A GARDENER'S GUIDE TO COMMUNITIES OF PRACTICE

THE WORLD BANK

IFC International Finance Corporation World Bank Group

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IFC International Finance Corporation
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Introduction

Communities of Practice bring together leaders and practitioners who are involved in a sector, product or theme for an informal affiliation beyond regional and departmental boundaries. They help build and retain expertise at both the individual and organization levels. Communities of Practice improve collaboration and cross-fertilization of good practices across and throughout an organization. They also can be instrumental in identifying and testing solutions and innovations.

For the World Bank Group (WBG), Communities of Practice are part of the engine that drives WBG's competitive knowledge advantage. They contribute to the cultivation, growth, and preservation of our knowledge base.

As with tending a garden, building vibrant and effective Communities of Practice takes considerable planning, on-going attention and focused effort. This toolkit, brought to you by the joint WBG Knowledge team, can assist in the process.

The guide provides tools and techniques to help WBG's Community of Practice leadership teams — as well as knowledge management practitioners — to "plant and cultivate" successful Communities of Practice.

It also offers useful information for any and all who are interested in learning more about how to build and sustain Communities of Practice at WBG — including sponsors, would-be members, and decision-makers who are exploring the role of Communities of Practice as part of their programs.

Acknowledgements

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This is a second edition of the Gardener's guide, building on a first IFC version, and expanding it to the World Bank Group.

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This toolkit is a living compendium of Community of Practice knowledge. We invite your suggestions and updates. Please contact wbgkm@worldbank.org

What is a Community of Practice?

Before plunging into the work of setting up a new Community of Practice, make sure that it fulfills a genuine need.

Communities of Practice are defined at the WBG as: "A gathering of individuals motivated by the desire to cross organizational (unit) boundaries, to relate to one another, and to build a body of actionable knowledge through coordination and collaboration." More colloquially, it is:

"A group of people who share a concern or passion for something that they do, and learn how to do it better as they interact regularly."

For WBG, Communities of Practice are focused on:

- Improving both internal and external knowledge-flow
- Improving our solution portfolio and accumulating insights from practice
- Building our competencies and the knowledge base behind them
- Mobilizing rapid response
- Improving staff connectivity
- Accelerating onboarding

Is this the kind of gathering you have in mind?

The popularity of Communities of Practice is growing at the WBG. They can be sources of real business value when they work successfully.

Before you jump in ask two questions:

Does a relevant Community of Practice already exist? Check with the WBG online Community Directory, your unit's or department's knowledge management officer and others in your department or sector to make sure that a relevant Community of Practice does not exist already. Might you be able to join that group, or work with them to expand what they do?

Is a Community of Practice the model best for me to accomplish my goals? Other frameworks are sometimes more appropriate. For example, while WBG's sectors and networks are similar in nature to Communities of Practice, they are charted more formally and have more rigorous delivery criteria.

In addition to Communities of Practice, WBG staff gather for common purpose in other ways:

- Networks
- Sector teams
- Project teams
- Global Expert Teams (GETs)
- Working groups
- Communities of interest

Your needs might be better met by way of another type of group, so it makes sense to investigate carefully and consider thoroughly the goals you have in mind before pushing ahead.

How to build a Community of Practice

Stating your Purpose

The first step in building your Community of Practice is to define its purpose.

> *What business need does it address?*
>
> *What doesn't it address?*
>
> *How will it create value?*
>
> *What are the benefits for group members?*
>
> *How do you articulate the business case?*

Note that adequate time invested at this stage will serve you well throughout the Community of Practice's lifecycle. Getting this step right will enable all the other steps to flow with ease.

Test your understanding of the purpose with others who will form the nucleus of your community. Ask for their input and ideas. This consultative approach has the added value of giving potential group members a greater sense of ownership, in addition to refining your statement of purpose and ensuring that there is a shared understanding of this purpose.

You may also conduct a needs assessment through surveys, informal discussions, or focus groups. You should be prepared to answer these questions:

- Are the objectives directly mapped to the business strategy?
- Are they negotiated among the Community of Practice leaders?
- How will they be negotiated on an ongoing basis?
- How will you test that they are widely agreed-upon?

A good framework for describing goals is the "four outcomes." These were developed in a project for the Bill and Melinda Gates Foundation by Katrina Pugh and Larry Prusak in 2011. By being clear about which outcomes you seek, you can gauge your investment in various activities, and how you will "position" the community of practice.

Outcomes are broad types of impacts that Communities of Practice desire to have on their members, WBG, and on the WBG ecosystem:

1. *Learning/Innovation:* This outcome is about reflecting on, capturing and reusing past experiences. It involves collaboratively constructing knowledge products (like solutions, templates, and concept notes). It also entails having the community be a learning organization — learning from its activities and results.
2. *Coordination:* This outcome is about aligning efforts, for example, within or across a country or a region, and within or across sectors. It involves coordinating community projects and activities.
3. *Practitioner support:* This outcome is about supporting individuals in problem-solving and finding knowledge and expertise just in time. In practice, it may entail any number of activities that increase access to expertise and experiences, such as discussions, help-desk or research-desk, and knowledge brokering.
4. *Translation/Local adaptation:* This outcome is about supporting teams as they come into the community to get ideas, and then rapidly adapt those to their local situation. It is helping them to not just disseminate ideas, but to translate them, and in so doing, become more effective change agents.

Test for clarity with your "Elevator Speech"

Imagine that you need to describe the purpose of your Community of Practice to a senior manager in the time it takes for the elevator to go from the first floor to the tenth floor.

Repeat the process, aiming for clarity with a junior staff member, in the time it takes for the elevator to descend from the tenth to the first floor.

Setting a Charter

With your purpose defined, it's time to establish some foundational principles — a charter — to help structure your community. Among the issues for your group to consider and resolve together:

- Goals: Addressing business needs with the help of peer-to-peer learning and knowledge activities.
- Membership: Open? Closed? Somewhere in between?
- Roles: Who will do what?
- Leadership: Who will be the leaders? How will they be supported?
- Sponsorship: Can we arrange for a senior sponsor who will support and legitimize the time we are investing?
- Expectations: What will it be like to be part of this group? What is expected of members? How will the performance of the community be measured?

All of these — especially ways of working, key topics to cover and measures of success — require consensus.

A written version of consensus can serve as your charter. A basic charter like the one below can keep your direction on track, and provide clarity for new members and for others interested in learning more about what you are doing.

When you add more detail it can also be a "Term of Reference" (TOR). In the Resources section below, we have provided a longer, more detailed charter that can be modified into a TOR.

Ensure community of practice leaders agree about the charter

When leaders are able to discuss how their actions work, they are more likely to act consistently, and to model the desired behaviors-to "walk the talk." As you work on your charter, you should be prepared to answer these questions:

- What should be the leaders' working assumptions about how community actions result in outcomes (e.g., How people learn and adapt credible knowledge into action)?
- Are leaders in agreement on what they are doing, and what should be the results (e.g., "Do x and get y")?

Another area of agreement is how to make the community a safe place for learning. When leaders make it safe for the experts to be vulnerable and to learn, and for learners to speak of bold possibilities, magic can happen. A safe place for learning allows people to be open, ask questions (revealing one doesn't have all the

Examples of Community of Practice Statements of Purpose

The purpose of our Community of Practice is to…

…continuously improve our professional capabilities.

…build awareness of expertise and encourage collaboration.

…retain expertise and know-how of retiring staff.

…facilitate onboarding of new hires and other network members.

…share and solve problems; provide and receive solutions.

…ensure consistency in client advice.

answers), and test pilots/innovations that may fail. As you work on your charter, you should be prepared to answer these questions:

- How should we support our members as both experts and learners?
- How should we use collective learning, versus expert-apprentice, versus external research/expertise?
- What can leaders do to make it "safe"? (E.g., leaders being role models, empowering, offering a sense of equality, timely recognition and feedback?)
- Do we look for members' social networks, expertise, geography/time zone, influence?
- What different profiles do we want to see for members at large, active participants and leaders? (For example, accountability, comfort with ambiguity, or time commitment?)
- How will we broadcast the Community's goals and accomplishments, and to whom?

A final area of agreement is how to target members, and position the community program among other operations or competing organizational models. Leaders explicitly define what types of

How Private Should Your Community of Practice's Platform Be?

Open: Membership is open and non-members can view content and participate.

Members only: Membership is open and non-members can view content, but must join to participate.

Private: Membership is by approval/invitation only and only members can view content and participate.

Secret: Membership is by invitation only. Non-members cannot participate and the group is not listed in the Spark directory.

Community of Practice High Level Charter

(see more details in the Resources Section)

Purpose

- What is the business need that this Community of Practice addresses?
- What is out of scope?
- What are the goals?
- What are the benefits for the members?

Membership

- Is membership open, closed, or something in between?
- Is it limited to one WBG entity, internal staff or it includes external audiences too?
- What organizational structures will be included?
- Will it include investment, advisory, WB, others?

Operating Model

- How will this community of practice be organized and run?
- How much time?
- Who will take on the key roles: sponsor, leader, coordinator, core team/topic leads?
- How will decisions be made?
- What potential CoP Work Groups or projects?

Behaviors

- What can we expect from each other? respect? responsiveness? "no dumb questions"? Incentives and "What's in it for me?"

Resources

- Budget, IT and support resources required
- Fixed costs and variable costs

Key Topics

- Specify focus areas
- is there a relevant and existing body of knowledge?

Platform & Other Convening Tools

- Meeting frequency
- Use of collaborative tools
- Communications and user engagement plans.

Measures

- Deliverables and business outcomes.
- Health and maturity indicators
- Benefits
- KPIs
- Value measurements

Adapted from templates from Syngenta,Mars, and the World Bank COP Strengthening Initiative.

Q How Much Time Does Leading a Community of Practice Really Take?

A A lot more than you think!

- For a 20-to-50 member group, between 10 and 20 percent of a person's time (4-8 hours a week).
- For a 50-to-250 member group — or a group with significant international membership — between 30 and 100 percent of a person's time (12 to 40 hours a week).
- Larger groups may require additional support from a cross-regional core team
- Additional time and resources may be needed for specific events, projects or products

members they seek and actively recruit them. As you work on your charter, you should be prepared to answer these questions.

Community Roles and Responsibilities

Communities of Practice are dynamic social structures that require cultivation so that they can emerge and grow. A number of roles need to be filled, often on a part-time basis, by one or several individuals with the proper credentials and knowledge.

Leaders strong leadership is critical to your Community of Practice's success. Leaders provide overall guidance and management, perpetually align the Community of Practice with WBG's strategy, and ensure the Community of Practice's visibility to key stakeholders.

Sponsors "bring sunshine'" and nurture the relationship between the community and WBG. They also allocate budget and resources.

Facilitators "add nutrients" and help the leader energize the community, encourage participation and keep discussions flowing.

Coordinators "maintain, plan and tidy," playing a vital role in supporting the practical working of the group, its content, tools, events and logistics. Sometimes coordinator roles are broken down into Community/outreach coordinators and Knowledge/Content managers.

- Communicators/outreach coordinators, "promote the garden," through communications, and help keep members informed.
- Knowledge/Content Managers reap from the garden and trim it back as needed. They collect, curate, and promote content.

Work group or Project leads facilitate mini-projects, such as conducting a survey or synthesizing different documents.

Subject Matter Experts "tend and grow," sharing their deep expertise by creating content and materials and participating in discussions. They may participate at large, or may focus their time in the CoP Work groups or Projects.

Community of Practice Members "pollinate the flowers and pick the fruit," sharing and receiving knowledge and expertise from peers, while participating and contributing to the group.

Inactive Lurkers are important — they "enjoy the garden", but don't participate as much as others.

We call the group of leaders, coordinators, facilitators and working group or project leaders the "Core Team." All play a role in nurturing the garden and contributing to the success of the group. All Core Team members "encourage garden visitors," help build the mission, purpose and charter, setting norms and values, and attending community events and discussions. Sometimes the Community Manager takes on many of these roles.

Core Team Members will demonstrate responsiveness and flexibility to meet the balanced needs of WBG, the Community of Practice and its members. They require time to do the job, recognition from their managers, and support of a sponsor. In some cases they may also need part- time resources to support their work. Note that all of these roles can be fluid. You may have a *tour of duty* model, where various members rotate in and out of core team roles.

