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REVIEW AND RECOMMENDATIONS FOR PROFESSIONAL COMMUNITY IMPROVEMENT, SUSTAINABILITY, AND HANDOFF

Final Report

August 20, 2009

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REVIEW AND RECOMMENDATIONS FOR PROFESSIONAL COMMUNITY IMPROVEMENT, SUSTAINABILITY, AND HANDOFF

Final Report

USAID JORDAN ECONOMIC DEVELOPMENT PROGRAM (SABEQ)

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INTRODUCTION

As the Professional Communities Initiative concludes at its first stages, and prepares for management handoff from SABEQ to a local organization, feedback from members showed that there is a need to consider re-designing some activities to meet the members' needs and retain attract members and assure sustainability. This report recommends possible PC amendments and new activities to strengthen the PC initiative and its contribution to the enhanced productivity of Jordanian firms. It is divided into four sections and an annex:

- 1) Professional community hand off and sustainability
- 2) Comments on the current status of Professional Communities
- 3) Executive Round Table (ERT) supplemental support options
- 4) Potential additional Professional Community Services
- 5) Capturing and packaging Jordanian specific documents

Annex 1: Rights and Restrictions Guiding Professional Community (PC) Promotional Activity

SECTION I: PC HAND-OFF AND SUSTAINABILITY

Professional Communities (PCs) have the potential to support improved management and the increased productivity of Jordan firms well beyond the duration of the USAID Jordan Economic Development Program (SABEQ). Assuming the Management of Professional Communities presents a distinct business opportunity for one or more qualified Jordanian organizations. This document details the benefits, obligations and overall opportunity of PC leadership to Jordanian local organizations that are potentially interested in assuming overall management responsibility and leadership of one or more Professional Communities. SABEQ will work hand-in-hand for a period of not less than eight months with this/these organizations to ensure that they have every opportunity for success in their efforts leading PC.

Background of PCs

Communities currently support approximately 400 Jordanian professionals, creating a means for these professionals to assist each other, and receive outside support through the transfer of ideas, experiences, and expertise. Professional Communities also provide access to hundreds of reform support resources – captured by PC members themselves and external organizations - that can be easily accessed, understood, and applied by Jordanian professionals. PCs are made up of individuals working in the respective area, and the companies they represent.

Professional Communities consist of live and virtual activities and assistance. Live community events include Community-wide meetings. These events bring community members together to fortify personal relationships, discuss best practices, hear from top local and international experts, and learn about newly available resources and tools. Community sub-groups meet separately in Executive Round Tables to learn about and apply niche topics of interest. Direct assistance is complemented by an interactive web-site that provides an additional meeting place for collaboration, a consolidator of each group's collective intelligence, and a provider of resources and expertise. This virtual (web) assistance makes hundreds of best practice templates, presentations, newsletters, case studies, and other resources available to community members to download, adapt, and use. It also provides a place for community members to interact, assess and adapt reform resources, voice their priorities for support, and connect with like minded peers.

PC Management Principles

The following are fundamental guiding principles that make PCs a success and differentiate them from related other services:

Member-driven: Members determine the focus and direction of their respective communities and community activities. PC leadership should use surveys, polls, and regular dialogue to gauge and respond to the demand of members.

Member-based contributions: PCs members commit to giving back to the community by supporting the advancement and reform initiatives of their peers. Empowered by communities, individuals become proactive agents of their own personal development, and that of the organizations they represent. Each community supports its own, inspiring reformers and underwriting their reforms through the sharing of ideas, experiences, and expertise. PC activity should encourage this as well as capture how international best practices are applied in practice in Jordan.

Market maker: PCs seek to maintain the free and open access and use of all resources developed by the community, to ensure that the community is not co-opted by special interests, and to lead communities in a manner that creates more awareness of other existing services in the marketplace that PC members might value and use. While some restrictions and/or costs apply PCs should allow all qualified local organizations to post their events on the PC calendar and to make their offerings known. PCs are intended, above all else, to create more informed consumers of these outside services, thereby raising the standard for training and business development services in general

Applied Knowledge: PC activities should focus on the practical application of international best-practices, not just theory. While enhancing the skills of members is an important outcome of PC activities, the tangible application of these new skills to the businesses and other organizations in which PC members work, and the increased competitiveness of these organizations, is the main metric of PC success. Organizations assuming leadership of PCs would be expected to uphold these principles. They would also be expected to adhere to the attached Rights and Restrictions Guiding Professional Community (PC) Promotional Activity, which defines that which is allowable and unallowable in greater detail. This may be modified as appropriate over time but should remain true to the original's guiding principles.

