THE ART OF KNOWLEDGE EXCHANGE

A Results-Focused Planning Guide For Development Practitioners

ARE YOU LOOKING TO...

- **Connect** clients to new information and opportunities across countries and regions?

- **Encourage** innovation and the sharing of practical experience?

- **Inspire** collaboration between countries?

- **Help** development practitioners get results out of their knowledge exchange?

- **Facilitate** new methods of capacity development?

- **Be a resource** for others who want to do development differently?

THE PLANNING GUIDE – WHAT'S INSIDE?

Designing and implementing knowledge exchange initiatives can be a big undertaking. This guide takes the guesswork out of the process by breaking it down into simple steps and providing tools to help you play a more effective role as knowledge connector and learning facilitator.

IT WILL HELP YOU:

» **Identify & Assess** capacity development needs

» **Design & Develop** an appropriate knowledge exchange initiative that responds to those needs

» **Implement** the knowledge exchange initiative

» **Measure & Report** the results
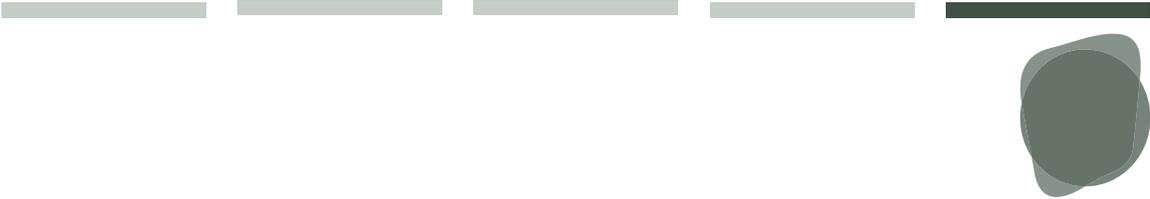
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GOT MILK? HOW TANZANIA LEARNED FROM INDIA'S 'WHITE REVOLUTION'

EXAMPLES FROM THE TANZANIAN STORY ARE USED THROUGHOUT THIS TOOLKIT TO SHOW YOU HOW TO WRITE EACH STEP OF YOUR KNOWLEDGE EXCHANGE DESIGN. WHILE BASED ON A TRUE CASE, THE TANZANIAN STORY AS REPRESENTED HEREIN HAS BEEN MODIFIED FOR THE PURPOSE OF LEARNING AND SHOULD NOT BE CONSIDERED FACTUAL. FOR MORE INFORMATION ABOUT THE ACTUAL EXCHANGE, PLEASE VISIT HTTP://WBI.WORLDBANK. ORG/SSKE.

Although Tanzania's child mortality rate has been falling steadily in recent decades, it remains 77 percent above the world average, at 108 deaths per 1,000 children. In order to address this problem, the Tanzanian government sought to improve nutrition and incomes in rural areas by restructuring its agriculture sector, particularly the struggling dairy industry.

Tanzania wanted to follow the best model and learn how India carried out its renowned "white revolution," during which it increased its milk production by a factor of five to become the world's largest single milk producer.

Last year, the World Bank funded a Knowledge Exchange between the two nations, aimed at improving the performance of Tanzania's dairy sector by promoting favorable policies, incentives and efficient dairy supply chains, as well as improving the operational efficiency of the National Dairy Development Board (NDDB) and the Ministry of Agriculture (MoA).

The initiative involved a number of Knowledge Exchange Instruments and activities and was highly successful. A working group from Tanzania and India met in a series of videoconferences to plan the exchange, which was anchored by a 10-day expert visit to Tanzania by six officials from the Indian National Development Dairy Board and the Gujarat Federation. Then a small delegation of 14 Tanzanian officials, chosen from the MoA, NDDB, dairy producers, processors, and distributors, visited India on a study tour to see first-hand how India had transformed its dairy industry. The exchange participants held a follow-up videoconference and developed a brochure and videos summarizing the lessons learned.

The outcomes included:

• Enhanced knowledge and skills

• Improved consensus and teamwork

• New implementation know-how

Using their new insights, Tanzanian dairy officials have not only developed policies based on the Indian model, they have also successfully implemented dairy reforms and built consensus among stakeholder groups for a blueprint of further reforms. The NDDB has implemented the rapid results approach learned from India to scale up the reforms across the country.

Even though Tanzania may not see its milk production quintuple in the near future, it has started to make progress in revamping and improving its agriculture sector. Boosting nutrition and incomes in rural areas cannot be far behind.

KNOWLEDGE EXCHANGE AND RESULTS

Knowledge exchange, or peer-to-peer learning, is a powerful way to share, replicate, and scale up what works in development. Development practitioners want to learn from the practical experience of others who have gone through, or are going through, similar problems. They want to be connected to each other and have ready access to knowledge and solutions.

This guide emphasizes empowering local agents through experiential learning with peers from their own and other countries, by following a strategic, results-oriented approach to learning based on the World Bank Institute's Capacity Development and Results Framework.

THIS APPROACH HELPS YOU TO:

» Consider knowledge exchange within a broader programmatic and development context

» Ensure your initiative is stakeholder-owned and demand-driven

» Determine capacity challenges impeding the achievement of a specific development goal

» Reflect on the change processes needed to achieve a development objective

» Identify individuals or groups who can play effective roles in bringing about these changes

» Choose the right mix of knowledge exchange instruments and activities needed to help your participants to learn, grow, and act

» Measure the results of your knowledge exchange initiative

Introduction
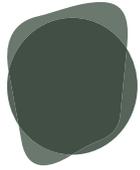
Figure 1. Five Steps to a Successful Knowledge Exchange

Anchor

Define

KNOWLEDGE

Results

EXCHANGE

Design and Develop

Implement
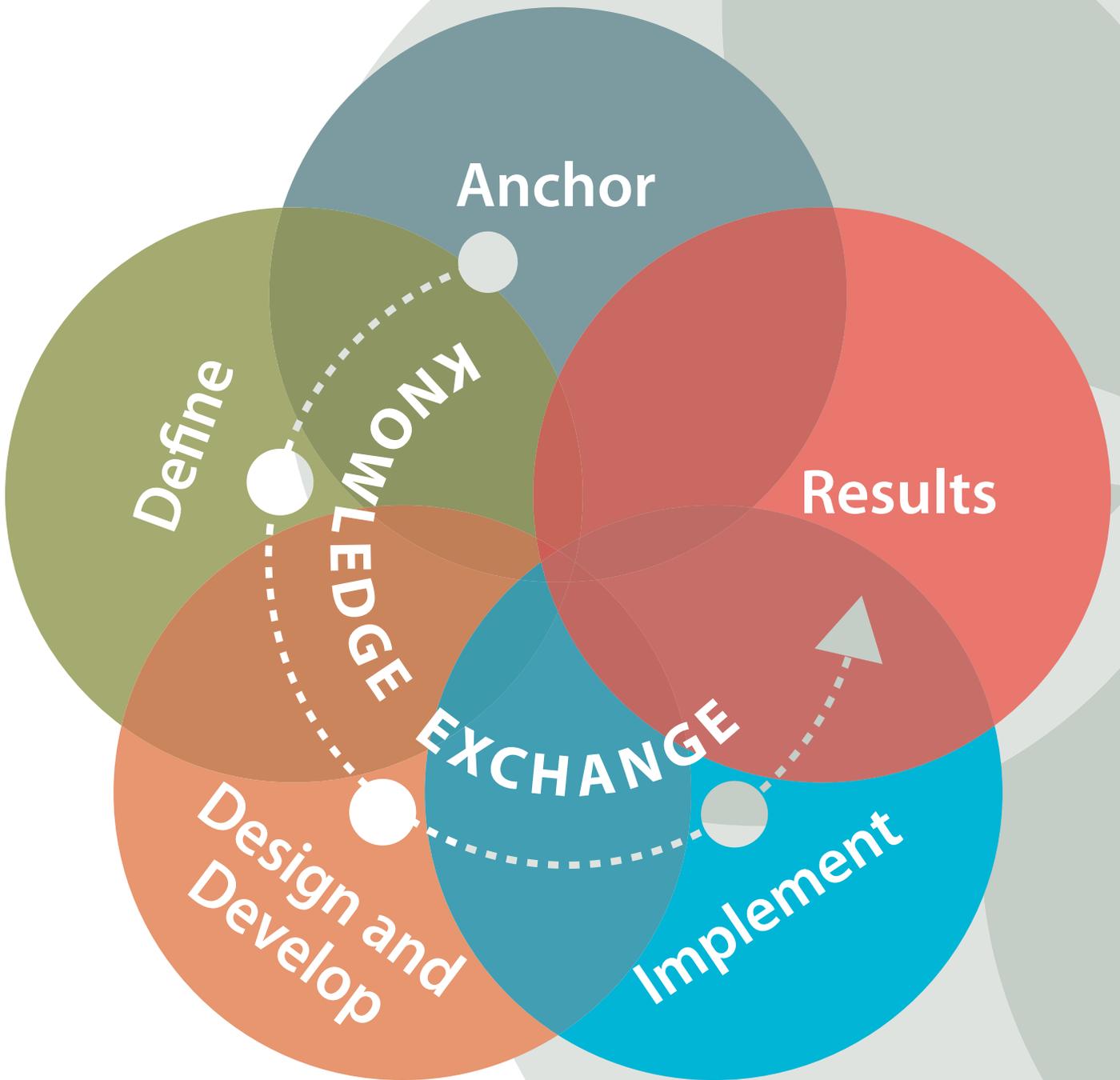
STEP 1

ANCHOR IT

- Identify the development goal (and how it will be reached)
- Identify the institutional capacity challenge(s)
- Consider the capacity-development objective(s)

STEP 2

DEFINE IT

- Identify the ideal participant profiles
- Consider the desired capacity outcomes
- Identify the most appropriate knowledge providers

STEP 3

DESIGN AND DEVELOP IT

- Select the participants
- Agree on the capacity objective and outcomes
- Assemble the knowledge exchange initiative (consider the operating constraints, select the knowledge exchange instrument(s), and select, sequence and design the activities)
- Plan the results measurement

STEP 4

IMPLEMENT IT

STEP 5

REPORT THE RESULTS

ANCHOR THE KNOWLEDGE EXCHANGE

Knowledge exchange can be used as part of a change process to powerful effect. But like any good capacity building approach, it should be anchored in the broader development context and your clients' needs should drive the agenda. Before committing to a full-fledged knowledge exchange initiative, ask yourself these questions:

» What is the development goal and how will this initiative contribute towards its achievement?
» What are the major constraints limiting your clients' achievement of this goal?
» What will change as a result of this knowledge exchange? How is this change going to happen?

STEP
1

Anchor the
Knowledge
Exchange

1.1. IDENTIFY THE DEVELOPMENT GOAL (AND HOW TO ACHIEVE IT)

The Development Goal focuses on the major objective your clients hope to achieve. It derives from a long-term regional, national, or local development strategy. The knowledge exchange initiative should bring your clients closer to realizing this goal, by targeting the institutional constraints preventing its achievement. The development goal therefore guides the design of your knowledge exchange.

An effective development goal is locally owned and provides clear economic and social value to targeted beneficiaries. It's important to recognize that a knowledge exchange initiative will not result in the development goal, but should contribute to it. In some instances, knowledge exchange can be used to build group consensus on a development goal itself.

Tanzania's Development Goal

The development goal in Tanzania was to improve nutrition and income in Tanzania's rural areas and increase economic growth by restructuring its agricultural sector.

TANZANIA
EXAMPLE

1.2. IDENTIFY THE INSTITUTIONAL CAPACITY CHALLENGE(S)

Three main factors often block the way to realizing the development goal.

1. Weak stakeholder ownership
2. Inefficient policy instruments
3. Ineffective organizational arrangements

It helps to break down the institutional capacity challenges into sets of characteristics. *(See Table 1).* Work with your clients and other stakeholders to identify the most important capacity challenges. Doing this will help you design a knowledge exchange initiative that yields meaningful results.

STEP
1

Anchor the
Knowledge
Exchange

Table 1. Institutional Capacity Challenges & Characteristics[1]

Capacity Challenge	Definition of Terms	Characteristics
Weak stakeholder ownership	Stakeholder ownership refers to the political and social forces that determine the priority government, civil society, and the private sector give to a development goal.	• Lack of commitment from leaders • Incompatibility of social norms and values • Lack of stakeholder participation in setting priorities • Lack of information transparency • Insufficient stakeholder demand for accountability
Inefficiency of policy instruments	Policy instruments refer to the administrative rules, laws, regulations, standards, and other formal incentives that a society uses to guide stakeholder actions to achieve development goals.	• Ambiguity in defining rights and responsibilities of stakeholders • Inconsistency • Lack of legitimacy • Lack of incentives for compliance • Difficulty of administration/implementation • Failure to minimize unintended negative impacts • Insufficient flexibility • Susceptibility to corruption
Ineffectiveness of organizational arrangements	Organizational arrangements are the systems, rules of action, processes, personnel, and other resources that state or non-state stakeholders bring together within a specific organization to achieve a development goal.	• Ambiguity of mission • Failure to achieve outcomes • Operational inefficiency • Lack of financial viability & probity • Lack of stakeholder communications and support • Lack of adaptability to anticipate and respond to change

1.3. CONSIDER THE CAPACITY-DEVELOPMENT OBJECTIVE(S)

The capacity-development objective is the institutional change your clients and participants seek to realize in society. It should describe the desired results to which the

