The Art of Knowledge Exchange

Tapping into the power and potential of peer-to-peer learning

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GEF ECW, Accra, Ghana
Facilitators

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Workshop Goals

- Learn how to use a **systematic and results-focused approach** to knowledge exchange
- Learn to use a range of **instruments** and **activities** that contribute to a successful knowledge exchange
What is Knowledge Exchange?

Knowledge Exchange involves sharing of knowledge and experience within and across countries and regions with the purpose of accelerating development processes and solutions.
Why Knowledge Exchange?

A powerful way to:

- share, replicate, scale up environmental and sustainable development solutions
- learn from peers who have overcome similar challenges
- access practical knowledge and environmental and sustainable development solutions
Use of Knowledge Exchange in a project cycle

- Faster **project preparation**
- Consensus and coalition building
- Overcoming **implementation bottlenecks**
- Facilitating transfer of **operational lessons learned**
The **Burundi Story Example**

As you watch the video, consider the following questions:

• What is the challenge that Burundi was facing?
• What role did Knowledge Exchange play in solving the challenge?
• What else strikes you about the exchange?
Knowledge Exchange on Sustainable Shade Grown Coffee: Colombia, Burundi, Ethiopia and Rwanda

2014-2015
The Burundi Story Example

Now that you watched the video, let’s share:

• What is the challenge that Burundi was facing?
• What role did Knowledge Exchange play in solving the challenge?
• What else strikes you about the exchange design?
Buzz Session: Your Experience

Half the tables

• Share one to two opportunities or challenges you have faced when integrating knowledge exchange in a project cycle.

Half the tables

• Share one to two examples of how knowledge exchange has contributed to project outcomes.
Challenges

- What is the best way to exchange knowledge?
- How can we get (and measure) results from knowledge exchange?
- How can we systematically integrate knowledge exchange as a part of a larger change process?
Addressing the Challenge!
A systematic approach to Knowledge Exchange

Art of Knowledge Exchange:
- Practical guide and tools on the “how to” of knowledge exchange to help practitioners achieve results
- Initially developed for World Bank Group staff and now used by institutions and development partners in their operations and training
- Customized to meet the needs of the GEF Partnership, reflecting the GEF experience
The Art of Knowledge Exchange is located on the GEF’s Knowledge and Learning Page:

http://www.thegef.org/topics/knowledge-learning

http://www.thegef.org/publications/art-knowledge-exchange-results-focused-planning-guide-gef-partnership
A Roadmap for Knowledge Exchange

Art of Knowledge Exchange Methodology:

1. Anchor
2. Define
3. Design & Develop
4. Implement
5. Measure & Report Results
Instruments = Dishes in a Meal
Activities = Ingredients in a Dish
Tools Used for Serving & Sharing
The Guide is your Cookbook!
Roadmap for Knowledge Exchange: The Philippines Story
The Art of Knowledge Exchange
Philippines
The Journey:
Philippines – Tañon Strait
Knowledge Exchange
Step 1: ANCHOR
Step 1: ANCHOR

1.1 Identify the Global Environmental Goal
1.2 Define the Institutional Challenges
1.3 Determine the Change Objectives

pp. 2-5
GLOBAL ENVIRONMENTAL GOAL

To strengthen the conservation, protection, and management of key marine biodiversity areas.
INSTITUTIONAL CHALLENGES

- Weak environment for change.
- Ineffective organizational arrangements.
CHANGE OBJECTIVES

- Weak environment for change.
  - To Re-activate the Protected Area Management Board
  - To formalize partnerships among the local government units & other stakeholders
  - Ineffective organizational arrangements.
  - Strengthen the capacity of the Protected Area Office staff
Step 1: ANCHOR

Recap

1.1 Identify the Global Environmental Goal
1.2 Define the Institutional Challenges
1.3 Determine the Change Objectives
Reflections and Questions
Step 2: DEFINE

WHERE WE ARE

KNOWLEDGE GAP

ANCHOR

DEFINE

WHERE WE WANT TO BE
Step 2: DEFINE

2.1 Identify the groups of people needed to achieve the change
2.2 Determine the intermediate outcomes
2.3 Identify the knowledge providers
2.1 Identify Participant Profiles

- Who will lead?
- Who will influence?
- Who will convene?
- Who will act?
PARTICIPANT PROFILES

- Representatives from Key public agencies
  - Department of Environment & Natural Resources - Region VII and VIII
  - Bureau of Fisheries & Aquatic Resources - Region VII and VIII
  - Local government units
- Representatives from NGOs
  - RARE-Philippines
  - SMARTSeas Project
2.2 Determine the Intermediate Outcomes

Intermediate Outcomes are the *stepping stones*
2.2 Intermediate Outcomes

- New Knowledge
- Enhanced Skills
- Enhanced Connectivity
- Improved Consensus
- New and Improved Actions
INTERMEDIATE OUTCOMES

- New Knowledge
- Enhanced Skills
- Improved Consensus
2.3 Identify 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?
KNOWLEDGE PROVIDERS

✓ RARE-Philippines
✓ SMARTSeas-PH Project Unit
✓ Protected Area Office
Knowledge Provider Perspective

Why share knowledge?
What your peers say...