We will now take a deeper look at each of the Core Team members.

More on the Role of the Community of Practice Leader

Leaders contribute to developing and maintaining the thriving community ecosystem — the garden. They need a thorough knowledge of the subject matter, strong management and coordination skills, credibility with peers, and the ability to motivate peers. They also must be passionate — about the practice and the community process.

Here is a look at the Leaders' key responsibilities:

- Seeking support and sponsorship from senior management
- Securing resources and budget
- Together with other Core Team members, identifying the group's strategic fit and value for WBG, and setting mission, purpose, goals, norms and values
- Building and maintaining relationships with internal and external stakeholders, sponsors, Core Team, and members at large to increase recognition and support
- Identifying key content, resources and expertise in the subject matter area
- Together with other Core Team members, Measuring and evaluating the Community of Practice's contributions to WBG
- Together with other Core Team members, leading meetings, activities, discussions, events and conferences
- Motivating large groups of people and across organizational boundaries

Community of Practice Core Team's Checklist

- Daily: Check forums for new questions, welcome new members
- Weekly: Work behind the scenes to get answers to open questions, connect with people on the phone.
- Monthly: Summarize discussions as FAQs, hold teleconference/ virtual meeting, send newsletter. Communicate to members and outside the community on events, status.
- Monthly or Quarterly: Update Sponsor with progress, gather success stories, and check progress against charter.
- Annually: Evaluate performance, survey members, do health check, check strategic direction, review with sponsor

Role of Community of Practice Coordinators

The Community of Practice coordinators are the essential, go-to detail people in the group. The coordinators handle logistics and details related to all of the group's activities, actions and meetings. (In some Communities of Practice, the leader is also the coordinator, while other groups might separate the job descriptions into two or more formal roles.)

In addition to having a broad understanding of the Community of Practice theme, coordinators must have strong administrative and organizational skills. Coordinators have a personality that enables them to form positive relationships with Community of Practice members quickly.

Here is a look at the Coordinators' key responsibilities (responsibilities can be broken down into Community /outreach coordinators and KM/Content managers).

- Organizing and planning meetings: face-to-face and virtual
- Arranging and coordinating agendas
- Testing and setting up technology support: webinars, voice and video conferences
- Lead the design of the community platform layout and activities, seeding the community site with relevant content
- Piloting the community site design with beta testers, arranging improvements and launching the community site
- Administering collaborative technologies
- Inviting guest speakers
- Circulating meeting outputs
- Planning major events: agenda, content, inputs, outputs, venue, catering, logistics, travel
- (With Work Group leads) Coordinating projects and outreach
- Managing budget expenditures
- Managing membership list
- Managing information: tagging, updates, consolidation of Q&A and data archiving data
- Following up on other Community of Practice members' responsibilities and commitments

Key Topics and Conversations

Communities of Practice typically focus on several key topics or themes, such as Agribusiness or Water, which are of strategic value to WBG, and incorporated into your charter or TOR.

When possible, seek out subject matter experts to take responsibility for relevant content and discussions on your key themes.

Choose the experts with care: they should be visible and known to all group members, but their role is to guide, explore, coach and encourage others, rather than to demonstrate their own intellectual superiority. This sort of "servant leader" capacity is also true for the Core Team. They should not dominate the conversation, but draw other people out.

Of course, the importance of various topics and themes will ebb and flow over the lifetime of a Community of Practice, so be sure to include a regular review process to ensure that discussed topics remain relevant.

Tending your Community of Practice

Like a garden, Communities of Practice require care and attention if they are to create maximum benefit and function well.

Interaction is Key

Meeting face-to-face as an entire group is essential, in addition to connecting by way of virtual collaboration tools. For geographically dispersed groups, this face-to-face interaction will be limited, perhaps to a once-a-year retreat.

On the other hand, for groups that are centrally located, regular face-to-face meetings could be your standard. Regardless of whether meetings are virtual or in-person, emphasis early on should be on awareness, connecting and building relationships. As the group matures, emphasis can shift towards solving business issues and learning.

Manage the Interactions and the Agendas

From the outset, members should agree on a regular schedule of meetings and video conferences, as well as on issues for discussion. While sharing news is an important aspect of the interaction, limit this portion of the meeting — we recommend allotting a maximum of 25 percent of your time — otherwise, too much of the meeting could be taken up by this, and there's a risk of losing members' focus and attention.

BEST PRACTICES:

Tales from the Corporate Community

ConocoPhillips invests heavily in communities of practice. Each community has a clearly defined focus and theme. Designated subject matter experts share their knowledge with members of the group. They are expected to:

- Share experiences and approaches in discussion forums
- Work with other subject matter experts and leaders to agree on a group standard for best practices
- Provide guidance to members
- Provide input on all relevant discussions
- Steer discussions to satisfactory conclusion
- Advise leader on addressing business cases presented for discussion and resolution

It's often the small details that make meetings happen, like ensuring that the guest speaker has a pass for the building. The coordinator is the practical glue that holds the group together.

To facilitate additional interactions among members that don't require the involvement of the leader of coordinator, set aside time or designated virtual spaces on your collaborative platform for such exchanges. These might be called "Offers and Requests" or "Peer Assists."

Communication Inward and Outward

Successful Communities of Practice emphasize regular communication — to share successes, elevate your group's profile within WBG, resolve unanswered questions, and spread relevant internal and external news. Among the communications tools to consider:

- Contribute articles to WBG's Intranet news site,
- Send out broadcast emails
- Advertise brown bag lunches with posters and flyers
- Create a newsletter: rotate guest editors to enhance participation.
- Conduct brief "In the Hot Seat" interviews with individual members and other relevant experts: group members can pose technical or career-related questions via email or chat and the give-and-take can be shared as a magazine-style article; for example, "This month's 'in the hot seat' features Joe from Business Risk and Credit.

Cultivate Your CoP Work Groups

You will be diving into your topics in a number of venues: threaded discussions, webinars, meetings — even games and networking events.

As you mature, a more focused and motivating mode of interaction can be mini-projects or "CoP Work Groups," as we discussed earlier. CoP Work Groups are directed toward creating products, events or formalized points of view. For example, they might create a bibliography of content on a topic, they might integrate several threads of discussion into an article, or they might formalize a process flow that appears to happen in various forms in different member organizations.

CoP Work Group outputs may require a sub-charter as they may require added time of members or consultants. It goes without saying that they shift from the informal (e.g., discussions) into the formal (reusable products).

Build your Knowledge Base

Building a resource library is a valuable, all-group activity. Having documents and references at the ready can improve workplace productivity and efficiency. It also can streamline new project planning, design, implementation, and monitoring by enabling project teams to access information and documented experience on earlier efforts, so they know what works and what does not.

Keep in mind that organization and prioritization are key to building a resource library that is of genuine use. Include only relevant documents, go for quality over quantity, and organize the library so information is easy to find. Be aware about proper use of information classification and record management systems for proper handling of WBG records.

As we saw with CoP Work Groups, it's often not just uploads you want; it's co-created content, where members contribute their insights and create integrations or comparisons.

For more on how to build your knowledge base — especially the co-created content — , view the AdobeConnect training "102: Leveraging CoPs for Integrating Practical Content" in the Resources section.

Get Tacit Knowledge Out

It's often said that tacit knowledge is the "holy grail" of the community. That is, the knowledge in the heads and hands of members that has never been quite written down. There are a number of techniques for sharing tacit knowledge in the bank, such as Peer Assists, Master Classes, Story Telling, and Knowledge Jams.

For techniques on facilitating live tacit knowledge conversations view the AdobeConnect training "105: Channeling Tacit Knowledge into Action" in the Resources section.

For IFC learning and sharing tools, such as the Technical Master Class, consult the Global Knowledge Office.

BEST PRACTICES:

Tales from the Corporate Community

BP staff are free to pose questions on the company-wide community discussion board. But instead of an "answer", they receive "responses."

Why the word change?

BP knowledge managers felt that staff might balk at sharing what could be construed as a definitive answer, out of concern that others might disagree, or that they could be criticized.

To address the issue, they changed the wording.

Staff are encouraged to provide responses — rather than an answer to the question: Q&R instead of Q&A. The person who poses the question typically consolidates the responses received and posts them to share the valuable insights with others.

Is this just a matter of semantics? Maybe. But BP has found success with this approach.

Encourage Active Sponsorship

An active sponsor from senior management can be one of the greatest assets for your Community of Practice. At least quarterly, sponsors should be kept informed of what's happening with the group — particularly successes that they can use to champion the value of what you are doing. They might suggest sharing the successes with others within the World Bank Group or its entities.

Sponsors also can play an important communication role by providing messages of support and encouragement, by posing a business challenge to the group and by communicating the community's successes to senior management.

The Heart of a Community of Practice: Encouraging a Flow of Questions and Answers

A steady flow of questions and answers is key to the health and wellbeing of a Community of Practice.

As said in the leaders' agreements above, it is important to establish an environment in which members feel safe asking questions. In fact, many organizations that think they have a problem with sharing knowledge actually have issues with asking and responding to questions. People may be hesitant to ask questions or to respond, because they are concerned that others in the room might criticize the question or the answer.

Successful Communities of Practice focus on uncovering the demand for knowledge, by encouraging members to ask good questions — and by posing questions of members. (Polling tools can help with this.)

Core Teams can model and encourage courtesy (respecting differences), inclusion (bringing others into the discussion, e.g., with the use of the Twitter convention # name), and translation (drawing a close around a threaded discussion – "Where have we been and what have we learned?").

The Community of Practice Core Team can also play a key role in encouraging a steady flow of questions and answers, while balancing team and individual needs. Here are some suggestions on how to keep the questions and answers flowing:

- Schedule regular calls or visits to members
- Encourage members to post questions to the group on the collaborative space (rather than on email)
- Work behind the scenes to ensure that group members respond if answers are not forthcoming

Soon enough, the process will unfold on its own. For more on how to generate a flow of questions and answers, view the AdobeConnect training "104: Problem Solving with the CoP Collective" in the Resources section.

Handling Destructive Behavior

Communities of Practice thrive on trust and acknowledgement.

As said, they also must be a safe place to ask questions and offer solutions, ideas and suggestions. Ground rules mutually agreed by community members — and gently enforced by the community facilitator- may be a way to achieve this.

Members who act as if they have heard it all before — as if they are experts on everything — can have a negative impact on discussions in face-to-face or online meetings. They might withdraw their participation, behave in openly critical ways or aggressively shoot down ideas.

As the leaders, you will need to recognize when this is happening and be prepared to explain the impact of this behavior to the members with the problematic attitude. You might consider suggesting ways to channel this frustration in more productive ways, such as capturing and sharing their experience to help on-board other members into the community. Or you might suggest that they start a CoP Work Group on the topic that interests them.

While not overtly destructive, lack of participation can be problematic as well. Use the same principles of good team management and facilitation to draw out reticent members, such as specifically inviting them to contribute. All community members should watch out for problematic behaviors and to encourage positive interaction. Consider emphasizing this positive focus in your charter (e.g., with your vision and ground rules) — and pointing to this section of the charter when needed.

Using Virtual Collaboration Tools

In a geographically dispersed Community of Practice, virtual tools can be very effective at keeping members connected. In fact, even when members are in the same building, these tools can be helpful. At WBG, we make use of synchronous virtual tools:

- CMA Polycom Desktop
- Cisco TelePresence
- Sametime eMeetings
- WebEx

Set aside time to tune up in your group dynamics:

For example, in a special meeting or online, pair up members to discuss:

When do I feel most motivated by my Community of Practice?

What causes me to tune out?

What group behaviors are frustrating to me?

Share the responses and agree on a set of principles and ground rules for future meetings.