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[1] From *The Capacity Development Results Framework: A Strategic and Results-Oriented Approach to Learning for Capacity Development,* World Bank Institute, Washington D.C. (See http://wbi.worldbank.org/wbi/about/capacity-and-results.)
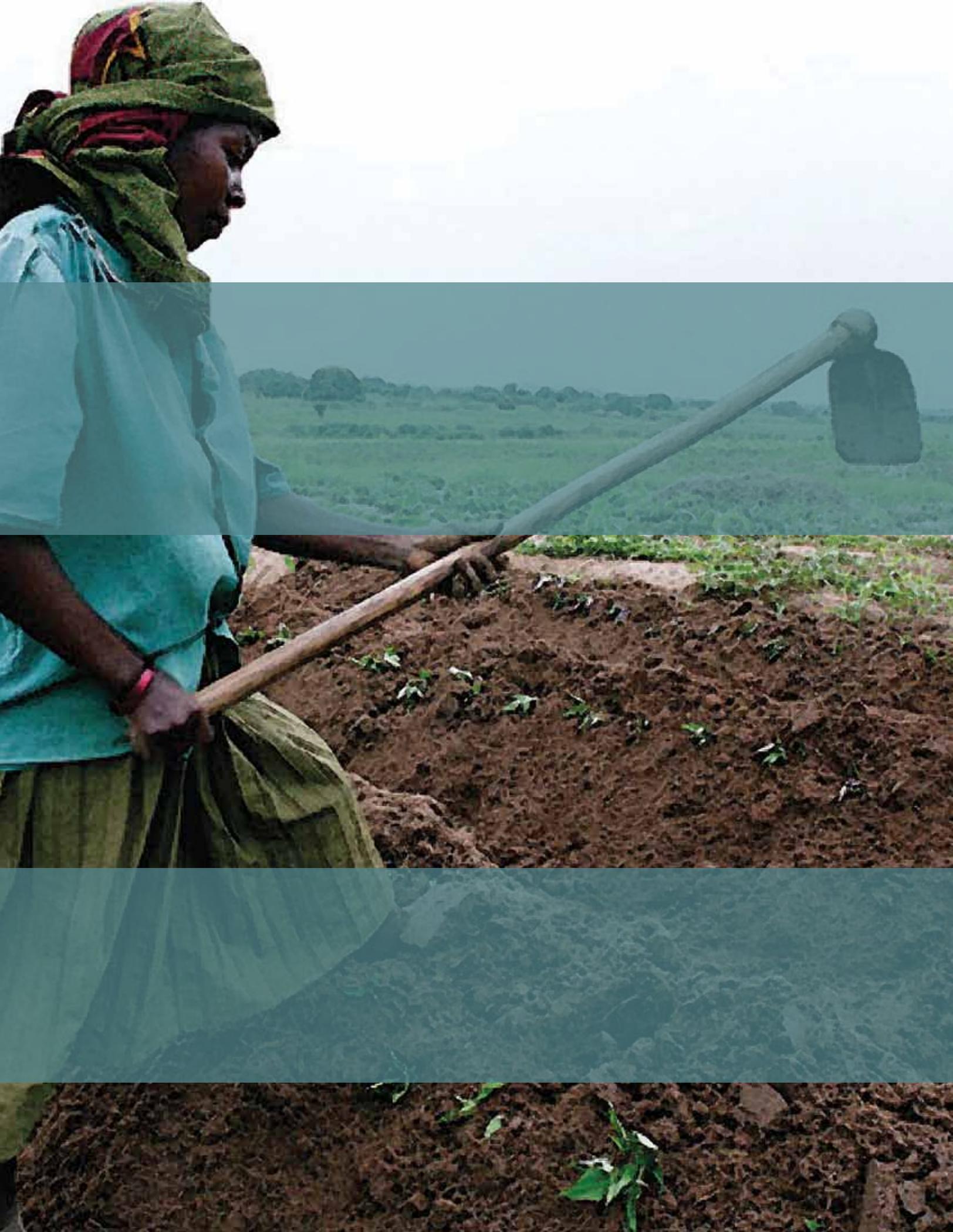
TANZANIA'S CAPACITY CHALLENGES

This exchange sought to address two interrelated capacity challenges faced by Tanzania:

- **Inefficient policy instruments:** Policies implemented by Tanzania's National Dairy Development Board (NDDB) and stakeholders had been unsuccessful at establishing effective dairy cooperatives and supply chains.
- **Ineffective organizational arrangements:** The operational efficiency of the NDDB and the Ministry of Agriculture were weak due to poorly focused missions, weak extension services, and insufficient technical knowledge.

**TANZANIA
EXAMPLE**

knowledge exchange initiative will contribute and how these changes will address the key institutional capacity challenge(s). Indicating the contributing characteristics targeted for improvement will make the capacity development objective more specific. In the event that the knowledge exchange is part of a broader development program, the capacity development objective should complement your program objective. While you and your clients should have a fairly clear idea of this from the beginning, it will be important to revisit the objective with *all* the participants once they have been determined.

TANZANIA'S CAPACITY DEVELOPMENT OBJECTIVE

The knowledge exchange initiative focused on improving the performance of Tanzania's dairy sector by:

- Promoting favorable policies and incentives and the efficient organization of dairy supply chains
- Improving the operational efficiency of the National Dairy Board and the Ministry of Agriculture

**TANZANIA
EXAMPLE**

STEP
2

DEFINE THE KNOWLEDGE EXCHANGE

IN STEP 1 YOU ANCHORED YOUR KNOWLEDGE EXCHANGE INITIATIVE BY:

» Tying it to the development goal
» Identifying the constraints to reaching the development goal
» And considering the capacity development objective with your clients

IN STEP 2 YOU WILL:

» Identify the groups of people who can achieve the capacity objective
» Consider the specific outcomes participants will seek from the exchange
» Identify groups and individuals with relevant and transferable knowledge and experience to share

STEP 2

Define the
Knowledge
Exchange

STEP 2.1. IDENTIFY THE IDEAL PARTICIPANT PROFILES

Which people/groups are most likely to make this change happen?

Why are they best placed to do so?

The success of this knowledge exchange initiative depends on having the right kinds of people involved. Consider those who *can* and *will* initiate and manage the changes needed to reach the capacity development objective. These **change agents** can be either a homogenous or diverse mix of individuals, groups, and institutions. Most likely one or more of your clients will be involved. But who else should participate?

When considering participants, don't just think about how they might behave or what they can contribute as individuals. Also consider how and what they add to the group dynamic. Putting different kinds of people together with diverse backgrounds and perspectives can result in a powerful learning experience.

TIP

Selecting the participants is a juggling act. The list of knowledge exchange participants will change again and again as you move deeper into planning. This is a natural part of the process, so don't get discouraged. Tailoring the exchange to the capacity needs of the participants is what is most important. At the same time, be careful not to lose sight of the objective.

Table 2: Selecting Participants

Talk to your clients when considering participants (individuals and groups):

- Who will champion the cause and make the envisioned changes happen?
- Will the knowledge they gain enable them to act or behave in a new way? Will this help them realize the capacity development objective?
- How does the person's role or status help him/her contribute to the exchange and its aftermath?
  - Does this person or group have prior experience in the topic?
  - Can the inclusion of this person or group improve the likelihood of realizing the capacity development objective?
- Are different change agents needed to achieve different outcomes?
- Does this person bring a new or different perspective to the group? Sometimes a diverse mix of people can achieve what others with a similar background, role, or status cannot.
- Are the prospective participants operating in an environment that lets them act on the knowledge and experience they receive?
- What incentives do they have to apply their learning as expected?

Tanzania's Participant Profiles

Ideal groups of people included:

Representatives from Tanzania's National Dairy Board and the Ministry of Agriculture: These institutions are responsible for dairy policies and sector oversight and are uniquely suited to improve the operational efficiency of dairy supply chains.

Leading dairy producers, processors, and distributors: These are the people who can help push for greater reforms and will eventually benefit from having a better system.

TANZANIA
EXAMPLE

STEP
2

STEP 2.2. CONSIDER THE DESIRED CAPACITY OUTCOMES

What specific, measurable changes are desired?
Will these changes help measure progress towards the capacity development objective?

In **Step 1** you considered the context for this exchange, including the development goal and the institutional capacity challenges preventing its achievement. You also discussed the capacity development objective with your clients—what will change in society as a result of the knowledge gained through this initiative. While the capacity objective could be reached through a single knowledge exchange initiative, it is not very likely. However, progress towards the capacity objective <u>is</u> measurable. These intermediate steps, or capacity outcomes, are what we expect to see, measure and report after a knowledge exchange initiative.

The capacity outcomes reflect the specific changes the participants are looking to achieve at the individual and group level—what they want to learn and how they want to change. Six general capacity outcomes form the basis of all change processes. The capacity outcomes will vary depending on the challenges your clients and participants aim to address, how they want to address them, and who is involved. Getting the capacity outcomes right is really important—the outcomes are how we define and measure progress toward the capacity development objectives.

Again, while you and your clients should establish the capacity outcomes at the beginning, it will be important to revisit them with <u>all</u> the participants once they have been determined. At that time, you will ask them, *"What do you want to learn?"* and *"How do you hope to grow?"*

Table 3. Capacity Outcomes & Change Types[3]

Capacity Outcomes	Definition	Change Type
Raised awareness	**A person is more likely to act** because of an improved understanding, attitude, or motivation.	Action and behavioral change
Enhanced knowledge and skills	**A person is more capable of acting** because of what (s)he has learned or how (s)he has applied new knowledge or skills.	
Improved consensus and teamwork	**A group with a common task is more likely or able to act because they collaborate better**, i.e. there is greater agreement, coordination, communication or cohesion--or because group members make better contributions.	Altered processes and relationships
Strengthened coalitions	**A group with diverse objectives but a common action agenda is more likely or able to act because they collaborate better**, i.e. there is greater agreement and trust among members, increased commitment to the agenda, or members are better at leveraging their diverse strengths.	
Enhanced networks	**A group with a common interest but no formal action agenda is more likely or able to act because they collaborate better**, i.e. there are better processes, stronger incentives to participate, or members communicate more or are more active.	
Increased implementation know-how	**A person or group is more likely or able to formulate or implement plans, strategies or policies because of hands-on experience**	New products and services

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[3] From *The Capacity Development Results Framework: A Strategic and Results-Oriented Approach to Learning for Capacity Development,* World Bank Institute, Washington D.C. (See http://wbi.worldbank.org/wbi/about/capacity-and-results.)

STEP
2

Define the
Knowledge
Exchange

Use the table below to help participants identify their desired capacity outcomes. A "NO" indicates a possible learning gap. Consider whether this is something that the knowledge exchange should address in order to achieve the capacity development objective.

Table 4. Identifying Desired Change Types[4]

"No" indicates a possible learning gap	Change Type
• Is it clear how the capacity-development objective ties into the overall development goal? • Are roles well defined and are you clear on what you need to do to address the capacity challenge? • Do you have the knowledge and/or skills to achieve the capacity-development objective?	Action and behavioral change
• Is your work situation conducive to collaboration? • Is working together important for you and your colleagues? • If you belong to a network, are you connected to other members in a way that promotes collaboration?	Altered processes and relationships
• Is there a policy or strategy already in place that supports the envisioned changes related to the capacity-development objective? • Has the policy, strategy, or plan been implemented?	New implementation know-how

TANZANIA
EXAMPLE

Capacity Outcomes Sought by Tanzania

Enhanced Knowledge and Skills: Officials in the Ministry of Agriculture (MOA), National Dairy Development Board (NDDB), dairy producers, processors, and distributors will have a better understanding of the constraints facing Tanzania's dairy sector and be better equipped to develop effective policies to improve performance.

Improved Consensus: Exchange participants will reach agreement on a blueprint of potential dairy sector reforms appropriate in Tanzania.

Increased Implementation Know-how: NDDB participants gain first-hand experience attempting reforms through a rapid results approach. This helps them identify constraints and challenges before rolling out reforms on a larger scale.

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[4] Ibid.

STEP 2.3. IDENTIFY THE MOST APPROPRIATE KNOWLEDGE PROVIDERS

Which individuals or groups have the most relevant and transferable knowledge and experience to share?

Do they have the resources and capacity to share it?

Having the right knowledge providers is key to a successful knowledge exchange. Knowledge providers can be individuals, groups, or institutions hailing from the private, public, or civil sectors. Knowledge providers can come from the same country or region, or from somewhere completely different. In many instances, the roles of knowledge providers and knowledge recipients are not very distinct. Some knowledge exchange instruments are designed specifically for this mutual learning and knowledge sharing. This is addressed in greater detail in Step 3.

When selecting knowledge providers, consider whether they can claim the following:

» Demonstrated success in effectively addressing similar development challenges

» Relevant experience in providing this knowledge, receiving delegations, and applying the proposed knowledge exchange methods (See Step 3)

» Available resources that the proposed institution(s) can mobilize to plan and implement the knowledge exchange in the proposed timeframe

» Readiness to deliver, as evidenced by confirmed commitment and a clear distribution of responsibilities

» Prior relationships between proposed delegations in the knowledge-provider and knowledge-receiving institutions, groups, or individuals

» Understanding of potential logistical issues and risks, such as how to address language issues, potential travel challenges, and so on

As in participant selection, try to find a good mix of knowledge providers that can share different perspectives on the issue. You want to expose participants to many points of view, to allow them to see how something has worked at all levels, including operational, social, and political.

Tanzania's Knowledge Providers

India's National Dairy Development Board: This preeminent oversight agency was instrumental in catalyzing the country's "White Revolution," which led to an increase in India's milk production from 20 to 100 million metric tons in only 40 years . The NDDB is interested in sharing its experiences in analyzing constraints and restructuring dairy operations, and brings a proven track record in undertaking exchanges worldwide.

The Gujarat Cooperative Milk Marketing Federation: Can provide direct linkages to a cooperative that dramatically scaled up its operations, especially through its global brand, AMUL.

Both organizations have confirmed resources to deliver all exchange activities within the noted timeframe.

**TANZANIA
EXAMPLE**

The knowledge provider(s) may change for any number of reasons as planning progresses. This is a natural part of the process, so don't get discouraged. Finding the right match for your clients and participants is what counts. The ideal knowledge provider must both be available and willing to share the details of their development experience.

TIP

STEP
3

DESIGN AND DEVELOP THE KNOWLEDGE EXCHANGE

If you feel you are ready for designing and developing without having thought through the development context and defining key components of your knowledge exchange, **you should stop! Take a few minutes to look at Steps 1 and 2.** Getting the beginning right will dramatically increase the chances that the time and effort from you, your clients, the participants, and the knowledge providers is well spent

WATCH OUT

This is when the initiative starts to take shape. In designing and developing the knowledge exchange, you will tighten up your participant list, work with your key stakeholders to determine the capacity objective and expected outcomes, assemble your exchange, and plan how to measure the results of your exchange.
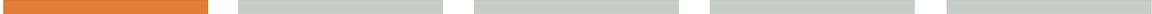
STEP
3

Design and Develop the
Knowledge Exchange

Figure 2: Designing and Developing the Knowledge Exchange Initiative

3.1   **SELECT THE PARTICIPANTS**

3.2   **VERIFY THE DESIRED CAPACITY OUTCOMES**

3.3   **ASSEMBLE YOUR KNOWLEDGE EXCHANGE INITIATIVE**

a) Consider the operating constraints
b) Select the Knowledge Exchange Instrument(s)
c) Select and sequence the activities (building blocks of the knowledge exchange instrument)
d) Design the Activities

3.4   **PLAN YOUR RESULTS MEASUREMENT**
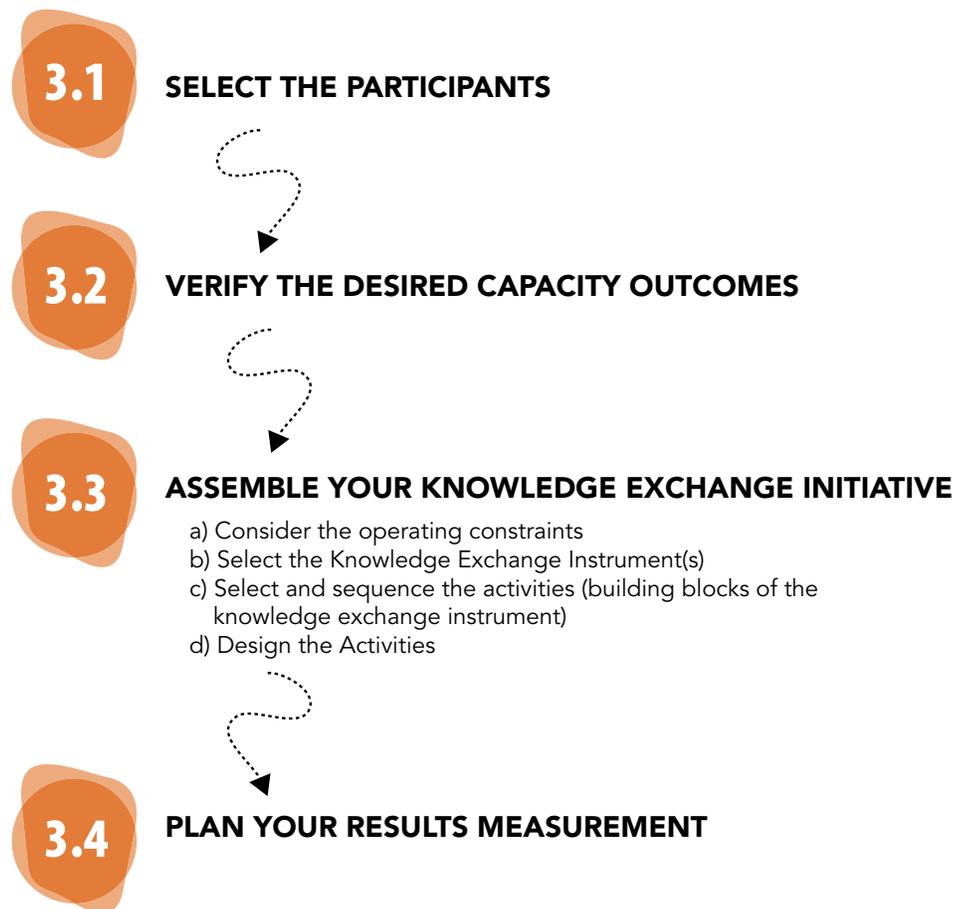
STEP 3.1. SELECT THE PARTICIPANTS

Which individuals are best placed to benefit from the knowledge exchange and act on what is learned?

