How to Set up a Technical Working Group

Overview

Technical working groups (TWGs) can help digital development practitioners realize greater impact by coordinating efforts, systems and resources to achieve common objectives.

Description

By forming a technical working group (TWG), digital development practitioners working in the same country or region can coordinate activities and align resources to better work toward common objectives in their sector or area of expertise. For example, a TWG can be set up around education technology or supply chains and logistics.

TWGs can take different forms and are known by different names, but what these groups share is an aim to improve communication and collaboration among stakeholders such as nongovernmental organizations, donors, government officials and community leaders. Collaborative development [http://digitalprinciples.org/be-collaborative/] leads to more efficient use of resources and increased impact compared with what a single organization could achieve. For digital development practitioners, this collaboration can be especially important to help all implementers and stakeholders to understand the technologies that are currently being used, prevent duplication and reuse or adapt existing tools for other contexts [http://digitalprinciples.org/reuse-and-improve/].

TWGs typically come together for a set period of time to share information, evidence and lessons learned, explore opportunities for innovation to overcome common challenges, and ensure that systems and tools that are being designed or implemented work together. Country governments often convene or serve as key

EBOLA RESPONSE IN SIERRA LEONE: A TECHNICAL WORKING GROUP IN ACTION

During the Ebola outbreak in 2014, multiple donor organizations began funding digital programs in Sierra Leone for contact tracing, general reporting and community engagement. Some of the programs were similar in scope, and the tools that were built and used didn't work together. Given the emergency context, the Ministry of Health and Sanitation (MOHS) felt that there was not enough coordination and insight into what implementers were doing. The MOHS re-established a technical working group for mHealth programs in Sierra Leone in late 2015. On the first Friday of each month, technical representatives from implementing organizations met with the MOHS to find ways to work together, share information and make their programs interoperable. This approach led to a more coordinated response to the outbreak and recovery efforts.

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stakeholders in TWGs, as they want implementers to consider how their work supports national priorities, how new tools align with existing ones, and how programs and tools are ultimately sustainable [http://digitalprinciples.org/build-for-sustainability/].

This guide outlines steps to create a productive and inclusive TWG. These recommendations are summarized from existing references, which are noted in the Resources section.

Process

1. **Define the problem.** Write a short, simple statement about the challenge or need that the TWG will address, including prospective deliverables (e.g., interoperability standards) that the group will produce and a vision statement. Describe why addressing this challenge collaboratively through a TWG is beneficial. This step could involve drafting a theory of change that explains how the collaboration will lead to increased impact.

2. **Identify existing groups and networks.** Consult with other digital development implementers, government officials or stakeholders to learn about the forums that already exist for collaborating and sharing information on digital development programs. Look into the purpose of these groups, their members and their activities. Your proposed group may be different enough to justify the creation of a new group, or you may want to consider ways to work with existing groups to address your defined problem.

3. **Identify members.** Think about the mix of people that should be part of the TWG. This means looking for individuals who represent a range of viewpoints, who are invested in the working group's success and who will actively participate in the group.

    To ensure that all relevant stakeholders who work on and bring expertise to the issue are included, create a matrix of organizations that should be represented, and make sure you have identified individuals for each one. Consider nongovernmental organizations and governmental bodies, as well as civil society, private industry, and local religious and community leaders. Identify a diversity of participants, including senior leaders and program-level staff, and a balance of men and women. Reflect on the power dynamics that could occur

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in the group based on culture or typical behavior between men and women or older and younger participants. Also connect with your personal network to get additional ideas for who should be in the TWG. Begin to plan for how to encourage participation from all members and ensure that no one voice dominates the conversation.

Also consider the size of the group: too large and it becomes difficult to get full engagement; too small and varied perspectives won't be represented. A good size for a TWG is typically between 12 and 15 members.

4. **Define roles and processes.** Determine the legislative and administrative status of the TWG. Also consider the individual and organizational roles, which could include the following:

   - **Chair.** Typically, a TWG is led by a chair or co-chairs who are strong leaders, have significant interest in the issue and are respected as subject matter experts. The chair or co-chairs are responsible for getting agreement on meeting times and locations, setting agendas and facilitating the meetings. If the host government is represented in the TWG, that representative should serve in the role of chair to solidify ownership.

