Communities of Practice Host Memorandum of Understanding

Thank you for your interest in serving as a Communities of Practice host for FPA. Our association recognizes that efficient and successful practices are fueled by knowledge. We believe that cultivating Communities of Practice is the keystone to an effective knowledge strategy. So the roles that hosts play will be of vital importance to both FPA and the development of the profession.

General Expectations:

- The role of host is one of the most critical factors that will drive Communities of Practice success. They will help people connect the dots so that FPA member benefits knowledge can be collectively transformed into wisdom on how that serves their practices. A host needs to have foundational knowledge of the community topic, but it is not their role to be a content expert. The host doesn’t answer questions, but rather asks questions and helps get conversations started.

- As a community host, we expect that you act and speak as an individual. Your personality is welcome to shine through in order to have your participation be authentic. At the same time, we ask you to be mindful that you will serve in a place of significant influence on other FPA members. Setting a professional tone is important.

- Community posts need to be supportive of FPA’s core beliefs.

- All community hosts are expected to both follow and encourage others’ adherence to FPA Connect’s code of conduct.

- Community hosts will sign an NDA to help protect FPA confidential or sensitive information.

- While serving as a community host, you cannot serve in a similar role with a competing organization.

- Hosts are required to run potential conflicts of interest by FPA.

- Ideally, communities will have multiple hosts, with one person in each of the three roles – host, senior host, and master host.

- All hosts will begin as first tier participants (host). Assessment of their engagement will be made at the end of the quarter.

- Master hosts are limited to one per community. Once a master host is in place, they are able to serve in this role for a maximum of 24-months. After this period of time, if a senior host is ready to advance into a master role, the master host will become a community mentor.
Requirements to become a host (listed in order of importance with items in bold as must-haves):

- A passion and deep understanding of the Communities of Practice topic.
- A desire to connect with others and engage in conversation on the topic.
- Time and energy to devote to this effort.
- The ability to connect the dots around FPA membership benefits – from understanding a concept to seeing how its implementation/adoption could positively impact a planner’s knowledge/practice.
- Signature of this memorandum of understanding and NDA.
- Attendance at a training on use of FPA Connect and OneFPA web site
- A strong network of fellow professionals who could serve as resources or community participants.
- Valuing/appreciating been seen as a content matter expert and leader on this topic.
- Name recognition.

Requirements to remain a host.

- Items listed above.
- Fulfillment of tier responsibilities listed below. Community Host status is assessed and earned on a quarterly basis.
- Engagement is expected to be consistent. (ie, four posts per month are best when one per week, not four posts on the same day)

Role and Responsibility Overview:

- **Role:**
  - Each host will be assigned to a specific community.
  - Hosts will be identified on FPA Connect through their signature and a digital ribbon describing them as “[COMMUNITY NAME] Host/Senior Host/Master Host.”
- **General responsibilities (further detailed on pg 2 & 3):**
  - Connect on a monthly basis via email or conference call with other community hosts specific to one community to outline planned efforts for the coming weeks.
  - Belong to community to gather all hosts across different areas for coordination and best practice discussions.
  - Scan FPA benefits such as *Journal of Financial Planning* articles, online webinars, in-person conference sessions, and RPI offerings that have relevance to their community of practice.
  - Hosts serve in a role to help create and validate sessions – both online and in-person.
  - Scan for content from sources outside of FPA, as well.
- Post to community, sharing a link to the resource with a comment on the perceived relevance to your practice or professional development. Finish post with a conversation starter to build engagement with the community.
- Respond to threads others make in the community when they have something to share, always ending with question or comment to invite further conversation.
- If active on other social media channels such as Twitter, LinkedIn, Facebook, make posts with the intention of driving awareness and activity back to the community.
- Invite people who would be good community participants to join.
- Prompt appropriate people to answer questions posed in the community.

**Tier 1 - Host Responsibilities**

- Responds to posts at least 2x per month
- Gets conversations started 1x per month through individual posts and by inviting hosts and participants to chime in.
- Has one-on-one conversations (via email, phone or in-person) with various community members and potential members to learn about what is important for the community to address and spur engagement. (Outreach to at least 10 people per quarter)
- Invites people to join community – at least 5 people per quarter
- Attends FPA BE conference and acts as host of Community of Practice in-person gathering.
- Attends calls for that Community of Practice (which may range between 4 to 12/year). These calls may include presentations, best practice discussions and open conversation.
- Attends monthly general host calls (where hosts from all communities come together) and monthly host calls for that specific community.