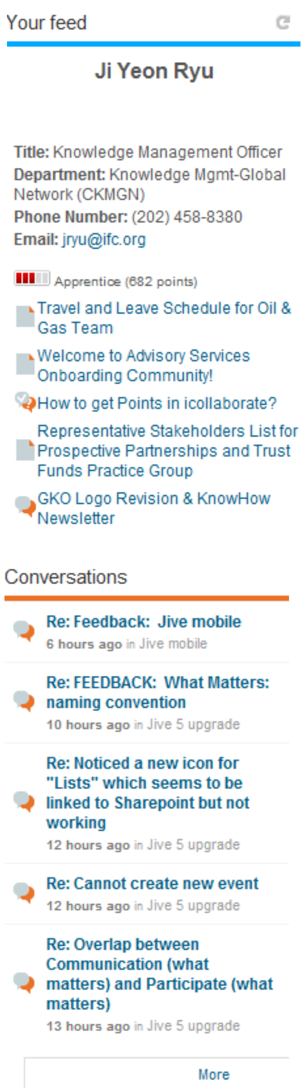
- Adobe Connect
- Audio Conference
- Video Conference

In addition, members can use Spark and Collaborate for Development (C4D). These are WBG's social collaboration platforms that allow community members to:

- Connect with colleagues around the globe, 24/7
- Find experts and expertise
- Access and share information
- Have virtual discussions around challenges and ideas
- Pose questions and get responses from a larger audience
- Expand their network
- Create a personal brand as a subject matter expert
- Build a sense of community: photos — especially non-work related photos — can help with this by providing a window into the personalities and interests of work colleagues

Below in the Tools & Technologies section you will find more information on these and other Community of Practice technologies.

Spark Pages Let You Connect with Colleagues around the World



How to sustain
a Community of Practice

Understanding the Group Dynamic

In the bestselling book, *The Tipping Point*, author Malcolm Gladwell identifies a number of critical characters that lead to the spread of sociological change. Among the roles are what Gladwell terms "mavens," "connectors," and "salespeople." These distinctions are relevant in the context of Community of Practice.

Mavens are subject matter experts. They provide new information and insight. They develop and refine the practice.

Connectors are natural bridge-builders. They connect people and groups. They establish new partnerships. They notice the kinds of connections that happen and make connections throughout WBG to deliver solutions and innovations.

Salespeople are persuasive and charismatic, and they are also negotiators. They are the champions who energize the group and help navigate through WBG's political landscape.

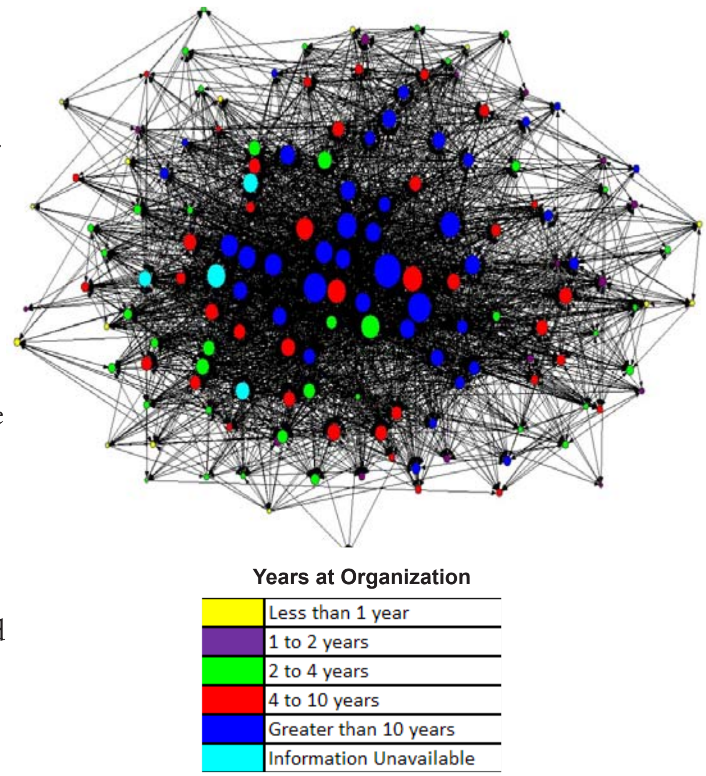
Understanding more about the characters various community members play can provide insight into the ways knowledge, advice, ideas and communication flow in your Community of Practice.

How do you accomplish this?

One effective approach is Organizational Network Analysis, or ONA, also known as Social Network Analysis. In this type of analysis, members are asked to complete a simple survey, which poses questions such as: From which member of the Community of Practice would you be most likely to ask for technical support?" "Which member of the Community of Practice would you be most likely to ask for career advice?"

Using specialized software, the survey results are compiled and depicted as a set of maps. The maps show how the group is working, identify roles various members play — such as connectors — and uncover members who might be isolated or in the periphery. The analysis also can help identify potential new topics and new Communities of Practice where there is a cluster of shared interest.

Below is an organizational network analysis screenshot. This shows the connections (lines) and the tenure of the people in the network. This illustration points to the fact that more senior staff (blue) are highly connected in the center, and some of the less-tenured (red) are not as central. But. there's room for hope, as junior staff (lime green) are right in there.



Building Social Capital Intentionally

Just knowing that there are bottlenecks, connectors, or isolated people is only the first step. You must build your community's network connectivity (social capital) intentionally. Have a "Connectivity Plan" and make specific interventions such as round robins in meetings, introductions during live events, and community member education events about growing one's personal networks. For more on how to do this, view the AdobeConnect training "103: Intensifying CoP Connectivity and Social Capital" in the Resources section.

Onboarding and Communities of Practice

Communities of Practice can play an important role in onboarding new WBG staff. Communities benefit as well, from the fresh insights of newcomers. When considering the role of your Community of Practice in the onboarding of new staff, there are a number of issues to address:

- Membership structure: Is your Community of Practice membership restricted only to experienced professionals, or is there an opportunity for the group to become part of the development path for people new to WBG?
- Connectivity: How easy is it for an experienced staff member to connect with your Community of Practice?
- New member assimilation: How can new members become part of the group? What kinds of introductions, documents and support are needed?
- Community of Practice onboarding: Do you have a "Welcome Packet" — an introduction to the group containing all the information needed — that can be sent electronically to new members to ease their transition?

BEST PRACTICES:

Tales from the Corporate Community

Like many companies, **Vodafone** uses Organizational Network Analysis to map out the connections and flow of knowledge in its networks. The results are used to identify key connectors, experts and bridges between departments. Vodafone's management relies on the maps for:

- Scenario planning
- Risk management
- Succession planning

BEST PRACTICES:

Tales from the Corporate Community

At **Schlumberger** new hires are immediately connected with relevant communities of practice and special interest groups. The company encourages new hires to join two or three groups that would support their technical and professional development.

As staff careers develop, the relationship shifts from consuming and learning to sharing expertise with others.

These relationships and connections remain important throughout staff careers. Promotion to the highest technical ranks in the company is dependent on a peer nomination process.

- Coaching: Would assigning coaches or mentors from the Community of Practice help to connect members with different levels of experience and encourage knowledge transfer?
- Visibility: Is there a general awareness of your Community of Practice 's purpose and membership, so that new staff hear about it during the general departmental onboarding process?

Using the Community of Practice to Build Consensus on a Theme

Reaching consensus on key aspects of your Community of Practice's theme — developing a common language to identify important elements — can help facilitate sharing and learning.

What are the key elements or themes of your member's practice?

What does good look like?

What is the lowest level of acceptable capability?

What level of performance lies in-between?

The discussion of such questions is itself a worthwhile activity, as it involves all members in a participatory exercise. The result of the discussions is a self-assessment or maturity model that regional or local offices can use to assess their capabilities, identify strengths, and prioritize areas for improvement.

In turn, this creates an appetite for learning from others and a common language to describe the themes of the community. (For example, Water, Transportation, Education, Childhood Nutrition). It also can lead to surprise discoveries by teams or local offices: what they have been doing all along could be what good looks like in the context of the practice. And they can share this good practice with others.

All Communities of Practice should be encouraged to share their good practices (within the bounds of confidentiality, security and privacy).

Highlighting the Benefits and Celebrating Successes

Stories of success and real business benefit will energize your Communities of Practice. As you meet and talk with members of your group, always be on the lookout for examples of applying the community's knowledge that can inspire other members of the group. Have group members:

- Prevented extra work by guiding a new project team on steps to take?
- Improved the efficiency of a process?
- Avoided unnecessary costs?
- Repeated a successful approach?
- Published a widely-applicable solution for typical client issues?
- Enhanced WBG's reputation?

When you find these examples, celebrate them.

Make use of video interviews to obtain first-hand experiences. Gather quotes from key players in the experience. Suggest that they quantify the value of the experience in dollar terms or in other business benefit terms. Such evidence can be tremendously helpful in persuading others of the value of your group, and of Communities of Practice in general.

In thinking about positioning your group and promoting it within WBG, we suggest this exercise:

1. Imagine yourself a year from now, making a video that celebrates a success story from your Community of Practice.
2. Think about what that story might be.
3. What would you want your sponsor and executive team to say?
4. Use your answers to guide you as you work to elevate your group's visibility.

Maintenance of a Mature Community of Practice Platform

Communities of Practice require frequent maintenance. As your group matures, things change, and the platform may need some tinkering and tidying up. Here are some specific issues you might confront at this stage of your group's lifecycle, along with suggested actions to address the issues.

If your document database is overrun or out of date...
Then ask a subset of members to conduct a library review.

If your membership list includes staff who have moved into other areas or lost interest in the topic…
Then send an opt-in email to your members, so you preserve your group for committed members instead of holding on to a long but inactive list that becomes increasingly irrelevant.

BEST PRACTICES:

Tales from the Development Community

Knowledge staff at **UNAIDS** identified leading practices in the field of AIDS activism – prevention, treatment, and anti-discrimination. Using the description they developed, they designed a self-assessment tool to evaluate the range of "AIDS competence" in different cities around the world.

This common language and understanding about how to identify top performers led to new opportunities for sharing and learning and the creation of the AIDS constellation community.

BEST PRACTICES:

Tales from the Corporate Community

Syngenta has a formal program in place to salute communities of practice and networks that create value for the company. The quarterly TREE awards recognize teams for knowledge that has been:

Transferred
Reused
Embedded

What does the final "E" in the award program stand for?

The awards also acknowledge teams that share difficult **E**xperiences — or failures — with others.

Mining giant **Rio Tinto** celebrates the clear cultural shift resulting from its long tradition of prioritizing communities of practice. A book, "Tales from the Coal Face," features success stories such as the role of one group in reducing the frequency of bulldozer breakdowns and enhancing mine productivity. An accompanying video includes words of praise from a senior sponsor, Rio Tinto's energy chief executive.

If discussion threads lack focus and wander off-topic…

Then delete, archive, re-post and summarize the most useful threads into FAQs. This makes room for new knowledge to flow.

If you are concerned that your Community of Practice charter has become outdated and might not address current business priorities…

Then set aside time at your next major face-to-face meeting or retreat to re-visit the charter.

Use the Health Check tool and Community of Practice Radar to assist you in this maintenance process.

Performing a Health Check

When the signs of either restlessness or disengagement arise, always go back to the charter to ask, "Are our we meeting our goals?" and "Are our goals drifting?" The cause may be obvious (new strategic focus for a large number of members), or subtle. In the latter case, you may want to do a health check and discuss the results with your core team and sponsors.

Chris Collison (Knowledgeable) introduced a health check tool for the communities to look across communities, and for individual communities to see how they are doing, using a sort of 360-degree feedback along eight measures:

- Strategic Purpose
- Leadership
- Communication
- Tools (Perhaps "Collaboration" would be a better title)
- Content
- Vitality
- Culture
- Benefits

The health check tool is included in the Resources Section.

The health check can also be done comparatively, as a benchmark, across communities. The results can be plotted as a "River Diagram," with the high and low values for each of the eight measures marking the edge of the blue river, and having the average plotted through the center.

As a collective of communities of practice, you can discern cross-community sharing opportunities, and you can inspire communities to shoot for better performance.

Closing Out a Community of Practice

Having a conversation about focus, relevance and activity levels of your community on a regular basis — we suggest once a year — are important to ensure continued value. Such conversations should take place with members and with your community's Sponsor to affirm everyone's commitment.

There will come a time when your group's run is nearing its end. Even when communities have regular annual conversations about their value, it can be difficult to acknowledge that the end is near. Closing down groups that are no longer relevant or functional is a critical aspect of tending the Community of Practice garden — it makes way for new growth and enables a continual focus on innovation and business value-driven knowledge sharing.

