

The WBG Community of Practice Toolkit

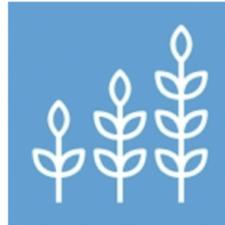
A resource kit to help you build impactful Communities



**LEARN COP
FUNDAMENTALS**



**START A
COMMUNITY**



**DEVELOP A
COMMUNITY**



**INCREASE
MEMBER
ENGAGEMENT**

About the WBG Community of Practice Toolkit

The [Community of Practice Toolkit](#) is a collection of knowledge articles, practical examples, checklists, templates, and other resources to help community managers develop impactful Communities of Practice (CoPs). It is a knowledge product published by the World Bank Group in 2021.

The Toolkit consolidates the experience and learning of [Communities Reinvented](#), a program and team of the World Bank Group which enables teams and departments to create and sustain Communities of Practice in a way that fosters learning, collaboration and innovation to drive real development impact.

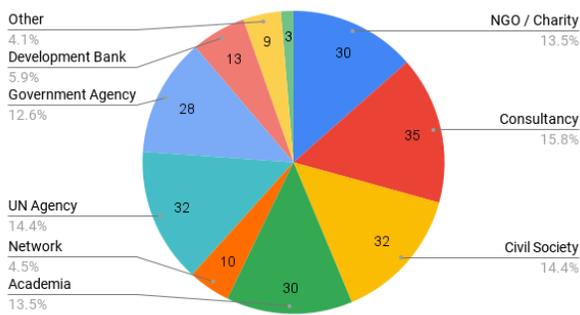
Share this document and the Toolkit with your networks: the Toolkit is a public resource published under a [Creative Commons Attribution 4.0 International license](#). It is aimed at helping anyone interested in building Communities of Practice with a focus on International Development.

Frequently Asked Questions about Communities of Practice (CoPs)

On 24 June 2021, KM4Dev - a global community of international development practitioners interested in Knowledge Management - hosted [an informative session](#) organized by the WBG in collaboration with IFAD, to create awareness of the community building tools available in the Toolkit, and to share practical advice and tips. More than 200 participants registered for the session, representing 156 organizations from 43 countries.



Participants from 156 organizations



Participants from 43 Countries

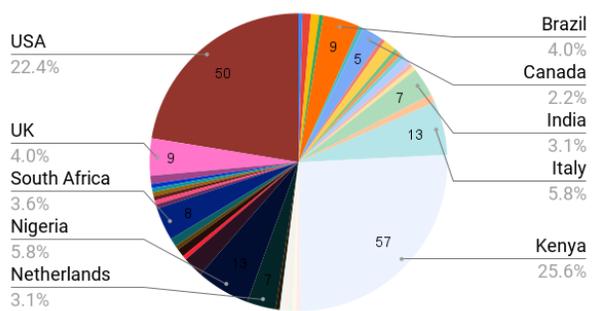


Fig 1: A breakdown of the participants who registered to attend [KM4Dev's Knowledge Cafe: "Discover the WBG CoP Toolkit: A Resource Kit to Help You Build Communities of Practice"](#) which took place on 24 June 2021..

More than 150 questions were submitted through the registration form. The questions were analysed and grouped into 5 topics.

Distribution of clustered questions (excl. "Other" category)

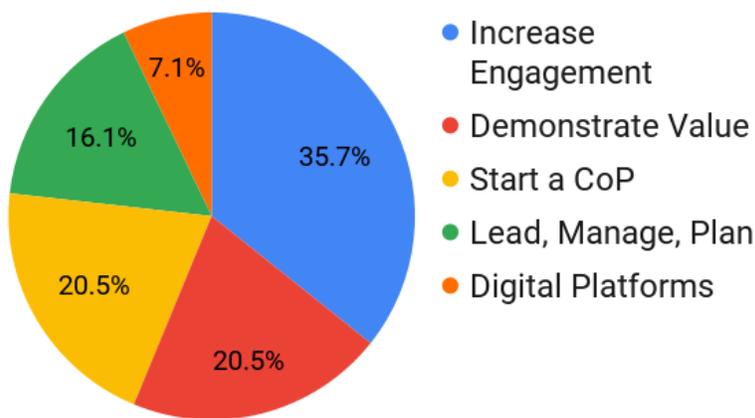


Fig 2: Distribution of questions by topic area.