Currently Active Professional Communities

Name	Description	Notes
Strategic Management	The Strategic Management community supports organizational leaders to create and implement powerful strategy, and to transform strategy into a competitive advantage. It is divided into the following interconnected sub-communities: <ul style="list-style-type: none"> • Strategy and Implementation • Monitoring and Evaluation • Leadership • Industry 	Industry is a new subcommunity that may spin-off as its own PC
Human Resources	The Human Resources (HR) community supports HR professionals to transform human capital into a competitive advantage for the organization. It is divided into the following interconnected sub-communities: <ul style="list-style-type: none"> • Recruitment & Selection • Training and Development • Performance Management Systems • Employee Welfare and Retention 	
Trade and Export Development	The Trade and Export Development Professional Community supports the private sector leaders to streamline and simplify their exporting and importing procedures, evaluate the costs and benefits of international trade and marketing opportunities, and identify promising approaches to achieve these opportunities. The community is divided into the following interconnected sub-communities: <ul style="list-style-type: none"> • Import & Export opportunities • Trade capacity building • Trade advocacy 	Managed in practice as a subcommunity of Strategic Management

Public Sector Policy, Service, and Performance	<ul style="list-style-type: none"> The Public Sector Policy, Service & Performance Professional Community assists public servants to improve their roles as regulators and service providers to businesses. The community supports government managers and employees to create a transparent and predictable business environment, and to become enablers of private sector driven economic growth. It is divided into the following sub-communities: Business Policy Regulatory Reform Customer Service Performance incentives 	This PC is new and 'under construction'
Economic Media Reporters	<p>The Economic Journalism Professional Community supports journalists and public relations professionals???? to Improve the Jordanian public's understanding of key economic developments within the Kingdom. The media will play a key role in enhancing this capacity as well as establishing a continuing dialogue between the public and the private sectors. While the media is active, it appears to lack the necessary foundation in economics to play this role effectively. The community is divided into the following interconnected sub-communities:</p> <ul style="list-style-type: none"> Specialized Economic Issues Media General Skills 	
Business Process Outsourcing	Pending – Potential PC (description pending)	
Environment, Water, Energy	Pending – Potential PC (description pending)	

Sustainability Plan

SABEQ will support PC members who wish to continue professional communities that are providing considerable value. This is defined as the number of active members in a given community and the number of reforms attempted by PC members.¹

Per the underlying principles of Professional Communities, PC members will choose which organization assumes post-SABEQ PC leadership. Interested Jordanian organizations will be given the opportunity to make a 'sales pitch' to active PC members as to why they should be chosen to lead the community moving forward. Active PC Members will be invited to serve as de-facto shareholders in deciding which organization will assume PC leadership. With PC member support, SABEQ will publicly offer the opportunity to lead PCs to Jordanian Private Sector companies and Non-profits (i.e. business associations, universities). Prospective offers will be invited to vie for leadership of an individual PC, or all PCs combined.

¹ PCs with 75 active members and 50 total reforms attempted per year (based on what?)

SABEQ will also support successful communities to create by-laws so as to allow the community to weigh in on community leadership and change it if necessary every couple of years. These bylaws would also maintain minimum requirements for community leadership, such as the requirement to maintain the free and open access and use of all resources developed by the community, and restrictions that ensure that the community is not co-opted by special interests.

Benefits to organizations vying to assume PC leadership

Assume ownership of a distinct service, potential revenue generator: PCs are a distinct service offering that have already attracted 400 (albeit non-paying) members and a current growth rate of just under one member per day. 30.7% of these members are considered either 'active' or 'highly active'. Ownership will include all PC information and management tools including the PC web portal, PC Customer Resource Management (CRM) system, the PC newsletter, recent PC brand positioning and marketing strategy, member communication formats and examples, and applicable sections of the PC management manual, and other valuable resources that support the successful operation of PCs.

Take ownership of the PC brand: The PC brand will be cobranded as a distinct service under the name of the organization assuming leadership. This co-branding will extend awareness, and create an avenue for ongoing communications of an organization's affiliated products and services to approximately 200 Jordanian firms. However, organizations must commit to maintaining 'market maker' principle of PCs. In practice, this means allowing and encouraging other Jordanian private and not-for-profit organizations with relevant content, services, and expertise to make this available to PC members on the PC calendar and in relevant events.

Rights to value-added content from 30+ international organizations and Jordanian PC members Successfully led PCs generate valuable resources such as articles, case studies, and fact-briefs that detail the experiences of Jordanian firms applying international best practices and confronting diverse management challenges. The Jordan PC web portal houses and provides direct links to relevant, high-quality, international content. International content is uploaded regularly to ensure that content available to PC members remains current and cutting-edge. Rights to this content are limited to the rights that SABEQ subcontractor The Kaizen Company was able to secure for their use in Jordan. Kaizen will disclose full information on these rights and their limitations upon the transfer of each PC.

Regular web portal updates and opportunities to develop and pilot additional new-to-Jordan services: The number of international resource partnerships is continuing to grow and will continue to do so indefinitely. So too will the type of services that these international partners make available to local lead organizations. PC lead organizations will have the opportunity to 'sync' with the international site, adding both new content and services to their Jordanian PC members as they see fit. While access to this content will be for-free, the lead organization must also be willing to 'trade' Jordanian-specific content that is generated through PCs. Additional PCs in other Arabic speaking countries, once launched, will also create value added content and opportunities for the increased country-to-country sharing of management experiences and lessons-learned. Lead organizations will have the opportunity to form resource and expertise sharing relationships with these related PCs in the future.

