

# Knowledge Exchange Instruments Supplement

Using the Art of Knowledge Exchange Instruments in a virtual environment

This document includes tips for using the knowledge exchange instruments in the Art of Knowledge Exchange in a virtual environment. Note that these tips have been developed specifically to be included in the participant package for Art of Knowledge Exchange Workshops and serve the purpose of a supplement to the existing Art of Knowledge Exchange toolbox. These guidelines will need to be fine-tuned and edited for wider distribution and/or for other formal publications/knowledge products.

## Contents

- Short-term Engagement Instruments ..... 2
  - Tips for Virtual Conference ..... 2
  - Tips for Virtual Expert Visits ..... 2
  - Tips for Virtual Knowledge Fair ..... 2
  - Tips for Virtual Study Tours ..... 3
  - Tips for Virtual Workshop ..... 3
- Medium-term Engagement Instruments ..... 4
  - Tips for Virtual Competitions ..... 4
  - Tips for Virtual Knowledge Jams ..... 4
  - Tips for Virtual Multi-stakeholder Dialogues & Consultations ..... 4
- Long-term Engagement Instruments ..... 5
  - Tips for Virtual Communities of Practice ..... 5
  - Tips for Virtual Twinning ..... 5

## Short-term Engagement Instruments

### Tips for Virtual Conference

- Ensure that you staff each session appropriately depending on the size of the audience. For example, during a virtual synchronous session you may need to have a facilitator that focuses on the topics shared, a technical person to support participants in the use of the software, and a moderator to be keeping track of Chat.
- If you are recording interactive sessions with participant involvement, ensure that participants are aware that the recording is taking place and that they consent.
- Keep individual sessions approximately 45 minutes and to continue engagement have a mechanism for participants to ask questions both synchronously and asynchronously.
- Add 5 minutes between sessions to give participants enough time to go from one session to another.
- Consider having social breaks such as a coffee and lunch break in smaller breakout groups. Also, consider adding some fun activities such as a “Play a game session” or a meditation or yoga session to address well-being.

### Tips for Virtual Expert Visits

- Organize synchronous sessions that can be recorded to ensure that you can disseminate the expert insights more broadly. If you are planning to disseminate the recording more broadly, get permission from all those participating for its distribution.
- Ensure that there are clear directions for participant engagement during a virtual expert visit otherwise it may end up being more of a one way communication rather than a knowledge exchange.
- Have the appropriate support mechanisms for both the participants and experts to ensure that any technical content/discussion to take place is accessible to all. For example, if a demonstration is part of the expert visit, confirm the availability of the equipment to be demonstrated and how the demonstration will happen.
- Conduct a brief training with the expert on the software or platform to be used for the virtual expert visit. If technology challenges cannot be overcome to conduct a synchronous expert visit, consider recording it.

### Tips for Virtual Knowledge Fair

- Ensure that you know the features and know how to use them of the web conferencing software you are using. For example, not all web conferencing tools enable participants to join a breakout group of their choice but if the tool allows it then you might want to consider that in your planning.
- Determine how you would like to run individual stations.
  - o Each knowledge fair station could be a separate breakout group that participants visit based on their interest. Or, you might want to have lightning talks as part of the main room and conduct breakout groups for discussion.
  - o Consider how long participants will have in each group and if there are going to be timed to ensure that those sharing have the flexibility to start their sharing at a certain point.

- Running a synchronous knowledge fair will take more time to move from one station/group to another simply because the technology does not allow one to view individuals movement from one room to another very smoothly. Allow for more time!

### Tips for Virtual Study Tours

Depending upon the outcomes you seek and your target audiences, you can select from the following activities to design your virtual study tour agenda.

1. Virtual check in and welcome with virtual ice breakers and energizers
2. Virtual coffee chats
3. Panel discussions with experts
4. Virtual field visits/tours
5. Sharing of pre-recorded videos from field-visit sites and hosting a discussion around it
6. Virtual home visits with local stakeholders over coffee and cake
7. Interviews and surveys
8. Knowledge cafes and round tables

It is also helpful to gain insights from the tourism industry on how they organize outreach to their target audiences and use this knowledge to design your study tours.