This document provides advice and practical tips covering each of the 5 topics, plus an additional section providing answers to questions that could not be captured under any of the topics.

In alternative, you can [navigate the same FAQs on a webpage](#) directly on the WBG CoP Toolkit.

If the answers to the FAQs are not sufficient and you need more help such as peer-support, ask a question on [Communities4Dev](#), a Community of Practice bringing together CoP enthusiasts with the purpose of helping each other develop impactful CoPs in the International Development sector. If you need ad-hoc support such as coaching and training, [ask a question on Communities4Dev](#) indicating that you need support, and a certified trainer will respond.

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How do you create, maintain, and reinvigorate engagement in a CoP?

Think high level first before considering tactics

Revisit the 3 main pillars of your CoP: Purpose, People, and Practice.

- **Purpose** - Do you have the right subject matter for your audience and what are your objectives, or did you have the right ones but have they now changed?
- **People** - Do you have the right membership for your CoP and do you understand their needs?
- **Practice** - Are you meeting in the most relevant convening venues? Are you meeting where your members want to meet? Are they receiving information at the right time and in the right format?

Relevant articles from the WBG CoP Toolkit

Read: [CoP Framework](#)

Think of member engagement for activities in general on three levels:

- **Strategic level:** the purpose of the activity and the members you wish to engage
- **Design level:** with the purpose and members in mind, how do you design the activity itself
- **Execution level:** now that you have thought through the design, what are the necessary logistical steps you need to take to run a successful community activity.



Relevant articles from the WBG CoP Toolkit

Read the dedicated [Engagement section](#) in the CoP Toolkit with a further explanation of this approach and lots of practical ways to build engagement (See the Specific Engagement Tactics section following.)

Choose specific engagement tactics

Here are some specific KM techniques that you can use to stimulate engagement:

Relevant articles from the WBG CoP Toolkit

Read: [Staging Engagement](#), [Organizing a Community Roundtable](#), [Organizing a Peer Assist](#), [Organizing a Fishbowl](#), and [Organizing an E-Debate](#).

Make your content social

Create content that stimulates collaboration such as @mentions, questions, requests for comments and so on. @Mentions are especially important - they not only increase engagement, it makes members feel good to be recognized in this way. It adds to their reputation in the community and adds to community spirit.

Relevant articles from the WBG CoP Toolkit

Read: [Creating Social Content](#) and [Sense of Community](#)

Model what you want to see mirrored

The champions and leaders and members of the Core Team and Core Group are key to modeling the behavior you want to see in your members and to drive engagement. Make sure that content is posted on your platform and drive people there to read it. Make your community the go to place for announcements and content.

Relevant articles from the WBG CoP Toolkit

Read: [Core Team](#), specific [Roles in a CoP](#), [Core Group](#)

You can achieve engagement without a KM Lead

Not many CoPs have a dedicated KM Lead. it's a shared responsibility, it's a collective responsibility to provide those communication, facilitation, and other KM best practices. However, you might be able to secure KM advice from your organization's KM team (if it has one), or Knowledge Managers based in other departments.

Relevant articles from the WBG CoP Toolkit

Read: [Core Team](#).

Achieving engagement within a specific country context

Think local, use local language if possible. Make it specific to and timely for that country or region. Identify member needs within the country. Use local changes in policy, regulations, events and other newsworthy items to drive engagement within the country.

Relevant articles from the WBG CoP Toolkit

Read: [Member Needs](#)

How do you define and demonstrate value, and secure sponsorship/support from senior management?

To identify value to members, Identify member needs

A successful Community is one that provides value to its members by addressing whatever needs they have and challenges they face. You can identify what members need through surveys, and especially on more in-depth one-on-one interviews, You can also build on the expressed needs of the Core Group who ideally are an active and representative sample of your members. You can also identify what content resonates with members: for example, what blog posts get the most views and comments, what pages in the website are visited most, what questions are asked most, and which events are attended most.