   - **Officers.** Some TWGs have other officers, such as a secretary who is responsible for keeping meeting minutes and sharing information with group members between meetings.

   - **Sub-groups.** Complex topics might require subgroups to increase productivity and knowledge sharing. While the actual subgroups should be determined once the TWG has been formed, decide on the structure for subgroups during the planning phase.

   - **Hosting organization.** Determine if the TWG will be housed at a particular organization that commits to certain logistical or leadership tasks, such as hosting meetings. This could be a rotating responsibility for a set period of time. If a government ministry or other governmental body is involved, it may be most appropriate to offer that group hosting responsibilities to build legitimacy and encourage government engagement.

Define processes for how the group will function. For example, will decisions be made by majority vote? Will a certain number of members need to be present at a meeting for a vote to occur?

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Present the framework as a proposal for consideration and feedback at the first meeting.

These roles and processes define a traditional TWG setup. If your TWG will meet primarily through digital platforms, the roles and processes will look different. For example, an important role in such a group could be the online facilitator, who helps to encourage virtual sharing and dialogue. Digital platforms could also facilitate virtual voting or include recordings of meetings, reducing the need for members to attend all in-person meetings.

5. **Define the scope.** Create terms of reference for the TWG to circulate to potential members that include the following:
   - The goals and expected outputs or deliverables of the group.
   - The length of time that the TWG will be active.
   - The frequency and duration of meetings.
   - The expected and optional contributions of each member. For example, an expected contribution would be attending a certain percentage of meetings, while an optional contribution would be serving in a leadership role, such as subgroup chair.
   - The end state when the TWG will stop meeting regularly. The end state may be when a short-term crisis ends, when a milestone has been reached or at another recognized moment of transition.
   - A participant profile. This profile will help potential members to determine if the group is a good fit. It will also provide formal criteria, if needed, to keep the group to a certain size or to avoid having members who do not actually have the right technical expertise or belong to the sector on which you are focusing.

6. **Invite people to join.** Write a short but formal invitation that you can send to each potential member. In some contexts you may need to send official printed invitations, while email is appropriate for others. Consider having a well-known and well-respected stakeholder – a government representative, for example – sign and send the invitation or personally contact those whom you are inviting to join. Ask all potential participants to express interest by responding with basic information, such as their professional roles, areas of expertise, what they believe they can commit to the group and what they believe they will get out

of it. This step can help ensure that members have buy-in and understand their commitment to the group.

7. **Revisit the draft roles, processes and scope.** At the first meeting, review the draft vision, roles, processes and scope for discussion and feedback with the membership. Revise, as needed, until all members agree.

8. **Develop an actionable agenda for every meeting.** A TWG includes experts who are very busy and have many demands on their time. Take the time to understand the cultures [http://digitalprinciples.org/understand-the-existing-ecosystem/] — both organizational and national or community cultures — that shape the way members think about the group. Ensure that participants feel like their time engaging with the TWG has been valuably spent. Once the TWG is up and running, the leadership team should take on the responsibility of defining an agenda for each meeting and sharing it, along with any background documents, in a formal email invitation at least one week before the meeting. Encourage the leadership team to establish a process for receiving feedback on the agenda from members and circulating notes following the meeting.

9. **Empower the leadership.** Once meetings start, give leadership the power to make changes to the TWG. They might discover that they are missing input from important stakeholders, or they might find that the group needs to meet more or less frequently or use a different format or venue. Ensure that leadership have the authority to make any changes needed to make the TWG successful.

10. **Document and communicate progress.** Record the ideas and decisions of the TWG, and make it easy for participants to share progress with their own networks, serving as advocates for the group. This increases buy-in and widens the circle of people who are invested in the success of the TWG.