When considering who to invite (and who not), work with your clients and any participants already identified. Your knowledge exchange participants should be well positioned to leverage the learning and experience they will gain. Seek the champions—those who are open to reform and who will drive the desired change. Ask yourself the question, *"Who from my target participant groups is best placed to benefit from the knowledge exchange and act on what is learned?"* Consult Table 2 (Page 9) again for help in selecting participants.

Once you have the perfect list, know that it may still change! As plans firm up, some participants won't be available, some will drop out, and others will want to join. Don't get discouraged. This is part of the process. The important thing is to maintain the momentum and regularly involve your participants in the planning. By the time it's ready to launch, you and your participants will have formed a strong sense of the knowledge exchange objectives and expected outcomes. If a new participant can help to achieve these or even expand the outcomes, he or she will be a good addition to the team.

Participants from Tanzania's National Dairy Board and Ministry of Agriculture

These individuals are responsible for dairy policies and sector oversight and are uniquely suited to improve the operational efficiency of dairy supply chains. They are proven champions of reform and were selected because of their desire to apply learning and share it with others.

J.M. Gray, Director of Operations, Ministry of Agriculture
E. Mulholland, Secretary General, Ministry of Agriculture
D. Kuyeri, Program Manager, National Dairy Board
A. Maranatha, Operations Specialist, National Dairy Board
M. Williams, Deputy Director of Engineering, National Dairy Board

TANZANIA
EXAMPLE

STEP
3

Design and Develop the
Knowledge Exchange

STEP 3.2. AGREE ON THE CAPACITY OBJECTIVE AND OUTCOMES

What do the participants want to learn?

How do they hope to grow?

Now that you have identified the participants (or at least many of them), verify that you and your clients' assumptions regarding the development goal, institutional challenges, and capacity objective are accurate. If not, work with your participants and clients to determine these before tackling the capacity outcomes.

The capacity outcomes are the specific changes clients and participants seek to realize as a result of the knowledge exchange. It is therefore critical that your participants be involved in determining them. The success of the exchange depends on having participants own the results.

Determining the expected capacity outcomes can be done in a number of ways, including:

» Meeting face-to-face or virtually with all the participants, or a representative sample, to discuss and produce a draft list.

» Circulating the proposed capacity outcomes, drafted by you and your clients, for inputs from the participants. If taking this approach, encourage your clients to own the outcomes by writing new ones if necessary. The capacity outcomes should be theirs, or it is doubtful the knowledge exchange will result in anything substantial. Please refer to the example on Capacity Outcomes (Page 11)

It is important to check in with the knowledge provider(s) during this time. What they know and are able to share can help shape the capacity outcomes. These conversations may also highlight the need for an additional knowledge provider or a replacement of the original(s).

6 Capacity Outcomes (More information on page 11)

1. Raised awareness
2. Enhanced knowledge and skills
3. Improved consensus and teamwork
4. Strengthened coalitions
5. Enhanced networks
6. Increased implementation know-how

STEP 3.3. ASSEMBLE THE KNOWLEDGE EXCHANGE INITIATIVE

Every knowledge exchange initiative consists of an integrated blend of instruments, activities, and delivery modes. Selecting the right mix of these will help participants realize their capacity development outcomes.

When assembling your initiative follow the steps in figure 4 below.

Figure 3. Assembling the Knowledge Exchange Initiative

a) Consider the operating constraints

People   Time   Money   Technology

b) Select one or more knowledge exchange instruments

COMMUNITY OF PRACTICE   CONFERENCES AND FORA   DIALOGUES   EXPERT VISITS   PEER CONSULTATION   STUDY TOURS   TWINNING ARRANGEMENTS

c) Select and sequence the activities

Planning

Delivery

Follow Up

ACTION PLANNING   BRAINSTORMING   DEMONSTRATION

GROUP DISCUSSION   PANEL OF EXPERTS   PRESENTATIONS

EDISCUSSION   SIMULATION

ROLE PLAY   SURVEY

d) Design the activities

Face-to-face   and/or   Virtual

STEP
3

Design and Develop the
Knowledge Exchange

For example, if you were planning an Expert Visit, the process would look like this:

EXPERT VISITS

Planning

- **Brainstorm** through video conference to meet and agree on the scope of the mission
- **e-Discussion** to prepare a concept note

BRAINSTORMING

E-DISCUSSION

Delivery

- **Group Discussion,** in person, with visiting experts, local government and implementing agencies
- **Panel of Expert**s, in person and webcast with visiting experts, government officials, implementing agencies, civil and private sector representatives
- **Demonstration,** in person, with visiting experts and implementing agencies

GROUP DISCUSSION

PANEL OF EXPERTS

DEMONSTRATION

Follow Up

- **Action Planning** session in person and online to develop blueprint of sector reforms

ACTION PLANNING

3.3A. CONSIDER THE OPERATING CONSTRAINTS

What are the human, environmental, budgetary, and time constraints limiting the knowledge exchange initiative?

Among the first things to consider at an early design stage are the operating constraints. Think about:

» The time available to plan and complete the exchange
   • Is this a longer-term learning initiative? Or do the participants have an immediate learning need?

» The participants and their availability and ability to contribute to the initiative
   • Can the Vice Minister of Finance take a full week off from her regular duties?

   • Are extra preparation sessions needed to get the results your participants seek?

» The number of people participating
   • Is 80 really the right number? Can you be more selective?

» The operating environment
   • Are your participants located in a conflict-affected area?

   • If technology is needed, is it accessible?

» Your budget
   • *Can you afford to fly 80 people across the world? Is there a more cost-efficient way to get the same result?*

   • *What other trade-offs will be needed to make the most efficient use of budgetary and human resources?*

Tanzania's Operating Constraints

Time available	9 months
Participants	Mix of decision makers and operational level people from government, private sector, and civil society
Operating Environment	The operating environment in both Tanzania and India is conducive to this knowledge exchange.
Number of people	14
Budget	$75,000

TANZANIA
EXAMPLE

Table 5. Knowledge Exchange Instruments—A Brief Overview

COMMUNITY OF PRACTICE

A community of practice is a group of people who interact regularly on a common topic of shared interest with the goal of learning from one another. A CoP can be formal, with a detailed mission, structure, funding, arrangement, etc.—or informal, driven by peer-to-peer exchange of knowledge and information.

CONFERENCES AND FORA

These events are opportunities for a large number of stakeholders to engage on a specific topic with a high level of interaction among participants.

DIALOGUES

An exploration of participants' knowledge on a common subject from which new or stronger understanding, meaning, and possibilities can emerge. Dialogues raise awareness, support consensus building, and encourage informed action.

EXPERT VISITS

A subject matter expert (or group) goes to a requesting country, city, or organization to impart knowledge in their area of expertise. The visits allow for in-depth consideration of an issue or problem and the localization of practical knowledge and experience to address it.

PEER CONSULTATION

A process by which peers work together in small groups for mutual benefit providing critical, yet supportive, feedback.

STUDY TOURS

Visits by an individual or a group to one or more countries/areas for knowledge exchange. Study tours provide an opportunity for key stakeholders to learn relevant, good development practice from their peers.

TWINNING ARRANGEMENTS

A process that pairs an organizational entity in a developing country with a similar but more mature entity in another country.

3.3B. SELECT THE KNOWLEDGE EXCHANGE INSTRUMENT(S)

**Which instrument(s) will work within the operating constraints
and help participants achieve the capacity outcomes?**

Most knowledge exchange initiatives consist of one or more instruments. They can be used alone or in combination. Each instrument has its own strengths and limitations, with some more suitable for particular types of learning than others. The choice of instrument will also be affected by participant profile, group size, time, logistical constraints, and the resources available. Each knowledge exchange instrument should be designed in a way that helps achieve the capacity outcomes the group has set out for itself.

Selecting an instrument or mix of instruments for your participants is like considering what menu to prepare for a group of important dinner guests. Knowing these people, you should have a fairly good idea of what will be appreciated, and what will not (especially since you've already met and discussed expectations in Step 3.2). Suppose you decide on a hearty soup—it would be enough by itself, but by complementing it with good bread you make a meal. Similarly, you may find that one knowledge exchange instrument will meet your participants' basic needs, but by mixing it with another instrument you can leave them fully satisfied.

Tanzania's Selection of Knowledge Exchange Instruments

A working group from Tanzania and India planned the exchange together. It was anchored by a 10-day expert visit to Tanzania by six officials from the Indian National Development Dairy Board and the Gujarat Federation. Then a small delegation of 14 Tanzanian officials from the Ministry of Agriculture, National Development Dairy Board, dairy producers, processors, and distributors visited India on a study tour to see first-hand how the Indians had implemented these recommendations in their own country—and the results of their work.

**TANZANIA
EXAMPLE**

COMMUNITY OF PRACTICE

3.3.B.1

WHAT IS A COMMUNITY OF PRACTICE?

A community of practice (CoP) is a group of people who interact regularly on a shared topic with the goal of learning from one another. A CoP can be formal, with a detailed mission, structure, funding arrangement, etc.—or informal, driven by peer exchange of knowledge and information.

For a given KE initiative, consider developing a CoP if the group sees a need for ongoing, participant-driven knowledge exchange over the medium-to-long term.

Although a CoP requires planning at the inception, its ongoing success depends on the participants' commitment for mutual learning and on a dedicated person(s) to manage/encourage group interaction. A key strength of CoPs is the peer networks that are formed (and grown) through the sharing of knowledge, experiences, and expertise. It is important that members recognize the benefit of their participation, and that the interaction continues to support members' learning needs.

WHEN SHOULD I USE A COMMUNITY OF PRACTICE?

- There is a need for ongoing, participant-driven knowledge exchange over the medium-to-long term
- Participants are committed to mutual learning
- Participants recognize the benefits of their participation
- Participants have an opportunity to meet (physically or virtually) at the beginning

WHY SHOULD I USE A COMMUNITY OF PRACTICE?

- In-depth, face-to-face or virtual exchanges (both synchronous and asynchronous) among peers.
- Adaptable in terms of delivery platforms and organization (formal, informal).
- Continuous learning.
- Network building and expansion.
- Relationship building.
- Allows mobilization of new ideas.
- Increases visibility for issues of common concern.

THINGS TO CONSIDER

- How will you ensure that the participants are committed to the ongoing interaction necessary for a vibrant CoP?
- Have you set aside resources to hire a community manager to manage/encourage group interactions?
- Is the CoP component an integral part of your overall program design?

THINGS TO CONSIDER

How do you plan to involve the participants in planning sessions before the launch of the CoP? (Please consider the exchange's capacity-development objective and ICOs as you plan its activities.)

The following questions may help you fine-tune your planning of KE activities under a CoP:

- What types of communication technologies and delivery tools will you use for the activities (before, during, and after)?
- Will the CoP include both face-to-face and virtual interaction?
- Will there be a need for translation services either during a face-to-face activity or online?
- How do you plan to monitor and assess the learning outcomes of KE activities throughout the duration of the CoP and after (please include quantifiable indicators whenever possible)?
- Is there a beginning and an end to the CoP?
- Is the CoP working toward a time-sensitive deliverable/output?
- How will you assess the results of the CoP?

How do you plan to capture the tacit knowledge that is exchanged in the CoP?

What opportunities will there be to adjust the CoP design, if the desired outcomes are not being achieved?

Monitoring Methods:

- Participant questionnaire.
- Online discussions/Q&A.
- Participation rates as measured by overall membership, daily visits, length of stay, click-thru rates, site activity, etc.

OTHER FACTORS TO CONSIDER

- Internet access needed for electronic knowledge exchanges.
- Cost (depending on structure of CoP implemented).
- Time-intensive.
- Commitment (depending on the goals of the CoP, commitment may need to be at multiple levels: individual, institutional, national, etc.).
- There is a risk of lack of participation.

KNOWLEDGE
EXCHANGE
INSTRUMENT

CONFERENCES AND LARGE OR HIGH-LEVEL EVENTS

WHAT ARE CONFERENCES?

Conferences* are an opportunity for key stakeholders to engage in knowledge exchange activities that further locally driven institutional change and meet broader development agendas. Conferences provide a high level of interaction among stakeholders around specific topics. The reasons for hosting large events may include launching a global initiative, or communicating program impact or changes in strategy. Depending on their structure, conferences may include one or more Knowledge Exchange activities: plenary sessions, dialogues, parallel workshops and sessions, world cafés, and field visits.

Conferences require in-depth planning, in terms of not only the selected venue and logistics, but also of the engagement with partners before and during the conference. For a successful conference, a participatory approach should be considered during the planning of the event, with adequate lead time; this will ensure that all activities and logistical arrangements get the necessary support for timely completion.

WHEN SHOULD I USE A CONFERENCE?

- There is a need for global high visibility and impact of the selected topic(s).
- Outreach to large or high-level audiences is needed for awareness and consultation purposes.
- There is a need for in-depth interaction among participants.

WHY SHOULD I USE A CONFERENCE?

- In-depth, face-to-face exchanges.
- Immersion in select topics.
- Network building.
- High potential for media attraction.
- Broad dissemination of ideas and knowledge.
- Builds commitment of key stakeholder groups.

THINGS TO CONSIDER WHEN PLANNING AND MONITORING

How do you plan to involve internal and external partners in the planning sessions before the conference? Consider the following:

- Keep in mind the capacity development goal as you plan the various KE activities.
- Keep in mind the ICOs being supported by the KE activities.
- Do you need private investors (sponsors), and would that create an institutional conflict?

*Conference is broadly defined here to include any form of large and/or high-level event such as forum, symposium, summit, or congress.