Relevant articles from the WBG CoP Toolkit

Read: [Definition of a Community of Practice](#), [Member Needs](#), [Shared Value](#) and [Core Group](#)

To identify value to the organization, Identify the problem the organization is trying to solve

Value to the organization and senior management, leaders, and funders, will depend on what problem it is trying to solve: for example, are constituents working in isolation and there is a lack of communication, or is the problem that knowledge products are not getting out into the field or if they are getting out into the field they are not being adopted? The value to the organization will be the extent to which the Community can ameliorate or address these problems.

Where member value overlaps organizational value is called “shared value.” Maximizing shared value will give your CoPs the greatest chance of success.

Relevant articles from the WBG CoP Toolkit

Read: [Shared Value](#) and [The Business Case for a CoP](#)



Use stories also to show value to senior management

An Impact Story should be simple, emotional, human, relevant, enables to audience to self-identify, results in repetition, behavior change, and lasts long past the original telling. Stories are important because they add a human and emotional factor which has far greater impact than simply the raw data. It is important to gather Impact Stories at each stage of the value-creation process as it helps show the value of CoPs, which in turn helps secure ongoing support, including funding.

Also, once you gather sufficient qualitative data from stories, you can start to aggregate that qualitative data into quantitative data.

Relevant articles from the WBG CoP Toolkit

Read: [Creating Impact Stories](#), [Impact Evaluation](#) and [Reporting](#).

How do you start a CoP?

Think first about the 3 main pillars of your proposed CoP: Purpose, People, and Practice before considering tactics

Ask yourself:

- **Purpose** - What do you want to talk about and what are you trying to achieve?
- **People** - Who is your target audience and at this beginning stage, what do you think are your member needs? (Later on you will validate these assumptions.)
- **Practice** - Where do your members meet, in-person and online? How and where do they normally get their information? How are you going to capture that tacit knowledge? How are you going to distribute it? What platforms are you going to use?

Relevant articles from the WBG CoP Toolkit

Read: [CoP Framework](#)

Follow the Five Musts of a CoP

The Five Musts are five essential community building principles:

- Know your members
- Define value - both value to members and value to the organization
- Plan and define a strategy
- Decide roles and responsibilities
- Set up a process to test, measure, and iterate

Relevant articles from the WBG CoP Toolkit



Read: [The Five Musts](#), [Member Needs](#), [Shared Value](#), [Roles in a Community of Practice](#), and [Core Group](#)

Start small, test, learn, and iterate

A Minimum Viable Community is the minimum you need to start a Community of Practice. Starting with a Minimum Viable Community gives you something tangible you can experiment with. Start by bringing together a few partners or allies and fleshing out the basic concepts of your Community of Practice, based on Purpose, People, and Practice and the Five Musts. Try It out, test it, see what resonates and what doesn't, and iterate.

Relevant articles from the WBG CoP Toolkit

Read: [Minimum Viable Community](#), [CoP Sprints](#), [CoP Framework](#), [The Five Musts](#), and [CoP Sprints](#).

How do you lead, manage, and plan the work of a CoP?

Think distributed leadership, foster champions, and plan for succession

Community is a team sport. It needs to have many contributors. The World Bank initially starts with a 2- or 3-person Core Team that sets the initial strategy and begins the work of starting a minimal viable community. Next a Core Group is formed, which can be of any number but is usually of around 5 to 12 people. This is the Group that contains the most passionate members of the community - here is where the community champions are.

At some point, the Core Team may decide that it needs a Community Manager - a person dedicated to the running of the community, but there are several other leadership roles such as Community Leader, Community Sponsor, Technical Expert, Knowledge Management Advisor, Communications Advisor, and Administrative Support. Having several different assigned roles encourages greater buy-in and ownership of the success of the Community.

There does not have to be a separate person for every role. One person can take on several roles and roles can also be filled on an intermittent basis by advisors from different departments such as Knowledge Management or Communications.

A quick word about succession - often communities will fail when the initial enthusiasts leave the community (promotions, different jobs, different companies and organizations, extended vacations or missions abroad). Your most active members will also experience burnout, so it is important to have backup people for each of the different roles especially the Community Leader and Community Manager and to be nurturing the next iteration of the Core Team and Core Group. People will leave so it's important to plan for them leaving.

