Military Operations Research Society
Communities of Practice (CoP) Tutorial

Keeping the Analytical Momentum Going the Year ‘Round
Agenda

• Background
• Function
• Meetings
• Maintenance
• Summary
During the December 2006 MORS Board Meeting, the questions that were asked are:

- Are we collaborating to grow analysts, expand our toolsets, and improve analysis?
- Are we following up to special meetings and reporting back to our MORS Sponsors?

The answer to both questions was:

- NO
The background of MORS is the annual symposium’s Composite Group / Working Group Structure.

Previous MORS Meetings were based on information sharing and not collaborating:
- Annual Symposium
  - Present Papers and exchange business cards
- Special Meetings
  - Work together on selected, specific issues
  - Could be developed from symposium discussions for a one-time event

There was NO opportunity to work together between symposia or after special meetings.
CoP Background: Communities of Interest

• **Community of Interest (CoI) Definitions**
  - DoD’s Net-Centric Data Strategy: A collaborative group of users who must exchange information in pursuit of their shared goals, interests, missions, or business processes and who there must have shared vocabulary for the information they exchange.
  - Commercial: Bringing together stakeholders from different Communities of Practice (CoPs) to solve a particular problem or common concern.
CoP Background: CoI Attributes

- Key DoD CoI Attributes
  - Formed to meet a specific data sharing mission or fulfill a task
  - Composed of stakeholders cooperating on behalf of various organizations, with emphasis on cross-component activities
  - Members committed to actively sharing information in relation to their mission and/or task objectives
  - Recognize potential for authorized but unanticipated users and therefore, strive to make their data visible, accessible, and understandable to those inside and outside their community
CoP Background: Different Types of Communities

- **Five different types of communities**
  - **Interest**: Communities of people who share the same interest or passion.
  - **Action**: Communities of people trying to bring about change.
  - **Place**: Communities of people brought together by geographic boundaries.
  - **Practice**: Communities of people in the same profession or undertake the same activities.
  - **Circumstance**: Communities of people brought together by external events / situations.
Communities of Practice (CoPs) are founded on three primary characteristics:

- **The domain**: An identity defined by a shared domain of interest. Membership therefore implies a commitment to the domain, and therefore a shared competence that distinguishes members from other people.

- **The community**: Members engage in joint activities and discussions, help each other, and share information. They build relationships that enable them to learn from each other.

- **The practice**: Members develop a shared repertoire of resources: experiences, stories, tools, and ways of addressing recurring problems - in short, a shared practice.
MORS members are Operations Research Analyst Practitioners, MORS CoPs were established to:

- Continue discussions from the annual Symposium and Special Meetings,
- Work on any outstanding issues from Special Meetings,
- Document and share best practices and work being done,
- Encourage members to share their best advice,
- Filter out the good from the bad,
- Orientate discussions toward what lies upon the latest & greatest within the sector,
- Provide an opportunity to meet regularly throughout the year,
- Work on projects
CoP Relationship: Symposium & Special Meetings

• **Goal**
  - Per the MORS Organization Manual, each Community of Practice should be tied / linked with one (or more) of the annual symposium’s composite groups (CGs) or working groups (WG)

• **Meetings**
  - CoPs meet regularly throughout the year
  - Mostly virtual, but one face-to-face during annual symposium

• **Personnel: (e.g., linkage between Symposium and CoP)**
  - One of the CG/WG/DWG leadership is the CoP Chair or Co-Chair
  - A volunteer can be the CoP Chair, and if so, they should be a CG/WG/DWG Co-Chair or Advisor
  - A CoP Advisor (can be a past CoP Leader)
CoP Function: Types

• Now that you have considered forming a MORS CoP, what will the purpose be?
  − How can you determine the purpose?
  − By conducting a survey, e-mail questionnaire, and / or kickoff meeting of potential members.

• Once the function is known, then the CoP can be organized to support the purpose, i.e.,
  − Activity / Project Based
    ▪ Organized around activities or projects
  − Sharing Information
    ▪ Organized around sharing information, collaborating with other like groups
  − A Combination of the above
CoP Function: CoP Webpages

• For a complete listing of current MORS CoPs
  − Go to the MORS Communities page at http://www.mors.org/Communities

• There is an overview of each MORS CoP on the MORS Community webpage (right-hand column) and the specific CoP webpages, including the following information
  − CoP Name
  − When the CoP was established
  − Reason the CoP was established
  − CoP meeting frequency / date of next meeting
  − Tie to Symposium / Special Meeting
  − CoP Points of Contact
CoP Function: Example # 1

- **Affordability Analysis (AA) CoP** (an activity / project based CoP)
  - [http://www.mors.org/Communities/Affordability-Analysis](http://www.mors.org/Communities/Affordability-Analysis)
  - Brought together like groups from different professional organizations and communities for collaborating,
  - Drove discussions to include affordability analysis in government policy and law, and
  - Developed the foundation for the first-ever affordability analysis process guide (or thought roadmap)
  ➔ Organized around recommendations from the first AA Workshop
CoP Function: Example # 2

- **Wargaming CoP**
  (a combination CoP)
  - [http://www.mors.org/Communities/Wargaming](http://www.mors.org/Communities/Wargaming)
  - Developed a compendium of Wargaming terms and a Wargamers handbook
  - Established a series of brown bag lectures to share best practices, and
  - Created the first MORS Certificate Program for Wargaming

- Organized around the discussions from the Symposium Working Group and past Wargaming Special Meetings
CoP Meetings: Overview

- Now that you have decided to create a CoP and determined it’s purpose, the next step is to develop the meetings.