Obligations: Management responsibilities and Associated Costs of PC Activities

The following chart describes each of the main PC events and requirements for successful PC management. Organizations assuming PC leadership would commit to the following minimum requirements:

Community Events	Description	Minimum Requirements
Community wide meetings	Forum inviting where all PC members convene to fortify personal relationships, discuss emerging best practices, hear from top local and international experts, and highlight newly available resources and tools.	1 per year per community
PC Portal (www.jordanpc.org)	Interactive community website. Through a link on their desktops, community members can access virtually unlimited resources. The site also encourages community members to comment on which resources they value, view the comments and contributions of their peers, set priorities for additional assistance and community focus, and work together to localize select resources.	<ul style="list-style-type: none">• Review Content for appropriateness and, as relevant, technical quality.• Review and select newly available international resources quarterly from a list of what is available and permissible to use.
Executive Round-Tables (ERT)	Small community sub-groups discuss niche topics of top priority to each specific group.	<ul style="list-style-type: none">• Minimum of 8 per year per community.
Newsletter	Newsletter updating PC members on PC activities, successes, and upcoming events. Also, opportunity to drive members to the PC website.	<ul style="list-style-type: none">• Minimum biannual publication (2x per year) Quarterly preferred.
Content Capture and Storage	Regularly identify, capture, and package content that speaks to the practical application of international best-practices in Jordanian companies.	<ul style="list-style-type: none">• Could be done through relationship with local business school.• Encourage PC members to contribute content

Professional Community Operating Costs

The following estimate anticipated costs for running a community successfully after the USAID Jordan Economic Development Program (SABEQ) hands it off completely:

Total yearly cost estimate (per community) 2: \$28,300

² All costs are in U.S. Dollars unless otherwise specified.

Yearly per-member cost assuming 100 paying community members: \$283

Breakdown of fixed and variable costs to manage and operate an individual community:

Community Activity	Fixed Costs (yearly)	Variable Costs (yearly)
Community-wide Meetings	Estimated cost: \$5,000 Requirements: Meeting space at a 5 star hotel that can hold up to 150 people; availability once per year <ul style="list-style-type: none"> Laptop and data-show, white boards for each meeting Catering for meetings (Coffee breaks, snacks, etc.) Event coordination Basic Printed Materials 	Variable costs: (\$0) <ul style="list-style-type: none"> Outside technical experts or honorary members, per the community's expressed needs, to present or lead discussions <p>*Cost assumes renting meeting space from a 5 star hotel only. Other costs are unlikely as presenters come for free from the community, local firms the community has asked to present (who gain exposure in return) honorary members, or donor funded consultants seconded temporarily from other assignments for one presentation.</p>
Community Portal Management	Estimated Cost: \$300 Requires hosting costs only. Assumes two lead organizations assume PC leadership for two separate PCs.	Variable costs: \$0 Note: International updates and new content will be provided free for the Human Resources, Strategic Management, and Trade and Export Development communities by The Kaizen Company. Costs associated with updates for other PCs must be borne by the organization assuming responsibility. However, Kaizen will coach them on systems for establishing relevant systems
Executive Round Tables	Estimated Cost: \$8000 Cost assumes facilitator costs only (\$1000 per 6 session PC. We may consider adding \$210/ full PC for the cost of coffee and refreshments as well. Requirements: <ul style="list-style-type: none"> Meeting space that can hold up to 25 people 	Variable costs: (\$1000 per ERT)
Newsletter	Estimated Cost: \$0 Template is complete and will be provided. Requires Community Manager time only.	Variable costs: \$0

Community Management	Estimated Cost: \$15,000 Requirements: <ul style="list-style-type: none"> One half-time community coordinator per community One part time (20%) senior community leader to provide oversight 	Variable costs: \$? per PC member We do not have sufficient data on this at this time. However, one can assume that the fees paid by each new member will be sufficient to cover additional management costs.
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PC Revenue Generating Options

Various revenue streams could be used individually or in combination to ensure that communities sustain themselves independent of further donor assistance. These include:

- Membership subscription fees including a \$100 initiation and \$15.25/month³ would cover the basic cost of each PC without additional funding sources. Fees could be born by members themselves or by the companies they represent.
- Sell corporate sponsorship(s) as a form of Marketing or even Corporate Social Responsibility (CSR) to the firms of larger community members or other prominent firms in Jordan. This could generate sufficient revenue and potentially cover minimum community costs on its own. Sponsors could also receive advertising space and or speaking opportunities at select community events.
- Allow consulting firms or training organizations wishing to make new services available to community members sponsor select meetings for a fee, and present their services as part of the community-wide meeting agenda.
- Requiring Jordanian organizations to pay a fee for posting for-fee events on the community online calendar, and/or a percentage of the event cost per each community member that signs up; alternatively, require that organizations posting for-fee events on calendar offer a significant discount to PC members. Such discounts would serve as a promotional point for attracting new members.
- Sell advertisements in the PC Newsletter and/or PC website.
- Allow organizations to request an ERT intervention. Relevant ERTs could take up these interventions and use the organization as a practical case study. Requesting organizations would be requested to pay a fee or make a donation (if a non-profit) to organization assuming PC leadership.
- Charge for participation in individual ERTs (for non-members).
- (Potential) Small SABEQ grant to subsidize the transfer from for-free to for-fee PC membership status. This could include, for example, initiation fee existing members and first six-month member fees, and/or partially subsidized initiation and monthly fees for new members.

