hear it?*

During the meeting, you pay attention to process on behalf of the community and intervene if necessary. At the end of the meeting and based on your findings you make recommendations to the whole group about what went well and what could be done better next time.

For the longer-term design of the community, keep a record of the feedback, and use it to influence the design and agenda for upcoming events.

While you pay attention to process throughout the event, there are designated times when you can work together, engage the community in reflection, and consolidate your findings. You might want to be systematic in collecting feedback, for example, by creating reflective moments for the whole group, interviewing members, or inviting people to leave their feedback on post-it notes. The feedback should be written up and recorded for future events.

social reporters

description

An important element for continuity of learning across meetings and events is the creation of a shared memory. The idea is to capture significant moments in the life of a community as well as the learning that is taking place over time.

Social reporters help their community generate a history of what happens from the different perspectives of the members. The genre of social reporting tends to be informal, visual and a representation of perspectives from different places and angles. The shared memory provides an entry point for newcomers and an evolving reference for old-timers.

A shared memory goes beyond typed notes to include testimonies, opinions, images, videos, and other uses of social media. New tools and technologies are thus essential for social reporters. They are changing the way communities create, store, and retrieve things from their shared memory. Social media tools such as wikis, blogs, and tweets are redefining who participates in creating the memory and who has access to it. In many cases, the products of social reporting can be made available immediately as events unfold. It isn't necessary, however, to have specialist tools - the best tools are the ones at hand. Social reporting is now well within the reach of anyone who has a smartphone or a digital camera.

facilitation tips

- Depending on the size of the group and what we want to achieve, sometimes we combine the social reporters and the external messengers. The group then decides what is internal to the community and what should be in the public domain.
- Two approaches to the work of social reporters seem to be emerging. Some groups attempt to create a more systematic record of what has taken place. In other cases, especially if there are already note-takers and a crew documenting the event, social reporters take a lighter approach, emphasizing more subjective reflections, personal opinions, quirky moments, and producing something fun, light, and memorable.
- Try to get everything done as you go along during the event. People are usually unrealistic about what they will do or finish once they go home.

technology tips

- Invite members beforehand to bring their digital devices (and the corresponding lead to a USB port) to the event. Gather any devices you or your organization has that can be lent out.
- Decide where the memory “home base” will be, e.g., a wiki, blog, slideshow? Will you use an existing online space, or create one especially for it?
- While it is good to have at least one person in this group who is confident in the use of tools and social media, not everyone has to be. Enthusiasm, willingness to learn, and playfulness are all key ingredients for making social reporting effective.

sample instructions

Social Reporters

Take the lead on creating a shared, internal memory

As social reporters you take the lead in for creating a shared memory for the group. This could be something as simple as a slide show, a report through a cartoon strip, or a consolidated presentation from a mix of different social media. You are encouraged to make it informal, creative, fun, and memorable. The kinds of questions you should discuss are:

- *What insights, stories, and community outputs should be captured and recorded during this event? Whose perspectives need to be included?*
- *How will we divide up the work? How do we involve other people? Who will do the final editing and production?*
- *What tools do we have to capture memories (e.g., mobile phone, cameras, webcams) and what application(s) will we use to present the output (e.g., Animoto, Comic Life, Windows Photostory, Power Point)?*
- *Where will the memory be showcased or archived (e.g., wiki, blog, Twitter)? What will be the hashtag?*
- *What level of privacy do people need in order to have candid conversations? How or when will we have this conversation with the wider group?*

During the meeting you focus on memorable moments, key highlights, people, and reflections. You can also use the breaks for capturing some spot-interviews.

For the longer-term design of the community, you need to decide how you will store and provide access to the shared memory and how to continue harvesting and displaying highlights.

While your custody of the shared memory is ongoing, there are key moments when you will come together, consolidate your work, and reflect on what you are doing in your leadership group. You will also have time to engage the whole group in any discussions, such as issues of privacy. You will present your final production at the end of the meeting and reflect on what you learned in carrying out the task.

external messengers

description

While community events can be quite inward focused it is important to pay attention to what messages need to be publicized for external audiences, shared with a wider community, or taken back to members' organizations.

External messengers are responsible for identifying who the potentially interested parties are, what types of outputs or communication would be valuable for them, and how best to present the community's messages. They pay attention to insights, statements, or documents that could be shared more widely. And they craft products for these external audiences.

facilitation tips

Sometimes we combine external messengers with other leadership groups:

- With social reporters: the group must distinguish between what is private and what is public for different audiences.
- With organizational brokers: the group should decide if most of the external constituencies to address are organizational stakeholders.

sample instructions

External messengers: getting the message out

Responsible for crafting a public narrative

As external messengers, you take stewardship of the public face of the community. You consider who outside the community may benefit from being informed of what is happening. You pay attention to pearls that should be shared more broadly. And you craft additional communiqués, where necessary. The kinds of questions you focus on include:

- *Who are the key external audiences and how are they best reached?*
- *What are the key messages we want to convey out of this meeting? In what language(s)?*
- *Who is responsible for final editing and publishing of these external messages? Through which media? How to get input on the final draft from the whole group?*
- *Should the community have a website for external audiences?*
- *Are any public/private issues raised by the desire to communicate externally?*

During the meeting, you collect messages for external audience and create a draft of the output in the appropriate format to present to the whole group for their endorsement. By the end of the meeting you may want to have a narrative that participants can take back to external community stakeholders.

