|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| |  | | --- | | **COMMUNITY**  Management  Training  LEVEL ONE  **Workbook**    The Communities and Collaboration Team, within HR Leadership and Staff Learning, is offering the **Community Management Level 1 Training**. This is a practical certification program for new or established Community Managers, to equip them with the right tools and strengthen their Knowledge Management, Learning, and Innovation competencies, for the establishment and development of vibrant and valuable communities of practice.  This workbook contains templates, samples and exercises for Community Managers to practice what they learn, and apply it directly to their community work. | |  | |  | **2016** |

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# **DEFINING AND PLANNING YOUR COMMUNITY | MODULE 1**

## 1 Audience Analysis

Together with the competitive analysis, the audience analysis is one of the two pieces of research that are essential to successfully design a community. In particular, the audience analysis will help you understand who your potential members are (demographics), what they do (habits), and what they think (psychographics).

In this exercise, please come up with your own questions, tailored to your community, and interview at least 3 potential members. Then share your questions and your interviewees’ responses by replying to this thread.

During the interview process, respondents might wander “off topic”. Listen to and respect what they say. You might learn something new and of value; it might challenge your initial assumptions of who should be in this community and what it is for. Also, if certain themes start emerging, you might want to refine your questions as you go forward.

**To identify and interview potential members of your community, follow this process:**

1. Narrow down your target audience using at least two qualifiers (for example, Geophysicists in Latin America)
2. Use SkillFinder/Linkedin to identify 10 potential members of the community you have in mind.
3. Select 3 potential members.
4. Interview them asking at least 3 questions on habits (what they do) and 3 questions on psychographics (what they think) one question on challenges, one on experiences, and one on aspirations.
5. See if there are any common patterns and try to write two paragraphs that represent the habits and psychographics profile of a generic potential member of your community.
6. Record interviews with the potential members, for no longer than 15 minutes each.
7. From these data, several common characteristics should emerge that can help you plan how and when you will engage your members.

|  |  |
| --- | --- |
| **Audience Analysis − Habits Survey Template** | |
| **Questions** | **Responses** |
| What tools and platforms do you use professionally?  (This should be a multiple-choice question with the tools members are most familiar with.) | * C4D * Ning * Facebook * Linkedin * Twitter * Sharepoint * Jabber * Other (please specify): |
| What do you read online?  (This should be a multiple-choice question with space to add own reading materials.) | * Economist * Wall Street Journal * Financial Times * Trade journals (please specify) : * Other (please specify): |
| What do you read offline?  (This should be a multiple-choice question with space to add own reading materials.) | * Economist * Wall Street Journal * Financial Times * Trade journals (please specify) : * Other (please specify): |
| What sectorial events (conferences, talks, workshops etc.) do you attend? | Specify the event: |
| What sectorial networks or communities are you members of? | Specify the networks or communities: |
| What sustains your attention? | Please specify: |
| When do you browse the Internet?  (This should be a pure multiple-choice question) | * In the morning before work * During work * In the evening after work * How late in the evening? Please specify: * At the weekend * How much at the weekend? Please specify: |
| When do you participate in your domain/community? | * In the morning before work * During work * In the evening after work * How late in the evening? Please specify: * At the weekend * How much at the weekend? Please specify: * Monthly * Quarterly * Semi-annually * Annually (for example, at an annual conference) * Other? Please specify: |
| What specific aspects of the domain do you participate in? | * Online community * In-person meetings * Other? Please specify: |
| How do you participate in your domain? | * Read online articles/posts * Comment on online articles/posts * Write articles online * P0st/ask/answer questions online * Attend meetings * Attend conferences * Other? Please specify: |

|  |  |
| --- | --- |
| **Audience Analysis – Psychographics Interview Template** | |
| **Questions** | **Responses** |
| **Biggest Problems/Challenges** | |
| What key issues do you care about? |  |
| What are you struggling with? |  |
| What are you worried about? |  |
| What are you interested in? |  |
| NOTE: Also make a note of what they mention *without* being prompted. |  |
| ***Experiences (successes, failures)*** | |
| How did you become interested in the domain? |  |
| What is your average day like? |  |
| What have been your biggest achievements/failures? |  |
| **Aspirations** | |
| What are your hopes, fears, and aspirations? |  |
| What would you love to see within your domain in the future? |  |
| What barriers do you find in networking with other practitioners in your domain? |  |
| Would you like to be one of the founding members of the community? |  |

From these data several common themes should emerge. List these themes in each category in order of popularity.