Relevant articles from the WBG CoP Toolkit

Read: [Core Team](#), [Core Group](#) and [Roles in a Community of Practice](#)

Planning the work: regular cadence vs opportunistic timeliness

A useful tool for planning the regular work of the community is the 30-60-90-Day Action Planning Framework. It is an approach that enables you to plan your community activities over the short and medium term, that is, over the next 30, 60, and 90 days.

Dividing activities into chunks makes planning more manageable and ensures that longer term activities do not get delayed or overwhelmed by a lot of short-term activities.

Planning the activities of the community establishes a regular rhythm or cadence of the community: a weekly meeting, a Friday water-cooler social event, a bi-weekly webinar, a monthly newsletter, the large annual event. It shows people what to expect and where they are expected to show up.

On the other hand, doing the same thing repeatedly can get boring and stale, so it is always useful to be opportunistic and take advantage of current events: a speaker that has become available, a new policy announcement that would benefit from discussion, new regulations that need the analysis of the community and also the events and conferences of allied professions and communities all provide interest and relief from the regular activities of the community and help keep it fresh for members.

Tools that can help you with your planning include activity, content, and editorial Calendars. An activity without a due date is just an aspiration, so dates need to be assigned to each activity and a calendar is a simple and familiar format to plan those activities and communicate those dates.

Relevant articles from the WBG CoP Toolkit

Read: [Action Planning](#) and [Calendaring](#)

How do you choose a digital platform and what are different tools used for CoPs?

Think people first before tools

When choosing an online tool, carefully consider the readiness of the team or department, familiarity with the tool, resistance to the tool. As with all good change management, check with others, and warn, prepare, and include people in the decision so that the best tool for the task is chosen. Understanding what you want to accomplish, members' motivation, and the collaboration goal that you're trying to achieve will help you choose the best tool for the task.

Tools you will want to investigate further

The World Bank Group uses several online collaboration tools including Microsoft Office 365, Yammer, Teams and the [Collaboration 4 Development \(C4D\)](#) platform. Other development organizations may use other popular tools and platforms, hosted, in-house, and open source, to enable online collaboration.

Additionally, communities can be built on Social Media platforms such as Facebook, LinkedIn, Twitter, Instagram, and so on. While these tools are widely available and many people are on them and very familiar with them, one of their big drawbacks is data: the data belongs to the companies, analytic tools are not always available, and access to the data is often restricted. Access to the data of the community should be an important part of your selection.

It will also not be a one tool solution. There will be different tools for meetings, events, learning and training courses and classes, and other online collaboration interventions. Hence, the need to set up an ecosystem of tools and platforms that enable practitioners to work together, and the pandemic has made us all acutely aware of the need for such systems.

Relevant articles from the WBG CoP Toolkit

Read: [Choosing Online Platforms and Tools](#)

Other questions

Question: I am particularly interested in **metrics for impact** that CoPs may have on the external world, (e.g. how they may be moving the needle with their climate campaigns), and how these impact metrics may be related to internal CoP indicators so they may become more impactful over time.

You can think of metrics on two levels: metrics around the health of the community, and metrics that show you are having an impact on policies, programs, and of course, beneficiaries. Of course, all impact metrics are based on your theory of change, that is, you will achieve certain objectives by performing certain activities.

Think about what you can measure, by when, either quantitatively or qualitatively. Examples:

- How many views or impressions have you made each quarter? Quantitative
- So what changed this quarter, as a result of those views or impressions? More than 80 new Members joined and took 28 Actions? Quantitative
- New members were surveyed at the end of the month? Would you recommend this community to a colleague? Yes/No, If Yes or no - Why or Why not? Mix of why or why not? Mix of Quantitative and Qualitative.
- Ask a couple of demographic questions... Kindly check the box that matches your age range __20 to 25, __ 26 to 30, __ 31 to 35...; How did you first learn about our community.... This allows you to compare segments of members. Quantitative and Qualitative



- Establish internal CoP indicators - Benchmarks at the beginning of the year, then measure progress against these benchmarks each quarter. Quantitative
- What was the most memorable CoP Activity or Action that you were involved in this quarter, and why? Qualitative.
- How is our community moving the needle with our climate campaigns? Qualitative.