3.3.B.2

STEP 3

THINGS TO CONSIDER WHEN PLANNING AND MONITORING	How will you operationalize the various KE activities for the conference instrument? Consider the following: • What type of audience are you seeking? • Host country: know the country protocol, professional level of your contact in government, your local partner institutions, etc. • Type of venue, room capacity for various activities/types of participants (plenary, break-out or workshop rooms, secretariat, media/interview room, high-tech room, etc.). • Conference capacity—total number of participants (including staff) needed for logistics and budgeting. • Resource mobilization: who pays for what? • Session format: plenary, presentation, facilitated dialogue, panel discussion, talk show, working sessions, networking sessions, etc. • High-tech needs: audiovisual setup, videoconferencing, video recording, interviews, Internet, special delivery tools. • Will you need simultaneous interpretation during the event? How many languages? • Will you need to arrange for any on-site protocol with the presence of high-level officials? • What human resources are available in your unit to work on content preparation and logistics? How do you plan to gauge the learning that occurs during the various conference activities and document the experiences? How will you monitor progress in achieving the targeted ICO(s)? What opportunities will there be to adjust the program design if the desired outcomes are not being achieved? How will you assess/evaluate the results of the conference?
WHAT OTHER FACTORS DO I NEED TO CONSIDER WHEN ASSEMBLING A CONFERENCE?	• High financial costs; resources must be available BEFORE the preparation stage. • Need for human resources to support content preparation and logistics coordination. • Timeline sensitive. • Host country/institutional constraints (infrastructure, policies/protocol, including procurement, visa issuance). • Can you attract/retain high-level participants/speakers? • Are there competing conferences on the same issue(s), in the same year, same region? • Risk of the host country protocol/host institution policies limiting participation of participants from certain nationalities or organizations.

KNOWLEDGE
EXCHANGE
INSTRUMENT

DIALOGUES

WHAT IS A DIALOGUE?

Dialogues engage participants in an exploration of their own knowledge toward a shared experience, from which new or stronger relationships, meanings, and possibilities can emerge. Dialogues promote respect and equality and deepen understanding. Ultimately, a dialogue is meant to encourage action that is informed and linked to the values of those engaged in it. Because dialogues allow for a disciplined conversation among development practitioners or policymakers on a specific topic, those involved learn from each other on a technical as well as a policy level. Consider using dialogues when the exchange could lead to a common position on global, regional, or in-country issues.

At the core of the dialogues instrument is the linkage of diverse sources of knowledge, which can be facilitated through both face-to-face and virtual exchanges. Participants may use videoconferencing (up to six connections recommended), social networking sites, discussion forums, and other online environments to support this knowledge exchange. To ensure a rich dialogue, careful consideration must be given to the number of participants and/or countries involved.

WHEN SHOULD I USE A DIALOGUE?

- The topic/issue under discussion requires multiple perspectives to either raise awareness or reach consensus.
- Many people possess expertise on the topic/issue, and by sharing their expertise they can enhance the knowledge and skills of all.

WHY SHOULD I USE A DIALOGUE?

- Strong interactivity
- Spontaneous conversations
- Just-in-time peer exchanges (synchronous)
- Cost-effective
- Can be recorded and reused later
- Can reach a globally spread audience synchronously

THINGS TO CONSIDER WHEN PLANNING AND MONITORING

How do you identify the right audience and the right speaker/s?

How will you design the session to ensure the Dialogue will be interactive and beneficial to all stakeholders?

Who should moderate? Should you have a moderator/facilitator at each location?

If the dialogue is held using videoconferencing, how many sites will you be connecting to? What kinds of facilities/ AV setup do you need given the format of your event?

3.3.B.3

STEP
3

THINGS TO CONSIDER WHEN PLANNING AND MONITORING	Who contacts the speakers/participants? What are the follow-up actions? In terms of logistics: • Contact and test the sites / visit physical location • Consider if interpretation is needed • Establish budget • Draft running order **Monitoring Methods:** • Participant questionnaire • Facilitator evaluation • Summary of key points

WHAT OTHER FACTORS DO I NEED TO CONSIDER WHEN ASSEMBLING A DIALOGUE?	• Both virtual and face-to-face dialogues can require significant planning and coordination • Can rely heavily on technology: availability of equipment and connectivity • Need for strict/disciplined moderation • Limited in scope and depth in the absence of follow-up • **Risks include:** Equipment failure, quality of connection (including interruption), dialogue can become chaotic without a good moderator, participants not familiar with engagement methods, and can become overly political; dialogue is replaced with prepared speeches.

KNOWLEDGE
EXCHANGE
INSTRUMENT

EXPERT VISITS

WHAT IS AN EXPERT VISIT?

An expert visit is just like it sounds: When a subject matter expert (or group) goes to a requesting country, city, organization, etc. to impart knowledge in the area of expertise. Expert visits can be used to help recipient institutions think through a particular development challenge. Expert visits allow for in-depth consideration of an issue or problem and for the localization of practical knowledge and experience to address it.

Visiting experts have a strong educational and professional background in the relevant issue area, and the exchange is about determining ways to solve a problem.

WHEN SHOULD I USE AN EXPERT VISIT?

- In-depth interaction among small groups is needed.
- Expert-to-expert interaction is desirable.
- The topic requires diagnosis and analysis through problem solving.
- An expert is needed to help address a problem or issue.
- An external opinion or recommendation is needed.

WHY SHOULD I USE AN EXPERT VISIT?

- Strong interactivity.
- Garners high level of respect/ prestige.
- Spontaneous conversations.
- Immediate and timely peer exchanges.
- Can be cost-effective (especially when used in place of a study tour to achieve similar outcomes).
- Can be documented and re-used later to support further reflection.

3.3.B.4

STEP
3

| **THINGS TO CONSIDER WHEN PLANNING AND MONITORING** | How will you ensure a productive exchange?

What is your plan for the preparatory sessions before the actual visit?

The following questions may help you fine-tune your planning of KE activities under expert visits:

• What types of communication technologies and delivery tools will you use for the activities?

• Will the visit include both face-to-face and videoconference-based interaction?

• Will there be a need for translation services during either type of discussion?

• Is the visit working on a time-sensitive deliverable/output?

• How will you assess the results of the visit?

How do you plan to document and disseminate the learning of the expert visit among those driving change in the recipient countries (i.e., change agents, key stakeholders) and/or other audiences? |

WHAT OTHER FACTORS DO I NEED TO CONSIDER WHEN ASSEMBLING AN EXPERT VISIT?

• Cost can be prohibitive (depending on the cost of the expert).

• Can be time consuming.

Risks include: Not enough advance planning and preparation; the right expert is not identified; the right audience is not identified; the duration of the expert visit is not sufficient to yield results; there is inadequate follow-up to help with implementation.

PEER CONSULTATION

WHAT IS PEER CONSULTATION?

Peer consultation is a process by which peers work together in small groups for mutual benefit, providing critical, yet supportive, feedback. The peer consultation process supports the diagnosis and analysis of a subject through reflective exchanges and practice. The key advantage of peer consultation is the contextual relevance and application of the feedback sought from peers.

Peer consultation can be organized in a face-to-face mode or via videoconference or an online discussion forum. With videoconferencing, participants should carefully consider the number of sites to be connected for a live exchange: more than five or six could be hard to manage and generate the desired interaction. For greater effectiveness, peer consultation sessions can be preceded by an exchange of e-mails or a series of regional face-to-face peer discussions and followed up by additional asynchronous modes of exchange such as online discussions. This type of before-and-after exchange allows for a deeper contextual reflection.

WHEN SHOULD I USE PEER CONSULTATION?

- In-depth interaction among small groups is needed.
- The interaction is meant to be that of a peer support group.
- The issue under study requires diagnosis and analysis through reflective exchanges and practice.
- Confidentiality of the discussion is ensured, facilitating trust and open conversation.
- To expose participants to new perspectives, different ideas, increase access to additional resources/practitioners to consult
- Use of peers as role models

WHY SHOULD I USE PEER CONSULTATION?

- Strong interactivity
- Spontaneous conversations
- Immediate and timely peer exchanges
- Cost-effective (if online tools used)
- Can be recorded and reused later to support further reflection
- Can reach a global audience

THINGS TO CONSIDER WHEN PLANNING AND MONITORING

How will you ensure that the participants are committed to, or have motivation for, the ongoing interaction necessary for a vibrant peer consultation?

How do you plan to involve the participants in local/regional face-to-face discussions before the peer consultation?

STEP
3

THINGS TO CONSIDER WHEN PLANNING AND MONITORING	The following questions may help you fine-tune your planning of KE activities under peer consultations: • Have participants clarified their expectations? Is there an agreement on the rules of engagement? • Do you have an experienced facilitator/moderator? • What types of communication technologies and delivery tools will you use for the activities (before, during, and after)? • Will the peer consultation include both face-to-face and videoconference-based interaction? • Will either type of discussion require translation services? • Is the consultation working toward a time-sensitive deliverable/output? • How will you assess the results of the consultation? How do you plan to document and disseminate the learning of the consultation (keeping in mind the trust and confidentiality issues) among those driving change in the recipient countries (i.e., change agents, key stakeholders) and/or other audiences? **Monitoring Methods:** • Participant questionnaire • Producer evaluation • Formative techniques for generating follow-up actions
WHAT OTHER FACTORS DO I NEED TO CONSIDER WHEN ASSEMBLING A PEER CONSULTATION?	• Videoconference-based peer consultations rely heavily on technology: availability of equipment and connectivity • Face-to-face peer consultations are costly • Need for strict/disciplined moderation and rules of engagement • Risks include: Equipment failure; connectivity interruption; quality of connectivity; poor moderation/wrong mix of participants; participants may not be open to suggestions from peers; breach of confidentiality reduces trust in peers/ facilitator; supportive feedback must be emphasized while deemphasizing the tendency to "evaluate."

STUDY TOUR

WHAT IS A STUDY TOUR?

A study tour is a visit by an individual or group to one or more countries/areas for knowledge exchange. Study tours provide an opportunity for key stakeholders to learn relevant, good development practice from their peers. Study tours allow for a high level of interaction among participants and exposure to the topic of study. Consider using a study tour if you are looking for a personal and in-depth learning experience.

Study tours require in-depth planning, not only in terms of the venue and logistics, but also in terms of the overall assembly of activities and participant engagement before the actual visit. For a study tour to be successful, it is best to involve all participants (hosts and visitors) in the planning, in order to understand the expectations of both knowledge recipients and providers, and reach consensus on the objectives of the exchange. This requires sufficient lead time as well as appropriate activities that support the identified capacity development goal.

WHEN SHOULD I USE A STUDY TOUR?

- There is a need for in-depth interaction among participants.
- Decision-makers need to see first-hand what is possible.
- Technical people need to learn first-hand how to do something.

WHY SHOULD I USE A STUDY TOUR?

- In-depth, face-to-face exchanges with peers
- First-hand experience
- Immersion in a topic
- Builds networks
- Builds commitment/excitement

THINGS TO CONSIDER WHEN PLANNING AND MONITORING

How will you ensure that the participants from the knowledge-receiving and knowledge-providing countries are the right leaders, coalitions, or institutions to achieve the exchange's capacity development objective and influence its overall development goal?

How do you plan to make sure that the design of the study tour will meet participants' expectations? (Please consider the exchange's capacity development objective and intermediate capacity outcomes as you plan its activities.)

The following questions may help you fine-tune your planning of KE activities under study tours:

- Have you included at least one planning session to finalize your study tour design and preparations?

STEP
3

THINGS TO CONSIDER WHEN PLANNING AND MONITORING	• Have you considered introducing knowledge providers and recipients before the actual exchange? (This can be done via videoconference or online social networking sites like Facebook or LinkedIn.) • What type of communication technologies and delivery tools will you use for the planning sessions? Will you have simultaneous translation during the events? • Will you need to arrange visas for your participants? How do you plan to document and disseminate the learning from the study tour among those driving change in the recipient countries (i.e., change agents, key stakeholders) and/ or other audiences? What opportunities will there be to adjust the program design if the desired outcomes are not being achieved? How will you monitor and assess the results of the study tour? **Monitoring Methods:** • Participant questionnaire • Participant interviews / testimonials (pre- and post-visit)
WHAT OTHER FACTORS DO I NEED TO CONSIDER WHEN ASSEMBLING A STUDY TOUR?	• Cost intensive • Time intensive (for preparation and actual visit) • Requires intensive coordination and logistical support • Requires high degree of planning and coordination • Language barriers; translation often needed • Scheduling is difficult • **Risks Include:** Participant mix not optimal; drop-outs may significantly affect achieving the goals of the study tour; visit fails to meet participant expectations/ considered a waste of time; knowledge/ideas get "lost in translation"; no follow-up actions taken

TWINNING

WHAT IS TWINNING?

The World Bank defines twinning as "a process that pairs an organizational entity in a developing country with a similar but more mature entity in another country." Twinning is most effective when it is used to transfer operational knowledge between two organizations similar in function and structure, and complemented with other capacity-development initiatives such as formal training and technical assistance. Twinning can take the form of secondment of experts from one organization to the other; participation in a formal or informal network or association; direct interaction and collaboration of staff from the twinning organizations; exchange of specific information or resources; mentoring and knowledge sharing from the mature organization to the learning organization; exchange of staff to improve knowledge and skills; and collaboration on a particular project/task, with each organization capitalizing on its comparative advantages and strengths.

Twinning arrangements are typically characterized by (a) an institution-to-institution relationship; (b) achievement of sustainable organizational capacity building; (c) long-term cooperation that continues after project completion; (d) a high degree of flexibility; (e) use of diverse modes of activity to ensure sustainability; and (f) a notion of learning.

Key issues to consider when developing a twinning arrangement are the selection of appropriate partners and the design of the arrangement and relationship. Factors promoting success include (a) strong commitment of the parties; (b) high competence and flexibility of the provider; (c) high feasibility of designated tasks; (d) periodic follow-ups after project completion; and (e) positive work relationships.

WHEN SHOULD I USE TWINNING?

- For an institution-to institution relationship, based on a partnership between two organizations
- For sustainable organizational capacity building;
- For long-term cooperation that continues after project completion;
- For a high degree of flexibility;
- With diverse modes of activity to ensure sustainability

WHY SHOULD I USE A TWINNING?

- Strategically integrates training and technical assistance
- Offers flexible work plans and long-term cooperation
- Engaging a provider through competitive bidding can lower costs and/or result in higher quality of offers
- Promotes immediate engagement of the provider and recipients
- Catalyzes positive impacts and benefits because of the depth of interaction between provider and recipient
- Provides first-hand experience and engages key stakeholders

STEP 3

THINGS TO CONSIDER WHEN PLANNING AND MONITORING	• Need to adapt the content to the exact needs of the recipient. • Need for strong commitment at all levels. • Twinning should be an investment in a long-term relationship. • Organization should facilitate informal and interpersonal contacts beyond the formal contract. • Find the right scale: is the receiving institution ready to move at full speed? Does it have sufficient human resources? • Communication, flexibility, and trust are crucial. • Twinning is a joint project and a partnership, not a one-way delivery of technical assistance. • Actors must follow the structure of the project. • The Task Team Leader (TTL) has a crucial supervising role, especially in supporting and monitoring the program and approving changes. • Provider must dedicate key staff to the twinning, and financial and operational impacts must be clear and accepted by all parties. • The planning and design of the twinning arrangement should take into consideration in early phases any arrangements that might be needed to assist the recipient institution in retaining newly trained employees.