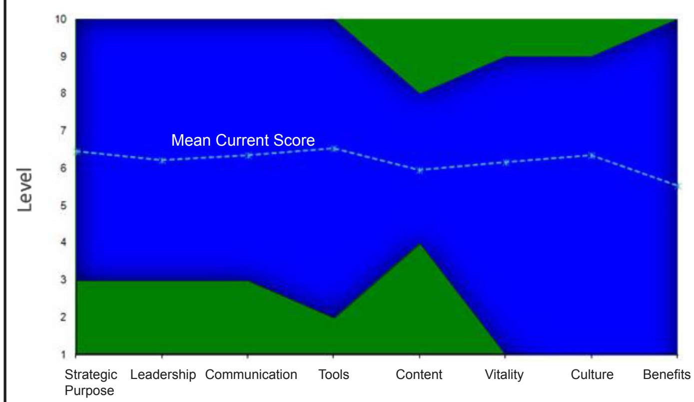
What are some of the signs that it's time to close things down?

- Changed corporate priorities mean that the group's focus is no longer relevant
- The community is not creating value for members
- New sector teams or units replace the community's functions so that the group itself becomes redundant and not necessary
- The communities online place has ceased to have any activity

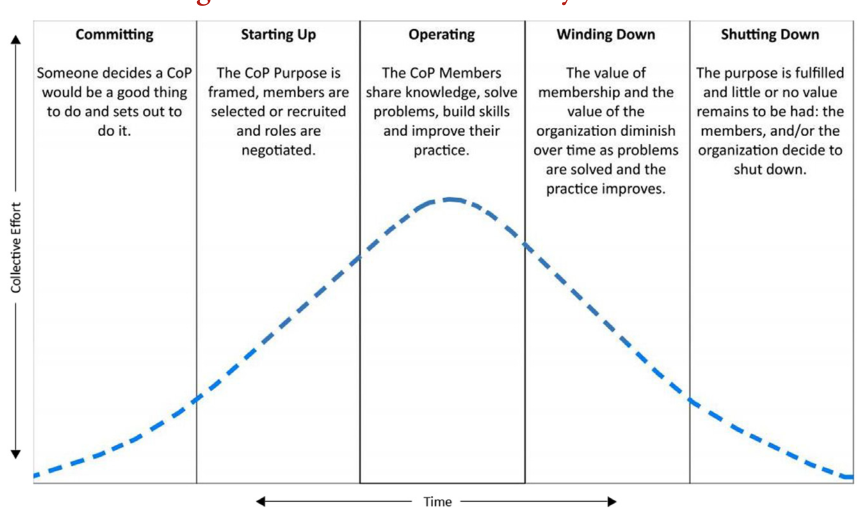
For online communities, the Joint WBG Knowledge team has established the following governance process: If after three months, there is no new content and there are no visitors to a Spark community the space goes on a watch list. If it remains inactive, with no views after six months, the plaece gets decommissioned.

If you believe that your group isn't needed anymore, plan a party to celebrate achievements, capture lessons, summarize achievements and acknowledge members. Decommission or archive online discussions and content and notify the Joint WBG Knowledge Team of the change in status.

Overal River Diagram for all Community of Practice



Stages in the Life of a Community of Practice



Tools and Technologies
for your Community of Practice

In a geographically dispersed Community of Practice, virtual tools can be very effective at keeping members connected. In fact, even when members are in the same building, these tools can be helpful.

In general there are two types of virtual tools: one type allows for synchronous collaboration, communication and interaction, the other allows for asynchronous collaboration, communication and interaction. Examples of synchronous interaction, in addition to face-to-face meetings, are virtual meetings and videoconferences. Some of the tools associated are Cisco WebEx or IBM Sametime eMeetings. Asynchronous interaction can happen through online discussions or email chains. At the World Bank Group the most used tool to collaborate in an asynchronous way is the Internal Social Collaboration Platform called Spark[1], which allows staff to connect with colleagues around the globe 24/7 through discussions, document sharing, and joint content creation.

Synchronous Collaboration Virtual Meetings

Virtual meetings are examples of synchronous collaboration. During these meetings members of a Community of Practice interact with each other at the same time, similarly to how they would interact during a face-to-face meeting. They work well for reporting, checking progress, and maintaining team contact. In general, they are a poor mechanism for creating, innovating, or tackling emotional issues unless community members have a bond of trust and good virtual meeting skills. Make sure you are

[1] Spark is WBG's collaboration platform that resulted of the convergence of WB's Scoop and IFC's iCollaborate platforms.

not attempting the impossible. Remember that virtual meetings require more intentional facilitation control than face-to-face meetings.

Virtual meetings can take several different forms. Decide on the optimal approach — video or teleconference, chat or webinar — depending on the focus of the meeting.

Here are some hints to help you run an effective virtual meeting:

- Prepare content, procedures and agenda in advance.
- Set clear ground rules for behavior (for example, have participants turn off cell phones, and email and avoice side conversations).
- Set convenient meeting times for all time zones.
- To remind you to involve members who remain quiet during the conversation, write down the names of participants and their locations for quick reference.
- Enhance understanding by paraphrasing what others say.
- Avoid judging the comments of participants and use the "parking lot" to move off-topic comments aside for revising later.
- Encourage participation: ask direct questions to specific individuals.
- Gain verbal agreement from all at decision points: to ensure that everyone contributes.
- Share conversations that happen during breaks. The best insights often come during these moments.
- Keep track of the time and pace the meeting. Prioritize timeliness over completing a discussion, letting the group know that there will be planned time to continue on the subject off-line or during an upcoming meeting.
- Leave time to say goodbye and, optionally, open the line early to invite people to check with each other.

Asynchronous Online Collaboration

To increase productivity and facilitate knowledge sharing among members of geographically-dispersed Communities of Practice use an online collaboration platform. All of the interactions and documents are captured online in the same place and are available to the other members of a community, greatly improving knowledge sharing and knowledge flows. It serves as a collaboration "hub," which integrates face-to-face activities and events.

WBG's Tools for Virtual Meetings

	What is it used for?	*What do you need to use it?*	*Features*	*Costs/Limitations*
Adobe Connect	Adobe Connect is a web-conferencing tool for web/on-line meetings (up to 200 participants), recorded and real-time e-learning, and webinars.	Host needs Adobe Connect license to get an account. Participants need link.	Audio, video, chat, document and desktop sharing, screen sharing, record meeting, Event Management System, meeting report, accessible from mobile device (via mobile app). Has configurable interface for just hosts and presenters.	$500/year for one license. (Note: there are a limited number of licenses available—not all WBG can get license).
Cisco WEBEX	WebEx is a web-conferencing cloud service for web/on-line meetings (up to 500 participants), recorded and real-time e-learning, and webinars.	Host needs account (all WBG staff can create account), Participants need link.	Internal & external participants, audio, video, chat, document and desktop sharing, screen sharing, record meeting, accessible for mobile device (via mobile app)	No cost during pilot (Feb-May 2013). After pilot: cost depends on type of audio used. Audio charges will be billed to host unit.
IBM Sametime eMeetings	It is the World Bank's enterprise web conferencing application. It can be used for on-line meetings, training, presentations, and document-based collaboration.	Connection to WBG network (intranet), Lotus Notes account, a Bank-issued ED5 computer, staff UPI & computer logon password.	Internal system (WB & IFC use only), audio, video, chat, screen sharing, document sharing.	No cost.
Skype	Skype is a software application that allows users to make voice calls over the Internet to other users within the Skype service. Recommended for casual collaboration with WBG or external colleagues.	Internet connection, Computer/Mobile device with Skype Application installed, Skype account (for video calling, instant messaging).	Internal & external participants, audio, video, chat, document and desktop sharing, accessible for mobile device (via mobile app).	Cost range depending on features used.
Video Conference (VC)	VC services are available to all WBG teams. Connections can be provided with country offices and external parties. Recommended for secure video conference with limited sites/interaction.	VC meeting room, WBG Network Connection, scheduled meeting.	Internal plus (limited & pre-authorized) external participants, audio, video, record meeting, Presentation (PPT)	$205/scheduled connections. Additional charges may apply.
Desktop VC	Desktop VC allows users to conduct videoconferences or participate in a scheduled videoconference from Bank-issued computer.	A Bank-issued ED5 machine connected to the WBG network (either from the office or via E360), an application, Polycom CMA Desktop, must be installed on the machine, a webcam or built-in camera, scheduled meeting.	Audio, video, screen sharing.	$205/scheduled connections. Free point-to-point.
CMA Polycom Desktop (IFC)	For virtual meetings, the optimal solution when you need to join a scheduled VC meeting.	Polycom CMA application installed on computer, access via SSL, connection details need to be added to the scheduled VC.	Audio, video, screen sharing.	Free of charge within the IFC.
Cisco TelePresence (IFC)	Life-like high definition video conference, ideal for 6-10 participants in each location.	Participants need to be physically located in one of the telepresence rooms in Washington, Istanbul, Hong Kong, Lotus Notes calendar to schedule. Participants in non-telepresence rooms need audio bridge conference number to join.	Audio, video.	Currently free of charge.

With modern "Social Collaboration" platforms, which integrate various social media elements, members more efficiently and systematically share and co-create new knowledge by:

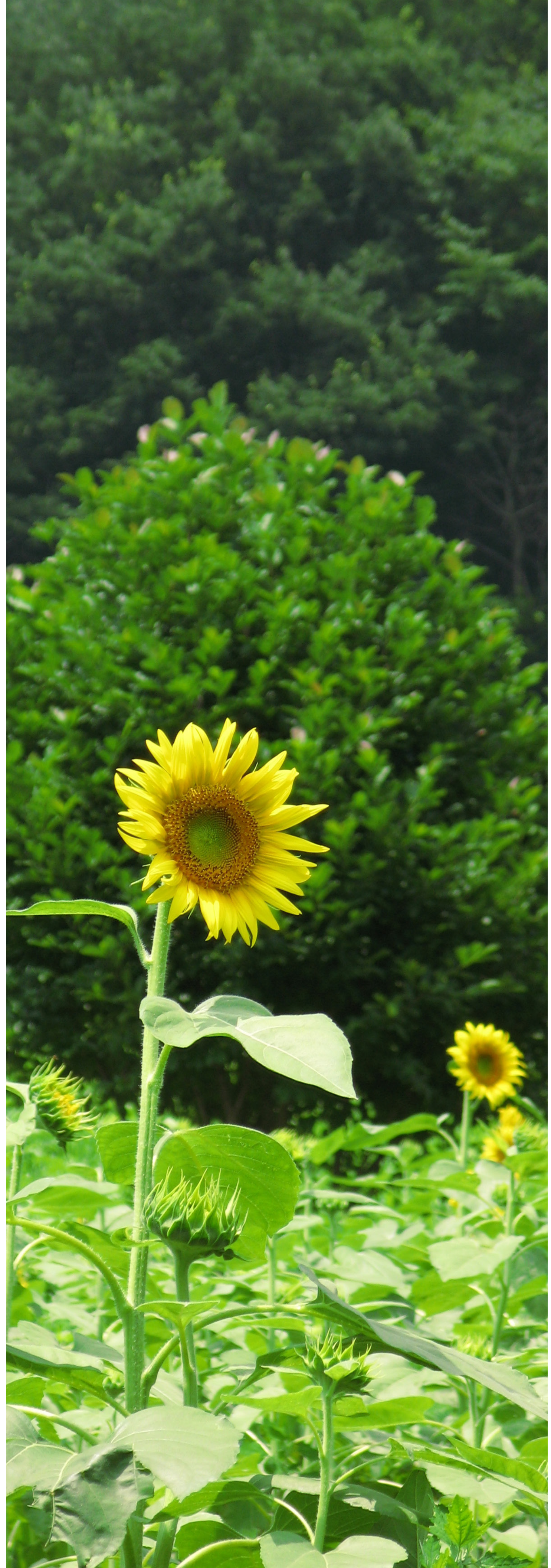
1. Participating in discussions
2. Posting blogs
3. Uploading documents
4. Brainstorming new ideas
5. Editing content simultaneously
6. Sharing or liking others' content
7. Wikis, open to community members' editing

A facilitator or a group of administrators should be identified within the community to manage the membership, facilitate interaction, ensure engagement and customize the layout and features of the online environment. This will allow the community to take full advantage of the benefits of Social Collaboration platforms.