## 2 Competitive Analysis

Before starting a community you need to know if there is **demand**. The first thing to look at is what’s already out there in your domain and how the community you have in mind might fit into the wider ecosystem. The competitive analysis helps you avoid re-creating what already exists, and also provides you with valuable insights into how relevant communities, mailing groups, and social gatherings function, which areas of a domain they do and do not cover, and how they engage their members. This analysis also helps you identify the right niche for your community.

**How to Find Existing Communities**

* **Ask** your target audience (potential members) what communities and associations they belong to, what meetings and conferences they attend and so on. See the “Habits” section of the “Audience Analysis Template.”
* Search on **CommunityFinder** for WBG communities. You can also search Spark (internal) and C4D (external) to find other relevant groups.   
  NOTE: When using CommunityFinder, note that you can visit the community's platform by clicking on "Visit Community" in the top right corner. In case a community doesn't have a platform, see if it has an e-mail distribution list and if you could join it, or simply contact the community leader and discuss your questions with her/him.
* Use a **search engine** to search for external communities. Make sure that you search not only for the specific topic but also add key words such as “community”, “network”, “group”, “forum”, and “professionals.”

Important Note: *If you don’t find a community like the one you have in mind, it might not necessarily mean that you have found a niche to fill. It might also mean that there is no interest in that topic. This is where the Audience Analysis comes in handy.*

|  |  |
| --- | --- |
| **Competitive Analysis Template** | |
| **Question** | **Response** |
| **What You Need to *Know* About Existing Communities (online and face-to-face, inside and outside WBG)** | |
| What are the existing communities within the domain? |  |
| How active are they? |  |
| Which are the most successful ones? |  |
| What makes them successful (unique design, top members, culture/personality, types of conversations, leader’s involvement, etc.)? |  |
| What type of communities are they (interest, place, practice, action, circumstance, or a combination)? |  |
| How old are the existing communities? |  |
| If online, what platform are they using? |  |
| **What You Need to *Answer* About Existing Communities** | |
| What niche should I focus on? |  |
| How would my community fit within the ecosystem? |  |
| Could it develop as a sub-community of a broader existing one? |  |
| What’s the added value my community would bring? |  |
| How could my community leverage the existing ones? |  |
| How would my community stand out? |  |



# **(RE)DESIGNING YOUR COMMUNITY FOR SUCCESS | MODULE 2**

## 1 Community Value

A community has to provide value to both members and the sponsoring organization, which is the WBG in our case. You also have to think about value both in the short term and in the long term.

Use the following Value Matrix Template to identify the Short Term value and Long Term value that your community provides or will provide to both Members and the Organization.

**Value Template**

|  |  |  |
| --- | --- | --- |
|  | **Value Template** | |
|  | **Short Term Value** | **Long Term Value** |
| **Members** |  |  |
| **Organization** |  |  |

**Value Example**

|  |  |  |
| --- | --- | --- |
|  | **Value Template** | |
|  | **Short Term Value** | **Long Term Value** |
| **Members** | * Help with challenges * Access to expertise * Increased confidence * Fun with colleagues * Meaningful participation * Sense of belonging | * Professional development * Enhanced reputation * Professional identity * Extended network * Increased marketability |
| **Organization** | * Rapid problem solving * Time and cost saving * Improved quality * Synergy across units * Resources for operations * Community-supported risk-taking | * Strategic capacity building * Increased productivity * Knowledge-driven projects * Latest thinking * Innovation * Retention of talent * New strategies and capabilities |

## 2 What’s Your Community’s Pitch to Members?

After having completed the competitive and the audience analysis, you should be able to transform the initial idea you (and/or your manager) have of the community you would like to create into a short description that is based on what would make your community unique and what could appeal to its potential members.