### Tips for Virtual Workshop

- Have a range of activities to keep participant attention and maintain focus.
- There are several activities that work nicely in a synchronous virtual environment that you may want to consider including to engage participants such as
  - o Buzz Session (Conversation Pod)
  - o Surveys
  - o Polls
  - o Ice-breakers and group energizers
  - o Chat
- Ensure that you create a facilitation/moderation/presenter guidance document that outlines the procedures of the activities to be conducted and how.
- Create a logistics document that includes guidance for the person who may be providing technical support such as creating polls and/or creating breakout groups.
- Conduct a dry run with the entire facilitation team.
- Provide user testing for participants to give them the opportunity to test the technology they are using on their end and ask questions about the how-to features of the virtual environment.

## Medium-term Engagement Instruments

### Tips for Virtual Competitions

- Ensure that the technology you select allows for the submission files you need to collect.
- Depending on who is eligible for the competition, ensure that all will have the appropriate access to the technology used.
- Determine the protocol you plan to use and make the criteria and the selection of the winners procedures as visible as possible.
- Create a communication/outreach/marketing approach to ensure that you are announcing the virtual competition using the appropriate channels to reach the broader audience.
- Create a social media strategy to highlight the efforts and showcase finalists and winners.

### Tips for Virtual Knowledge Jams

- Most knowledge jams are run virtually and take no more than 90 minutes.
- You can organize knowledge jams with teams which are scattered across several locations.
- They bring together knowledge seekers and knowledge originators for a sharply focused conversation aimed at sharing relevant knowledge within a very short period of time.
- Some essential guidelines for a virtual knowledge jam are:
  - o First, define the type of know-how that's needed
  - o Err on the side of brevity
  - o Select participants who are in the best position to share, and receive or translate, the needed knowledge
  - o Map out a list of topics and questions with a subgroup in advance
  - o Make sure to reuse and apply the knowledge that the knowledge jam generates
- The facilitator should make sure to:
  - o have an easy template to record the discussions and share the screen with participants so all can visualize the progress of the discussions
  - o create a safe environment for sharing ideas

### Tips for Virtual Multi-stakeholder Dialogues & Consultations

To reach consensus, share practical experience, and gain diverse perspective virtually, you can:

- bring in a range of stakeholders who are otherwise difficult to connect to or organize for a face to face meeting
- choose to spread the dialogue process over time
- start your advance planning long before the dialogues to set the foundation for a successful dialogue
- design a detailed planning phase which includes outreach to key stakeholders for a brainstorming meeting, focus group discussions, and interviews with key stakeholders
- based on the inputs received during the planning phase, and the ground-work, develop an agenda which directly addresses the outcomes you seek from the dialogues
- during the stakeholder dialogues, you can have:
  1. virtual round table discussions and role play to gain diverse perspectives and understand each other's realities, and
  2. virtual consensus building workshops led by a skilled facilitator to find common ground on key priority issues.

## Long-term Engagement Instruments

### Tips for Virtual Communities of Practice

Communities of Practice is one of the instruments that has been used within the virtual setting for a long time now. The platform of choice for a virtual community of practice depends on who the participants are and how the community platform is going to be managed. Consider the following:

- what type of analytics you are able to get from a given platform
- access to collaboration options such as how you can create groups and sub-groups
- how to capture individual contributions
- balance between synchronous and asynchronous options
- how to promote key contributions
- how to push notifications

### Tips for Virtual Twinning

- Depending on the level of formality in a twinning arrangement, you may want to adjust the selection of activities participants engage in as part of the twinning efforts. For example, eDiscussions may be the go-to activity if the participants involved have technology limitations and are in different locations.
- For less formal twinning, forming twinning groups would provide flexibility to bring participants together based on their areas of interest and common concerns. This might offer those involved more flexibility in relation to activities and the technology used to engage in. For example, everyone might want to join a Whatsapp group to engage with each other over time.