Setting up Your Collaboration Platform

The World Bank Group offers a number of distinct solutions depending on the collaboration needs and audiences of the Community of Practice:

- Internal Social Collaboration Platform: A Jive-based platform, "Spark" (the merger of Scoop and iCollaborate), allows you to create open or permission-based groups, collaboratively work on documents with the group members, start discussions, and upload files. This platform is open only to WBG staff and thus does not allow for interaction with external partners.
- External Collaboration Platform: A Jive-based platform, Collaboration for Development (C4D) is the WBG-approved collaboration solution enables staff to invite external partners and audiences to join Communities of Practice. C4D has similar features to the Internal Social Collaboration Platform.
- NING has been approved by the WBG on an exception basis, only when primarily led by external partners. NING allows for customization and groups are easily accessible by external audiences, with powerful social collaboration features.



Are you creating a community of practice or are you just creating another website?

How does your Community of Practice stack up to some of these statements?

- People voluntarily spend time helping others in a collaboration platform. People visit a website to download what they need.
- Communities of Practice focus on adding value to their members. Websites focus on getting new users or keeping existing ones engaged.
- The success of a Community of Practice is mostly measured in anecdotes, knowledge-reuse efficiencies, and employee satisfaction. The success of a website is mostly measured by hits, visits, and referrals.
- The members of a Community of Practice volunteer their expertise to create new tech features. A website has paid developers who add new features.
- A Community of Practice is built around conversation. A website is built around content.

- SharePoint is available to WBG staff, allowing for restricted and highly customizable environments where on-line collaboration and document management is desired. Social features are limited relative to Jive-based platforms, but Sharepoint is well-suited to Communities of Practice with a vast searchable library of content.

Before requesting a collaboration platform, make sure to carefully review the different options, their features, and then contact the appropriate office by go to wbgkm@worldbank.org.

Once you have decided which platform to use, set up the collaborative platform following these steps:

1. Work with your Collaboration Team, Focal Point, or KM officer to plan your platform's design and launch and get guidance on engagement strategy.
2. Structure content within the template so that it is logical, easy- to-use and provides value.
3. Pre-populate your platform with discussions, blogs and documents so that members will learn how to use it by example.
4. Establish privacy levels. Work with your Collaboration Team, Focal Point, or KM officer to ensure proper classification, based on content confidentiality. You will be able to select whether your group will contain information which is primarily:
   - IFC Official Use Only
   - MIGA Official Use Only
   - WBG Official Use Only
   - Confidential
5. Based on this classification you will also need to select the appropriate type of place: open, members only, private, or secret.
6. Complete your profile as a model for other members to follow.
7. Plan your launch. The saying "If you build it, they will come" does not apply to collaboration platforms. Create a plan to attract interest and manage the launch. Consider providing training to
8. Teach Core Team and members how to use the various features, especially the profile.
9. Show benefits so members are motivated to use it

10. Identify what's appropriate to post on the collaboration platform (e.g., Spark), versus other systems, such as iDocs (IFC) or WBDocs (IBRD), your intranet site, or your shared drives.
11. Maintain site quality. Appoint a Core Team member who will take responsibility for keeping content current, complete, and accurate. It is unrealistic for anyone to read every word of every document, blog, and comment in your platform. However, routine maintenance can help sustain the health — and the usefulness — of your platform.
12. Conduct spot checks. Especially in the beginning, set aside time to review your place's most active sections. Be on the lookout for incorrect information, items that are filed to the wrong section, or tagged incorrectly. Work with the person posting the content to understand the proper use of the site and the standards expected for posted. Be alert for problematic trends and educate members for better usage.

Maximizing the value of your Collaboration Platform

Encouraging participation in your new platform can be a challenge. You can address this challenge by planning strong launch-related activities and identifying some key people who will commit to frequent, pro-active use of the on-line place and who will help populate it with interesting content.

These champions should have credibility with other members and should be enthusiastic about the platform's potential.

Work closely with them to start populating the platform with documents, discussions, and blogs. As other users begin to see that the platform has useful information, they will start to visit more often and add their own content.

Other ways to encourage participation include incentives, such as prize drawings to reward completion of online profiles, or publish kudos for active engagement for the first month that the place is up and running.

Be sure to visit the Internal Social Collaboration Platform (Spark) home page for more tips on setting up your platform and to find out how other groups have handled the set up and launch of theirs.

Resources

Community of Practice High Level Charter
(more details below)

Purpose

- What is the business need that this Community of Practice addresses?
- What is out of scope?
- What are the goals?
- What are the benefits for the members?

Membership

- Is membership open, closed, or something in between?
- Is it limited to one WBG entity, internal staff or it includes external audiences too?
- What organizational structures will be included?
- Will it include investment, advisory, WB, others?

Operating Model

- How will this community of practice be organized and run?
- How much time?
- Who will take on the key roles: sponsor, leader, coordinator, core team/topic leads?
- How will decisions be made?
- What potential CoP Work Groups or projects?

Behaviors

- What can we expect from each other? respect? responsiveness? "no dumb questions"? Incentives and "What's in it for me?"

Resources

- Budget, IT and support resources required
- Fixed costs and variable costs

Key Topics

- Specify focus areas
- is there a relevant and existing body of knowledge?

Platform & Other Convening Tools

- Meeting frequency
- Use of collaborative tools
- Communications and user engagement plans.

Measures

- Deliverables and business outcomes.
- Health and maturity indicators
- Benefits
- KPIs
- Value measurements

Adapted from templates from Syngenta,Mars, and the World Bank COP Strengthening Initiative.

Charter Template

Below is a charter framework that you can use that incorporates the learnings in the Gardener's Guide. As the detail level is richer than the table above, it also can be used as a "Terms of Reference."

Developed as the "CoP Strengthening Charter Framework" the table below provides an outline annotated in a way to write your charter clearly and compellingly so that you gain support for the Community of Practice, and gain agreement around your mission, purpose, and use of resources. Below that is a template you can use to start your writing.

Community of Practice Charter

<table>
<tr><th>Section</th><th>What needs to be covered in the Section?</th></tr>
<tr><td>Background and CoP Purpose</td><td>

Explain the business context (e.g., changing environment). Articulate the need for the CoP and make a clear business case
Explain why you have chosen to use a CoP. Recall that CoPs members cross organizational (unit) boundaries, come together to share and create knowledge, and act as a network and resource to each other. Explain why you can benefit from stepping out of the traditional hierarchy and tapping into the diversity, reach, and collective energy and passion of members. Describe the purpose and business objectives for the CoP that, when met, will respond to the business context. In doing this, describe the value of the CoP for the WBG and its clients, and for the members. Focus on the what (e.g., efficiency, innovation, job satisfaction, reputation). Put objectives into SMART format: Specific, Measurable, Action-oriented, Realistic and Time-bound.
Map objectives to expected types of outcomes. For example to:

▶ Learning/innovation

▶ Practitioner support

▶ Translation/Local Adaptation

▶ Coordination
Identify a mechanism for the objectives to be negotiated and widely agreed-upon

</td></tr>
<tr><td>Target CoP Membership</td><td>

Define the scope of membership (internal, external, hybrid).
Define who will participate in the CoP. How would you characterize them, and why are they critical to achieving your objectives.

▶ Describe the desired profile of members at large, for example, participation / commitment level, expertise, location, time zone.

▶ Describe target profile for Core Team and sponsors.

▶ Describe target profile for working group (project) leaders.
State how would you position or brand the CoP to attract members, core teams, and sponsors. (Remember: Core Team is rotating so you will be on the lookout for suitable core team candidates.)
If appropriate, describe how this membership will evolve over time.

</td></tr>
<tr><td>Strategy to drive positive behaviors and engagement</td><td>

Describe your understanding about how people learn and adapt knowledge into action, how your choice of tools, facilitation norms, and incentives will engage your target members in behaviors that will lead to the desired outcomes. (This is your “theory of change.”)
State how your chosen facilitation strategy will provoke desired community behaviors (collaboration/reciprocity, cohesion or identity, sharing one’s network, goal-alignment, use of agreed upon platform, and trust.) Name potential facilitation moves you will use (e.g., platform onboarding, meeting round-robins, online and real-time discussion moderation, 1:1 mentoring or check-ins, broadcasting provocative questions).
Describe the incentive/motivation and recognition structure for sponsors, leaders, individual members, working groups, CoP at large.

▶ Professional development/self-actualization/job satisfaction

▶ Reputation: how will the CoP improve the reputation of, management recognition for, or opportunities for individual members or working groups?

▶ Network building

▶ Belonging/identity

▶ Executive recognition

▶ Speedy onboarding

▶ Identification of new organizational structures or resources

▶ How will the CoP, as a whole, get recognition from the outside (e.g., with the help of the sponsor or communications specialist, the CoP can publically celebrate achievements in Bank or Bank partner international publications).

▶ How do we broadcast the CoPs goals and accomplishments?
Describe how the Core Team (leaders and other roles) will conduct themselves (E.g., leaders being role model, empowering, offering a sense of equality, timely recognition and feedback).
Describe your desired social norming. Discuss how norms like reciprocity, openness, transparency, and accountability, will be established and protected. Describe some ways you will intentionally build trust and safety.
Describe how you will enable members to be both expert and learner. Describe how you will balance collective learning, versus expert-apprentice, versus external research/expertise.

</td></tr>
</table>

Section	What needs to be covered in the Section?
Operating model	• Describe the roles, responsibilities, activities, and clear deliverables. • Describe who is doing what: ▶ Core Team ▸ Leaders (provide direction, convene meetings, participate in or moderate discussions, engage sponsors) ▸ KM/Content Managers (help manage the publishing and curation of content) ▸ Facilitators (facilitate online and live meetings, engage and help moderate discussions) ▸ Coordinators (provide support for members' use of the tools, AV, help with metrics) ▸ Communicators/outreach coordinators (conduct broadcast and narrow-cast communications) ▸ Working group leads and participants (participate in mini-projects [working groups] like creating an document to integrate member knowledge, running an event, conducting a survey) ▶ Sponsors (provide funding, advice, alignment, connections) ▶ Advisors (provide advice, alignment, connections) • Describe in general what resources are required. (Note: budget is below). • Explain which of these roles are rotating and on what schedule. • Identify projects fostered by the CoP which would require working groups that may emerge, and potential working group leader profiles. • Describe how / where decisions are made. Describe briefly what types of decisions will be handled by whom, and who will be included. Explain how sectors and regions would be represented. For example, by establishing a CoP Executive Committee with representatives from the anchor, regions and other sectors (in case of a multisectoral CoP). Explain the role of the stakeholders outside the community.
Platform and other convening tools	• Describe what channels and platforms you will use to "convene" members, synchronously and asynchronously? (Face-to-face meetings, videoconferences, online collaboration platforms, webinars, social media, etc.) • Describe how the CoP will use technology to convene, to co-produce and to share knowledge. Describe what collaboration technology capabilities are needed. (For example, will selected technology support the convening of members in remote locations and what complimentary low-tech structures will be required?) • Describe the rhythm of meetings with the CoP at large, with the sponsor, with the Core Team. Mention how you are accommodating different time zones.
Performance Measures	• Define the outcome metrics, community input metrics, satisfaction metrics you will examine. Define your data collection approach. • Describe what qualitative and quantitative metrics you will be tracking in alignment with the CoP objectives: ▶ For example: Quantitative: Number of participants in working groups, number of people speaking up at a meeting, number of documents shared, number of posts in forums, response time, numbers of unique participants in various areas in the community. ▶ For example: Qualitative: Surveyed or interviewed members' satisfaction with the CoP outcomes and process, members' evidence of benefit, such as lessons learned and applied, problems solved quickly, other members' direct participation or provision of resources to get a project done.
Resources	• List fixed and variable costs
Reporting Arrangements	• Describe the nature and frequency of reporting relationships with the sponsor (Sector director, Sector Board, Network Council, KLC, etc.)

On the next page you will find a template of the charter, which can be quickly filled in for your Community of Practice.