You should think of this short description as an “elevator pitch”, no longer than a couple of paragraphs, which you would tell a potential member if you met her/him in an elevator. Develop a “WOW – HOW – NOW” approach:

* WOW – think of a “WOW” opening that will get their attention.
* HOW – explain briefly how your community addresses a need or solves a problem, and give example(s)
* NOW – what action you or they can take NOW

|  |  |
| --- | --- |
| **Community Pitch/Elevator Pitch Template** | |
| **Instructions** | **Your Community Pitch** |
| **1. Think of who the community is for and of a “WOW” opening to get their attention**  *E.g. Did you know that…? Do you want more X…? The secret of X is… Avoid (X problem) once and for all! Imagine if you could… Did you realize that…? True or false…? Wouldn’t you agree that...* |  |
| **2. Identify HOW the community helps its members**  **a. State a concrete benefit or value**  E.g. *Solve a problem, make a difference, add value, bring result, change a process, transform something, provide a benefit*  **b. Give an example that illustrates impact or potential impact. Make sure the example is relevant to your pitch target group.**  E.g. *A community member was able to get feedback on a proposal by starting a discussion with and getting response from fellow community members.* |  |
| **3. Call to action: what can they or you do NOW – make it concrete:**  E.g. *They can join the community, or refer a colleague to the community. You can refer them or connect them with someone, offer a resource, share research.* |  |

## 3 Core Group Interview

The purpose of this interview/these interviews is to involve the Core Group in the process of designing the community of practice, so that they also feel ownership and are more committed to its success. Once the interview is completed, the community charter can be finalized.

This could be a group interview or a series of one-on-one interviews. While more difficult to convene, the group interview is more beneficial as participants are able to collaborate and start feeling a sense of community from the beginning and to build on each other’s ideas. While the community manager can help with setting up the interview and with taking notes, the community leader should lead it because of his/her sectorial knowledge. The questions following are provided to guide you on what should be addressed and are not meant to be exhaustive. Use, replace, delete, and augment, as appropriate for your community.

|  |  |
| --- | --- |
| **Core Group Interview Template** | |
| **Questions** | **Responses** |
| **Domain Questions  Goal**: To develop a shared understanding of the domain, find its legitimacy in the organization, and engage the passion of members | |
| What topics and issues do we really care about? |  |
| What are the development challenges we want to address? |  |
| What is out of scope? |  |
| How is this domain connected to the organization’s strategy? |  |
| What business needs can the community address? |  |
| What is in it for us? |  |
| What are the open questions and the leading edge of our domain? |  |
| Are we ready to take some leadership in promoting and developing our domain? |  |
| What kind of influence do we want to have? |  |
| How will we communicate the community’s goals and achievements, and to whom? |  |
| **Community Questions  Goal**: To find the community’s specific way to operate, build relationships, and grow | |
| How will the community be organized and run? |  |
| Is membership open, closed, or something in between? |  |
| What roles are members going to play? |  |
| How will decisions be made? |  |
| How often will the community meet? |  |
| What venues and technology will be used for members to connect on an ongoing basis? |  |
| What kind of activities will generate energy and develop trust? |  |
| What kind of behaviors can we expect from each other (respect, responsiveness, “no dumb questions”, tough questions, honest feedback, “no hurt feelings” etc.)? |  |
| How can the community balance the needs of various segments of members? |  |
| How will members deal with conflict? |  |
| How will newcomers be introduced into the community? |  |
| **Practice Questions  Goal**: To design the community in a way that it becomes an effective knowledge resource to its members and to other constituencies that may benefit from its expertise. | |
| What outcomes do we want to focus on? |  |
| How will community actions result in outcomes? |  |
| What small short term victories do we want achieve? |  |
| What big long term victories do we want to achieve? |  |
| What knowledge to share, develop, document? |  |
| What kinds of learning activities to organize? |  |
| How should we use collective learning, versus expert-apprentice, versus external research/expertise? |  |
| How should the knowledge repository be organized to reflect the practice of members and be easily accessible? |  |
| When should processes be standardized and when are differences appropriate? |  |
| What development projects should the community undertake? |  |
| What potential work groups could be created? |  |
| Where are the sources of knowledge and benchmarks outside the community? |  |
| How should we support members as both experts and learners? |  |
| What are the benefits for members? |  |



# **(RE)LAUNCHING YOUR COMMUNITY | MODULE 3**

## 1 From Inputs to Outcomes

In order to make sure that a community delivers value, first you have to decide which **Outcomes** you would like to have as results of your community's activities.

Once you have decided the Outcomes, you also have to think clearly about the **Inputs** and the **Outputs** that are necessary to obtain those outcomes.