WHAT OTHER FACTORS DO I NEED TO CONSIDER WHEN ASSEMBLING A TWINNING?	• Both virtual and face-to-face dialogues can require significant planning and coordination • Can rely heavily on technology: availability of equipment and connectivity • Need for strict/disciplined moderation • Limited in scope and depth in the absence of follow-up • **Risks include:** Equipment failure, quality of connection (including interruption), dialogue can become chaotic without a good moderator, participants not familiar with engagement methods, and can become overly political; dialogue is replaced with prepared speeches.

Table 6. 10 Knowledge Exchange Activities—A Brief Overview

ACTION PLANNING

An action plan describes how participants will implement the knowledge gained during the exchange. It's a road map for follow-up actions. Usually, a facilitator helps the participants create the action plan.

BRAINSTORMING

Brainstorming is a group problem solving technique used for generating many ideas about a specific topic or issue. A brainstorming session should tap into the wisdom of peers, encourage novelty, and be done at the initial stages of a project or process.

DEMONSTRATION

In a demonstration activity, an expert or presenter shows participants how to perform an activity or procedure or introduces a new process or innovation. Ultimately, learners should be able to perform the demonstrated task on their own and apply it in their specific work environment. This activity is frequently followed by a discussion.

E-DISCUSSION

This is an online dialogue in which people discuss a topic in an open setting. E-discussions are asynchronous; communication does not have to occur at the same time, so participants can engage when it is convenient for them. E-discussions are managed online through a discussion forum or similar tool.

GROUP DISCUSSION

They can be very informal to highly structured and challenging conversations as part of learning and knowledge-sharing events. Group discussions include topic-based discussions, case-based discussions, or discussions where the objective is to solve a problem, make a decision or create something together.

PANEL OF EXPERTS

A panel of experts is a group of people with specialized knowledge who are invited to discuss a topic/issue before an audience. It requires a coordinator and moderator.

PRESENTATION

A presentation is an oral report of information in which the pattern of communication is mainly a one-way transmission from the presenter to participants. The presenter's communication and delivery skills and the presentation format are important factors in ensuring the audience stays engaged.

ROLE PLAY

A highly interactive activity in which participants act out situations and problems and then analyze the situation with the help of other participants and observers. Role-play requires an experienced facilitator.

SIMULATION

A simulation exercise presents a realistic situation and invites learners to interact in that setting with objects and/or people (i.e., through role-play, building models, and computer games). Many simulations are in the form of games; the most successful one is the real-estate game "Monopoly."

SURVEY

A survey is a way to gather information from participants. Surveys can be used to prompt discussions, surface areas for consensus or stakeholder ownership, and prioritize important next steps from knowledge-exchange activities.

3.3C. SELECT AND SEQUENCE ACTIVITIES

Which activities will most help participants achieve the desired capacity outcomes?

What's the best sequence for the activities?

Knowledge exchange activities are the actions through which learning takes place. Common activities are presentations, group discussions, brainstorms, and action planning sessions. Each activity should contribute to the participants' desired capacity outcomes. Like the instruments, each activity has its own strengths and limitations, with some more suitable for particular types of learning than others. Activity choice will also be affected by participant profile, group size, time, logistical constraints, and the resources available.

Going back to our cooking analogy, the activities are like the special ingredients that make up your soup. These ingredients can be added to the knowledge exchange instrument in different orders. This sequencing, or deciding when to use one activity in relation to another, is another factor to consider when selecting activities. Some activities are more suitable in the knowledge exchange planning phase, while others are more effective in delivery and follow-up.

Well-designed activities will allow participants to:

» Experience something new
» Internalize the significance of the new experience
» Engage in observations, ask questions, share reflections, and contribute their own experience
» Have opportunities for substantive interaction/dialogue with experts, other participants, and new learning materials
» Create a new collective understanding based on knowledge exchange
» Translate the knowledge into action plans
» Summarize newly created knowledge in written documents, transcripts, and audiovisual materials and make them available as references for both participants and broader groups of stakeholders.

EXAMPLE: Sequencing of Knowledge Exchange Activities for Tanzania's Study Tour to India

Planning:

To plan for the second phase of their knowledge exchange initiative, the study tour, Tanzania and India organized a preliminary brainstorm through videoconference to define the scope of the visit and an e-discussion to prepare a concept note for the visit.

Delivery:

The study tour included presentations and field visits aimed at learning about India's dairy revolution and how it was implemented, from both a political and practical standpoint. In addition, group discussions were arranged with Indian business leaders to promote future partnerships for improving Tanzania's dairy sector.

Follow up:

A series of presentations to colleagues and decision makers back home provided an opportunity for the Tanzanians to share lessons learned and propose a way forward.

TANZANIA EXAMPLE

Activities should be considered for each phase of the knowledge exchange instrument

1. **Planning**
2. **Delivery**
3. **Follow-up**

TIP

ACTION PLANNING

WHAT IS ACTION PLANNING?

An action plan is a personal or group agenda that describes how a participant, or participants, will implement the knowledge gained in a given knowledge exchange activity. A participant or group usually creates an action plan with the assistance of a facilitator. An action plan provides participants with a tangible output and road map for follow-up actions.

WHEN SHOULD I USE ACTION PLANNING?	• Following up on the knowledge exchange initiative—i.e. when planning next steps • The learning objective is to apply knowledge • Supporting the transfer of learning to workplace environment • Localizing knowledge to a participant's setting • Encouraging ownership by the learner
HOW DO I CREATE AN EFFECTIVE ACTION PLANNING ACTIVITY?	• Define what you hope to accomplish. • Assign roles and responsibilities. • Identify resources and key stakeholders. • Prioritize. • Break down activities into discrete steps that are measurable • Estimate costs. • Decide what is feasible. • Create a timeline with major milestones.
WHAT IS THE FACILITATOR'S ROLE?	The facilitator's role is to support the learner(s) in creating an action plan. The facilitator should: • Provide guidelines to participants about how to create an action plan. • Guide the participants in writing a realistic action plan.
WHAT IS THE LEARNER'S ROLE?	• Reflect on the actions that need to be completed to achieve a goal. • Write the actions as discrete tasks that are realistic and attainable. • Identify who is responsible for completing various tasks. • Identify resources needed to complete tasks. • Create a timeline for completing tasks. • Discuss the action plan with key stakeholders who are a part of the enabling environment to successfully implement the action plan.

STEP
3

WHICH KNOWLEDGE EXCHANGE INSTRUMENTS UTILIZE ACTION PLANNING?

STUDY VISITS/ TOURS

COMMUNITIES OF PRACTICE

PEER CONSULTATIONS

CONFERENCES

WHAT DOES AN ACTION PLAN LOOK LIKE?

Many formats can be used to create an action plan. For a learning setting, an action plan may include the following categories:[1]

ACTION PLAN			
Learner:		Date:	
Specific focus of the action plan:			
Areas of opportunity as well as challenges:			
Detailed specific actions	Responsible person(s)	Resources required	Date/time
Step 1.			
Step 2.			
Step 3.			

[1]This format is adapted from Johns Hopkins University: www.reproline.jhu.edu/English/6read/6training/tol/pdf/actionplan_c.pdf

BRAINSTORMING

WHAT IS BRAINSTORMING?

Brainstorming is a powerful knowledge-exchange activity that can be used for generating ideas or solutions about a specific topic, or for problem-solving, team-building, and creative processes. A brainstorming session should tap into the wisdom of peers; encourage novel, out-of-the-box ideas; and be done at the initial stages of a project or process.

The key goal of brainstorming sessions is to generate as many ideas as possible from participants—original ideas or ideas that build from each other. Quantity is what counts at this stage, not quality. For this reason it is important that participants be aware that "no idea is a bad idea." Participants should refrain from judging ideas as they are shared. A successful brainstorm should result in many bold and unique ideas that can then be analyzed, prioritized, and applied in relevant contexts.

WHEN SHOULD I USE BRAINSTORMING?	• **Planning** your knowledge exchange initiative – i.e., in thinking about capacity challenges, objectives, or outcomes • **Implementing** your knowledge exchange initiative – i.e., when thinking about how to address problems based on what's been learned • **Following up**—i.e., when thinking about how to apply what's been learned • Facilitating consensus and teamwork, and raising awareness around a specific area of interest • Generating new ideas or working toward operationalizing something (i.e., coming up with tasks) • Engaging participants to come up with ideas to solve a specific problem • Motivating participants to get them to invest in an idea or solution
HOW DO I CREATE AN EFFECTIVE BRAINSTORMING ACTIVITY?	• Have a dedicated facilitator for the brainstorming session. • Select a brainstorming topic that is relevant to participants—something on which participants will have an opinion. This will result in a more appropriate and useful output. • Organize the session well: Make sure the brainstorm questions and guidelines are clear and that all participants understand the question and process. • Don't judge suggested ideas and solutions, either directly or indirectly, through body language. Judging stifles creative thinking and inhibits the fullest possible contributions. • Encourage solutions from all participants; one or two people should not dominate the conversation. • Write down every suggestion and in participants' own words. If needed, have participant clarify meaning. Always check that the idea is correctly reflected.

WHAT IS THE FACILITATOR'S ROLE?

- Introduce the topic or problem facing the group.
- Manage the process by establishing ground rules: Suggest solutions in rapid succession, share ideas as they come to mind, and respect others' ideas.
- Appoint a person to record all suggestions
- Establish a time limit.
- Assist group to broaden the scope of responses, if necessary.
- After the initial idea-sharing phase, provide a method for organizing and evaluating suggested ideas and solutions.
- Provide an approach for how suggested ideas and solutions can best be put into effect after the brainstorm session.

WHAT IS THE LEARNER'S ROLE?

- Think creatively.
- State ideas that come to mind, regardless of how ridiculous they seem.
- Refrain from expressing an opinion on other participants' ideas and solutions during the idea-sharing phase.
- Assist in evaluating the solutions after the initial idea-sharing phase.
- Determine how best to use the information.
- Help evaluate the group's learning experience.

WHICH KNOWLEDGE EXCHANGE INSTRUMENTS UTILIZE BRAINSTORMING?

COMMUNITIES OF PRACTICE

CONFERENCES

DIALOGUES

STUDY TOURS

PEER CONSULTATIONS

TWINNING ARRANGEMENTS

DEMONSTRATION

WHAT IS A DEMONSTRATION?

In a demonstration activity, an expert or presenter shows participants how to perform an activity or procedure or introduces a new process or innovation. Ultimately, learners should be able to perform the demonstrated task on their own and apply it in their specific work environment. This activity is frequently followed by a discussion.

WHEN SHOULD I USE A DEMONSTRATION?

- Implementing—i.e., when a knowledge provider wants to show participants a new technology, method, etc.
- Knowledge is codified and can be presented in a standardized format.
- Addressing learning objectives that are geared toward applying knowledge or mastering a process.
- Sharing practical experience or process steps with the objective of transferring expertise or good practices.
- Sharing an innovation.
- Transforming theoretical concepts into practice.

HOW DO I CREATE AN EFFECTIVE DEMONSTRATION?

- It generally helps to have two people for a demonstration activity—one to run the demonstration and the other to present.
- Every presentation should be as customized as possible.
- The demonstration should be followed by a brief question-and-answer session.
- Each member of the group must be given an opportunity to practice process steps.
- The technique works best in smaller groups (5 to 20 people).
- Individual guidance during the practice session is important.
- The expert should have good pedagogical skills and should adapt the demonstration for the needs of the audience.
- Sufficient time should be made available for all the steps, including discussion after practice.
- Follow-up performance support should be made available to help with the practical application in the participants' contexts.

WHAT IS THE FACILITATOR'S ROLE?

- Demonstrations often require substantive preparation time. The expert's or presenter's role is to:
- Prepare for the demonstration in advance.
- Help the audience understand the context of the demonstration and how it relates to them.

STEP
3

WHAT IS THE FACILITATOR'S ROLE?

- Be confident in his/her ability to perform the task.
- Present the solution to address the problems, showing only the features, benefits, and capabilities that relate to those issues.
- Describe the steps of the process as it is being demonstrated.
- Proceed slowly and methodically so all can understand.
- Lead the discussion after the demonstration.
- Embrace questions and concerns, delve deeper to clarify, ask the rest of the audience how they see the issue.
- Provide follow-up performance-support tools and options.

WHAT IS THE PARTICIPANTS' ROLE?

Good demonstrations should have a high level of participant involvement. Participants need to:

- Understand the purpose of the demonstration.
- Listen actively and watch carefully.
- Ask questions when the information or process is not clear.
- Practice the process steps.
- Decide how to best adapt or apply the new knowledge in their own context.

WHICH KNOWLEDGE EXCHANGE INSTRUMENTS UTILIZE A DEMONSTRATION?

STUDY TOURS   EXPERT VISITS   COMMUNITIES OF PRACTICE   CONFERENCES   TWINNING ARRANGEMENTS

OTHER KEY CONSIDERATIONS:

Are the expected outputs of the demonstration session clear?

Have you decided how to run the demonstration session?

Did you establish the ground rules for the session?

Have you considered the logistical, resource, and equipment needs for this session?
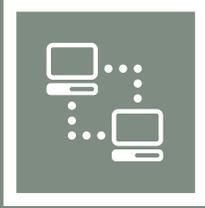
E-DISCUSSIONS

WHAT IS AN E-DISCUSSION?

An e-discussion is a knowledge exchange activity that permits the participants to consider a question or topic online in an open setting, formal or informal. E-discussions are asynchronous—that is, communication does not have to occur at the same time. E-discussions are managed online through a discussion forum environment or tool. This kind of knowledge exchange is flexible, as participants do not need to be available at a fixed time to discuss something, but can engage when available within the established parameters of the e-discussion.

WHEN SHOULD I USE AN E-DISCUSSION?	• **Planning**—i.e., planning the introductory sessions • **Implementing**—i.e., examining topics in depth or carrying out long-term collaboration independent of location • **Following up**—i.e., discussing what was learned, coaching / mentoring as teams try to apply knowledge gained
HOW DO I CREATE AN EFFECTIVE E-DISCUSSION?	• Provide moderator and participants with how-to documentation on the use of the e-discussion tool/ environment. • Develop and provide guidelines for participation. • Provide clear instructions on when participants can post and when they can expect replies. • Define clear expectations as to the outcomes of discussion.
WHAT IS THE FACILITATOR'S ROLE?	• Choose and invite additional e-discussion moderators as needed. • Clarify the topics and procedures with participants. • Answer questions directed to you within the allotted timeframe. • Keep the discussion on topic.
WHAT IS THE PARTICIPANT'S ROLE?	• Follow guidelines and instructions. • Read and respond to postings by moderator and peers in a thoughtful way. • Share information, resources, opinions, and examples, and pose questions.

WHICH KNOWLEDGE EXCHANGE INSTRUMENTS UTILIZE AN E-DISCUSSION?

DIALOGUES **COMMUNITIES
OF PRACTICE** **EXPERT VISITS**

OTHER KEY CONSIDERATIONS:	Are the expected outputs of the e-discussion clear?
	Have you decided how to conduct the e-discussion session?

**OTHER KEY
CONSIDERATIONS:**

Are the expected outputs of the e-discussion clear?

Have you decided how to conduct the e-discussion session?

