



The **Research** Shop

COMMUNITY. CAMPUS. COLLABORATION. 

ASSESSING CORPORATE ENERGY COMMUNITIES OF PRACTICE IN ONTARIO

APRIL 2017

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Citation: DeLorenzo, A., Sawatzky, A., & Jenkins, A. (2017). *Assessing Corporate Energy Communities of Practice in Ontario*. Guelph, ON: Community Engaged Scholarship Institute.

<https://atrium.lib.uoguelph.ca/xmlui/handle/10214/8902>



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ACKNOWLEDGEMENTS

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- Samantha Blostein, Research Shop Coordinator, Community Engaged Scholarship Institute
- Karen Nelson, Research Shop Coordinator, Community Engaged Scholarship Institute

Acknowledgements

The authors would like to acknowledge the members of the communities of practice who we interviewed. Your time and responses made this work possible.



SUMMARY

This research involved the assessment of a Municipal Corporate Energy Manager Community of Practice (CoP) in Ontario, supported by an investigation of a few external examples of CoPs in Canada. A CoP is a group of people who share a common profession and interest. This group may meet in person, over the phone, or virtually (online). Municipal Corporate Energy Managers are housed within municipalities. Their tasks include planning energy needs for the entire community and municipality owned corporate facilities. Depending on each municipality, these managers may or may not have a range of resources available to them. Thus, a CoP provides a support system for the energy managers and a forum through which they can transfer knowledge, seek advice, exchange best practices, and work through common problems.

- **Research Goals:**
 - To “check the pulse” of the current members of the Municipal Corporate Energy Manager CoP, and assess what they would like to stop, continue, and improve regarding the current structure.
 - To provide suggestions on where or how the Municipal Corporate Energy Manager CoP in Ontario can grow in the future.
- **Methods:** Online surveys and semi-structured informational interviews conducted via phone.
- **Main findings:** A majority of those interviewed were pleased with the current structure of the Municipal Corporate Energy Manager CoP, and discussed the value of this network to them as individuals, as well as its value to their



respective municipalities. Interviewees also offered suggestions on where it could grow in the future, including extending the network to include more municipalities.

- **Conclusions:** We recommend that further formalization of structures within this CoP will lead to long-term growth and success, and continue to support its intangible and tangible value for both individuals and communities.



The **Research** Shop

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INTRODUCTION

This report summarizes the results of surveys and interviews conducted with members of the Ontario Municipal Corporate Energy Managers Community of Practice (CoP).

Research Goals

While there is existing literature that assesses the effectiveness of CoPs in general, this research project did not seek to contribute to that scholarship. Rather, the goal of surveying and interviewing these Energy Managers was to assess the overall effectiveness of this particular CoP, and to investigate ways that it could be improved and expanded upon in the future.

Background

This project was brought to the Research Shop by the CoP's founder, Alex Chapman. Alex is the Manager of the Office of Climate Change for the City of Guelph, Ontario. He began the Municipal Corporate Energy Manager CoP in Spring 2016 as an informal Google Group to connect Energy Managers from different municipalities and provide a space for them to discuss and share resources and ideas. The group has grown organically since its origins; members are recruited either through direct invitations from Alex, or through references from current members. To date, an assessment of the group's demographics and development progress has not been done. Therefore, in partnership with the Research Shop this research was undertaken as a way to assess where the CoP group currently stands and suggest areas of growth for the future. We focused on generating an understanding of how members of the CoP perceived the structure and function of the CoP, as well as its added value for its members and their respective municipalities.

METHODS

Two methods were used to assess this CoP, surveys and semi-structured interviews. An online survey on the Qualtrics platform was first developed that focused on four areas:

1. **Background of Members:** information on participants' roles and responsibilities within and outside the CoP, as well as gauging participants' levels of involvement in the CoP including how active they were in the group;



2. **Forms/Governance/Structures:** how participants felt about the structure of the CoP and how it could be improved. This included: leadership structures; organization of meetings; and processes for recruiting new members
3. **Functions:** how participants perceived the operations of the CoP, including: decision-making processes; discussions within the group; and overall purpose of the CoP.
4. **Value Added:** how participants assessed the value that the CoP brought to their daily job, and vice versa.