For the long-term design of the community, you think of the kind of public face that would be useful. This may include a website, but also publications, presentations, and workshops.

While you are custodians of these questions through all activities, there are some key moments when you will come together, consolidate the messages you are crafting, and reflect on your task in your leadership group. You will also have time to engage the rest of the group with your evolving drafts. You will present your final reflections and recommendations at the end of the meeting.

organizational brokers

description

Most communities of practice and other learning groups have to interact with organizational stakeholders, such as sponsors, IT departments, and managers.

Organizational brokers are custodians of the interface between the community and organizational stakeholders. They are responsible for finding ways to align the community's agenda, activities, and outputs with organizational strategies—and how the work of the community can feed back into strategy. They pay attention to references to strategic capabilities, resources needed, support desired, infrastructure, management role, formal structures, expectations, recognition and certification, and channels of communication with the formal organization. They seek ways to engage the right set of stakeholders and negotiate the relationship between the community and the relevant organization(s).

facilitation tips

- Depending on the size of the group we sometimes combine this role with the external messengers. If the groups work separately, you can build time into the agenda for them to come together and consolidate what they have done.
- There are usually people at the meeting who already play a brokering role with organizational stakeholders. We try and make sure they are in this group.

sample instructions

Organizational brokers

Take the lead on negotiating the interface with organizational stakeholders

As organizational brokers, you are taking the lead in understanding what the various organizational stakeholders and constituencies are and how the community should relate to them. You think about the role of the organization in enabling your community and the way your community contributes important capabilities. The kinds of questions you ask include:

- *How does the community fit into wider organizational contexts and agendas? What is the strategic argument for this community?*
- *What organizational resources are going to be necessary? What kind of support?*
- *Who are organizational stakeholders? How can we engage them?*
- *What are their expectations? What are the expectations and aspirations of the community?*
- *What resources do they offer? How are expectations and resources matched? Is there a contract?*
- *What do organizational stakeholders need to know? And what form should this communication take?*
- *What kind of input should they have into the community's learning agenda?*

- *What recognition from the organization is necessary for participating, leading, and contributing?*

Use your imagination to address these questions productively, keep track of them, and engage others in your task as appropriate:

- During the meeting, you bring the organizational perspective into activities and conversations.
- For the longer-term design of the community, you map the relevant stakeholders and develop a system of sponsorship, support, and communication that will enable the community to evolve, find its place in the organization, and contribute its full potential.

You may want to do this in a systematic way, for example, by listing all the stakeholders and creating a table of what they expect, what they offer, and how the community should interact with them. You may also want to interview community members and representatives of these organizational constituencies.

While you bring this perspective to all activities, there are some key moments when you will come together and reflect on your perspective in your leadership group, and when you will be invited to engage the rest of the group with your findings. You will also present your final reflections and recommendations at the end of the meeting.

value detectives

description

Social learning is meant to produce value for both people and organizations, in terms of improved capabilities and performance. This value, however, is not always obvious, as it often manifests outside the group, when members apply what they have learned to a project they are working on. Many constituencies can benefit from a more explicit account of this value: members who will be inspired, community leaders who will be able to see what activities are most productive, and sponsors who will understand the effect of their investments.

Value detectives are on the lookout for this value and they attempt to make it visible, through an appropriate mix of stories, assessments, and measurements. They apply the methods outlined in the “community value-creation assessment framework”² to develop a series of key indicators, select relevant stories, and devise data-collection plans. They assess who needs to know what and prepare accounts of value-creation to serve the needs of various constituencies.

facilitation tips

- There is a balance between being thorough and being realistic. Look out for the trade-offs between the time required to collect a lot of data (the easy bit) and the time it takes to produce a convincing account of the value creation of the community.
- This leadership group is not one that we would use for a one-off event.

sample instructions

Value detectives

Take the lead on making the value created by the community visible

As the value detectives, you ferret out nuggets of value that the community has created—or could potentially create-- and you make them visible with stories, indicators, and when relevant quantitative measurements. You invite the community to join your investigation as you address the following questions:

- Who needs to be aware of the value created by the community? What do they need to know and why? What can they do with this information?
- What indicators would demonstrate value creation? How should they be monitored?
- What kind of data would be useful? Who will collect it?
- Who has a value-creation story to share?
- What value can the community aim to create? How will we know? What stories would the community want to hear in the future if it is successful?

Use your imagination to address these questions productively and engage others with your task as appropriate:

- During the meeting, you keep an eye for indicators of value and for value-creation stories, actual or potential.
- For the longer-term design of the community, you plan a strategy for monitoring value creation and providing accounts of it to relevant constituencies.

You may want to do this in a systematic way. You can use the templates of the value-creation assessment framework to collect stories, devise indicators at each cycle, and build a matrix that integrates stories and indicators. You may also want to interview community members as well as others interested in understanding, increasing, and leveraging the value produced by the community.

There are some key moments when you will come together and work on your task in your leadership group, and when you will be invited to engage the rest of the group in your efforts. You will also present your final reflections and recommendations at the end of the meeting.