



# KNOWLEDGE EXCHANGE ROADMAP

## STEP 1

### ANCHOR

#### STEP 1.1 IDENTIFY THE GLOBAL ENVIRONMENTAL GOAL

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

What is the global environmental goal that the knowledge exchange will support? What beneficial results are staff or teams seeking to achieve?

#### STEP 1.2 DEFINE THE INSTITUTIONAL CHALLENGE(S)

**Weak environment for change:** characterized by weak stakeholder ownership, lack of consensus on a development approach, or failure to conceptualize or consider a better approach.

**Inefficient policy instruments:** characterized by weak administrative rules, laws, regulations, standards, and other formal incentives that guide action towards a global environmental goal.

**Ineffective organizational arrangements:** characterized by inadequate systems, financing, staffing, incentives, and other resources for achieving a global environmental goal.

What challenges are blocking the achievement of the global environmental goal?

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#### STEP 1.3 DETERMINE THE CHANGE OBJECTIVE(S)

A change objective is the change your clients and stakeholders believe will best address the institutional challenge(s) they've identified.

What results will help overcome the institutional challenges?

# STEP 2

## DEFINE

### STEP 2.1 IDENTIFYING PARTICIPANT PROFILES

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

Why are they best placed to do so?

Who will Lead?	Who will influence?	Who will Convene?	Who will Act?

### STEP 2.2 DETERMINE INTERMEDIATE OUTCOMES

What specific, measurable changes do participants seek?

What does success look like?

Will these changes help participants make progress toward the change objective?

- New knowledge**  
A person is more likely to act because of a change in awareness, attitude, or understanding.
- Enhanced skill**  
A person is more capable of acting because of a new or developed proficiency.
- Improved consensus**  
Groups with a common interest or agenda are more likely or able to act because of new knowledge, demonstrated experiences, changed attitudes, shared understanding, and improved collaboration.
- Enhanced connectivity**  
A group is more likely or able to act because of new or improved relationships, greater affinity, improved trust, and reduced isolation.
- New and improved actions**  
A person or group initiates or modifies its activity because of what was learned, practiced, realized and/or as a result of shared understanding and improved relationships.

### STEP 2.3 IDENTIFY THE MOST APPROPRIATE KNOWLEDGE PROVIDERS

Which individuals or groups have the most relevant and transferable knowledge, development experience, or a potential solution?

Do they have the resources and capacity to share it?

- Demonstrated success**  
in efficiency addressing similar global environmental challenges.
- Relevant experience**  
in providing this knowledge to people from other places, cultures, and learning backgrounds.
- Familiarity**  
with the cultural and historical contexts of participating groups.
- Resources**  
to plan and implement the knowledge exchange in the proposed timeframe.
- Readiness**  
to deliver, shown by confirmed commitment and understanding of responsibilities due to prior relationships with the knowledge-receiving institutions, groups, or individuals.

# STEP 3

# DESIGN & DEVELOP

## STEP 3.1 SELECT THE PARTICIPANTS

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

## STEP 3.2 VERIFY THE OBJECTIVE AND OUTCOMES

What do the participants want to learn?  
 How do they hope to grow?  
 What do they need in order to act, convene, influence, or lead?

## STEP 3.3 ORGANIZE THE DESIGN AND DELIVERY TEAM

How can you organize for a successful knowledge exchange?  
 Who should be in your core design and implementation team?

## STEP 3.4 ASSEMBLE THE KNOWLEDGE EXCHANGE

What blend of instruments, activities, and delivery modes will help achieve the desired intermediate outcomes?

### 3.4A CONSIDER THE OPERATING CONSTRAINTS & OPPORTUNITIES



Budget



People



Time



Technology



Environment

### 3.4B SELECT THE BLEND AND SEQUENCE OF KNOWLEDGE EXCHANGE INSTRUMENT(S)

#### SHORT-TERM ENGAGEMENT

- CONFERENCE
- EXPERT VISIT
- KNOWLEDGE FAIR
- STUDY TOUR
- WORKSHOP

#### MEDIUM-TERM ENGAGEMENT

- COMPETITION/  
CHALLENGE
- KNOWLEDGE  
JAM
- MULTI-STAKEHOLDER  
DIALOG AND CONSULTATION

#### LONG-TERM ENGAGEMENT

- COMMUNITY  
OF PRACTICE
- TWINNING  
ARRANGEMENT



# STEP 3

# DESIGN & DEVELOP

## STEP 3.4 ASSEMBLE THE KNOWLEDGE EXCHANGE (continued)

### 3.4C SELECT AND SEQUENCE THE KNOWLEDGE EXCHANGE ACTIVITIES

What is the best way to sequence activities?