The survey questions can be found in Appendix A. The survey was distributed to 35 individuals from both the Municipal Corporate Energy Manager CoP, and other, larger CoPs. These individuals were recruited by Alex Chapman directly through email and phone. In total, there were 28 individuals who began the survey, 20 of whom fully completed it. Participants who completed the survey and who expressed interest in being interviewed were then contacted by the Project Manager and Research Shop Interns to schedule a phone interview at a convenient time.

Of the 20 participants who completed the survey, 10 were interviewed over the phone by the Research Shop Interns with the purpose of expanding and elaborating on the responses from the survey. These interviews were conducted throughout the month of February, 2017, and lasted between 30-45 minutes each. The list of interview questions can be found in Appendix B. Of the 10 people interviewed, 8 belonged to the CoP in question, and 2 were representatives from external CoPs, in order to provide a broader, and more diverse perspective. Interviews were recorded with permission from the participants, and notes were also taken for later analysis purposes.

RESULTS/FINDINGS

As noted, the results of this study are categorized as follows: 1) Background of Members; 2) Forms/Structures; 3) Functions; and 4) Value Added. We will discuss each of them in turn.

Background of Members

The Ontario Municipal Corporate Energy Managers CoP is in its beginning stages, and many of the members are new to the field of energy management. However, some survey respondents indicated that they have been involved in the community and/or



corporate energy managing sector for at least 6 years, with 2 respondents noting they've been involved in the sector for over 10 years.

Half of the members surveyed reported that they were minimally involved in the CoP, participating less than 1 hour per week. This suggests that a majority of the members use the Google Group to check in on discussions when necessary, but don't feel the need to be "plugged in" constantly. One interviewee elaborated on this point, stating:

"It's a good way for me to get a municipal perspective on my job. I use it as a place to talk to colleagues, brainstorm, etc." (Participant 3)

Forms/Structures: "Filling a key component to deliver information and support"

Many interviewees commented on the ease of using the Google Group to support and encourage discussions within the CoP. A common theme discussed in the interviews was the importance of maintaining this easy-to-use online structure as it doesn't place excess stress on CoP members, and allows them to contribute to discussions whenever is most convenient for them.

However, some interviewees had never used Google Groups before, and were not as familiar with navigating its tools and settings, such as setting up notification alerts for new postings. One suggestion for mitigating these technological difficulties was to provide a tutorial (to new and current members) for using and navigating the Google Group. A longer term solution was suggested by one participant as having available administrative support for the group:

"It would be great if there was someone who had formal clerk or admin duties, where they could conglomerate all the data and information. This person could also facilitate face-to-face meetings." (Participant 4)

Since the CoP is online-based, and does not involve regularly scheduled meetings, many members do not interact regularly in person. As explained by one participant, this online structure is beneficial because it offers *"a great way to complement the other meetings that Municipal Energy Managers participate in regularly."* Another interviewee added that the CoP's relatively informal structure *"makes it more inviting to ask questions or be more comfortable sharing."* The ad-hoc nature of meetings and sharing information was therefore an important structure for delivering information and providing support among CoP members that would otherwise have to wait until they run into each other at external conferences and meetings.