NOTE: Your Outcomes should be aligned with each Short/Long Term Value you decided on (for Members and the Organization) using the Value template

**Inputs/Outputs/Outcomes Template**

|  |  |  |
| --- | --- | --- |
| **Inputs/Outputs/Outcomes Template** | | |
| **Inputs** | **Outputs** | **Outcomes** |
|  |  | <Start with Outcomes> |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Inputs/Outputs/Outcomes Example**

|  |  |  |
| --- | --- | --- |
| **Inputs/Outputs/Outcomes Template** | | |
| **Inputs** | **Outputs** | **Outcomes** |
| Hours worked | Connections created | Solutions sets created |
| Blogposts written | Unique comments | Projects impacted |
| People invited | Discussions occurring | Practitioner hours saved |
| Conversations initiated | Discussion depth | Support requests deflected |
| Platform management | Files shared | New business sourced |
|  |  |  |

**Example Metrics**

When thinking about inputs and outputs, you should think about how you will measure them, that is, what metrics you will use. Here are some examples, both Quantitative and Qualitative.

**Quantitative**

|  |  |
| --- | --- |
| Blogposts written | Comments on blogposts |
| People invited | People joining |
| Conversations initiated | Connections created |
| Page views | Time on page |
| Likes | Unique comments |
| Discussions | Posts |
| Questions | Responses to questions |
| Time to respond to questions | Solution sets created |
| Course units completed | Courses completed |
| Certificates awarded | Support requests deflected |
| Practitioners supported | Practitioner hours saved |
| New business sourced; | Solutions shared with other practitioners |
| New ideas generated | New ideas implemented |
| Clients and Partners involved in solutions design | Solution designs adopted |
| Discovering mistakes made and avoiding their repetition in the future | Quality improved and costs reduced via peer review of each other’s works |
| Increased overall satisfaction; Increased satisfaction with specific program parameters | Net Promoter Score (NPS) |
| Number of participants in working groups | Number of people speaking up at a meeting |
| Number of documents uploaded | Number of documents shared |
| Numbers of unique participants in various areas in the community | Tweets and retweets |

**Qualitative**

* Sustainable Innovation and Improvements in Products/Services via crowdsourcing
* Broader framing of development challenges and better translation of solution sets into local contexts
* Specific projects impacted in terms of validation and quality assurance
* Captured members/practitioners stories that demonstrate the casual links between inputs generating community activities, outputs, and outcomes (supported by quantitative measures in terms of documents and ideas shared on the online platform, and positive feedback received)
* Anecdotal success stories

## 2 Convening Venues

Each community uses a combination of convening venues to create opportunities for its members to interact in person and online: email, audio and video conferencing, webinars, events; BBLs, and online platforms. Choose a combination of convening venues you plan to use for your community, including how you might combine them so that they reinforce one another, for example, an online Learning Circle after a training event, or follow-up online discussions and after a conference.

**Convening Venues Template**

|  |  |  |
| --- | --- | --- |
| **Convening Venues Template** | | |
| **Category** | **Type** | **Details** |
|  |  |  |
| **In person** | Regular meetings |  |
|  | Major events |  |
|  | Training |  |
|  | Other |  |
|  |  |  |
| **Virtual face to face** | BBLs |  |
|  | Webinars/Training |  |
|  | Teleconference |  |
|  | Other |  |
| **Platforms** | Web site |  |
|  | Collaboration |  |
| **Social Media** | Linkedin |  |
|  | Twitter |  |
|  | Flickr |  |
|  | Youtube |  |
|  | Facebook |  |
|  | Other |  |
| **Online tools** | Email |  |
|  | Jabber |  |
|  | Other |  |
|  |  |  |

**Convening Venues Example**

|  |  |  |
| --- | --- | --- |
| **Convening Venues Template** | | |
| **Category** | **Type** | **Details** |
|  |  |  |
| **In person** | Regular meetings | Biweekly meetings in DC with Core Group |
|  | Major events | * Bi-annual managers meeting (rotating locations) * Annual conference in DC * Professional Association Conference (in NY and internationally) |
|  | Training | Ad hoc corporate-provided training opportunities |
|  | Other | Monthly social events |
|  |  |  |
| **Virtual face to face** | BBLs | Monthly BBLs (program agenda to be created) |
|  | Webinars/Training | Bi-monthly CoP-initiated online training events |
|  | Teleconference | Weekly teleconference including country offices |
|  | Other |  |
| **Platforms** | Web site | WBG corporate web site |
|  | Collaboration | CoP site on Spark |
| **Social Media** | Linkedin | Join existing related group(s) on LinkedIn |
|  | Twitter | Use at major events |
|  | Flickr | No |
|  | Youtube | No |
|  | Facebook | No |
| **Online tools** | Email | Email groups |
|  | Jabber | No |
|  | Other | Ad hoc polls on the CoP site |
|  |  |  |

## 3 Core Group Onboarding Activities

The first members to use the main convening venue you selected should be your Core Group members. This is particularly important when the convening venue is an online platform. You should make sure that you train your Core Group members to make sure they know how to use the venue you have selected, particularly the platform.

