**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.

**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.

**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.

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**STEP 2: DEFINE**
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**STEP 2.1 IDENTIFYING PARTICIPANT PROFILES**

<table>
<thead>
<tr>
<th>Who will Lead?</th>
<th>Who will influence?</th>
<th>Who will Convene?</th>
<th>Who will Act?</th>
</tr>
</thead>
</table>

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

Why are they best placed to do so?

**STEP 2.2 DETERMINE INTERMEDIATE OUTCOMES**

- **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**

- **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.

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**STEP 3: DESIGN & DEVELOP**
Which individuals are best placed to benefit from the knowledge exchange and act on what is learned?

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?

How can you organize for a successful knowledge exchange?

Who should be in your core design and implementation team?

What blend of instruments, activities, and delivery modes will help achieve the desired intermediate outcomes?
What is the best way to sequence activities?

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

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

<table>
<thead>
<tr>
<th>PRESENTATION ACTIVITIES</th>
<th>DISCUSSION ACTIVITIES</th>
<th>EXPERIENTIAL ACTIVITIES</th>
<th>ANALYTICAL ACTIVITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demonstration</td>
<td>Anecdote Circle</td>
<td>Action Planning</td>
<td>After Action Review</td>
</tr>
<tr>
<td>Lightning Talks</td>
<td>Buzz Session</td>
<td>Field Visit</td>
<td>Focus Group</td>
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<tr>
<td>Report</td>
<td>Knowledge Café</td>
<td>Learning Station</td>
<td>Interview</td>
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<tr>
<td>Storytelling</td>
<td>Peer Assist</td>
<td>Role Play</td>
<td>Self-Assessment</td>
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**Selected Instrument:**

- Planning
- Delivery
- Follow Up

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**STEP 4: IMPLEMENTATION**
How can you facilitate a genuine learning experience for participants and empower them to act?

How can you ensure participant needs are being met?

How can participants support one another and become collaborators for change?

How can you adjust to necessary changes in direction?

How can you track these changes?

How can you capture real-time evidence of results?
MEASURE & REPORT RESULTS

STEP 5

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?

Summary Report  Memo  Presentation  Blog Posting  Other
Final Report  Briefing  Webinar  Email
Results Story  Press Release  Facebook Page  Webpage

END ONE JOURNEY...BEGIN THE NEXT