**Recognition/Benefits**

- Listed as “COMMUNITY NAME Host” on
  - FPA Connect profile
  - Signature block
  - Community of Practice home page
  - In-person events such as FPA BE conference
- Included in both general host team conversations and specific community host team conversations.
- Free registration to FPA BE conference.
**Tier 2 – Senior Host**

**Responsibilities**

- Responds to posts at least 4x per month
- Gets conversations started 2x per month through individual posts and by inviting hosts and participants to chime in.
- Has one-on-one conversations (via email, phone or in-person) with various members and potential members to learn about what is important for the community to address and spur engagement. (Outreach to at least 10 people per quarter)
- Invites people to join community – at least 5 people per quarter
- Attends FPA BE conference and acts as host of Community of Practice in-person gathering.
- Attends calls for that Community of Practice (which may range between 4 to 12/year). These calls may include presentations, best practice discussions and open conversation.
- Attends monthly general host calls (where hosts from all communities come together) and monthly host calls for that specific community.

**Recognition/Benefits**

- Listed as “COMMUNITY NAME Senior Host” on
  - FPA Connect profile
  - signature block
  - Community of Practice home page
  - In-person events such as FPA BE conference

- Included in both general host team conversations and specific community host team conversations.
- Free BE convention registration

**Tier 3 – Master Host**

**Responsibilities**

- Responds to posts at least 4x per month
- Gets conversations started as necessary through both individual posts and by inviting hosts and participants to chime in.
- Has one-on-one conversations (via email, phone or in-person) with various people to learn about what is important for the community to address and spur engagement. (Outreach to at least 10 people per quarter)
- Invites people to join community – at least 10 people per quarter
• With the feedback and assistance of fellow hosts, sets call topics for the community, finds conversation leaders and communicates plans to community participants.
• Attends FPA BE conference and introduces sessions tied to that Community of Practice. Acts as host of Community of Practice in-person gathering.
• Attends calls for that Community of Practice (which may range between 4 to 12/year). These calls may include presentations, best practice discussions and open conversation.
• Scans community for points of interest and emerging issues. Passes this information on to staff via general host calls to help drive content creation.
• Attends monthly general host calls (where hosts from all communities come together) and leads monthly host calls for that specific community.

Recognition/Benefits

• Listed as “COMMUNITY NAME Master Host” on
  • FPA Connect profile
  • signature block
  • Community of Practice home page
  • In-person events such as FPA BE conference and Retreat
• Facilitates/leads host team conversations
• Free registrations to FPA BE and Retreat conferences
• First in line to receive calls from media (when appropriate).

Confidentiality Statement

As a host to an FPA Community of Practice, I recognize that I have a duty of care to FPA. This includes a duty of confidentiality.

In connection with my host service, I may be given or have access to confidential or proprietary information of and about FPA and third parties. Confidential Information is defined as all information that FPA considers confidential or proprietary information of or about FPA or third parties.

Confidential Information may include, but is not limited to, information discussed or distributed at host team meetings; information discussed on group content strategy calls; official host business discussed between or among hosts in any host-only medium or forum; information regarding FPA’s organization, operations, programs, activities, policies, procedures, practices, financial condition, or marketing strategies or plans; unpublished or pre-release versions of FPA documents or materials; internal-use-only or limited-circulation FPA documents or materials; and similar FPA information, documents or materials of a confidential or proprietary nature.
I agree to not disclose or permit to be disclosed any Confidential Information, and will not appropriate, photocopy, reproduce, or in any fashion replicate any Confidential Information without the prior written consent of FPA.

I agree to use reasonable efforts to maintain the confidentiality of all Confidential Information. I also agree not to use any Confidential Information for my own benefit or that of any other individual, company or organization.

Confidential Information shall not include information, which I rightfully obtain from a third party without comparable restrictions on disclosure or use.

**Intellectual Property Understanding**

When used in this agreement, the term "Intellectual Property" shall be understood to mean that bundle of rights that protect original works of authorship fixed in any tangible medium of expression, now known or later developed, from which they can be perceived, reproduced, or otherwise communicated, either directly or with the aid of a machine or device.

"Works of authorship" include, but are not limited to the following: articles; sound recordings; webinars; best practice standards; community conversations and any other products of CoP engagement. "Tangible media" include, but are not limited to, books, periodicals, manuscripts, videos, and disks.

It is the role of the Community of Practice to be a knowledge steward. As such, the CoP can share knowledge and wisdom freely with FPA members.

All efforts of the Community of Practice remain intellectual property of FPA for the sole use and benefit of FPA members.

*Document to be signed upon approval of Host Application.*

I have read and understand the above MOU, confidentiality policy and Intellectual Property agreement and I agree to abide by it:

________________________________________________________________________  ________________
Signature                                      Date

________________________________________________________________________

Name (please print)

________________________________________________________________________

Community of Practice Name (please print)