Support to Assure a Successful Handoff and Transfer

The SABEQ program will provide full support to organization(s) assuming PC ownership and management. Designated persons from this/these organizations will work hand-in-hand for a minimum of eight months with SABEQ's PC management in order to fully understand how to effectively manage and implement PCs. They will also receive and learn to use all of the aforementioned PC management resources, including tailored PC CRM software, relevant PC guidebook sections, the PC web portal, a PC concept white paper, and extended rights

³ Assumes 100 (active, paying) members for first year. Subsequent year sustainability rates would require an analysis of new member growth and retention rates, or a combination of other possible revenue sources, as listed.

to existing international resource relationships. They may also apply for a small grant to support the initial transfer of PCs from a for-free to a for-fee service.

Process to Determine PC Lead Organization(s)

SABEQ will promote this opportunity among Jordanian for profit and non-profit organizations, and encourage these organizations to submit short proposals explaining why they wish to lead one or more individual PCs and how they would insure future success. Up to three organizations presenting the top offers, as decided by SABEQ, will have the opportunity to present their credentials in front of all active PC members. These active PC members will vote to determine which organization assumes PC leadership for their respective PC.

SECTION II: COMMENTS ON THE CURRENT STATUS OF SABEQ PROFESSIONAL COMMUNITIES (AUGUST 2009)

SABEQ/Intrans is taking several steps strengthen PCs, make them more valuable to PC members (Jordanian Professionals), increase the number of active members, inspire reforms to strengthen Jordanian businesses, and prepare the PC product for handoff to a Jordanian organization. While much remains to be done, PCs appear on track to become sustainable peer-to-peer business forums that continue to add value to the Jordanian private sector well beyond the implementation of SABEQ. The following are recommendations (some already underway) to guide ongoing PC implementation:

1. Strengthen and diversify Executive Round Tables (ERT):
 - a. Heighten opportunities for PC members to identify interested peers and propose new ERTs. (Website revisions, once complete, will support this but increased off-line opportunities would also add value).
 - b. Diversify the ERT Product. ERTs are currently the main value added service of PCs.⁴ An opportunity exists to build on this success and to strengthen the ERT product by offering a diverse portfolio of potential ERT types from which members could choose. The matrix below describes ideas for potential ERT types. These are not meant to be mutually exclusive, but rather to serve as a menu of sorts.
 - c. Increase the focus of ERTs on supporting the approaches that directly result in implemented reforms, a key metric of PC success and more directly related to SABEQ's core goal of supporting the increased productivity of Jordanian firms.
2. Create and implement systems to capture local resources and begin the creation of a Jordan specific management best-practices library.⁵ SABEQ should create systems and templates that make it extremely easy for PC members to capture local resources. Where possible resources should focus on how international best practices are applied in the real-life Jordanian context, and the local best-practices that emerge there from. This would support the institutionalization of local resource creation and capture. Creating foundations for more dynamic resource capture is potentially much more valuable than capturing lots of static resources.
3. Create and implement a PC brand (in collaboration with organization(s) assuming leadership.⁶
4. The newly developed Customer Resource Management (CRM) system is a potentially valuable member management tool. SABEQ must be careful to ensure that data entry and upkeep requirements are not overly burdensome and that the knowledge generated is both valuable and systematically reviewed and acted upon. After 3 months of CRM implementation the system should be reviewed to streamline it as appropriate, eliminate unnecessary inputs, ensure that core information is captured accurately, and revise as appropriate to ensure that CRM efforts creates maximum value.
5. Revamp the community-wide meeting and possibly reduce its frequency to 1x per year. A less frequent event would make it more affordable for the handover to the local PC implementer. It should also be a higher-end event (assuming the branding study verifies this) in order to attract or re-attract a larger number of PC members. A suggested agenda for future Community-wide meetings is provided below.

4 The core ERT (and PC) approach of facilitating member-driven and peer-to-peer experience, knowledge sharing, and value added work well and should remain as underlying features of all PC activities.

5 This is described more fully in the separate write up entitled 'Capturing and Packaging Jordanian Specific Resources'.

6 The marketing and branding study, currently underway, will clarify optimal PC brand positioning

6. Recruit new members through CEOs and top executives.⁷ (Some members don't have power to implement reforms. Getting CEOs or directors to encourage or sponsor their employees: 1) ensures that these corporate leaders understand PCs and are thus more amenable to their employees participating in ERTs to apply what they learn in their jobs, and 2) increases the likelihood of new members signing up in bulk.⁸ (One idea is to provide free CEO membership to CEO only PC events, or special events).
7. Utilize MBA students or others to capture Jordan-specific resources. Forming a link between PCs and Talal Abu Ghazaleh College of Business (TAGCB) is potentially valuable, assuming that TAG professors and students are not allowed to make excessive time demands on PC members (whose privacy must be protected). TAG MBA students could play a valuable role in capturing local resources (#2 above). One or two (maximum) could sit in on each ERT and have the responsibility for creating local resources (such as case profiles or fact briefs) on the specific topic of the ERT.
8. Seek extended rights with select international resource providers. SABEQ subcontractor The Kaizen Company is currently working on this independent of SABEQ. Ultimately this will result in PC members having access to more and better international resources.