The fact that members can participate remotely, on an as-needed basis, and at less than 1 hour per week was described as a perk. However, as the group expands, adding a more “human element” (i.e. in-person meetings) to the structure of this network may become more necessary. Although the group is relatively small now, many interviewees described its potential to grow considerably beyond its current members:

“I find that a majority of people are from the GTA. What’s interesting about Ontario municipalities is that the experience in the north is very different than the GTA, so I’d like to see **more municipalities** joined into this to get a more diverse viewpoint.” (Participant 5)

With new municipalities being added comes the additional benefit of new knowledge and greater insights being shared. However, most participants agreed that membership eligibility should be restricted solely to Municipal Energy Managers as the group grows. As it stands currently, the CoP provides a repository of knowledge strictly related to common issues and opportunities experienced by Municipal Energy Managers, who have distinct needs and concerns from those employed in private industries. As explained by one participant, the shared challenges and experiences of Municipal Energy Managers *“is the general background of why this CoP exists and why it’s important.”*

Further, to maintain the collegial sense of community experienced within the current (smaller) group, occasional face-to-face meetings could be a helpful addition if additional members join the group. Another suggestion for facilitating the growth of the current group while maintaining a sense of community was to create smaller sub-groups that each focused on distinct topic areas. This structure, suggested by a participant who was involved with a large, national CoP, was said to be beneficial for increasing the ease and efficiency of accessing information:

“**Sub-groups within the CoP allow for more focused discussions**—these groups possess the same features and functions as in the larger group, but is targeted towards specific individuals.” (Participant 8)

Functions: “It’s all about providing information to make informed decisions”

This CoP indirectly supported decision-making processes for its members. As described by one interviewee, *“decision-making is more an individual responsibility”* among Municipal Energy Managers—each member of the CoP is ultimately responsible for



making decisions related to energy management that they feel would best benefit their respective municipalities. However, the CoP was also described as serving an important function as a peer review process for helping its members make the most informed decisions possible:

“Discussions about successes and failures are important to understand others’ experiences and adapt lessons learned to your own needs. It’s good to vet these experiences and ideas through this group so you’re prepared for discussions with City Council, industries...Before you get too excited about a new project, new ideas, it’s good to give it a second thought through running it by the group.” (Participant 6)

Other interviewees also commented on how they use the CoP as a valuable initial resource. When they have questions related to energy management CoP members frequently check the Google Group first. Often, there is only one Municipal Corporate Energy Manager per municipality. Having access to the CoP is therefore useful for keeping managers connected to a broader network of colleagues with whom they can discuss common challenges and strategies related to energy management. As explained by one interviewee, *“if someone in the CoP has a project coming up, there’s a good chance that someone else in another municipality has also done it.”* Another interviewee elaborated on this point:

“There’s a sharing of knowledge, and a solicitation of knowledge that goes both ways, so if something comes across my desk that I don’t know much about then I can ask the Community of Practice. I go to them first, and **it’s invaluable to get firsthand knowledge.**” (Participant 4)

In addition, this CoP functioned as a way to seek out individual connections and collaborations. For instance, having the contact information of others in the group and a general understanding of each others’ experiences was helpful, as this enables members to target their questions at those individuals who may hold the most relevant answers. As described by one interviewee, reaching out to *“specific individuals with specific questions”* about particular ideas or innovations related to energy management was helpful prior to approaching City Council with those ideas so as to minimize the potential of being asked unanticipated questions.



Overall, one of the most helpful functions of this CoP was the way it encouraged its members to bring talking points that emerged from discussions within the network back to their respective municipalities, and vice versa. One interviewee elaborated on the importance of these talking points:

“The CoP gives insight to challenges faced in other municipalities and allows for back-and-forth exchange over some of these challenges. It also provides opportunities for networking potential and technological advances in municipal energy management.” (Participant 7)

Value Added: *“It enhances what we can do as individuals to contribute to the progress of our communities”*

The value added by this CoP to both its individual members and their respective municipalities was inherently woven into its structures and functions. This added value was quite evident across both surveyed members and interview respondents alike, and offered both tangible and intangible benefits. Tangible benefits included saving resources and/or time with regards to discussing and implementing new ideas to enhance municipal energy management. Some more intangible benefits included the community building that resulted from engaging with the group, as well as receiving positive feedback and support from colleagues. We will discuss each of these types of benefits in turn.

Tangible Benefits

As noted, tangible benefits are the actual ideas and thoughts shared in the CoP that members can implement in their own municipality.