Charter for [CoP name]

Draft for discussion [date]
Authors: [names]

Background and CoP Purpose	• [background] • By definition, CoPs members cross organizational boundaries, come together to share and create knowledge, and act as a network and resource to each other. By using the CoP model we plan to tap into the diversity, reach, and energy of far-flung experts in safety, health, and construction. • During FY 2013 we will accomplish the following goals: 1. X 2. X 3. X 4. X
Target CoP Membership	• [multiple orgs?] [multiple sectors?] [multiple functions?] • [Thought leaders?] [advisors?]
Strategy to drive positive behaviors and engagement	• [approaches to drive engagement]
Operating model	• We will have the following Core Team functions, which may be shared by one or more individuals. [include/exclude]: ▶ Leaders [each name, at X hrs/month, for a X month term ending XXX] ▶ KM/Content Manager [name, at X hrs/month, for a X month term ending XXX] ▶ Coordinators [name, at X hrs/month, for a X month term ending XXX] ▶ Facilitators [name, at X hrs/month, for a X month term ending XXX] ▶ Communication/Outreach [names, at X hrs/month, for a X month term ending XXX] ▶ Admin [names, at X hrs/month, for a X month term ending XXX] ▶ Sponsors [names] • **Total estimated FTEs during year 1 is [X.]** • *Our working group topics* may correspond to the objectives above [objectives from above], plus others suggested by the community, and we anticipate launching all working groups [date] • *Decision making* ▶ Decisions related to CoP objectives and investments will be [consultative, with input from members and Core Team, and final say of sponsors]. ▶ Day to day decisions will be made by [Core Team members, but guided by the social norms or ground rules]. ▶ Working Group (mini project) selection will be [voted by the CoP members, with an emphasis on those tied to the objectives and for which motivated leaders have emerged].
Platform and other convening tools	• The Platform will include the following types of content and collaboration: ▶ [content] ▶ [collaboration approach] ▶ [blogs] • To seed the content, we will [conduct a survey on supply and demand for different content, and generate maps of sources or “nodes.”] From this we will develop [action plans, and identify countries to start with]. • *CoP meetings* will be held [monthly], with general discussion, Working group report-outs, short presentations, and CoP progress or celebrations. Sponsor meetings will also be held [monthly]. The timing in which the meetings will take place will rotate to enable members in [region].
Performance Measures	• We will measure performance qualitatively and quantitatively. We will track ▶ X ▶ X ▶ X • We will recognize [both individuals and teams, such as working groups, for their contributions to the goals]. For example ▶ X ▶ X ▶ X
Resources	• Fixed and variable costs

Community of Practice Action Plan

After completing your charter, you should publish your action plan that describes what the Community of Practice will do to get started with the platform, onboarding, communication, outreach to SMEs, and working group.

Community of Practice: ______________________ Start Date: ____________
Leader: ____

Resources	Priority	Timeframe	Responsibility	Resources Needed	Comments
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					
15.					

Community of Practice Health Check

Chris Collison (Knowledgeable) introduced a health check tool for the communities to look across communities, and for individual communities to see how they are doing, using a sort of 360-degree feedback along eight measures:

Strategic Purpose

- Leadership
- Communication
- Tools (Perhaps "Collaboration" would be a better title)
- Content
- Vitality
- Culture
- Benefits

Use this link to get to the community of practice Health Check (http://community.worldbank.org/community/cops-hub). This is intended as a general measure of the whole community's health, and of where it stands relative to best practices. You may aspire to be at the top level for only a few of the columns, based on your current objectives and membership.

Pre-launch Checklist

☐	• Check for duplication. • Make sure there is no other group or team that already meets this need.
☐	• Convene a core group. • Identify a few colleagues who share your interest and who want to be actively engaged with your Community of Practice.
☐	• State your purpose. • Define the purpose of your Community of Practice.
☐	• Agree on a charter. • Define the scope of your group. • Discuss what success looks like with your core group. • Discuss how to achieve the vision.
☐	• Agree on roles and responsibilities. • Identify a leader. • Identify a coordinator. • Define roles and responsibilities for the core group. • Set a meeting schedule.
☐	• Identify tools to support the group. • Set up a space on Spark.
☐	• Set communication approach. • Determine an approach to share information and activities within the group, and ways to share successes and heighten the visibility of the group externally. • Find out whether there are other groups or potential members who could benefit from the community.
☐	• Figure out what resources you'll need and how to access them.
☐	• Decide on launch approach: soft launch or formal launch? • Create a list of staff and managers who should be informed of the launch.

Community of Practice Strengthening "Deep Dive" Training

The following four training modules were developed as part of the CoP Strengthening Initiative in 2012 to address key challenges of typical CoPs. For example, "How do you get the CoP down to the business of creating reusable content from their ideas or existing documents?" (102), and "How do you improve the CoP's capacity to solve problems just in time?" (104), and "How do you improve the way people know each other across the CoP — that is, improve their social capital?" (103), and finally, "How can the CoP improve its ability to share tacit knowledge — of experts and teams, alike — so that it gets translated into action?"

Module	*Learning Objectives*	*Full URL*
102: Leveraging CoPs for Integrating Practical Content	Understand the process for co-creating innovative and practical content so that we leverage our collective insight in a practical way. Use a simple process for engaging content owners collaboratively to create useful knowledge products.	https://worldbankva.adobeconnect.com/_a833642795/p9he4dbsui1/?launcher=false&fcsContent=true&pbMode=normal)
103: Intensifying CoP Connectivity and Social Capital	Understand how connectivity and social capital of the CoP (and of its individual members) can result in productive connections. Use a variety of strategies to improve the trust and connectivity of the CoP members.	https://worldbankva.adobeconnect.com/_a833642795/p32zihz8jwc/?launcher=false&fcsContent=true&pbMode=normal)
104: Problem Solving with the CoP Collective	Know when to foster collaborative problem-solving as a CoP leader, and how to do this within your technology and capacity constraints. Make is easier for any CoP member to leverage the CoP to do crowd-sourcing (and narrow-sourcing) of ideas and solution through the discussions and meetings.	https://worldbankva.adobeconnect.com/_a833642795/p224dkhktwn/?launcher=false&fcsContent=true&pbMode=normal
105: Channeling Tacit Knowledge into Action	Be able to efficiently elicit the tacit knowledge of "situational experts" and veterans, and put that knowledge into action quickly. Use the "knowledge jam" process (facilitated live and online conversation cycles) to get out what people know, and have those who want to apply the knowledge shape it into a meaningful product, solution or process.	https://worldbankva.adobeconnect.com/_a833642795/p9pjmfxszxt/?launcher=false&fcsContent=true&pbMode=normal)

A Look Inside

Communities of Practice: Case Studies

Residential Energy Efficiency Finance Practice Group

In the Europe and Central Asia region, there is strong potential for expanding the market for energy efficiency finance in the residential housing sector. For the last several years, IFC has focused on developing its advisory services for residential energy efficiency finance in Russia (Russia Residential Energy Efficiency Finance Project), Ukraine (Ukraine Residential Energy Efficiency Finance Project), Albania (Albania Residential Energy Efficiency Finance Project), Armenia (Armenia Sustainable Energy Finance Project) and the Kyrgyz Republic (Kyrgyz Housing Microfinance Project).

These projects help IFC bank clients and other financial institutions in the region launch and market new lending products for housing management companies, homeowner associations and individual homeowners to implement energy efficiency improvements in multi-family and single family buildings. IFC projects also involve advising governments on legal and regulatory improvements that would support market expansion.

As the two projects in Ukraine and Russia started working towards the same development objectives, it became clear that there was a strong need to leverage the two teams' professional knowledge and to avoid any possible duplication of efforts.

In early 2011 the project teams decided to create a common platform within IFC — the Residential Energy Efficiency Finance (REEF) Practice Group. In its organizational stages, the practice group's membership identified clear business objectives:

- Foster knowledge sharing and product innovation among practice group members
- Enhance learning about specific tools and products
- Identify knowledge gaps and attract outside expertise to fill the gaps, including global product specialists, cluster managers, technical consultants and — potentially — clients

Seeing the value of such collaboration, three other advisory project teams operating under the same mandate in Albania, Armenia and the Kyrgyz Republic joined the practice group, making it the first regional IFC community of practice in ECA.

Membership is open to all interested staff

The group's membership is open for all teams and individual staff in IFC interested in energy efficiency improvements in residential housing. Currently it includes five advisory project teams with around 25 individuals. It meets once every three months or more frequently if issues arise.

The group is driven by the Leader, Eduard Yakubov, who is responsible for identifying discussion topics and developing content of the meetings. His work is supported by the group's coordinator, Olga Ioffe-Kasher, who deals with administrative issues and logistics.

Rolf Behrndt, Access to Finance Regional Business Line Manager, provides full support and strong leadership for the group. He regularly participates in meetings, offering feedback and strategic guidance.

Member engagement and topic relevance are keys to success

The group's enduring relevance and value are dependent on two main factors, including the willingness of staff to share expertise, and the relevance of discussion topics.

To maintain the high level of staff engagement, the coordinator and leader allot time for meeting planning and preparation. In addition, performance objectives for project managers include specific expectations of participation and regular contribution to the practice group.

"Our Residential Energy Efficiency Finance Practice Group helps us channel our individual passion into collective knowledge that helps us work better and service our clients and stakeholders with a greater impact."

Eduard Yakubov, Operations Officer, Residential Energy Efficiency Finance Practice Group Leader

Meetings always feature topics that are relevant to staff's daily work. These topics include key issues that arise in projects members are undertaking, weaving in housing finance, energy efficiency, enabling environment and social responsibility.

In addition to regular meetings, the group invites guest speakers to discuss particular housing issues. Past guest speakers have included a specialist from the IFC Climate Business Group and a global product specialist. Future events will include presentations from outside specialists, including attorneys, bank representatives and experts from prominent think tanks, to share their knowledge.

Networking tools enable collaboration

The REEF Practice Group actively uses iCollaborate, IFC's social platform. In the group's dedicated iCollaborate place, members upload materials and information, and engage in dialogue and commentary on relevant tools and products. The group made a conscious decision to enable open access so that all interested IFC staff — and community members — can interact and share ideas.

The group also conducts interactive meetings via videoconference, with a goal of four meetings minimum per financial year — once every three months. As the group matures, there is a growing need for additional face-to-face events to foster closer collaboration and networking.

With growth comes change

The REEF Practice Group has evolved and changed since its inception, as members learn from others and from outside experts. Benefits of membership are clear:

- Connecting with colleagues from the same area of expertise
- Learning from peers and outside experts
- Developing joint projects: for example, the upcoming Residential Energy Efficiency Handbook, which will include best practice examples of the group's work and expertise

With maturity has come the ability to contribute more broadly to wider IFC community and business objectives, such as providing recommendations for IFC's global housing finance strategy for advisory services.

The REEF practice group has matured to the point to realize that there is a great need to coordinate efforts not only within the IFC project teams, but with the colleagues from the World Bank Group and also from other international financial institutions (especially EBRD) that work in the same countries. As a next step, the group plans to widen its reach by creating a community of practice that will include IFC, WBG and EBRD experts in residential energy efficiency from across the region.

Among the lessons learned along the way:

- **Management commitment is vital for the formation and development of a practice group.** Included in the objectives of the Europe and Central Asia Regional Business Line Manager are targets for the number of practice group sessions to be held during a financial year.
- **A practice group coordinator is essential** to make things happen and ensure engagement at all levels.
- **Maintaining a dedicated group's space on iCollaborate helps** facilitate communications and keeps materials in one place.

This case study was prepared by Eduard Yakubov, REEF group leader, Operations Officer, Advisory Services, Europe and Central Asia (EYakubov@ifc.org) and Yulia Kislyak, Knowledge Management Analyst, Europe and Central Asia (YKislyak@ifc.org)

FinNet

FinNet, an association of staff members involved in increasing access to finance in developing countries, has developed and evolved over the last ten years from an informal group of staff into a robust knowledge and information sharing network of professionals, which is punctuated by an annual face-to-face meeting. FinNet, as both a network and an annual event, brings together staff from across the World Bank Group, providing a platform and forum for the exchange of information, knowledge sharing and ideation. In 2013, close to 400 people attended the annual FinNet event, including staff from Access to Finance, Financial Markets, Financial and Private Sector Development, CGAP, and the rest of the World Bank Group, and increasingly clients, donors and technical partners as well as commercial bank CEOs and representatives, academics, and policy makers.