Matrix: Potential Types of PC Executive Round Tables⁹

ERT Type: State of the Art in...	ERT Type: Highly flexible	ERT Type: Case Implementation
<p><i>Description:</i> Rapid review / discussion of cutting edge management theories and tools, ideally with 1 or 2 local guests presenting their personal experiences using these techniques and the pros/cons.</p> <p><i>Time:</i> Short (1-2 sessions)</p> <p><i>Level:</i> Expert</p>	<p><i>Description:</i> Type/approach to individual ERT decided by members in first session(s). Typically some theory/expert presentation, extensive peer discussion, some resulting reforms (Prevailing ERT approach currently)</p> <p><i>Time:</i> Long (6-8 sessions)</p> <p><i>Level:</i> Varies</p> <p><i>Note:</i> Highly flexible; specific approach/focus determined by members in initial session.</p>	<p><i>Description:</i> ERT members work on specific cases of participating ERT members. Likely, they divide into 3 or more teams, each headed by an individual PC member whose company has committed to participate / implementing reform</p> <p><i>Time:</i> (6-8 sessions)</p> <p><i>Level:</i> Varies (but may be specified)</p> <p><i>Note:</i> May include cases submitted by outside companies/organizations, though their representatives must participate somewhat. May also include a review of existing international cases in this topic area. This is prime opportunity for the creation of localized PC resources such as case profiles, fact briefs, or short videos.</p>

⁷ Assuming that results from the current marketing study support this notion

⁸ And bulk sales for whichever Jordanian implementer ultimately assumes PC leadership

⁹ Note that this matrix is meant to generate ideas and options for PC facilitators and members to consider when conceptualizing and/or beginning a new PC. Also, gray shaded boxes will result in a greater number of reforms. As such they are the preferable ERT types.

<p>ERT Type: Core Concepts Crash Course</p> <p><i>Description:</i> Rapid review of the basics of any given management topic</p> <p><i>Time:</i> Short (1-2 sessions)</p> <p><i>Level:</i> Beginner</p>	<p>ERT Type: Analysis and Action</p> <p><i>Description:</i> Participants apply an assessment tool (in a specific area) to their organization and create action plans for addressing identified opportunities and constraints identified in their organizations</p> <p><i>Time:</i> Medium/Long (2-8 sessions)</p> <p><i>Level:</i> Any</p> <p><i>Note:</i> Assessment tool in ERT area must already exist. Ideally participants enter ERT with understanding of need in this area and commitment / internal buy-in to solve it.</p>	<p>ERT Type: Resource Application</p> <p><i>Description:</i> Apply existing PC tools/resources (facilitator would select) to an existing problem ERT participants know their companies have (and ideally company decision makers wish to identify).</p> <p><i>Time:</i> Medium/Long (2-8 sessions)</p> <p><i>Level:</i> Varies (but may be specified)</p> <p><i>Note:</i> Facilitators would do their homework, in advance and clarify which resources will be applied (may include a combination of many resource types. Also, ERT members should have buy-in from their leadership to apply these in advance</p>
<p>ERT Type: Hybrid</p> <p><i>Description:</i> Any combination of the above. Or, one of the above that stays together post-ERT to transition into another ERT (ideally more actionable if the original was not)</p> <p><i>Time:</i> Varies</p> <p><i>Level:</i> Varies (but may be specified)</p>	<p>ERT Type: Examples in Action</p> <p><i>Description:</i> Multiple field trips / study tours where ERT members view hand-picked examples of how local companies handle ERT topic.</p> <p><i>Time:</i> Medium (2-5 sessions)</p> <p><i>Level:</i> Varies (but may be specified)</p> <p><i>Note:</i> Members prepare fact brief and submit this to companies visited during study tour (as a value-added thank you); may flow into more actionable other type of ERT</p>	<p>ERT Type: Business Barrier Buster</p> <p><i>Description:</i> Members come together around a shared constraint or opportunity. This may be a law they wish to see reformed or an area in which they can come together to achieve economies of scale (e.g. lowering costs of a shared expense)</p> <p><i>Time:</i> Long (6-8 sessions)</p> <p><i>Level:</i> Senior</p>

How to run future CW Meetings / Generate Energy!!!

1. CL Kick-off; CM recognition. (just a quick thanks from COP or PC manager to PCMs who contributed lots of resources online, hosted field trips, served as keynote speakers, or initiated and volunteered as ERTs)
2. High-profile Jordanian Keynote speaker 30 mins. (recruit a heavy hitter locally (e.g. Fadi Gandour, Talal Abu Ghazalleh, Ghassan Nuqul) to speak on a relevant topic of their choice for 30 mins)
3. ERT Round Table (ERT Facilitator or main participant (5 minutes total). He/she should succinctly say:
 - a) Here's what we focused on in the ERT
 - b) Here's what we gained/learned.
 - c) Here are the 2-4 takeaway lessons that we think you (other PCMs) should learn/know!

(Have other ERT members at the podium. Follow up with up to 5 minute personal experience from ERT participants panel (providing taste and smell), and Member Q&A. (5 mins) (all within 15 mins) (Alternatively, focus on some of the biggest business successes of PC members that can be linked to participation in PCs)

4. Brainstorming or teamwork activities regarding the hot topic, etc, done in a way that encourages members to interact, network, as relevant, and exchange ideas.