- How involved should the moderator be in the e-discussion?
- Is this going to be an open-ended, free-flow discussion? Or are specific outcomes expected?
- How have you ensured that all participants can access the e-discussion?
- Will the selected tool accommodate the number of participants wanting to participate?

How will you capture the results of the e-discussion session?
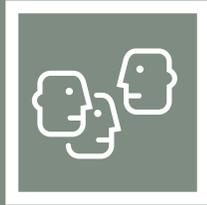
GROUP DISCUSSIONS

WHAT IS A GROUP DISCUSSION?

Group discussions occur in many different formats – from very informal ones to highly structured and challenging discussions included as an integral part of learning and knowledge-sharing events. Some examples of group discussions include topic-based discussions, case-based discussions where information about the situation is given to the group and they are asked as a group to resolve the situation, or discussions where the objective is to solve a problem, make a decision or create something together. Group facilitation is highly recommended to manage group dynamics and get the most out of the discussions. The format of facilitation will depend upon the size of the group and how you plan to structure the group report.

WHEN SHOULD I USE A GROUP DISCUSSION?	• **Planning**—i.e., in thinking about capacity challenges, objectives, or outcomes • **Implementing**—i.e., when thinking about how to address problems based on what's been learned, or delving deeper into issues • **Following up**—i.e., when thinking about how to apply what's been learned • Allowing richer opportunities for reflection and sharing of ideas, as compared to question-and-answer sessions • Encouraging inputs and tapping into the wisdom of a broader set of participants—including participants who tend to be reticent in plenary sessions • Enriching plenary discussions

HOW DO I CREATE AN EFFECTIVE GROUP DISCUSSION?	• Participants must have some background information or experience in a topic to ask informed questions.
	• The resource person must be able to adapt his/ her content to fit the audience.
	• The resource person needs to be comfortable speaking to large groups.
	• The moderator should try to involve participants through different types of questions:
	    Fact-finding questions
	        E.g. What kind of project are you involved with currently?
	        E.g. How would you describe the current situation in your department?
	    Contextualizing questions
	        E.g. How might these ideas apply to your projects?
	        E.g. Is this feasible in your situation?
	        E.g. What difficulties might arise?
	    Elaboration questions
	        E.g. Can you elaborate on that?
	        E.g. Can you be more specific?
	    Feeling questions
	        E.g. Do you and your colleagues feel comfortable with the new mission?

WHAT IS THE FACILITATOR'S ROLE?

- Prepare participants ahead of time
- Provide background information or instruction
- Encourage learners to research the topic
- Discuss the topic prior to the full group discussion
- Encourage participants to clarify ideas that they don't understand or that are unclear
- Facilitate the discussion among participants and the resource person(s)
- Encourage participants to ask questions
- Encourage the resource person(s) to connect their knowledge to the needs and interests of participants

WHAT IS THE PARTICIPANTS' ROLE?

- Read and research background notes, articles and other resources in order to be prepared for the group discussion
- Listen, think, and take notes
- Ask questions to each other and the resource person(s)
- Respond to questions if asked to do so
- Contribute ideas and observations

WHICH KNOWLEDGE EXCHANGE INSTRUMENTS UTILIZE GROUP DISCUSSIONS?

STUDY TOURS   **COMMUNITIES OF PRACTICE**   **CONFERENCES**   **TWINNING ARRANGEMENTS**   **DIALOGUES**

PEER CONSULTATIONS

OTHER KEY CONSIDERATIONS:

Are the expected outputs of the group discussion clear?
Have you decided how to run the group discussion?
Will you involve resource person(s)?
Who will moderate?
How will you capture the outcomes of the discussion?

PANEL OF EXPERTS

WHAT IS A PANEL OF EXPERTS?

A panel of experts is a group of people with specialized knowledge who are invited to discuss a topic/issue before an audience. Requires a coordinator and moderator.

WHEN SHOULD I USE A PANEL OF EXPERTS?	• **Implementing**—i.e., providing detailed, highly specialized information on a topic • Introducing or raising awareness about a topic or an issue • Lending credibility to a topic or providing an expert perspective • Emphasizing the importance of a topic • Providing multiple perspectives on a topic • Making presentations more engaging and maintaining a higher level of interest from the audience A panel of experts is not useful by itself when the learning objective is to apply, analyze, or integrate knowledge, or to create information.
HOW DO I CREATE AN EFFECTIVE PANEL OF EXPERTS?	• Choose panelists for their knowledge, communication skills, and effectiveness as speakers. • Provide panelists with background information about participants and the relevance of the topic area for them. • Encourage participants to learn about the panel discussion topic before the event; provide or suggest appropriate background documents to them. • Hold a pre-event briefing with panelists at least two weeks before the event to familiarize the moderator and all the panelists with the content of the presentations. • Strongly encourage panelists to prepare for the event in advance. • Strongly encourage panelists not to use PowerPoint but rather to engage in dialogue with the other panelists and the audience (if it is small enough). • Obtain short bios (3-4 sentences) from each panelist. • Have participants apply new information through follow-up activities.
WHAT IS THE MODERATOR'S ROLE?	• Choose and invite panel members. • Clarify the topics and procedures (e.g., time allotment, order of presentations, how questions will be handled) with panel members. • Introduce panel members and moderate discussion.

WHAT IS THE MODERATOR'S ROLE?

- Keep the panelists to their allotted time and ensure relatively equal exposure for all panelists.
- Facilitate question-and-answer session.
- Act as the participants' advocate by reading their reactions and making necessary adjustments, ensuring that their questions are answered, and managing the overall pace of the presentations.
- Ask questions of the panelists, as appropriate, to further understanding or enhance relevance for the participants.
- Stay actively engaged during the panelists' presentations rather than checking phone, shuffling papers, or holding a side conversation.

WHAT IS THE PARTICIPANTS' ROLE?

- Listen, think, take notes, and ask questions of panelists.

WHICH KNOWLEDGE EXCHANGE INSTRUMENTS UTILIZE A PANEL OF EXPERTS?

STUDY VISITS/ TOURS

DIALOGUES

CONFERENCES

OTHER KEY CONSIDERATIONS:

Are the expected outputs of the panel of experts session clear?

Have you decided how to run the panel of experts session?

» Will there be a question-and-answer period after each panelist or at the end of the presentations with all panelists?

» Will the panel of experts be in a face-to-face environment, streamed online / via video, or all of the above?

» Will the panel of experts presentations be recorded for later viewing?

» Have you adequately advertised this event?

Have you considered the following "what-ifs" and decided on a contingency plan?

» What will you do if you are running out of time?

» What will you do if there are too many participants? What if there are not enough?

» What if your desired panelists require compensation? Do you have adequate budget?

» What if you are unable to get enough panelists to participate?

» What will you do if one or more panelists are unavailable at the last minute?

» What will you do if the equipment malfunctions?

PRESENTATION

WHAT IS A PRESENTATION?

A presentation is an oral report of information in which the pattern of communication is mainly a one-way transmission from the presenter to participants. The presenter's communication and delivery skills and the presentation format are important factors in ensuring that the participants stay focused and engaged.

WHEN SHOULD I USE A PRESENTATION?	• **Planning**—i.e., introducing or raising awareness about the knowledge provider experience • **Implementing**—i.e., providing detailed information on a topic to a group of people • **Following up**—i.e., presenting findings and recommended actions to a large number of people • Knowledge is codified and can be presented in a standardized format • You want to establish learner interest in a subject • You want to control the message • The information is unavailable anywhere else, or is difficult to obtain
HOW DO I CREATE AN EFFECTIVE PRESENTATION?	• Determine the audience's needs and decide how to make the topic most relevant to them. • Determine what you want the audience to do as a result of the presentation. • Develop one overarching theme or key message and support that with no more than 2-3 secondary points. • Keep the presentation to 20-30 minutes; shorter presentations tend to be more effective. • To keep the audience engaged, integrate interactive techniques into the presentation—questions, polls, small group exercises, and report-outs. • Use illustrations, examples, and stories that contextualize the information for the audience. • Create a strong opening that will engage the audience immediately (e.g., a story, a startling statistic, a rhetorical question). • Prepare transitions to move smoothly from one section of the presentation to the next to help the audience follow the flow. • Do not end the presentation by asking if there are any questions; rather, end by summarizing or highlighting the key message. • Prepare a detailed presentation outline and choose any support tools (PowerPoint, props, handouts) only after developing this outline.

STEP 3

HOW DO I CREATE AN EFFECTIVE PRESENTATION?

- Use notes, not PowerPoint slides, to keep on track and ensure that all relevant points are covered.
- PowerPoint is the most overused and misused presentation tool. Ask yourself if PowerPoint will add any value to the presentation. If you do use PowerPoint slides, create them for the audience, not for the presenter.
- Use PowerPoint slides for visuals (graphics, pictures, graphs and charts).
- Use PowerPoint slides to keep the audience focused and highlight main points by simply showing a headline or a few key words.
- Do not create text-heavy presentations with every word a presenter says written on the slide.
- Never read the PowerPoint slides verbatim.
- Schedule time to review the presentation and rehearse it out loud at least twice before presenting.

WHAT IS THE PRESENTER'S ROLE?

- To communicate meaningful and relevant information in accessible language.

WHAT IS THE PARTICIPANTS' ROLE?

- To listen, think, take notes, and ask questions.

WHICH KNOWLEDGE EXCHANGE INSTRUMENTS UTILIZE PRESENTATIONS?

STUDY TOURS

COMMUNITIES OF PRACTICE

CONFERENCES

TWINNING ARRANGEMENTS

DIALOGUES

OTHER KEY CONSIDERATIONS:

Are the expected outputs of the presentation clear?

Have you decided how to run the presentation session?

- Will there be a question-and-answer period after the presentation, or will questions be taken throughout the presentation, or both?
- Will there be handouts for the participants?
- Will the presentation be in a face-to-face environment, streamed online / via video, or all of the above?
- Will the presentation be recorded for later viewing?

Have you adequately advertised this event?

Have you considered the following "what-ifs" and decided on a contingency plan?

- What will you do if you are running out of time?
- What will you do if there are too many participants? What if there are not enough?
- What if your desired presenter requires compensation? Do you have adequate budget?
- What will you do if your presenter is unavailable at the last minute?
- What will you do if there is an equipment failure?

ROLE-PLAY

WHAT IS A ROLE-PLAY?

Role-playing is a highly interactive activity in which participants act out situations and problems and then analyze the situation with the help of other role-players and observers. This type of activity requires an experienced facilitator.

WHEN SHOULD I USE A ROLE-PLAY?	**Planning**—i.e., considering different perspectives before multi-stakeholder negotiations **Implementing**—i.e., learning procedural knowledge, particularly how to interact with people in customer or client relations, counseling situations, peer dynamics, interviews, and conflicts **Following up**—i.e., the knowledge outcome is to implement a plan or strategy, or enhance skills - Applying information and knowledge - Gauging how participants respond to a scenario - Encouraging different or new behavior
HOW DO I CREATE AN EFFECTIVE ROLE-PLAY?	- Roles and scenario have to be realistic and relevant to the group. - Create and run the role-play scenario by using case studies from literature or personal experience, or ask participants to decide on the scenario themselves. - The scenario must provide enough context to orient role-players and observers. - To be effective, role-play should be unscripted, not a scripted dramatization: spontaneous action and dialogue are key to effective role-playing. - Create at most five roles for any scenario; many role-plays are done with just two people. - Cast people who will be able to execute the role and will not feel threatened or exposed. - Have the facilitator play the difficult or unpopular role, if required, in a scenario. - Have participants endorse different roles during the activity. - Set a time limit and clear objectives. - Stop the role-play when - The desired situation has been adequately demonstrated, so that the group can analyze the situation, - The role-players have reached an impasse. - The role-players have been miscast. - There is a natural closing to the dialogue or actions. - The time limit has been reached.

STEP
3

WHAT IS THE FACILITATOR'S ROLE?

- Identify an overall objective for the role-play.
- Define the problem and establish a real-life scenario that is relevant to participants.
- Determine which roles are needed for the scenario, and establish the characteristics of each role.
- Cast the roles, either by soliciting volunteers or suggesting individuals to play particular roles.
- Provide participants a synopsis of the role they are to play.
- Advise remaining participants what they should look for and note as observers.
- Perhaps serve as a role-player, particularly for a difficult or unpopular role.
- Facilitate the discussion and analysis of the role-play.
- In the discussion and analysis phase ask the role-players to comment first on the enactment to set the tone of the discussion.
- In the discussion and analysis phase ask observers to
    1. Discuss what took place during the role-play.
    2. Offer their own related experience and knowledge, not just their opinions
    3. Discuss how the role-play situation or problem relates to their work and
    4. Suggest how the situation could have been addressed differently or more quickly.
- In the discussion and analysis phase ask all participants to discuss what has been learned in relation to the overall objective stated at the outset.

WHAT IS THE LEARNER'S ROLE?

- Volunteer to play a role, if volunteers are sought; accept a role if assigned.
- Be an observer who comments on the role-play when it is completed.
- Help create the role-play problem and scenario, if requested.

WHICH KNOWLEDGE EXCHANGE INSTRUMENTS UTILIZE ROLE-PLAY?

STUDY TOURS

COMMUNITIES OF PRACTICE

CONFERENCES

DIALOGUES

TWINNING ARRANGEMENTS

OTHER KEY CONSIDERATIONS:

Are the expected outputs of the role-play activity clear?
Have you decided how to run the role-play session?

- Have you identified a facilitator?
- Do the "actors" know their parts?

Did you establish the ground rules for the activity for the participants?

Have you thought through a clear debrief plan?

Have you considered the following "what ifs" and decided on contingency plans?

- What will you do if you are running out of time?
- What will you do if there are too many participants?
- What if the players do not understand their roles? Or the participants do not understand what's happening?
- How will the analysis take place?

SIMULATION EXERCISE OR IMMERSIVE LEARNING

WHAT IS A SIMULATION EXERCISE?

A simulation exercise presents a realistic, structured situation and invites learners to interact in that setting with objects and/or people (i.e., through role-play, building models, and computer games). Simulation overlaps with and differs from role-play: In both, the goal is to create realistic situations, but in role-play, the focus is on realistic human relations. Many simulations are in the form of games; the most successful simulation is the real-estate game "Monopoly."

Simulations vary in how simple or complex they are, and how large a role they have in a learning event: They can be the bulk of an event (e.g., simulated cadavers as a course at some medical schools) or partial (e.g., financial planning games).

WHEN SHOULD I USE A SIMULATION EXERCISE?

- **Planning**—i.e., to analyze or evaluate an existing situation
- **Implementing**—i.e., to provide an immersive experience to gain crucial intrinsic motivation and meaningful learning
- **Following up**—i.e., to help create or evaluate a model or plan for a new system or encourage application of knowledge and skill development through reinforcement and conditioning
- Knowledge is codified and can be presented in a standardized format

A simulation is not useful by itself in creating a deep understanding of the skill or content.

HOW DO I CREATE AN EFFECTIVE SIMULATION EXERCISE?