In the fall of 2003, a group of about 30 IFC staff involved in small and medium enterprise finance activities got together to think about how they could better share what they knew about SME finance. The outcome of this process was an informal group to share lessons learned, contacts and ideas. Over the months the group grew, and the following spring the team decided to hold a meeting to discuss areas of common interest. The result of that meeting was the creation of "FinNet".

From this organic beginning, FinNet has evolved into a much larger network that encompasses formalized practice groups addressing specific areas within access to financial services, including Microfinance, SME Banking, Credit Bureaus and Retail Payments/Mobile Money, to name just a few. Over the years, FinNet has grown in scope and staff participation, and has become an effective moniker for convening staff. For example, widely viewed as a key event to attend for knowledge sharing and substantive networking, the FinNet event has developed its own brand in a way, and serves to consistently "gel" the work for which FinNet is an umbrella.

FinNet is a platform for a vast network of practitioners that provides a robust forum for open discussion, collaboration and innovation on issues related to access to financial services. The annual meeting is an opportunity to share knowledge, formally and informally with structured sessions as well as informal networking, while the network itself facilitates knowledge sharing across topical areas and elucidates areas of thought leadership for IFC. As a network, the group continuously changes and adapts to new issues that arise. This is a main advantage of the decentralized network. It is owned by everyone — it does not reside with a single person or department. As a result, questions, discussions, and issues reflect current needs and demands of participating staff and members.

While the annual meeting has become an important aspect of participation in the group, members benefit in other ways from the network. An active listserv, which predated iCollaborate as a forum for connecting with other members, provides a platform to solicit or give advice, while also finding relevant expertise in the network. It also helps catalyze working groups on issues that the network identifies as a need, such as standardizing M&E indicators.

FinNet as a network and the annual meeting in particular, have contributed enormously to the growth of IFC's work in advisory financial services. In fact, much of the activity of the product practice groups and sub-practice groups can be attributed to the network. The network has given rise to a healthy number of publications and resources; new areas of work have been elucidated and highlighted; and tools and diagnostics developed.

Specific achievements include:

- Improved and strengthened connectivity of staff with the opportunity to better understand the business strategy and goals of Access to Finance and Financial Markets.
- Enhanced ability for practice groups to discuss, develop and launch activities, publications, and other outputs through feedback loops and mechanisms tied to the network and the annual meeting. For example, the SME Banking Diagnostic, a tool which is now used by most A2F advisory services to determine the key needs of a bank requesting IFC assistance, came out of FinNet.
- Creation of sub-practice groups focused on cross-cutting and emerging themes that have then led to development of new product areas.
- Advancing IFC's thought leadership through the interaction and dialogue of internal and external participants at the annual meeting.

- Establishing best practices for a knowledge sharing platform and annual event.
- Raising the profile of the G20 financial inclusion agenda through the FinNet annual meeting.

Tracking outcomes and results stemming from FinNet have taken many forms over the years, but as stated above, the work products that have come out of the network speak for themselves. In relation to the annual event of FinNet, we have used standard evaluations where we are able to compare staff satisfaction year on year since 2008 and have had satisfaction ratings consistently of 4 and above on a scale of 1-5. The team actively mines meeting evaluations from previous years and incorporates as much of the feedback as possible..

At this mature stage of FinNet, some of the challenges reside in ensuring that the network remains intimate enough that staff feel they can leverage it effectively and feel that they are connected with other members of the network. This has been largely managed by the development of Practice Groups for specific Product/topical areas which represent smaller sub-sets of the membership of FinNet.

As the network evolves, there is a focus on continual improvement. Another challenge is to keep the network innovative and germane and not to rest on our "laurels". To address this challenge, we try to identify ways the network can serve the business needs of the evolving and changing business environment. For example, a key challenge is finding the balance between the "tried and true" and something new for the FinNet annual event, keeping the content relevant and fresh, while also providing a forum for interaction and learning that is meaningful.

The FinNet team has learned some lessons along their journey. They share the following recommendations for creating a strong network:

- **During face-to-face meetings and events, focus on the people aspect of the meeting.** This includes guided discussions, interactive sessions, and networking activities. Create an agenda that is less powerpoint presentation and more sharing of experiences and provision of practical examples.

- **Incorporate project deep-dives or cases that are delivered/ led by regional staff.** This ensures that discussions and interactions are not focused solely on global priorities and is balanced.
- **Create a platform for knowledge sharing.** New ideas and innovation are greatly facilitated by creating a platform for sharing, whether it is an annual meeting, an active listserv, and/or a virtual collaborative platform.
- **Find ways for regional teams to interact with each other.** While some people will meet and talk on their own, it is a good idea to structure opportunities for cross-regional sharing and connections.
- **Leave time for informal conversation and networking** at face to face meetings/events. Staff value and prioritize meetings that give them opportunities to meet and talk with colleagues.
- **You can't please all of the people all of the time, so try to strike a balance.** Remember that the network can self regulate in a way, so let the interests and priorities of the membership drive the agenda and simply create the enabling environment and tools to enable interaction to take place.

Gillette Conner, Knowledge Management Officer, Access to Finance Business Line contributed material to this case study: GConner@ifc.org

"Great event, very innovative, and a complete learning process."

2010 FinNet Annual Meeting Participant

Learning from MegaDisasters Community of Practice

Introduction

On March 11, 2011, an earthquake of magnitude 9.0 occurred in the Pacific Ocean off the coast of Japan's Tohoku region. The quake shook the ground as far away as western Japan and lasted for several minutes. A half hour later, a tsunami of unprecedented force broke over 650 kilometers of coastline, toppling sea walls and other defenses, flooding more than 500 km of land, and washing away entire towns and villages.

The Great East Japan Earthquake (GEJE) was the first disaster ever recorded that included an earthquake, a tsunami, a nuclear power plant accident, a power supply failure, and a large-scale disruption of supply chains. It is globally recognized that the loss of life and damage could have been far greater had it not been for Japan's advanced Disaster Risk Management (DRM) system, built up during nearly 2,000 years of coping with natural risks and hazards.

Japan's DRM system proved its worth. These methods and experiences can also help other countries protect themselves from major disasters. They can adopt — and adapt, as necessary — some of the measures taken by Japan, by understanding the strengths and weaknesses of Japan's response to the GEJE. To help them do that, the Government of Japan and the World Bank launched and sponsored the collaborative project, called "Learning from Mega Disasters."

Learning from Megadisasters is a knowledge-sharing project has the objective of sharing Japan's knowledge on DRM and post-disaster reconstruction with countries vulnerable to disasters. The project has deployed some of WBI's cutting-edge technologies and tools for learning, in an integrated way. Sample deployments include the Global Development Learning Network, a web-based community of practice, and the piloting of Capacity Building programs in seven countries around the world: Armenia, Indonesia, Kenya, Philippines, Sri Lanka, Uganda and Kyrgyzstan.

Learning from MegaDisasters Community of Practice

On October 14, 2012 the Learning from MegaDisaster Community of Practice (CoP) was launched during the World Bank Annual meeting in Japan. In particular, the CoP platform serves as a venue where, members can share views, discuss new topics, upload documents and add comments and suggestions.

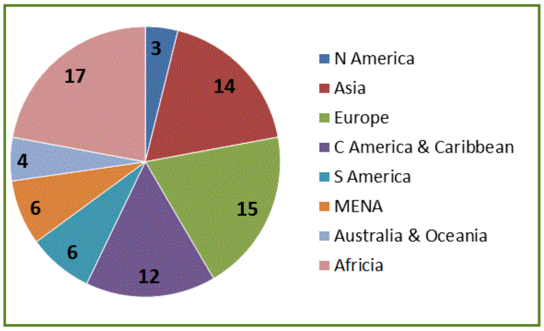
The CoP's membership is open for all DRM experts and practitioners all over the world. As of June, 2013, over 330 experts, from more than 78 countries, joined the community. The members affiliated with Government, Academia/Research Institutes, local and International NGOs, United Nations, Multinational Corporation (MNC), Foundations, and Development Agenesis. Members' regions and countries are:

- **North America:** USA, Canada, and Mexico.
- **Asia:** Afghanistan, Pakistan, India, Sri Lanka, Kazakhstan, Korea, China , Bangladesh, Japan, Malaysia, Philippines, Mongolia, Thailand, and Nepal
- **Europe:** Italy, UK, Germany, Spain, France, Ireland, Switzerland, Scotland, Netherlands, Portugal, Bosnia & Herzegovina, Moldova, Russia , Croatia, and Belgium
- **Central America and the Caribbean:** Haiti, Costa Rica, El Salvador , Nicaragua, Trinidad & Tobago, Barbados, Martinique, Bermuda, Belize, Nicaragua, Jamaica , and Honduras
- **South America:** Argentina, Guyana, Peru, Colombia, Brazil, and Bolivia
- **Middle East & North Africa:** Palestine, Turkey, Syria, Israel, Iran and Morocco
- **Australia and Oceania:** Fiji, Australia, New Zealand, and Solomon Islands
- **Sub-Saharan Africa:** Chad, Ethiopia, Kenya, Burkina Faso, Nigeria, Tanzania, Uganda, Mozambique, Sierra Leone, South Africa, Ethiopia, Senegal, Madagascar, Zimbabwe, Swaziland, Mali, Guinea, and Ghana

The CoP is driven by Federica Ranghieri, Task Team Leader (TTL) of the project, who provides full support and strong leadership for the project and offers feedback and strategic guidance to the community manager/coordinator, Rasha Rayes,

"The Learning from Mega Disasters program is fully aligned with WBI's role as a global connector of knowledge, learning, and innovation focused for capacity development."

Sanjay Pradhan, Vice President, WBI



Expected learning from MegaDisasters Community of Practice:

- Aims to become the reference CoP for sharing Disaster Risk Management (DRM) best practices.
- Builds the capacity of DRM practitioners through the development, dissemination and integration of knowledge.
- Contributes to the effective implementation of DRM management policies/programs around the world.
- Promotes DRM as a critical component in development strategies/policies.
- Provides continuous DRM education by underwriting webinars, discussion forums, and blogs.
- Develops and conveys the most up-to-date best practices for DRM.
- Shares lessons learned from the March 11 earthquake and tsunami in Japan.

The main benefits of collaborating with the CoP are:

- Continuous learning as a result of participation
- Recognition among peers within the DRM community
- Support for solving daily problems
- A reduced learning curve, because participants can refer to prior experience of other recognized experts and peers
- Opportunities to connect with colleagues who have shared interests, background, and experience
- Collaboration with other members to test ideas, get feedback and interact.

who leads the development of the CoP design, recruitment of members, initiation of activities that build trust within the community, facilitation of interactions, and energizing of community members.

The first step in building the Learning from MegaDisasters CoP was to prepare a concept note (PCN) in which the team identified the community's objective, clarified the outcomes, established the scope, identified the target members, defined knowledge to share, assigned knowledge development, and described benefits to members. Below is a paraphrase of ideas from this Concept Note:

The CoP has carefully tested its interaction model. Before launching the community, the team piloted it with a selected group of disaster Risk management experts in order to assess the design; understand how to define roles and responsibilities; test the activities; refine the communication strategy, understand what sort of professionals the community would attract, and learn what motivates them to be active members. Then, again, after launching the community the team did a poll to understand members' needs, then the CoP's design and activates were updated and changed according to their needs.

This continuous improvement process is central to the Learning from Megadisasters CoP's philosophy: Platform design, contents, and responsiveness to members' needs are tested often, through formal assessment (using the Survey Monkey software) and through members' interactions with the coordinators. Minor changes (not affecting the full design) are constantly made, even important changes have been done (new design of the homepage has just been implemented).

The leaders are attentive to the notion that communities have a lifecycle. For each stage in the lifecycle (e.g., start-up, expand, topic reorientation, etc.) there should be specific design, activities and facilitation strategy.

Factors Influencing CoP Success

In March 2013, Learning from MegaDisasters Community of Practice won an award as the best "Collaboration 4 Development" (C4D) community of practice. Member engagement was identified as the leading "key to success."