#### PRESENTATION ACTIVITIES

- Demonstration
- Expert Panel
- Lightning Talks
- Poster Session
- Report
- Storytelling

#### DISCUSSION ACTIVITIES

- Anecdote Circle
- Brainstorming
- Buzz Session
- e-Discussion
- Knowledge Café
- Peer Assist

#### EXPERIENTIAL ACTIVITIES

- Action Planning
- Book Sprint
- Field Visit
- Fishbowl
- Learning Station
- Role Play
- Secondment
- Simulation

#### ANALYTICAL ACTIVITIES

- After Action Review
- Focus Group
- Interview
- Self-Assessment
- Survey
- Swot Analysis

Some activities are more suitable in the knowledge exchange planning phase, while others are more effective in delivery and follow up.

#### Selected Instrument:



Planning



Delivery



Follow Up

STEP  
**4**

# IMPLEMENT

## STEP 4.1 GUIDE THE PARTICIPANTS ALONG THEIR LEARNING JOURNEY

How can you facilitate a genuine learning experience for participants and empower them to act?



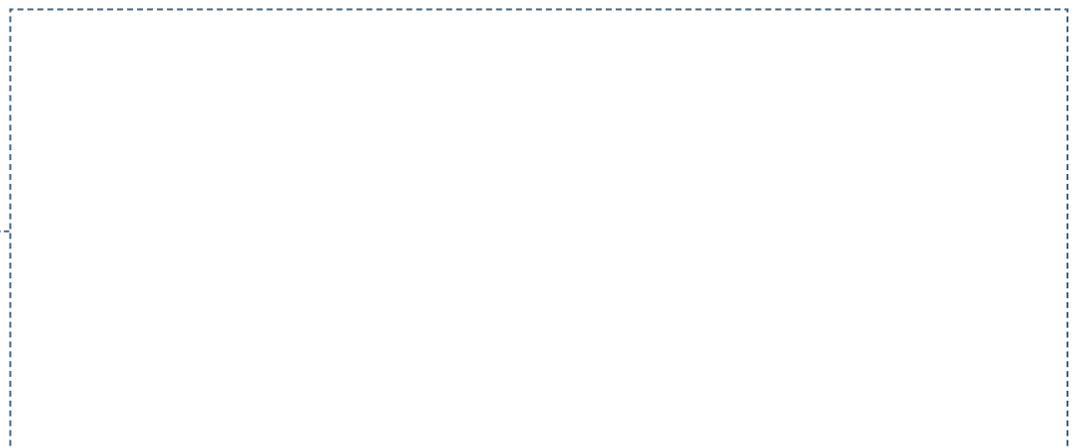
## STEP 4.2 ORCHESTRATE ENGAGEMENT AND BUILD RELATIONSHIPS

How can you ensure participant needs are being met?  
How can participants support one another and become collaborators for change?



## STEP 4.3 DOCUMENT IMPLEMENTATION AND TRACK RESULTS

How can you adjust to necessary changes in direction?  
How can you track these changes?  
How can you capture real-time evidence of results?



**STEP  
5**

# MEASURE & REPORT RESULTS

## STEP 5.1 SYNTHESIZE IMPLEMENTATION DATA

What did you learn during the knowledge exchange process?

## STEP 5.2 MEASURE RESULTS

**Measure Achievement of Intermediate Outcomes**

Did the exchange build the capacity, confidence and/or conviction of participants to act?

**Assess Progress on the Change Objective**

Did the exchange influence results at the institutional and systemic levels?

**Assess Design and Implementation**

## STEP 5.3 REPORT RESULTS

**Identify the Audience and Define the Goals**

What results should you highlight for different audiences?

How can you disseminate results?

- |   |  |  |                                       |                                |
|---|--|--|---------------------------------------|--------------------------------|
| <input type="checkbox"/> Summary Report | <input type="checkbox"/> Memo          | <input type="checkbox"/> Presentation  | <input type="checkbox"/> Blog Posting | <input type="checkbox"/> Other |
| <input type="checkbox"/> Final Report   | <input type="checkbox"/> Briefing      | <input type="checkbox"/> Webinar       | <input type="checkbox"/> Email        |                                |
| <input type="checkbox"/> Results Story  | <input type="checkbox"/> Press Release | <input type="checkbox"/> Facebook Page | <input type="checkbox"/> Webpage      |                                |

**END ONE JOURNEY...BEGIN THE NEXT**