SECTION 3: EXECUTIVE ROUND TABLE SUPPLEMENTAL SUPPORT OPTIONS

The following are options that, resource permitting, could be made available to Executive Round Table (ERT) participants to collectively select in order to enhance their experience and/or make ERT outcomes more accessible to additional PC members.

Title	Description	LOE Estimate (average)
Case Profiles	Short piece on how one or two firms dealt with a specific management challenge (that pertains to the specific ERT). May be International or Jordanian, and in written, video, or audio (podcast) format.	3 days
Fact Briefs	Short write up that describes various approaches to a topic, what the options are, what most companies do and why. This somewhat combines survey work with business best practices and analysis. Knowledge contained in these is typically drawn from a sample that includes multiple firms.	5 – 10 days
Survey / Polls	Survey of individuals (Jordanian and/or regional and/or international) on a specific topic (i.e. # and type of international sales agents). This may or may not include qualitative analysis of the survey results and may include only PC member firms or a wider audience (contingent on the request of the ERT)	3 – 5 days
Peer Reviews	One ERT member presents his/her strategy/plan/approach to something (i.e. marketing approaches, business process outsourcing, etc.) and a panel of his or her peers critique the strategy, adding ideas and advice.	0 days (done by peers from within ERT)
Expert Presentations	An expert presents on a niche topic chosen by the ERT	1 day
Book Summaries	Short written summary and/or presentation of a business book that ERT members would like to learn more about; may be followed by a discussion	3 days
Literature & Resource Reviews	Create a compellation of existing literature and resources on a specific topic (books, white papers, articles, scholarly reports, presentations, templates, etc). This makes ERT members aware of all that is available on a specific topic. Does not include analysis and or recommendation, just awareness. Materials come from the virtual PC	2 days
Premier (for fee) Resource Purchase	Pay for the purchase of (low cost) for-fee resources specific to a particular ERT. This could include the purchase of an e-course, software, for-fee research, literature/business books, etc.	Cost of items.

SECTION 4: POTENTIAL ADDITIONAL PC SERVICES

The following services should be prioritized as part of SABEQ's PC Marketing and Branding efforts in order to determine which of these potential services, should they be provided would most benefit current and future PC Members.

Service
<p>1. Just-in-time-training (or call this Expert/Situation Support): Bundled product that combines 1) e-trainings, 2) resource compilation, 3) expert advice. For use when one of our members needs to rapidly get up to speed on a management topic, and/or need expert guidance on how to handle. Includes recourse navigation support together with advice/analysis/ technical knowledge from local or international Kaizen expert(s) responsible for a given community) Could be done live and/or through video-conferencing.</p>
<p>2. E-trainings: Generally a 'short-course' of one session (with some exceptions). May be a webinar, an expert led presentation, or other. May be from a resource partner or individual expert consultant. Differ from ERTs in that they are shorter and more specific in nature. Could include 'state of the art in.....series' to provide a rapid intro on the current tools and literature on a specific area – particularly for lower level PC members.</p>
<p>3. Navigation support (or call this resource compilation): Compile a mini-report with the top kaizen connect resources and tools on a given topic. Basically, prescribe homework to a member who wants someone knowledgeable of Kaizen Connect to listen to the need and compile a short-list of material addressing the need.</p>
<p>4. Case Profiles: Examples of state-of-the-art best-practices in areas prioritized by our members. (typically highlighting the practices of one or more leading firms in this area). Drawing from member contribution/sharing)</p>
<p>5. Fact Briefs: Trends and analysis of management issues prioritized by our members. (using polls/surveys, identifying and analyzing trends, providing knowledge and insights)</p>
<p>6. Networking events: Happy hours, possible dinner (or equivalent) purely social occasion bringing PC members together.</p>
<p>7. Business book summaries: Short (typically 7-page) summaries of top business books.</p>
<p>8. Member video: Short videos showing real examples of exceptional services, business practices, etc. Members would be encouraged to identify, capture, and upload short narrated videos of functions/services that others would potentially value. These requests might come at the requests of ERTs or after site-visits.</p>
<p>9. Member site visits: Select members may take a field trip to the business of one of their own (locally) to view how that company conducts a specific practice. This is already happening somewhat – mainly stemming from ERT member requests and resulting in one of the ERT members hosting the field trip – but we could expand.</p>
<p>10. Seminars: Provide the opportunity for some of the PC active members to conduct seminars related to some ERTs topics.</p>

SECTION 5: CAPTURING AND PACKAGING JORDANIAN SPECIFIC RESOURCES

The following formats are ways to capture potentially valuable management reform resources for use by PC members in their efforts to improve the organizations in which they work. Collectively they would form a Jordan-specific management library of potentially significant value to Jordanian PC members. If successful systems can be institutionalized within PC management for capturing such resources this library would be ever-increasing and ultimately immensely valuable to PC members.

The best resources will have a combination of three factors. In order these are 1) Jordanian specific, 2) short, and 3) Arabic language.

Description of formats types that could be produces by and for Jordanian PCs.

Templates: Pre-developed documents, with instructions for how to fill them out, can be used for a variety of purposes. These may be as simple as a template for performance based position descriptions or as complex as organizational by-laws. Templates are most valuable when they include clear instructions on the overall purpose of the template, how to adapt it for specific purposes, and how to fill out each individual section. Unfortunately you can't provide a template for templates themselves as they vary widely for each purpose.