Relevant articles from the WBG CoP Toolkit

Read: [Theory of Change](#), [Community Metrics](#), [Impact Evaluation](#), [Impact Stories](#) and [Reporting](#), [Shared Value](#)

Question: How do I increase **inclusivity** in my CoPs?

Communities are a great way to ensure both diversity and inclusion, diversity being about the what, focusing on the makeup of your members; inclusion, on the other hand, being about the environment and culture that enables all members to participate and thrive. This issue relates directly to being able to create a Sense of Community, which has four components: membership, influence, fulfillment of needs, and emotional connection, ensuring that all members have a voice and that each voice is heard. It also relates to how you segment and recruit and onboard your members ensuring that your community pitch is not “tone deaf.”

Relevant articles from the WBG CoP Toolkit

Read: [Sense of Community](#), [Segmentation](#), [Personas](#), [Community Pitch](#), [Member Onboarding Journey](#)

Question: How do I coordinate several CoPs in global health in **different languages**?

Question one, will your CoP be convened in one or multiple languages?

- If you are using a community platform, can the registration page auto-translate to more than one language?
- Can members select a primary language for viewing content on your community?
- Is there an auto-translate feature so a member can easily view a translated version of the content? Example, if I speak French I can click one button and the content written in English displays in French, I respond in French and my English speaking colleagues can read my response in French.
- For conferences and meetings is there an interpreter? Do the materials need to be translated? Examples, for a meeting being primarily conducted in English, the PowerPoints need to be translated into Russian and shared ahead of time with Russian speaking participants, you may also need to have an English to Russian interpreter and a Russian to English Interpreter. Interpretation is a feature designed into Zoom Meetings. If you are showing a video in English,



you can either add Russian Subtitles ahead of time, or have the interpreters simultaneously translate the video from English into Russian.

Question: How can we energize a **CoP event**?

Event management both in-person and online is an art and science unto itself. Any event takes a lot of planning, even a small event, and a lot goes into planning and executing an effective Community Event. Consider these three broad principles to guide your thinking:

- Create a welcoming, safe and interactive environment
- Apply the 75/25 rule - design Community Events in such a way that the majority of the time (about 75%) is taken by members interacting with other members and only 25% or less is taken by moderators and guest speakers.
- Keep a good balance between full group engagement and small group discussion

Also, to plan your event effectively, think of the planning process in terms of three separate stages: before (pre), during, and after (post) the event. Before the event you can concentrate on activities like invitations, promotions, and generating excitement. During the event, you can facilitate introductions and “birds-of-a-feather” type gatherings. After the event, you must follow up with posting materials and videos and action items committed during the event.

Relevant articles from the WBG CoP Toolkit

Read: [Designing Effective Events](#), [Event Planning](#), [Organizing an Online Discussion](#), [Creating Social Content](#), and [Staging Engagement](#)

Question: I need to use CoP as a platform for extending our **internal and external partnerships**.

It is common to have Communities of Practice to apply to members internal to your organization and those external to the organization. It is not uncommon to have internal staff interact with external agencies, NGOs, ministries at the political and full-time official level. One of the key issues is confidentiality and trust both from internal to external, and external to internal. You will need to start with the key components of your community: Purpose, People, and Practice to clearly establish what you want to accomplish, especially who is in the community and just as importantly, who is not in the community, and what and what can not be discussed and recorded and posted publicly.

Relevant articles from the WBG CoP Toolkit

Read: [COP Framework](#), [5 Musts of Communities of Practice](#), [The Business Case for a CoP](#), [Stakeholder Analysis](#), [Shared Value](#)



Question: I need to learn different ways of **documenting knowledge** in CoPs, **improve research output**, and how to **share information** coming from CoPs?

We recommend adding a Knowledge Management Advisor to your Core Team or Core Group. Assign Core Team or Core group members to be an active listener, note taker, recorder for each CoP Activity.

If you are planning a eDiscussion, an eDebate, a Community Roundtable, an event with breakout rooms, plenary discussions, and/or interactive chat - then assign one or more individual that are can to take notes along the way and enter questions, questions answered, and key comments in a shared Google Document that Presenters can view during Question and Answer time, and or respond to afterwards as a follow-up to the activity.