“Tangible results—can mitigate risks, generate ideas for new products and projects, strategies for approaching administration or city government supported by those who are currently/have done it, or who are in the same stage of preparing for it. **Can help to avoid wasting/losing money—usually comes back to economics.** Particularly when dealing with taxpayer funds, second- or third-vetting of any idea is critical especially when dealing with internal pitches. The greatest value of this CoP is **mitigating risks**, particularly in the eyes of administration or city council.” (Participant 6).



Another participant also shared this sentiment:

“It’s great the way it is. There’s got to be a cost savings in here, because being part of the CoP saves costs for me in how many staff hours I dedicate to researching solutions.” (Participant 3)

While the previous two respondents are discussing the time and cost savings that occur for them specifically, this notion of value can be expanded outwards to their municipality as well:

“As for the city, it certainly gives more value... there’s only one of me. So this very specific group who has similar situations as me, and the questions we’re all getting are all very similar. So it makes me like a bigger group than just one, so it **provides huge value. Many Energy Managers for the price of one, so to speak. It’s huge to be able to share ideas with your management colleagues.**” (Participant 1)

Intangible Benefits

Beyond both the time and cost savings that result from being a member of this CoP, there are a number of less quantifiable benefits, including the knowledge sharing among members.

“Collaboration is an essential ingredient for adaptation [to climate change]. Putting people in contact with networks like this **increases their capacity** to understand and respond to impacts.” (Participant 8)

Building off the last set of benefits, this respondent cited increased capacity as one of the advantages of being a part of this CoP. Other participants similarly noted the benefits of sharing experiences and knowledge within the group:

“Success follows when individual abilities and talents are combined. **This CoP enhances what we can do as individuals to contribute to the progress of our communities.**” (Participant 7)

Furthermore, this CoP enabled and encouraged innovation among Municipal Corporate Energy Managers. Its structure and functions offer a safe space to share and discuss new ideas, and learn from both successful and unsuccessful initiatives implemented within other municipalities:



“It allows for constant tweaking of ideas and merging of practices, so from an innovation standpoint it helps to build an envelope of discussions/experiences that try to maximize the sum of all individual parts of certain ideas. **Sharing information/discussing ideas within this CoP lends a greater deal of confidence in the idea itself**—we need to be sure that an idea can deliver on its promises, and validate any economic investigation or analyses that need to be done. Risk mitigation and greater confidence in putting proposals together maximizes benefits of outcomes.” (Participant 6)

IMPLICATIONS

Survey and interview participants agreed that they appreciate the current format of this CoP. Members find they can effectively utilize knowledge shared in the CoP at their job, and also feel that they can effectively share knowledge gained in their job with other members of the CoP. Overall, both the structures and functions of this CoP add tangible and intangible value for its members and their respective municipalities.

A theme that came up often was the value of being part of a group of peers and colleagues who held a range and diversity of knowledge related to energy management. Each member contributed their own experiences to a collective knowledge base that was described as a valuable way for discussing the potential strengths and weaknesses of new ideas related to energy management in municipalities. Indeed, being able to propose ideas and innovations within each member’s respective municipalities based on what worked or didn’t work for other municipalities was a huge asset and selling point to being in the CoP.

Additionally, interviewees were fairly unified when asked if the CoP should be opened up to other municipal departments or outside consultants. While some agreed that the knowledge shared within the CoP would be helpful to outside groups, the overall consensus was to keep the group contained to just Corporate Energy Managers. This was to preserve the “safe space” of the group. Corporate Energy Managers are often pitched products and services by outside vendors, and many participants wished to keep this space free of the influence of these vendors, so that they could continue to give honest reviews and feedback. Furthermore, keeping the CoP limited to Municipal Corporate Energy Managers could also help to maintain the scope and specific focus of the group.