Presentations: On various topics that add value to organizations. Numerous presentations that have been or will be sponsored by SABEQ (or other organizations) presentation can be 'recycled' by our partner-beneficiaries to use for their stakeholders. Examples include the Laws of Leadership presentation previously presented by SABEQ staffer Tulin Bakeer and the upcoming presentation on mentoring paid for by SABEQ. PC members may value whole presentations or individual slides from these efforts.

For presentations with the highest potential for replication, presenters would be filmed and video incorporated into the presentations themselves. Text, translated into Arabic (assuming the presenter is English speaking) would stream underneath to complement the presenter's narrative. This technology is readily available but as yet not widely used.

PC Presentation Format #1: In PowerPoint. Captured presentations will have well filled out presenters notes sections under each slide so that PC members using these presentations have can read the main points spoken by the presenter.

PC Presentation Format #2: Flash Videos with presenters speaking should be created for presentations that have a high potential for future use and/or value to a wider audience. . These should be used to better capture a variety of value added technical assistance efforts, and Jordanian speakers. Filming future keynote speakers at PC community wide meetings is one example, especially assuming we get highly respected business leaders. An example is below. The image of the speaker could be expanded to the entire screen should there not be any slides.



Case profiles: PCs would benefit from lessons learned in the form of case profiles. These are short, written documents that describe in detail how one PC member's company dealt with a specific business challenge. These Jordanian-specific experiences can be extremely valuable for other Jordanian businesses facing similar challenges.

Template and example attached. Would need to be rebranded of course.

Fact briefs: Trends and analysis of management issues prioritized by our members. Often involve a survey and analysis of what multiple Jordanian organizations are approaching a specific management function (i.e. how companies recruit, business intelligence systems used, etc.)

Template and example attached. Would need to be rebranded of course.

Videos: Short videos documenting specific challenges of Jordanian businesses and how they were faced and overcome (or not). With ideas submitted by Community Members themselves, these will serve as valuable community resources that capture Jordanian specific tacit knowledge. Videos should be short (ideally 5 minutes or less) and in interview format. They should be viewable in standard video formats so that most viewers already have the required software on their computers to view the content.

Videos would be Jordanian specific but similar to those provided by PC partner the Small Business School at: <http://www.smallbusinessschool.org/page98.html>

ANNEX 1: RIGHTS AND RESTRICTIONS GUIDING PROFESSIONAL COMMUNITY PROMOTIONAL ACTIVITY

Introduction

This paper clarifies promotional rights and restrictions for PC members and other PC stakeholders in their engagement with other PC members. The policies defined herein are primarily intended to protect PC members from e-mails, calls, informational campaigns, surveys, direct or indirect marketing or sales efforts, or any other unsolicited contact or influence from individuals or groups, internal or external to the PC, that may seek to use the PC for inappropriate personal or organizational gain.

It is not the intention to eliminate promotional activity within PCs entirely. Such activity, within appropriate boundaries, serves the collective interest of the community by creating more informed consumers of consulting services, increasing opportunities for local consulting service providers, and raising the overall standard of local consulting services. It is also in the collective interest of the community for PC activities to serve as a means for business-to-business networking and deal making, albeit in an environment where PC members in no way feel burdened by or pressured to engage in such activities through their participation in the PCs.

It is the intention of this policy paper to clearly define the parameters within which such activity is acceptable so that the information members receive through their participation in PCs is clearly demarcated as either 1) fully unbiased by the business interests of other PC members or PC stakeholders, 2) clearly labeled as promotional in nature, and/or 3) from a PC member with a potential interest in developing relationships within PCs that lead to consulting, training, or other contracts outside of PC activities. Full transparency in these areas is critical in order to maintain a high level of trust among community members, and full confidence in the validity of peer-to-peer contributions and advice.

Stakeholder Definitions

We define each of the PC stakeholder groups using the following definitions:

PC Member: Individual who has signed a PC commitment letter¹⁰ and thus joined one of the PCs. Sometimes referred to simply as 'Member'.

High-Contribution Member (HCM): A member classification. HCM is a PC Member (as defined above) who contributes a significant amount of value to other members in the community. This could be either by 1) volunteering (for free) to facilitate one extended (4+ session) Executive Round Table (ERT) per year or 3 short (1-3 session) for free ERTs; contributing 5+ resources per month for 3+ months; and/or initiating and leading one or more active dialogue discussions involving 10+ other PC members.¹¹

¹⁰ See annex A

¹¹ HQM status lasts for six months, with the option for unlimited renewal.

Member Consultant: A PC member (as defined above) who, individually or through a firm, also offers business-to-business products and/or services (e.g. training, consulting) has a business interest in participating in PC activities, in whole or in part, as a means to attract clients.¹² A member consultant may or may not also be a HCM.

Honorary Member: A volunteer who, on invitation of PC Leadership, contributes to one or more PCs either 1) through the active contribution of resources and/or commentary on to PC web portal, 2) as a marquee keynote speaker at one or more PC in-person events, or both.

International Resource Provider: Any international organization that promotes event(s) they hold or sponsor by listing these events on the PC calendar(s), either for free or for a fee.