- Items to consider include
  - How often will your CoP meet?
    - Monthly, every other month, quarterly, etc.
  - What method will you collaborate?
    - Live or virtual?
    - For virtual: telecom only, GoTo Meetings, etc.
  - How will you communicate results?
    - Updated briefs, minutes, web-posts, etc.
CoP Meetings: Frequency

• When determining how often the CoP will meet, considerations to include are
  – The CoP Members are volunteers and the CoP is a coalition of the willing ➔ they may not have much time to meet
  – Providing time for the activity-based teams to work on their projects between meetings
  – Providing time for briefers to develop presentations to share their work / best practices

• Ask your members at the kick-off meeting for consensus on:
  – How often to meet
  – What day & time to meet
    ▪ Remember about your members in different time zones
When determining how the CoP will collaborate, there are several options:

- Telecom only, sending briefs as read-aheads
  - Must ensure briefs sent out a couple of days in advance
  - Must ensure slide numbers so briefer can let everyone know what slide they are on
- Go To Meeting with telecom or VOIP
  - Can be both telecom and VOIP
1. File sharing (.docx, .xlsx, .pptx, etc)
2. Chat
3. Can do webcam and VOIP
Many managers have found that using slides for these meetings is time well spent. Briefing slides
- Provide a quick written overview of status,
- Help ensure details are “right,”
- Serve as minutes for the meeting after post-meeting updates (if separate minutes are not created),
- Are an easy vehicle for others on the team to make a suggestion, include status reports, and
- Tend to help the leader run an efficient, focused meeting – hopefully resulting in shorter meetings

Goal is for no more than 1 hour (people are busy).
CoP Meetings: Meeting Agenda

- Meetings start and end on time
- An agenda with associated time frames is sent NLT 48 hours prior to the meeting; agenda characteristics:
  - Provide ground rules for Team Meeting etiquette
  - Allow all participants an opportunity to engage
  - Manager should be practiced in meetings management and have interpersonal skills
- Provide a Summary of each section
- Provide a “Summary” of key points, long discussions, tasks and suspenses
CoP Meetings: Communicating Results

- All CoP Members will not be able to participate in all meetings.
- Therefore, to communicate the results of the CoP meetings, the CoP Chair can:
  - Send an e-mail,
  - Post the information on the Community Page, and / or
  - Post the brief and minutes in the CoP Repository,

- **Information to include:**
  - Updated brief based on meeting discussions
  - Meeting minutes with attendees listed, discussions, and actions
CoP Maintenance: Keeping the CoP Going

- Once you have created and started your CoP, how do you keep it going?
- There are several items to know:
  - People
  - Members
  - Leadership
  - MORS Board and CoP Committee Chair
  - Charter
CoP Maintenance: People

• The key to a successful CoP is the people

• First:
  – Remember, the CoP Members are volunteers and the CoP is a coalition of the willing therefore, they may not have much time to meet

• Second:
  – To keep a CoP going, the leadership should be a core team of 2-4 energetic people, interested in the topic, have time available, and the ability to motivate the other CoP Members
MORS CoPs are where a group of common users can exchange information and work collaboratively in pursuit of shared goals, interests, missions, or business processes in a "community" setting.

- Participation helps to ensure their success.
- Participation also provides an enriched experience to the individual through active collaboration with practitioners in their respective communities.
CoP Maintenance: Leadership

- Again, the key is 2-4 energetic people, motivating individuals

- Each CoP shall have a chair, one or more co-chairs, and members
- At the discretion of the CoP, each may have other designated personnel for project/activity leads
- A recommended linkage to annual symposium is:
  - One of the CG/WG/DWG leadership is the CoP Chair or Co-Chair
- Past CoP Leadership stay on as CoP Advisor
Once you have determined the CoP’s purpose, organization, and leadership, it’s time to develop the charter.

Items to include in a charter:
- Background
- Purpose
- Activities / Projects
- Maintenance
- A template is available in the MORS Organization Manual (MOM)

To be an approved MORS CoP:
- The CoP Chair submits the rationale for existence and the charter to the MORS CoP Committee Chair
- The MORS CoP Committee Chair submits the rationale and charter to the MORS Vice President for Professional Development to present to the Board for approval
CoP Maintenance: MORS Board

• The MORS CoP Chairs report to the CoP Committee Chair under the Professional Development Vice President

• The CoP Committee Chair will:
  - Report the status of each CoP to the MORS Board
  - Ensure continued growth and viability of existing CoPs
  - Recommend new CoPs to the MORS Board
  - Recommend dissolving inactive CoPs to the MORS Board
  - Working with the Program Chair and WG / CG Coordinator to ensure each CoP meets in one of the existing Composite Groups/ Working Groups during the annual symposium
CoPs are a result of annual symposium discussions and/or special meeting recommendations that allow like-minded people to meet throughout the year.

CoP’s purpose / function can be:
- Activity / Project Based
- Sharing Information
- A Combination of the Above
CoP members are volunteers and the CoP is a coalition of the willing.

The key to a successful CoP is energetic, motivating individuals in the leadership positions.

CoPs are successful entities that add value to the profession, to MORS-affiliation, and offer the potential to recruit MORS members.
CoP Summary: Questions

• Are you ready to start a new CoP or volunteer for an existing CoP?
• Do you have any questions about maintaining a CoP?
• For more information, please contact MORS CoP Committee Member, Kirk Michealson, FS, at kirk.michealson@1979.usna.com.
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