- Clearly defining the learning objective(s) is crucial to building a better learning impact evaluation system.
- To prolong learners' attention span, set up a controlled facility by providing the right social context that facilitates asking the right questions and going to the right places.
- Lay down simple rules of the game and provide written directions to start the simulation; remember that complicated rules only frustrate learners.
- Ensure that adequate resources and time are available to complete the exercise.
- Do a run-through of the simulation or game in sequence before the learning event.
- Establish a termination point for the game.
- Set criteria for success in using the simulation or game; a feeling of mastery from completing a level is an intrinsic motivation in learning.
- As appropriate, act as a referee or guide in the game so that participants will not reach an impasse.
- Debrief and encourage learners to evaluate their experience; this captures learners' feedback so it can enhance the simulation scenario and better align it with learning objectives.
- Illustrate the possible implications of available courses of action; learners can take these into account and build new schemas.

STEP
3

WHAT IS THE FACILITATOR'S ROLE?

The facilitator should establish criteria for evaluating an existing, or creating a new, simulation or game. The criteria should focus on achieving specific learning objectives.

Facilitators are encouraged to search for existing simulations or games on topics as diverse as the following:
- Decision-making games for senior managers running a company.
- How to organize and do chemistry experiments online (created by Carnegie Mellon University).
- How to weld online (created by College Boreal in Ontario).
- SimCity as a videogame for urban planners.

WHAT IS THE PARTICIPANTS' ROLE?

- Understand and analyze the situation.
- Make decisions and act on those decisions.
- Learn from the consequences of their decisions and evaluate alternatives.
- Do the best to strive against obstacles to reach a predetermined goal.
- Learn the advantages of competition and cooperation in appropriate situations.
- To empathize and understand the roles and concepts assigned in the simulation.
- Learn how an individual's behavior and actions can change the environment.
- Learn the consequences of poor judgment or lack of skill.
- Learn the role of external variables and chance.
- Learn the value of creating alternate problem-solving strategies.
- To test ideas in the crucible of events, conditions, and personalities.

WHICH KNOWLEDGE EXCHANGE INSTRUMENTS UTILIZE SIMULATIONS?

COMMUNITIES OF PRACTICE

CONFERENCES

TWINNING

OTHER KEY CONSIDERATIONS:

- What is the problem to be resolved?
- Who and what will a simulation teach?
- Is the game at the right level for my participants?
- What preparations will be necessary to play the game?
- How long will the game take, and how will it fit into the learning event?
- How will I be able to determine what students have learned?
- Are the expected outputs of the simulation or game clear?
- Have you decided how to run the simulation or game?
- Did you establish the ground rules for the activity for the participants?
- Do you have clear assessment criteria?

SURVEY

WHAT IS A SURVEY?

A survey is a way to gather information from participants—for example, about what their knowledge needs are, how well they understand content presented to them, or what their opinions are on the usefulness of what has been presented. Surveys can be used before, during, or after a knowledge exchange to make learning more relevant, interactive, and useful for learners. Surveys are also effective as a polling tool to prompt discussions, surface areas for consensus or stakeholder ownership, and prioritize important next steps or action items and outputs from knowledge-exchange activities. Simple polling tools are available that allow participants to respond to questions from a facilitator in real time.

WHEN SHOULD I USE A SURVEY?	• **Planning**—i.e., capturing participants' perspectives and opinions to inform the design of KE activities • **Implementing**—i.e., creating an interactive dynamic with increased learner participation or gauging how well participants understand the subject matter • **Following up—i**.e., evaluating the achievement of planned follow up activities

HOW DO I CREATE AN EFFECTIVE SURVEY?	• Limit the scope of the survey. • Include simple instructions. • Use brief, tightly focused questions that cover one subject and are not general or ambiguous, nor leading. Follow good practice in designing the response options: - Use closed-ended questions when appropriate and if aggregation of responses is required. Developing the questions is more time-consuming up front, but analysis of results is simpler. - Pretest your survey before distribution—ideally, with individuals similar to your respondents. - Use open-ended questions when a narrative response is required, and limit the number of response options. In using such questions, consider your capacity to process the responses and how they will be used; narrative responses require more intensive data analysis for processing the responses and understanding and interpreting the results. - Use balanced rating scales and labels for each option on the rating scale to enhance the likelihood that respondents understand the scale. - Provide space for additional explanation at the end of your survey.

STEP
3

WHAT IS THE FACILITATOR'S ROLE?

- To understand how the responses will be used.
- To decide when it is useful to survey participants.
- To work with the survey developer to create the appropriate questions according to the timing and purpose of the survey. Including:
  - » Factual questions (about participants' current knowledge).
  - » Conceptual questions (about whether participants understand a concept).
  - » Opinion questions.
  - » Data-gathering questions (about demographics and experiences).
- Ensure that respondents understand the instructions, and answer any questions related to the survey.
- Collect responses.
- Forward the survey to appropriate staff to analyze and/or summarize the responses.
- Encourage group discussion before, during, or after the survey as appropriate for the KE activity.

WHAT IS THE PARTICIPANTS' ROLE?

- To listen to/read the survey questions carefully.
- To ask for clarification when needed.
- To ponder each question and answer it to the best of his/her ability.

WHICH KNOWLEDGE EXCHANGE INSTRUMENTS UTILIZE SURVEYS?

STUDY TOURS

COMMUNITIES OF PRACTICE

CONFERENCES

DIALOGUES

TWINNING ARRANGEMENTS

EXPERT VISITS
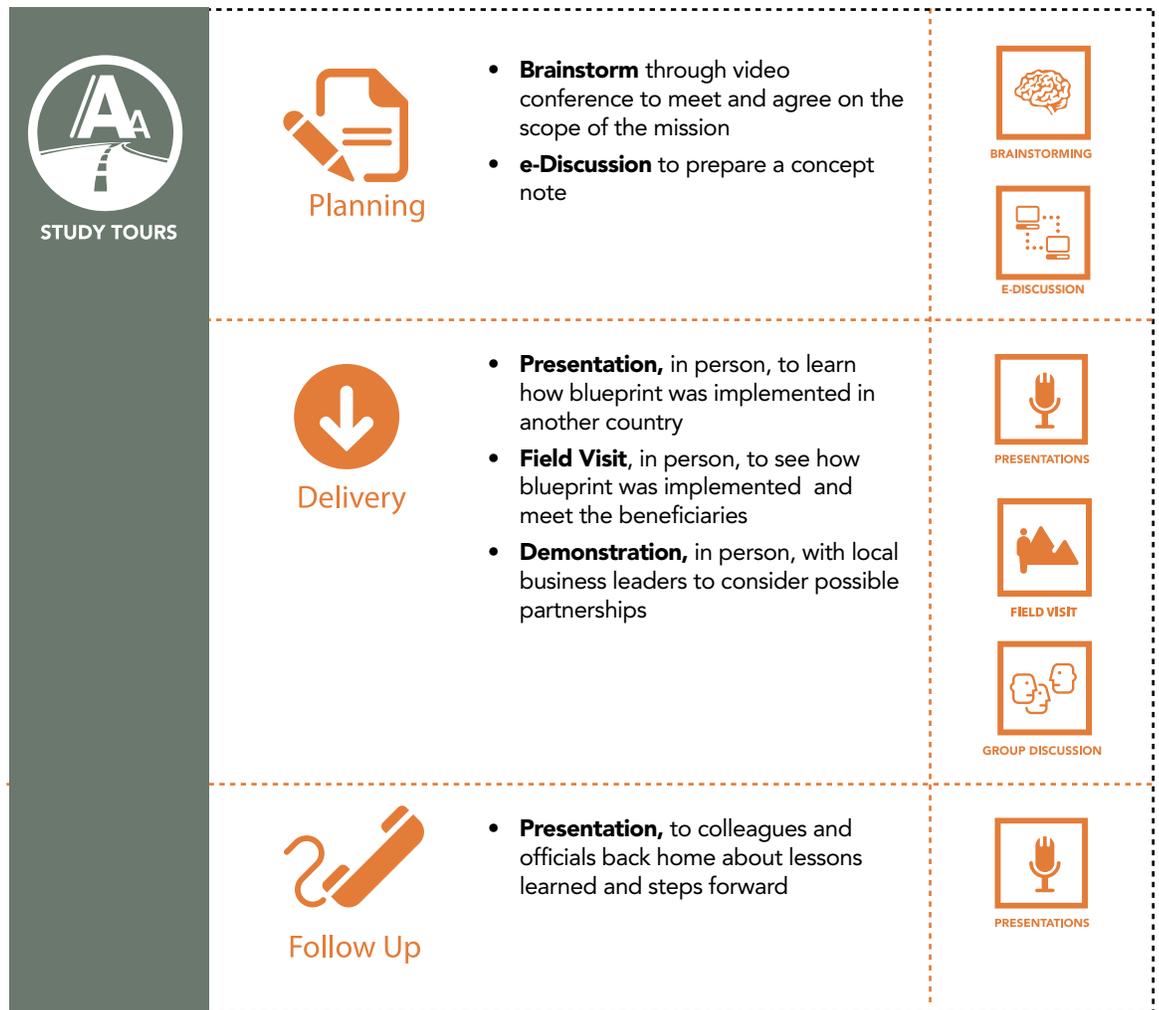
OTHER KEY CONSIDERATIONS:

Here is one example of how to use a survey as a learning method:

1. The facilitator surveys participants by posing a multiple-choice question.
2. Participants respond to the question. There are three common tools for answering the question:
   - » Raising hands (participants often feel inhibited in responding candidly).
   - » Raising a flash card. All participants are given flash cards numbered 1 to 4 or with different colors/symbols. When asked the question, all respond at the same time with their choice. Participants are less likely to feel watched by others while responding and more likely to be candid with their answers.
   - » Submitting an answer using a hand-held polling tool that looks like a remote control. A polling tool provides anonymous responses, encouraging a candid response.
3. Survey information is collected. The facilitator is responsible for noting the response trend when participants raise their hands or flash cards. With a polling tool, software on the facilitator's computer collects responses and produces a chart showing what choices participants made.
4. The survey responses are used to inform the activity and guide the next steps.

Figure 4. Example Sequencing of a Study Tour

STUDY TOURS			
	Planning	• **Brainstorm** through video conference to meet and agree on the scope of the mission • **e-Discussion** to prepare a concept note	BRAINSTORMING E-DISCUSSION
	Delivery	• **Presentation,** in person, to learn how blueprint was implemented in another country • **Field Visit**, in person, to see how blueprint was implemented and meet the beneficiaries • **Demonstration,** in person, with local business leaders to consider possible partnerships	PRESENTATIONS FIELD VISIT GROUP DISCUSSION
	Follow Up	• **Presentation,** to colleagues and officials back home about lessons learned and steps forward	PRESENTATIONS

TANZANIA EXAMPLE

Designing a Group Discussion for the Tanzanian Delegation and Indian Business Leaders

Prior to delivering this activity, the following will need to be considered:
• Guest list: Which companies should be invited and why?
• Timing: When should they meet? For how long?
• Format: Will there be a moderator? What can be done to help both groups get what they want out of the exchange?
• Location: Where is the most convenient place for everyone to meet? Is this location conducive to promoting networking and conversation?
• Next steps: What can be done to ensure this activity leads to something useful?

3.3D. DESIGN THE ACTIVITIES

How should each activity be designed and delivered?

Once you've selected and sequenced your activities, you should think about how you're going to design and deliver them. For example, when designing an action planning session, you would start with a preparatory meeting to:

» Define what you hope to accomplish
» Assign roles and responsibilities (facilitator, key participants, other resource people for content preparation etc.)
» Prepare the agenda and the list of materials needed
» Create a timeline with major milestones leading up to the session
» Review budget and logistics

A single knowledge exchange initiative will consist of many activities. Some activities are more complex than others and will require greater planning—for example, an immersive learning experience will take some serious thought and may require additional staff support to pull off, whereas a group discussion is probably something you can organize quite quickly with little help.

Another thing to consider while designing your activities is the way in which they will be delivered. Delivery can be in real time or staggered, in person or virtual. Some methods are better for building trust and consensus, whereas others promote greater participation and deeper reflection. Some are cheap, others expensive. See Annex III for more on delivery modes.

Keep in mind that the success of a knowledge exchange initiative rests on the achievement of the targeted capacity outcomes rather than on the delivery of a predetermined set of activities or even instruments. Individual activities within a knowledge exchange instrument, or even the instrument itself, might need to be adjusted during implementation to better ensure that learning goals are met.

3.3E. ACTIVITY DELIVERY MODES

The way in which knowledge exchange participants interact with one another or with learning content is called the delivery mode. A delivery mode is either synchronous (occurring at the same time) or asynchronous (occurring at different times).

Synchronous knowledge exchange: Formats include face-to-face, audio, online chat, and video conferencing. Synchronous delivery modes are useful for encouraging dialogue, and when trying to build trust and consensus.

Asynchronous knowledge exchange: Formats include e-learning, online discussion forums, online social networking, and email. These methods are increasingly being blended with face to face delivery, as they provide participants with greater flexibility in access and participation, allow for sustained interaction in a cost-effective way, and encourage deeper reflection.

The choice for one delivery mode or another is usually determined by a number of constraints.

» **Cost:** Face-to-face and video conferencing behave very similarly in terms of cost. It costs less per participant to use video conferencing than face-to-face, but for both modes there are no economies of scale. E-learning, on the other hand, requires a lot of preparation time, but once it is ready it becomes by far the cheapest delivery mode.

» **Access to technology:** Video conferencing, e-learning and other online knowledge exchange activities require access to certain technologies. Most online platforms are free to use or cost very little. Video conferencing requires special equipment and facilities.

» **Audience characteristics:** The schedules and profiles of high level people are best suited for synchronous delivery modes such as face-to-face sessions and video conferencing, while large or distributed audiences are best reached through asynchronous delivery modes.

» **Literacy (including digital literacy):** Your participants should feel comfortable with the technology used for delivery in order to engage effectively in the activity.

» **Language:** Accommodating multiple languages can be challenging. Simultaneous interpretation is easier for presentations and in KE activities where there is more structure. Asynchronous activities allow time for translation.

» **Cultural background and individual learning styles:** Some people prefer learning passively (i.e., through presentation, demonstration, etc.) and others prefer active or experiential learning (i.e., through role play, simulation, or dialogue).

» **External environment:** Natural disasters can affect the possibility of travel, of convening, or of access to technology.

STEP 3.4. PLAN THE RESULTS MEASUREMENT

How will you know whether the exchange is successful or not?

A knowledge exchange without results is not fruitful. The main purpose of this planning guide is to help you ensure that your knowledge exchange initiative—and all the work you and others put into it—leads to results.

Each capacity outcome targeted by the knowledge exchange initiative can and should be measured. As the knowledge exchange organizer, you want to know and be able to demonstrate how participants have been empowered to achieve the capacity outcomes they set for themselves, and how this contributes toward the institutional change your clients and participants seek to realize.

Capacity outcomes can be assessed in numerous ways. The following table illustrates a few possibilities.