Members of the CoP reported that the “casual” nature of the group suited them well: they could check into the Google Group as necessary, but did not feel that they needed to contribute constantly. Many participants mentioned that they often see each other at like-minded events, and did not mind the lack of “formal” meetings. However, as the group grows and membership turns over, it may be important to have quarterly or bi-annual meetings.

Some concerns of the participants were related to navigating the Google Groups platform. Several participants noted that they would like more regular updates from the group, and wanted an easier way to navigate posts so the same questions are not continuously being asked. These concerns could be mitigated in a number of ways. In addition to the standard “welcome email” that is sent out to new members with instructions on how to navigate the group (including how to search for and “tag” posts, or receive a “digest version” of the posts made that day/week), there could be a training video on how to use the group. Another option would be to move the group to a different platform with more functionality, such as Slack.

With migrating the system to a different platform comes additional concerns about the future of this Community of Practice. If it is to grow substantially, there may be a need for additional staff support, which is beyond the scope of its current structure.

CONCLUSIONS

As has been illustrated, many of the members of the CoP make clear connections between their work and the CoP itself. They draw a great deal of knowledge from the CoP and consider it to be a great value added to their position and their municipality. As one interviewee noted, “It’s like having many energy managers for the price of one.”

Restricting membership eligibility of the CoP to solely Municipal Corporate Energy Managers will preserve the “community feel” of the group, and encourage honest dialogue amongst the members.

The success of this CoP demonstrates the value of having a consistent, collaborative communication system in place. This system allows for members to share ideas and participate in discussions with a network of colleagues on an ongoing basis to supplement any external in-person meetings and/or events. Indeed, the existence of this CoP fills gaps in communication between Municipal Corporate Energy Managers—



resulting from the rhythms of external conference and meeting cycles—by providing a permanent space for members to give and receive advice in a more timely way.

If this CoP is to continue to grow and add members, we recommend a more formalized structure be put in place. It is up to the CoP members themselves what that structure will look like: some suggestions by participants included adopting an elevated online platform, or having regular, in-person formalized meetings specifically for members of the CoP. Regardless, the addition of an administrative staff person to organize and mobilize this structure would be of great benefit.



APPENDIX A: SURVEY QUESTION SET

1. Background of respondents:

- 1.1. Please provide your job title and affiliation.
- 1.2. How long have you been in this position?
- 1.3. Please identify the Community of Practice (COP) you are a member of.
- 1.4. How long have you been a member of this COP?
- 1.5. How would you describe your level of involvement in this COP?
 - Very Involved (5+ hours per week)
 - Involved (3-5 hours per week)
 - Somewhat involved (1-3 hours per week)
 - Minimally involved (less than 1 hour per week)

2. Forms/structures:

- 2.1. What is the scope/level of operation of this COP?
 - Community/local
 - Regional
 - Provincial
 - National
 - International



2.2. How is this COP organized? Please select all that apply.

- Community groups
- Regional groups
- Provincial groups
- National group
- International group

2.3. How are meetings conducted:

- In person?
 - Annually
 - Bi-annually
 - Quarterly
 - Monthly
 - Weekly
 - Not applicable
- Via phone
 - Annually
 - Bi-annually
 - Quarterly
 - Monthly
 - Weekly
 - Not applicable



- Via web-based conference technologies (such as Webex):
 - Annually
 - Bi-annually
 - Quarterly
 - Monthly
 - Weekly
 - Not applicable
- Other: _____

2.4. How do you find out about meetings? Please select all that apply.

- Word of mouth
- Email
- Listserv
- Social media
- Other (please explain)

2.5. What does the leadership structure of this COP look like?

- Internal (i.e., the leader is also an existing practitioner)
- Third party
- Other (please explain)

2.6. How are leaders appointed and how do transitions in leadership work?

- Democratic (voting system)
- Appointment

2.7. Please elaborate on your response to the previous question (i.e. the leadership systems in place within your COP).



2.8. What is the average term length for leaders within your COP?

- One year or less
- Between one and two years
- Two years or more
- Other (please explain)