Together with your Core Group members, you should also select a number of initial activities to make the Core Group comfortable with the platform and also to create initial content and engagement within your community. These activities should last until the Core Group is comfortable with the platform (around two weeks). Use the following template to select the activities you are going to use to onboard your Core Group members. Include why you chose them and how they might be combined. Use, replace, delete, and augment, as appropriate for your community.

|  |  |
| --- | --- |
| **Core Group Onboarding Activities Template** | |
| **Activity Areas** | **Your Activities** |
| Kick off meeting |  |
| Community description |  |
| Initial topics to tackle (governance, netiquette, etc) |  |
| Meeting schedule |  |
| Community Charter |  |
| Platform Training (how and when) |  |
| Content planning (identify topics and possible contributors) |  |
| Initial content creation |  |
| Online collaboration site - home page design |  |
| Training offerings |  |

## 4 Community Description

The community description is the first presentation of your community to a visitor. This is particularly true for closed and private communities where visitors can see only the community description before becoming members. The goal of the community description is to convert visitors into members by attracting your target audience to join.

Try to use around 50 words (think of an elevator pitch). Your description should cover three core and possibly two more optional points.

|  |  |
| --- | --- |
| **Community Description Template** | |
| **Guidelines and Examples** | **Your Community Description** |
| **1. Welcome the visitors (OPTIONAL)**  E.g. “WELCOME!” “*Welcome to the ACU – the Africa Credit Union community of practice.”* |  |
| **2. State who your community is for**  E.g. “*This is the dedicated space* for *credit union experts and professionals in Africa*” |  |
| **3. Describer your audience’s specific needs and challenges**  E.g. “*Here you can find resources and advice from peers and other experts that will help you save time and be more efficient with limited resources”* |  |
| **4. State the concrete benefit the community offers to prospective members**  E.g. “*As a member of a community of top experts in the field, you will have access to the latest innovations that will help you deliver better products to your clients”* |  |
| **5. Outline the big vision? (OPTIONAL – Only if it fits/makes sense)**  E.g. “*Together we will make finance more accessible and lift thousands of people out of poverty,”* |  |



# **PLANNING FOR YOUR NEXT 3 MONTHS | MODULE 4**

## 1 Create your CM Calendar for the First Four Weeks

A high-level community calendar helps you plan the major activities for a specific timeframe like a year or to the end of the financial or calendar year. This type of calendar should be produced collaboratively by the Core Group.

You should also create a detailed content calendar especially for the first four weeks specifying what activities are going on in the community and what content is to be produced and distributed, for example, a blog post every Thursday afternoon. As your community progresses, you should be able to ascertain what content resonates with your members, in what format, and at what times (morning, evenings, weekends, and so on)

In this phase, the first four weeks, the focus should be on growth, moderation, and influence/relationships in particular. However, feel free to expand based on your community's unique characteristics. Events would also be posted on a traditional but shared online community calendar, where members can advertise other events.

**Community Manager Content and Activity Calendar Template**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Community Manager Content and Activity Calendar Template** | | | | | |
| **Content Theme** | **Content Type** | **Author** | **Date** | **Event** | **Notes** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**Community Manager Content and Activity Calendar Example**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Community Manager Content and Activity Calendar Template** | | | | | |
| **Content Theme** | **Content Type** | **Author/Owner** | **Date** | **Event** | **Notes** |
| **Industry Trend** | Blog | Xaviar Gomes | Friday dd/mm/yyyy | NA |  |
|  |  | CM |  | Community roundtable |  |
| **AMA** | Post | Lena Prothinko | Mon to Thurs dd/mm/yy | E-discussion | CM to facilitate |
|  |  |  | Thursday dd/mm/yy | Panel discussion | Core group member to facilitate |
| **Industry job postings** | Wiki document | CM | Friday dd/mm/yyyy | NA |  |
| **Member update** | Announcement | CM | Daily |  |  |

## 2 Welcome Message

The welcome message is your first interaction with a new member. The goal of the welcome message is to get a member to take a specific step. Try to use around 50 words (think of an elevator pitch). Your description should cover three, or possibly four points. It’s important that you know who you are talking to so that you can choose the **right tone**.