Know what your managers or key stakeholders above you need to track and report on, this allows you to provide the information they need on a timely basis. This intelligence may also inform your impact metrics and what you need to record and report to members.

Relevant articles from the WBG CoP Toolkit

Read: [Roles in a Community of Practice](#), [Core Group](#), [Creating Social Content](#), and [Reporting](#)

Question: How do I **grow** a CoP?

Questions are often asked such as “How big is the Community?” or “How many members are there in the Community?” The implication is that bigger is better and that the Community always needs to be growing. However, the first question to ask yourself is whether the Community in fact needs to grow. Not all communities need to grow. *Smart growth* means that you make a conscious decision as to whether or not you should grow your Community, when you grow it and at what pace. This decision should be driven by the Core Team, the Core Group, and ultimately, the community itself. If growth is one of the Community’s goals, there are several approaches to use: direct, word-of-mouth, promotion, and search, or a combination of these.

Relevant articles from the WBG CoP Toolkit

Read: [Smart growth](#) and [CoP Sprints](#)

Question: How can we **introduce a potential CoP to new participants** so they can quickly develop as contributors?

The process you design to introduce a CoP to new participants and help welcome new members to your Community is known as member *onboarding*. Put yourself in your members’ shoes and design the onboarding process in a way that is welcoming and engaging. It is recommended that you invite

members in small waves to allow each “wave” of members to get to know one another and have a more intimate and personable experience with the Community.

Relevant articles from the WBG CoP Toolkit

Read: [Member Onboarding Journey](#)

Question: The "CoP" brand has been around for some time and may carry some **negative baggage** with potential participants and senior leaders alike. What other descriptors or names might be applied to a CoP?

One of the most common alternatives to Communities of Practice, is the term "Network". People instantly understand what a network is, and they are often part of several professional and personal networks. Generally, we have seen the term network used to avoid any negative connotations with Communities of Practice. At the World Bank, there are a set of CoPs named Knowledge Silo Breakers (KSBs). Their name had two advantages: the word CoP is not used, and secondly, their title clearly spells out what their goal is: to break through the knowledge silos in the organization.

Question: I need to understand better how we can use COPs to **answer learning needs** in the organisation and **establish CoPs beyond training**?

Communities of practice are all about learning. They are about learning from peers and fellow professionals in an ongoing and collaborative way. For the community members, it's about them as practitioners getting better at their practice, and one of the key advantages of CoPs is their ability to exchange and capture *tacit* knowledge, something that a formal learning program cannot do.

CoPs are also very useful for following up on formal learning programs answering questions such as how many people adopted the practices they learned in the classroom, what worked, what didn't work, and especially in a development context, who were the best people to contact. CoPs can be an integral part of the learning strategy in every organization.

Relevant articles from the WBG CoP Toolkit

Read: [Definition of a Community of Practice](#)

Question: How do I learn from other CoPs from other countries?

One recommendation would be to join CoPs that are related to your sector and areas of interest and learn directly from the members. For example, UNICEF, the UN, USAID, the World Bank all have CoPs that you might want to participate in - the World Bank hosts [Collaboration for Development \(C4D\)](#), a social collaboration platform with hundreds of Communities of Practice focused on development issues.

Secondly, the [KM4DEV](#) organization has links with many CoPs and I would urge you to join if you are not already a member. Lastly, there are several community management conferences around the world that you could look into. This is a [list](#) of events for community managers from 2019, pre-pandemic. Finally, take some community management training - the class (in person or online) will be filled with community managers that you can learn from.

Relevant articles from the WBG CoP Toolkit

Read: [Ecosystem analysis](#)

Question: How do I learn about building CoPs?

We recommend the following learning resources:

- Explore and read the Articles in the [WBG Community of Practice Toolkit](#)
- Read the publication: “[Building Community: A Primer](#)” (WBG, 2018)

If you are looking for peer advice, join [Communities4Dev](#), a Community of Practice bringing together CoP enthusiasts with the purpose of helping each other develop impactful Communities of Practice in the International Development sector. Should you need ad-hoc support such as coaching and training, [ask a question on Communities4Dev](#) indicating that you need support, and a certified trainer will get back to you.