Local Resource Partner: Any local individual or organization that promotes event(s) they hold or sponsor by listing these events on the PC calendar(s), either for free or for a fee.

Professional Community Leader: Leader of the professional community. Responsible for all technical decisions of the PC. A SABEQ employee (initially)

Professional Community Manager: Manager of the professional community. Responsible for all operational and management issues involved in running a PC. A SABEQ employee (initially).

Permissions

This section specifies which activities are permissible, not permissible, or conditionally permissible at PC in-person events, on the PC web portal, and/or in PC related outside engagements between PC Members and other stakeholders. Unless otherwise specified, these policies are valid for all stakeholder groups.

Permissible: The following activities are permitted in full by all PC stakeholders:

- Activity specifying the goods or services that your organization offers for a fee verbally, and asking individual community members if they would like you to follow up with a sales or marketing call outside of PC activities.
- Sending marketing or promotion e-mail or mailings to individual PC members that have requested it specifically.
- Ask PC members to join or participate in a discussion group that the member leads or participates in on the PC portal at PC events.
- Solicit the answer to one or more specific questions on a
- Contact individuals in a specific member demographic (i.e. only CEOs, only marketing personnel from service firms, etc) individually (through PC portal e-mails, or through virtual discussion groups or newsletter interests), to identify / recruit PC select PC members to join a proposed niche ERT, to gauge interest in requesting a study, or to see if sufficient demand exists for a specific new survey on the PC web portal.

¹² Member consultants must register individually, or through their organization, to receive the special rights of member consultants. (Once this function is available)

Not Permissible: The following activities are not permitted by any PC stakeholders, excepting the caveats, described as relevant.

- Distributing marketing or sales brochures at PC activities¹³.
- Requesting fees for insights or experiences offered at any PC activity
- Sending unsolicited marketing or promotional e-mails or mailings to one or more PC member(s).

Conditionally allowable

Activity	Condition
▪ Sponsor and lead a seminar or training (max 2x per year) on a topic relevant to PC members; list this seminar on the PC Calendar; lead a discussion group on the PC portal on this topic and speak to other members (informally) at PC events	<i>Permissible for HCMs only</i> ; no distribution of promotional materials allowed. OK only to state that the HCM or HCM's organization offers additional services in the area of the seminar (Also, state this in the invitation). Invitation can be posted on the calendar but not e-mailed to members; PCL must approve of the topic and PCL has the option of highlighting seminar/training on the newsletter. Can be held at SABEQ offices or elsewhere.
▪ Sponsor a field trip: invite PC members to your offices / factory to see first hand how your organization does something.	This is encouraged of all members, assuming 5+ fellow members would like to visit. However, during field trips the sponsor should not seek to directly market or sell the company's products or services. Informational brochures can be distributed as relevant.
▪ Post local events /trainings/ workshops on the PC calendar.	Any PC member can ask the PCL or PCM post <i>relevant</i> upcoming for-fee or for free events on the PC calendar. Interested HCMs only can receive administrator access to the PC web portal, and post events themselves (they are on their honor to only post relevant events; PCL/PCM have the right to remove events).
▪ Speak at a community-wide PC member event	Only allowable on PCL invitation.

¹³An exception to this rule is when HC Members sponsor pro-bono ERTs or workshops, requested by PC members. At these specific and clearly market occasions HC Members can specifically market the goods and services they provide.

Member Commitment Letter

Risk Management Professional Community

With my signature below I am pleased to join the USAID-funded Jordan Economic Development Program's Risk Management Professional Community. I commit that I will proactively utilize my membership to initiate reforms in my organization. I join with the expectation that the community will support me in a number of ways to further these reforms: These include:

- The community will add to my professional skills over the course of my membership; my proactive application of lessons learned and use of resources provided will benefit my organization.
- Along with my fellow community members, I will have the right to choose the focus of community activities and the type of technical support that the community receives.
- The community will provide me with increased access to local and international expertise.
- The community will provide me with opportunities to network with my professional peers, and to gain their insights and advise on issues that I confront in my work.
- The community will keep me well informed of events and opportunities, and will provide me with up-to-date professional information of relevance to the community.
- The community will provide me with relevant best-practice presentations, templates, assessments, and other resources that I can adapt and use freely to support my reform efforts.
- The community will respect my time and run events in a timely and professional manner.

I understand that while my membership in the community will bring many benefits, it also requires committed participation on my part. Other community members count on me, as I on them, to actively contribute to the community. I will do this by regularly participating in community activities and events, and by sharing my professional experiences and expertise with fellow community members when asked to do so. At a minimum I will:

- Serve as an ambassador of good will within the community and externally; support other members who request my advice; share non-confidential lessons from my reform efforts.
- Maintain a link to the community's interactive website on my computer; visit this website regularly to review community tools, resources, and upcoming events.
- Attend 75% of quarterly meetings (3 out of 4) during the year.
- Contribute resources to the community base; comment on other submissions each quarter.
- Vote in at least 66% of (approximately monthly) community polls.
- Meet my commitments to the Round Tables I choose to join.
- Not disclose potentially confidential information shared by other community members.

With my signature below, I pledge to uphold, to the best of my ability, my aforementioned efforts in the Risk Management Professional Community, both in letter and in spirit, for one year.

Name:

Date:

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