|  |  |
| --- | --- |
| **Welcome Message Template** | |
| **Guidelines and Examples** | **Your Message** |
| **1. Address the person personally whether formally or informally**  E.g. “Dear Director Garcia”, “Dear Mr. Jones”, “Dear Maria”, “Hi Camilla”, “Ivan!”...*.”* |  |
| **2. Welcome the new member to the community and express your honor/pleasure/excitement**  E.g. “Welcome to (name of community). I am very pleased that you are joining us.” “Welcome! I’m so excited that you are joining us!” |  |
| **3. Say something that you know the new member is interested in and relate it to the scope of the community (OPTIONAL – Only: in early stage/if person matters particularly to the community)**  E.g. “I read your recent blog post on the water sanitation project you are working on in Honduras and found it very stimulating. We have several members who have experience in this field who might help you with some of the challenges you are facing.” |  |
| **4. Have a clear call to action (CTA) with a link – Ideally have one call to action and not more than two**  E.g. “We are having an engaging e-discussion on water sanitation that you will find very interesting. Please, share your experience [link]” “Next month/week we will have a conference/webinar on water sanitation that you might want to consider attending. Here’s where you can find information and sign up [link]” “We have a new members’ area; here’s where you can find information on how to participate in the community [link]” |  |
| **5. Ask the new member to introduce herself/himself to the community (OPTIONAL – If you have a “new members section” or an “introduce yourself” thread. Do NOT do if you already have two calls of action!)**  E.g. “Please, introduce yourself to the community so that we can get to know you [link]” |  |
| **6. Let know that you are reachable**  E.g. “If you have questions or need assistance you can always reach me at….” |  |

## 3 Community Charter

After you have analyzed the community landscape for your domain, identified and discussed with your Core Group, your community’s value and your member characteristics, needs, and motives, you'll be able to draft your community's charter.

|  |  |
| --- | --- |
| **Community Charter Template** | |
| **Background and Purpose** | |
| What is the business context in which the Community of Practice would be operating and why you have chosen to create a CoP?  What is the business need that this CoP addresses?  What is out of scope?  What is the primary (but not exclusive) scope the CoP will focus on: practitioner support, business support, learning, innovation, or coordination?  What are the goals?  What are the SMART (Specific, Measurable, Action-oriented, Realistic) objectives for the first FY?  What are the benefits for the members and for the organization and its clients?  How will the CoP’s objectives be negotiated and agreed upon with members? |  |
| **Membership** | |
| Is membership open, closed, or something in between?  Is it limited to one WBG entity, WBG internal staff only, is it a mix of WBG staff and external audiences (clients, partners, private sector, Government agencies, academia, field experts, etc.), or is it mostly for an external audiences?  How will you recruit a core group of members and attract new members? |  |
| **Operating Model (Community Organization)** | |
| How will the CoP be organized and run?  Who will take on the key Core Team roles: sponsor, leader(s), community management professional(s), KM adviser?  How much time they need to dedicate?  How will decisions be made?  Any potential work groups/ projects and who will lead them |  |
| **Behaviors** | |
| What are the desired behaviors for the CoP (trust, respect, collaboration, reciprocity, network/idea/resource sharing, goal alignment, listening, open & honest discussions, etc.)?  What strategy (tools, facilitation norms, incentives) will you use to generate these behaviors?  How will you and the Core Team and Core Group conduct yourselves? |  |
| **Resources** | |
| Budget, IT and support resources required.  Fixed costs and variable costs, including staff and consultant’s time, events, collateral, etc. |  |
| **Key Topics** | |
| Specify focus areas and whether there is a relevant “body of knowledge”.  What are the key issues/challenges the CoP will address?  What is the minimum common understanding members need to have? |  |
| **Platform and Other Convening Venues** | |
| Will there be face-to-face interaction? In what form (meeting, BBL, panel discussion, conference, workshop, etc.) and how frequently?  What other convening venues will the CoP use (e-mail distribution list, AC/VC, webinars, etc.)  Will the CoP have an online collaboration platform? Will this be Spark or C4D, or something else?  How will communications with members be managed? |  |
| **Measurement and ROI** | |
| What are the desired outcomes and how will you measure them?  What are the inputs and outputs that will lead to the outcomes and how will you track them?  What quantitative and qualitative metrics will you need?  What CoP health and maturity indicators will you use? |  |