2.9. What kind of agreements are in place to keep leaders in their positions?

- Explicit (i.e., written contracts)
- Implied/assumed (i.e., oral agreements)

2.10. How would you describe the transitions in leadership that have taken place in this COP?

- Offer a scale from 1-5, where 1 = “challenging,” and 5 = “smooth”

3. Functions:

3.1. What is the state of evolution of this COP (or, how long has it been in existence)?

- Early stages (e.g. just formed)
- Middle stages
- Middle-to-late stages
- Late stages (e.g. has been in existence for X number of years)



3.2. What is the focus/purpose/goal of this COP? Please select all that apply.

- Providing lists / examples of best practices
- Related to community energy management
- Related to corporate energy management
- Other (please describe): _____

4. Value added/codes of conduct:

4.1. Do you feel this COP has added value to your organization?

- Yes
- No

4.2. If you answered “yes” to question (a), how do you feel this COP has added value?

4.3. Do you feel that this COP provides a safe space to share information?

- Yes
- No

4.4. Do you feel that you can present ideas generated in this COP to members of your community/corporation?

- Yes
- No

4.5. Is there a formal code of conduct that guides your COP’s operations?

- Yes
- No

5. Follow-up

5.1. What features of this COP do you like? Why?



- 5.2. What features of this COP would you improve? How?
- 5.3. Would you be interested in being contacted for a one-on-one interview regarding this COP's structures and functions? If so, please provide contact information below.
- 5.4. Is there anyone else you could recommend that might be interested in participating in a one-on-one interview? If so, please provide contact information below.

APPENDIX B: INTERVIEW QUESTION SET

1. Background information

- 1.1. What kinds of connections, if any, would you make between your job and your role as a member of this COP?
- 1.2. How did you become involved in this COP?

2. Forms/structures

2.1. Please describe how meetings are structured/facilitated in this COP:

- If this COP uses web-based conference technologies (such as Webex) to facilitate meetings, how do you feel these technologies compare to in-person meetings?
- If members of this COP are from different geographical locations, how do you overcome challenges of distance?
- What would you like to stop?
- What would you improve?
- What would like to continue?



2.2. Please describe the leadership structure of this COP:

- What would you like to stop/change?
- What would you improve?
- What would like to continue?

2.3. How does the structure of this COP facilitate decision-making processes?

2.4. How are new members brought into this COP?

- How are stakeholders and support systems sought out and maintained?
- When thinking about bringing in new members/stakeholders, under what conditions is an individual/group “eligible?”
- Must they be part of the same/similar sectors and scope associated with this COP?
- Is “scope creep” an issue for this COP? If so, how does this COP manage “scope creep?”

3. Functions:

3.1. How does this COP:

- Set, measure, and report on metrics for decision-making?
- Provide tools for members to use and apply to decision-making?



3.2. Discussions

- What are some examples of “talking points” that come from engaging in this COP that you, as a member, can bring back to your job?
- What are some examples of “talking points” that you can bring from your job to this COP?
- In what ways, if any, do the discussions and ideas that come from this COP help you to support or refute arguments surrounding energy management decisions in your community/corporation?

3.3. Have you had any experience with other COPs?

- If so, could you describe this experience?
- How would you compare your experiences with past COPs to those of this current COP?

4. Value added

4.1. Please discuss your thoughts on the value this COP might add to your community/corporation.

4.2. What is it about the forms/functions you mentioned (or other layers of COP organization) that have added value to this COP? To you as individual?

4.3. What are your thoughts about the ways in which information/ideas are shared and discussed in this COP?

4.4. Does this COP enable and encourage innovation? If so, what is it about its forms/functions that enable and encourage innovation?

4.5. If you are challenged by people in your community who will poke holes in your ideas, will your COP help you prepare to deal with these challenges?

4.6. Is there a formal code of conduct that guides your COP’s operations? Is it institutionalized? How are these code of conducts applied and enforced?

5. Is there anything you would like to discuss that I didn’t ask you?