11. **Evaluate the success of the group, and establish channels for collaboration beyond the life of the group.** Before the TWG adjourns for the final time, gather feedback from members on how the group was run and what each member believes were

IMPROVING FINANCIAL INCLUSION THROUGH A MOBILE MONEY WORKING GROUP

As part of the Feed the Future Malawi Mobile Money Project, FHI 360 convened a Mobile Money Coordinating Group [https://mstarproject.wordpress.com/2016/09/29/how-the-malawi-mobile-money-project-helped-transform-malawi/]. Mobile network operators (MNOs), government agencies and other key stakeholders were not talking or coordinating on ways to improve the mobile money infrastructure and increase uptake of the technology. Through this new collaboration, the MNOs were able to find innovative solutions, such as agreeing to share cell towers, allowing them all to deliver mobile money services to a wider number of Malawians.

the key accomplishments. Look for ways to sustain or establish digital platforms that allow members to continue to collaborate outside of the formal TWG..

Outcomes

These outcomes are illustrative and have been collected from digital development organizations that have followed the steps outlined in this guide.

■ Organizations and people collaborate on new or existing initiatives, share resources [http://digitalprinciples.org/reuse-and-improve/] and take advantage of different strengths to achieve common goals that were impossible alone.

■ New ideas or approaches are developed and refined, and members have a space to think about problems differently.

■ Technology systems and tools are harmonized through the creation of standards and protocols [http://digitalprinciples.org/use-open-standards-open-data-open-source-and-open-innovation/].

■ Isolated pilots are replaced by scalable and sustainable tools [http://digitalprinciples.org/design-for-scale/] [http://digitalprinciples.org/build-for-sustainability/]. Rather than seeing promising tools or approaches fail due to lack of funding or other resources, a TWG can identify partners who can help to improve, replicate and scale solutions.

Common Missteps

■ **Lack of ownership and buy in.** While a nongovernmental organization or donor can play an important role in establishing a TWG, the planning, design and launch of the group should be done in partnership with the local government or other local actors. This helps to ensure that there is desire and buy-in for the group and that local stakeholders can sustain it.

■ **Unclear scope.** When a TWG does not have a clear scope, members can become frustrated because there is no shared sense of what success or completion looks like. For example, an unsuccessful TWG may meet regularly but without a clear agenda, so the meetings don't lead to any concrete decisions or tasks. Encourage the TWG to create a clear scope that outlines

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deliverables, milestones and responsible parties, so expectations are clear and the TWG will know if it is on track. The work plan can also help to define the milestone or deliverable that would mark the completion of the TWG's work.

- **Wasting participants' time.** Be intentional when planning TWG meetings. Time is valuable, and if the meetings do not seem useful or productive, commitment will wane.

- **Missing stakeholders.** If the right people aren't in the TWG, you may not get new insights (or the right ones). Be intentional about including a broad range of stakeholders from a variety of organizations who are all invested in achieving the TWG's mandate. Reach beyond your immediate network to identify the right people.

- **Not considering tools or methods for digital engagement and participation.** The most efficient or effective way to collaborate may not be meeting in person. Useful knowledge sharing and collaboration can also happen through a social media or messaging platform. Virtual communication can help the group members to feel more connected, leading to greater participation , while reducing meeting costs and saving time. Explore which digital platforms your participants currently use, such as Facebook or WhatsApp, and test the effectiveness of using one of those platforms for group communication.

COMMON MISSTEPS
TIPS AND RESOURCES

TIP: To find the right stakeholders and ensure that important influencers are included, consider conducting a social network mapping exercise. Social network mapping allows you to identify influential people or groups, illustrate patterns in social connection, and examine network relationships and interactions. Social Network Visualizer (SocNetV) is open source social network analysis and visualization software that can support this process [http://socnetv.org/].

RESOURCE: Digital Health Knowledge Base Convening, PATH. http://bidinitiative.org/wp-content/files_mf/1481667343DigitalHealthKnowledgeBaseConvening_July2016_final.pdf

RESOURCE: Supporting National Logistics Working Group: Toolkit & Guidance, World Health Organization-UNICEF. https://www.unicef.org/supply/files/NLWG_Guidance_Draft_(4)_24052016.pdf

RESOURCE: Technical Working Group Inclusive Community Based Disaster Management Framework Terms of Reference, Nepal Risk Reduction Consortium - Flagship 4. http://flagship4.nrrc.org.np/sites/default/files/documents/TOR%20technical%20working%20group%20draft%20v3.pdf