- **Good planning and preparation of activities:** The community activities follow a rhythm. This helps create member confidence on how and when to participate. Members participate in facilitated discussions every three weeks, creating new DRM knowledge. This builds upon the 32 Knowledge Notes which were developed as core knowledge during the first phase of the project. The keys to better engagement are planned calendar of activities, trained and dedicated community facilitators, and interesting and new content.

- **Trust, mutual respect and accountability:** A relationship of trust, mutual respect and commitment with members has been developed by being open to members' new ideas and leadership. This has resulted in members' willingness to share their expertise.
- **Members' sense of value:** Members sense that the CoP has value. First, discussion topics are relevant. Members decide on discussion themes, and questions, and they contribute to facilitating the discussion. In addition, they witness personal value: active community members are awarded scholarships to attend the World Bank Institute's e-learning courses on DRM.

Community activities have enough variety that all members feel they can participate. Members can upload a file, write a document, post a blog, and start a discussion, and (soon) can provide input to new Knowledge Notes under Cluster 7. Knowledge Notes will be produced in 2013 with a focus on reconstruction and rebuilding.

Design Tips for CoPs:

Community managing is more about guiding rather than directing It is about guiding the group to share its knowlede, and skills. It is about engaging and connecting community members by encouraging participation, by facilitating and seeding discussions, and by keeping events and community activities engaging and vibrant.

Here are a few points to keep in mind when designing a community of practice:

✓ Each CoP is different. Therefore, design choices must be driven by community purpose. The purpose should be specific, focused and well articulated in terms of CoP goals meeting members' needs.

✓ Which community design elements are appropriate depends on the community stage of development.

- ✓ The purpose of the design is to help the community develop and is not to impose a rigid structure. As the community grows, new members will bring new interests and new ideas.
- ✓ Good community design requires both the perspective of an insiders and the collective experiences of the community members.
- ✓ Involving the members in designing the community will create a "sense of place" in their minds. That is, they will feel ownership for the platform and for the network they create.
- ✓ Design community activities that allow participation at all levels so all members can participate.
- ✓ A common mistake in CoP is to focus only on public events. The most valuable community activities are the small every-day interactions to solve a problem, or the one on one exchanges of information.
- ✓ As a network, the group continuously changes and adapts to new issues that arise. Thus, they need the platform to flex with them collectively. The CoP platform should be owned by everyone — it should not reside with a single person.

Advice for Leaders

- ✓ Managing a community of practice is a science and an art. It is an art because social beings thrive from human interactions and that there is artistry in the improvisational nature of human interaction. It is a science, because there are processes and technologies that benefit from rigorous attention to signals and refinements.
- ✓ Motivate, don't just coordinate. Always recognize and look after your facilitators and your power contributors. They are quite often the drivers of the community's future.
- ✓ Give your members a range of collaborative tools and let them decide which ones they want to use and how to use them.
- ✓ Promote the CoP through other channels (website pages, presentations at regional and local events) to grow your membership.
- ✓ Remember that members' capacities and interests differ. Be patient, plan, program, guide, and have fun. Enjoy the fact

that the CoP is an amazing communication tool and an effective collaboration model.

- ✓ Make sure that the contents, knowledge and information provided are always relevant, sources are checked and properly highlighted.
- ✓ Finally, managing a community of practice is not members' "Day Job", so take it easy, and remember that there is always tomorrow to finish another task.

The Learning from MegaDisasters case study was contributed by Federica Ranghieri, TTL, Senior Urban Specialist, WBIUR and Rasha Rayes, "The Learning from MegaDisasters" Community Manager

The Telecom-Energy Initiative

Introduction

The Telecom-Energy Initiative's Online Collaborative Platform was launched in December 2012. The platform, facilitating an online community of practice, was designed to be a central component of the World Bank Institute Climate Change Practice's "Incubating Innovation for Off-Grid Electrification: The Telecom-Energy Initiative." It was built using Jive social collaboration platform hosted in the cloud and called "Collaboration for Development" (C4D).

The *'Telecom-Energy Initiative'* is bringing together a coalition of key energy, telecom, financial and non-profit sectors stakeholders seeking to harness energy demand from the telecom sector infrastructure to spur energy supply to the 1.2 billion people remaining without energy access through the developing world. At a November, 2012 global consultation virtual roundtable bringing together more than 150 participants from multiple countries and sectors, attendees expressed a clear need for a common platform where dialogue could be continued. The WB team felt the need for a platform to bring transparency and inclusiveness to the new and innovative, multi-sector initiative.

The Telecom-Energy Initiative's Online Collaborative Platform

The Telecom-Energy Initiative's online community, nurtured on the platform, intends to develop awareness among key stakeholders about the opportunity to serve the rural customer through financially profitable energy service business models. The platform is also a unique place to bring together stakeholders that would have otherwise not have convened. Ultimately, the objective of this online community is to provide a virtual space where knowledge, ideas and opportunities can be shared and created through interactions between a wide range of stakeholders.

The development of the online collaborative platform has undergone different stages. The first was a careful assessment of the value proposition this online space could provide to its members. The incentive structure was directly drawn from comments gathered during the global consultation that triggered the creation of the platform.

After the launch of the platform with its initial design and set of planned activities, the core team gathered data on users' participation and feedback. This allowed the core team to better understand both the type of participants the platform was attracting and their specific needs and the evolving initiative and its needs, allowing for the appropriate corresponding evolution of the platform. Constant readjustments and a continuous improvement mindset were required to respond to the needs of the users and the initiative while updating the platform's design and developing activities.

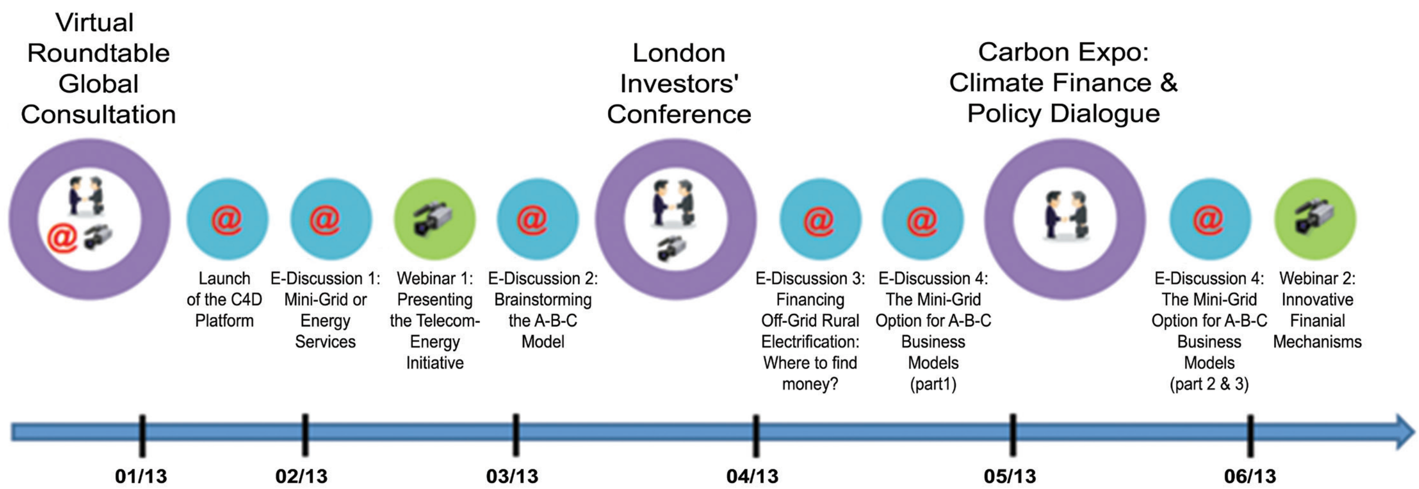
The Telecom-Energy Initiative has been extremely effective at building memberships as well as knowledge sharing and dissemination through its platform. In turn, the platform has also proven to be a valuable tool in development of the initiative. Even while not all results are quantifiable, feedback interestingly shows that connections between stakeholders have been made through public and private discussions. Some of these results:

- In less than five months more than 350 members have gradually joined the Telecom-Energy Initiative's Online Collaborative Platform, making it one of the largest and active C4D group within the World Bank.
- The platform includes participants from more than 300 organizations representing over 60 countries.
- During highest growth periods, the Telecom-Energy Initiative welcomed approximately 30 new members per week.
- Four E-Discussions were held for a period of 3 to 4 weeks each. They have generated altogether more than 2,300 views and 100 technical contributions.

Engaging Stakeholders: Engagement Planning and Example of Activities

In order to sustain stakeholder engagement over time, the Telecom-Energy Initiative Core Team has developed a comprehensive stakeholder engagement plan (see Box 1). The community plays a central role in achieving the different objectives of this initiative.

Box. 1: The Telecom-Energy Stakeholder Engagement Plan:
An Effort to use E-discussions, Webinars, Live Broadcasts and In-Person events to build stakeholders' coalition.



The Telecom-Energy Online Collaborative Platform has multiple purposes. In addition to being a repository for internal and external documents, all community engagement activities of the Initiative were supported through the platform. Below is a summary:

- **Notification and storage of recorded in-person events, video recordings and supporting documents.**
  There are multiple ways for the Telecom-Energy Initiative members to participate vicariously in in-person events. First, events are announced to members. Then, the platform contains participation links for conferences that are systematically broadcasted live using Adobe Connect. Maximizing opportunities to participate for people unable to attend in person, this approach allows the community to reach a significant number of participants while giving them the opportunity to interact with speakers through a live chat. The live chat is facilitated in real-time during the Adobe Connect session. Virtual participation allows for an increased participation in the community. More, the recorded events are available and all supporting materials are posted, including speakers' presentations, video recordings, list of participants and executive summaries.

- **Notification and storage of recorded Webinars**
  Webinar recordings from Adobe Connect sessions and supporting documents are also shared on the platform. While the relatively short length of such online live events has not usually allowed for a high level of interaction, the team has used the platform to allow participants to react and

share their thoughts in an online discussion once the webinar was over. Feedback tends to indicate that Telecom-Energy Initiative community members listen to Webinar recordings long after events took place.

- **E-Discussions**
  From January to June, 2013, E-Discussions have played a central role in successfully expanding the membership to 350 stakeholders over a short period of time. Featuring World Bank specialists as well as external expert practitioners and academics, the discussions attract new members.

  Not only have the online discussions allowed for dialogue among interested parties, they have also proven to be a powerful mean of crowdsourcing practitioners' knowledge. Notably, they have helped crowdsource existing barriers and opportunities for addressing the energy access challenge through private-sector led decentralized energy services provision.

- **Video addresses of World Bank Group's Senior Management**
  Periodically, a short video of a WBG manager or higher level is uploaded onto the platform. Speakers in these videos explain the vision of the World Bank Group related to the Telecom-Energy Initiative, and recognize the value of community member participation.

- **Reports/Knowledge Sharing**
  The core team routinely shares World Bank reports and other external material relevant to the initiative. Partners (private companies, industry associations, UN, development agencies, etc.) and individual members (practitioners, academics, etc.) have also been encouraged to share publications with the broader community.

- **Web-Based Multimedia**
  Participants may upload videos onto the platform homepage, reinforcing the sense of openness and ownership for groups' members. They may also suggest links to other relevant websites and initiatives for consideration to be placed on the homepage. Under consideration are other web-based multimedia, such as Twitter. A major criterion is increasing the interactivity of the platform with its members.

Lessons learned and tips to future CoPs

Below are some of the lessons learned from developing the Telecom-Energy online community over the fiscal year 2012/2013:

- ✓ Communities coalesce around a clearly defined shared goal, in this case enabling energy access.
- ✓ Participants engage when they perceive that the community is consistently dynamic, featuring various activities and member interactions.
- ✓ TTL support, core team engagement and community managers' time investment are key to maintain a certain level of dynamism. Dynamism created by these players allows participants to interact, and inspires new members to join.
- ✓ The objectives and interests of participants that join the group need to be understood, through consultation or other means. Such understanding needs to be applied into the design of group activities.
- ✓ A group will also need to attain a critical mass in order to witness self-sustained contributions. Critical mass differs depending on the group and the level of confidence gained in between its members. For example, a smaller group is at "critical mass" where there is more activity per member, or trust levels are high. Meanwhile, a larger group is at "critical mass" where there is less activity per member or the activity is less engaged as trust levels are only modest.

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