Design and Develop the
Knowledge Exchange

Table 7. Examples of Tanzania's Indicators for Capacity Outcomes

Capacity Outcome	Specific Outcome	Measurable Indicators
Enhanced knowledge and skills	Officials in the Ministry of Agriculture, National Dairy Development Board, leading dairy producers, processors, and distributors have a better understanding of the constraints facing Tanzania's dairy sector and are better equipped to develop effective policies to improve performance.	Tanzanian officials develop new policies based on the Indian model. They apply specific lessons learned from India as they implement the reforms in Tanzania.
Improved consensus and teamwork	Exchange participants reach agreement on a blueprint of potential dairy sector reforms appropriate in Tanzania.	Key stakeholder groups including leading dairy producers, processors, and distributors publish the blueprint or otherwise make it available to the public.
New implementation know-how	NDDB participants gain first-hand experience attempting reforms through a rapid results approach. This helps them identify constraints and challenges before rolling out reforms on a larger scale.	An official report or other documented proof that the National Dairy Board tried to implement the rapid results approach and applied lessons to scale up reforms.

The process of selecting and assigning measures should always include the consideration of existing data sources and the feasibility of collecting relevant data. Whenever possible, it is important to establish the following for any measure(s) used. (See table 8, page 69)

STEP
3

Table 8: The Basics of Measuring Results

The baseline value at the start of the initiative	A quantitative or qualitative statement that explains the value of a measure before the knowledge exchange is implemented or at its beginning. Identifying the baseline value for each measure allows practitioners to later assess any changes in the measured value that could be attributed to the program.
Targets or benchmarks for progress at various intervals or stages (e.g., after specific events)	Targeted outcomes can only be confirmed if target value(s) are established at the beginning of the initiative. The target value should be expressed in terms that are comparable to the baseline value. Consider what is feasible given the people involved, the instruments, activities, and delivery modes used, and the available timeframe of the exchange. Specify the estimated confirmation date of each capacity outcome. Some capacity outcomes can be assessed during the program (i.e. after a specific event), whereas others might need more time to be confirmed.
Methods, tools, and roles/responsibilities for collecting and analyzing the monitoring information	The achievement of capacity outcomes can be analyzed by monitoring changes in the indicators over time. This is why regularly tracking program progress is critical. The data collection methods and the tools necessary to utilize them should be clarified and responsible agents identified in order to ensure implementation. Example monitoring methods and tools include: Method: Rapid appraisal, participatory method Data Collection Tools: Surveys, focus groups, structured interviews, network analysis, awareness campaign effectiveness measures/analysis, monitoring the passing of certain laws for reform
Monitoring and evaluation outputs to improve the knowledge exchange initiative	Regularly review the results of activity surveys or feedback sessions with participants. Make adjustments as necessary to make sure participants are getting the most out of each activity. This will better help participants reach their desired capacity outcomes.
Plans for disseminating the performance information at regular intervals	Develop a clear dissemination and consultation plan with your stakeholders to discuss lessons, findings, and evidence. The documentation of capacity outcomes and results, coupled with the detailed description of project activities, lets you, your clients and others know what interventions have been effective and under what conditions. This information can be used to ensure better planning in the future.

STEP

4

IMPLEMENT THE KNOWLEDGE EXCHANGE

There are plenty of issues to address at the implementation phase, and usually the planning for this phase starts well before the initiative is ready for implementation. A great deal depends on the delivery modes that have been selected, but mostly implementation involves project management and logistics or fine-tuning of the activities and agenda.

Visit the World Bank Institute's Knowledge Exchange website at: http://wbi.worldbank.org/sske/guide/implement

5

REPORT THE RESULTS

The documentation of capacity outcomes and results, coupled with the detailed description of project activities, lets you, your clients, donors and others know what interventions have been effective and under what conditions. This information can be used to ensure better planning in the future.
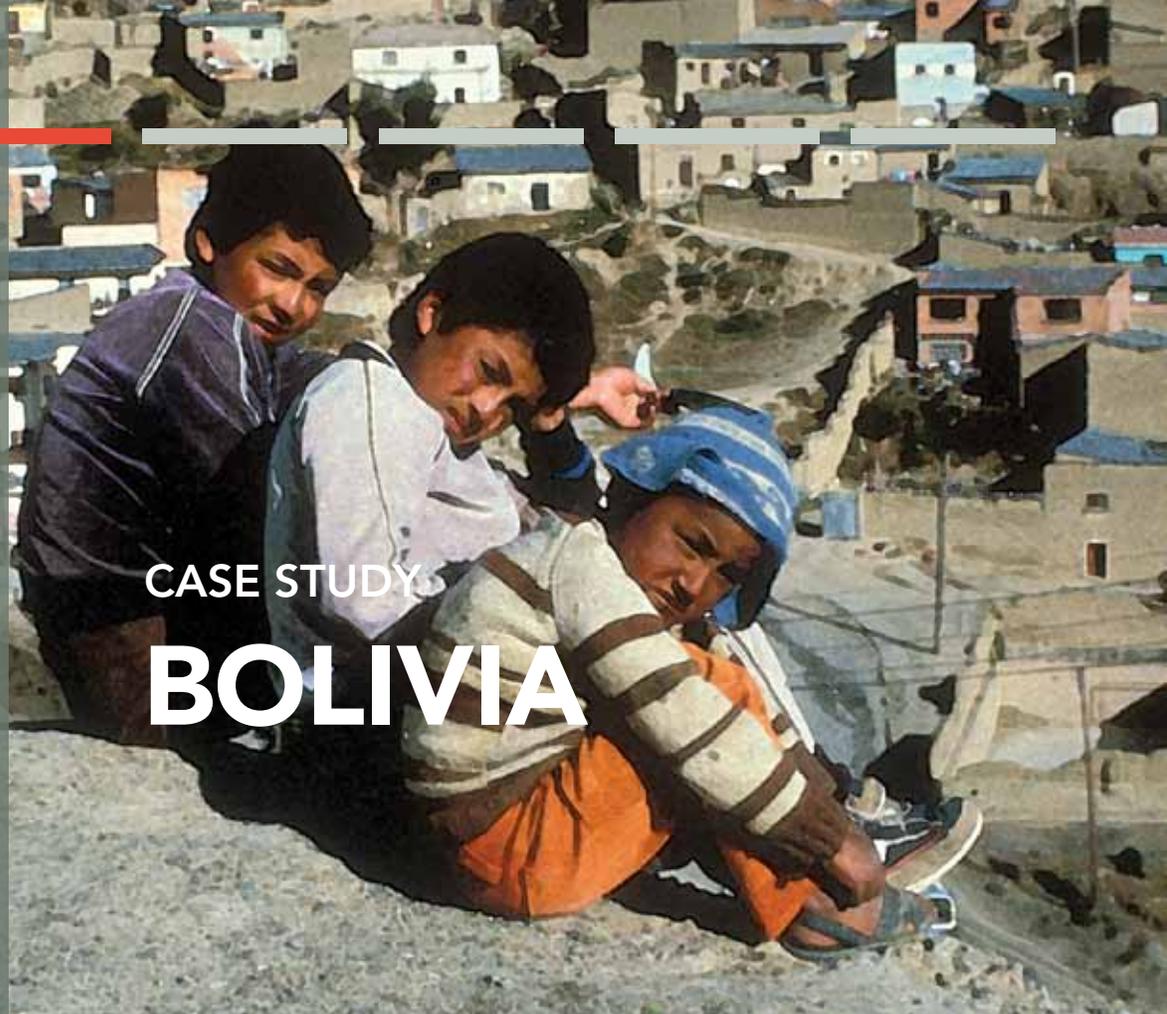
Visit the World Bank Institute's Knowledge Exchange website at: http://wbi.worldbank.org/sske/guide/results

CASE STUDY
BOLIVIA

PROBLEMS IN COMMON: BRAZIL, INDONESIA AND MEXICO CONVERGE TO HELP BOLIVIA WITH EXTREME POVERTY

NEW MEASURES WILL HELP MATERNAL AND INFANT HEALTHCARE AND LOWER INFANT MORTALITY

Despite Bolivia's best efforts to alleviate poverty through targeted social programs, vast populations of the nation — 59% of the indigenous and 62% of rural populations — still live in extreme poverty. Bolivia's Ministry of Development Planning approached the World Bank to help identify countries that have successful poverty reduction programs focusing on indigenous and rural populations.

Brazil, Mexico, and Indonesia were identified as nations who had made strides towards alleviating poverty among rural populations by using innovative **Conditional Cash Transfer (CCT)** and **Community-Driven Development (CDD)** programs, and a knowledge exchange was arranged by the Bank between officials, planners, and experts from the four countries in order to explore ways to improve the operational effectiveness of Bolivia's social programs.

Through **expert visits, global dialogues and a study tour**, the knowledge and skills that Bolivian planners gained from the exchange saved a great deal of trial and error in how to better design and implement social programs for Bolivia's neediest people. Bolivian officials also became aware of how social programs could be improved through smart monitoring and evaluation (M&E) systems. The exchange was almost derailed when Bolivia's elections and subsequent changes in government made communications difficult, but the team coalesced on multiple levels within the Bank and worked in collaboration with the Bolivian government to overcome the challenges. The Knowledge Exchange triumphed, resulting in a large number of ongoing social program improvements.

Outcomes included:

» Raised awareness about innovative social programs.
» Improved consensus about the importance of M&E.
» Enhanced the skills of Bolivian officials to design and implement social programs.
» Increased implementation

Bolivia now plans to apply rigorous M&E techniques that have been used successfully in Mexico to enact a conditional cash transfer program for maternal and infant healthcare. The new M&E approach has the potential to lower infant mortality rates by ensuring that mothers and children receiving program benefits follow program requirements, such as attending doctor visits, taking medications, and getting vaccinations.

> **"THE BOLIVIANS WERE ABLE TO UNDERSTAND THAT CONDITIONAL CASH TRANSFERS ARE NOT VERY EFFECTIVE WITHOUT ENSURING THAT 'CONDITIONS' FOR RECEIVING FUNDS ARE BEING MET."**
>
> —Samuel Freije-Rodriguez, a Senior Economist in the World Bank's Latin American region.

STUDY VISITS/ TOURS

PEER CONSULTATIONS

CONFERENCES

CASE STUDY

HAITI

LEARNING TO DEAL WITH DEVASTATION

USING LESSONS FROM HORRIFIC TSUNAMI, INDONESIA HELPS HAITI SHORE UP HOUSING INFRASTRUCTURE AFTER EARTHQUAKE THROUGH KNOWLEDGE EXCHANGE

The earthquake that struck Haiti in January 2010 left most of the country's housing infrastructure in shambles. While the Haitian government strove to provide emergency and temporary shelters, it was unable to focus adequate attention on long-term housing. The Haitian government turned to Indonesia for information, as the nation had successfully adopted transparent community-based approaches to housing reconstruction after the devastation of the 2004 tsunami. The World Bank subsequently fostered an exchange of experience between Haitian decision-makers and Indonesian reconstruction experts, government officials, and community members.

Through the Knowledge Exchange, **peer consultations, conferences and a study tour** provided opportunities to discuss the similarities and differences of both nations' experiences. Haitian officials sought to enhance their knowledge of ways to respond to disasters, focusing on planning and implementation tools for community-based housing reconstruction.

Haitian authorities received knowledge from public officials, community members, and representatives of international communities engaged in Indonesia's reconstruction process.

Capacity outcomes included:
» **Raised Awareness**
» **Improved Consensus and Teamwork**
» **Enhanced Networks**

The Indonesian concept of **'Gotong Royong'** (meaning mutual help) was key to Indonesia's community housing reconstruction, and this same concept helped the Haitian government in promoting community development and forming coalitions to assist in implementing community based housing projects. Importantly, Haitian officials leveraged the learning from this exchange to develop a blueprint for the first set of housing units. In addition, the exchange made the government of Haiti aware of the needs to amend housing policy and establish and implement new policies to facilitate the reconstruction process.

The exchange also fostered international ties between Haitian decision makers and community members and their Indonesian counterparts, and strengthened linkages with experts in urban planning and housing reconstruction. This contributed to the rebuilding process in Haiti, and is expected to enable more effective management of the urban landscape over the medium-to-long term.

"THE INDONESIAN CONCEPT OF 'GOTONG ROYONG' (MEANING MUTUAL HELP) WAS KEY TO INDONESIA'S COMMUNITY HOUSING RECONSTRUCTION, AND THIS SAME CONCEPT HELPED THE HAITIAN GOVERNMENT..."

CASE STUDY

CAMBODIA

A LESSON FROM CHINA: DON'T PUT ALL YOUR CLOTHES IN ONE BASKET

FROM THE KNOWLEDGE EXCHANGE: NURTURING SPECIAL ECONOMIC ZONES (SEZS) AND CLUSTERS IN CAMBODIA

Garment production alone accounts for nearly 90 percent of annual Cambodian exports, leaving the country vulnerable to economic shocks such as the recent global economic downturn, which halted nearly a decade of consistent economic growth in Cambodia. In order to shore up the Cambodian economy against such shocks, the Bank's Cambodia Office team **organized a multi-tiered Knowledge Exchange** between Cambodia and China. Through the Knowledge Exchange, Cambodian economic and planning officials travelled to China in order to learn about the People's Republic of China's industrial "cluster" policies and Special Economic Zones (SEZs), which played a major role in facilitating the growth of China's now famous export industries. The Cambodian delegation came away from China with:

» **Increased implementation** know-how by highlighting how some of China's reform experiences might be adapted and applied in Cambodia.

» **Raised awareness**s about the multidisciplinary nature of SEZ development requiring input from many Ministries

» **Improved consensus** about the potential for SEZs to stimulate economic growth and private sector investment.

Impressed with public administration reforms they had seen in China, the Cambodian Development Council (CDC) expressed a desire to begin implementing a computerized system to automate SEZ investment approvals. Several Chinese government officials and entrepreneurs expressed interest in cooperating with or potentially investing in Cambodia in the future.

"THIS TYPE OF BOTTOM-UP LEARNING IS REALLY IMPORTANT. I WANTED TO JOIN THE ACTIVITY AND MAKE SURE ALL CAMBODIAN OFFICIALS SEE AND HEAR THE THINKING BEHIND THESE POLICIES."

—H.E. Sok Chenda, Minister attached to the prime minister in charge of Special Economic Zones.

THE WORLD BANK & KNOWLEDGE:

CONNECTING GLOBALLY, ENABLING LOCALLY

The World Bank's role as a knowledge institution has evolved to include three distinct functions—

» Producing and disseminating high-quality global and country knowledge
» Working with clients to customize policies and programs to meet specific challenges based on the best available knowledge
» Connecting governments, civil society, and private actors with others that have faced similar challenges

Because of its scale and diversity, the World Bank can play any or all of these roles as needed to address development challenges:

Knowledge producer. Knowledge is produced all across the World Bank. One example is the Development Economics Unit, which provides intellectual leadership and analytical services to the Bank and the development community.

Knowledge customizer. World Bank task teams and country offices interact directly with clients organizing and applying knowledge from a wide range of sources to help countries address their development challenges.

The World Bank
and Knowledge

Knowledge connector. The World Bank's engagement through global partnerships and facilitation of South-South exchanges highlights its role as connector. Operational units perform this role as a part of their client services, while the World Bank Institute (WBI) focuses mainly on this role. WBI facilitates regional and global knowledge exchange by linking country practitioners and policy makers to sources and centers of cutting-edge knowledge and innovation across the world.

THE ONLY
SOURCE OF
KNOWLEDGE IS
EXPERIENCE

Albert Einstein

THE ART OF
KNOWLEDGE
EXCHANGE

A Results-Focused Planning Guide
For Development Practitioners

http://wbi.worldbank.org/sske/guide/