Setting up and managing convening initiatives

Criteria to consider

A  AT INITIATION

1. Clarify Impetus
   - Where does the proposed initiative originate from?
     - Internal
       - Senior management
       - Professional staff
     - Or, External
       - External VIP client
       - External non-VIP
   - What is the Bank’s additionality? How can it contribute to the Bank’s objectives?
     - What unique value does the Bank add?
     - Is the Bank’s proposed role grounded in its comparative strengths?
     - Is this activity aligned with corporate priorities?
     - Does it support operational work?
     - Would it generate business?
   - What is the development ecosystem on the issue?
     - Is there an organization with a designated role/mandate better suited for this role?
     - Does the proposed activity address an issue that requires a collective action response?
     - To what extent do the interests of partners and shareholders align or diverge on the issue and on how to tackle it?
     - What is the likelihood of success?
     - What are the risks of engaging? Of not engaging?

2. Apply Selectivity Criteria
   - What resources are required and for how long?
     - What involvement is expected from senior management/VP?
     - Will donors be willing to provide trust funds?
     - How long will the Bank need to remain engaged?

3. Define Goals
   - What would results look like?
     - Would it contribute to:
       - Shared understanding on the issue (such as changes in attitudes and positions)?
       - Shared/negotiated solutions (such as changes in strategies, policies, financing, standards)?
       - Shared implementation (partners act differently on the ground)?

4. Define Roles
   - What roles would the Bank assume?
     - Should the Bank convene, co-convene, or support?

5. Define Links to Country Programs
   - What operational links, if any, might be required to be effective?
     - Is there country demand?
     - How operational links will be ensured?

6. Plan the Bank’s contributions
   - What would results look like?
     - Would it contribute to:
       - Shared understanding on the issue (such as changes in attitudes and positions)?
       - Shared/negotiated solutions (such as changes in strategies, policies, financing, standards)?
       - Shared implementation (partners act differently on the ground)?

7. Consider intra-organizational collaboration
   - Which groups need to be involved, and how?
     - GPs
     - Regions
     - IFC
     - MIGA
   - Such as.
     - Data and analytics
     - Collaborative platforms
     - Advocacy
     - Financing
     - Country-level implementation

B  ACCOUNTABILITY AND MANAGEMENT

1. Decide Accountability and Decision making roles upfront
   - Decide accountability and decision-making roles in the lifecycle of a convening initiative based on the following:
     - Does Initiative have major WBG-wide reputational, resourcing, or strategic issues?
     - Does Initiative have major sectoral reputational, resourcing, or strategic issues?
     - Does it have routine department-level implications?
   - Oversight
     - How will the team assess progress toward the intended results?
     - Can indicators for annual monitoring be defined?
     - Will there be a review of results?
   - Resourcing
     - What will this cost? (In $ and staff time)
     - How will it be resourced?

2. Enhance accountability and management
   - Duration
     - What is the duration?
     - What is the exit mechanism?
     - Is there a sunset clause?