Share knowledge to:

- Grow as a Learning Organization
- Capture and harness tacit know-how and competencies,
- Build efficiencies and scale up good practices
- Package and disseminate knowledge
- Create new knowledge
- Gain recognition as a knowledge Leader
- Support domestic and international sharing of expertise
- Develop new forms of collaboration across the organization and with external partners
Step 2: DEFINE

Recap

2.1 Identify the groups of people needed to achieve the change
2.2 Determine the intermediate outcomes
2.3 Identify the knowledge providers
Step 3: DESIGN AND DEVELOP
3.1 Select the Participants
3.2 Verify the Change Objective and Desired Intermediate Outcomes
3.3 Organize the Design and Delivery Team
3.4 Assemble the Knowledge Exchange Initiative
Let’s look at how a successful knowledge exchange gets designed.
Philippines

✓ Selected Participants

2 to 5 participants from the 17 local government units - Governors, municipality/City mayors & other local officials & technical staff,

14 Representatives from RARE-Philippines, Tañon Strait Protected Seascape, Tañon Strait Protected Area Office, & Tañon Strait Protected Area Management Board;

11 Representatives from Department of Energy & Natural Resources, SMARTSeas PH Project Management Unit, & Bureau of Fisheries & Aquatic Resources
PHILIPPINES TEAM

✓ Project Lead and Project Manager from the SMARTSeas Project Management Unit
✓ Facilitators and experts from RARE-Philippines
✓ Logistical support from the Tañon Strait Protected Area Office.
PHILIPPINES

✓ Change objectives and Intermediate Outcomes

STILL VALID
Operating Constraints & Opportunities: Anecdotes?

- Budget
- People
- Time
- Technology & Resources
- Operating Environment

pp. 34-38
Philippines
Operating Constraints
✓ Budget: $70,000
✓ Participant Mix: Public and Community
✓ Timeframe: 1 year
3.4 Assemble the Knowledge Exchange

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

Page 33 of the Art of KE Guidebook
Review of Instruments

Conference
A formal event in which a large number of participants come together to share knowledge and experiences on a specific topic/theme.

- Best used for:
  - Gaining new knowledge.
  - Outreach to a large number of participants, especially when targeting high-level audiences.
  - As single or multi-day events.
  - With multiple thematic tracks / immersion in select topics.
  - With parallel workshops and knowledge sharing dealing with the same topic or theme.
  - Networking, building partnerships, and strengthening communities.
  - In-depth knowledge exchange activities designed to support knowledge transfer.
  - Giving a topic high visibility or launching global initiatives.
  - Communicating program impact or changes in strategy.

Expert Visit
Sending a practitioner or technical specialist from a knowledge provider country/region/organization to a knowledge seeker country/region/organization to assess current circumstances and/or provide guidance on a specific challenge.

- Best used for:
  - Enhancing skills and developing a new proficiency.
  - Getting an in-depth diagnosis of a global environmental challenge and recommendations for adopting a good practice or solution to the local context.
  - Over the span of several days or as a series over a one-year period.
  - With small groups of participants.
  - With expert-to-expert interaction.
  - At the institutional level.
  - Getting hands-on guidance and coaching or mentoring through various stages of implementation.
  - Times when travel to the knowledge-supplying country is not possible for whatever reason.
Link between Instrument and Intermediate Outcomes

- The choice of instrument(s) should always target the intermediate outcomes the group would like to achieve.
- One instrument can help achieve multiple intermediate outcomes.
Blending of Instruments

CONFERENCE + KNOWLEDGE FAIR + COMMUNITY OF PRACTICE = New Knowledge

WORKSHOP + KNOWLEDGE JAM + EXPERT VISIT = Enhanced Skills
Keep in mind

The choice and blend of instruments will also be influenced by:

- The nature of the challenge (straightforward or complex)
- Participant profile
- Group size
- Time, logistical constraints, resource
- Availability
Group Work: Selecting Instruments

1. **Review** the Philippines Case Story Handout

2. Based on what you now know of the Philippines story, **discuss**, in your groups, *which instruments you would like to blend together to reach the Knowledge Exchange intermediate outcomes.*
   - Select and blend 3 instruments
   - Justify your selections
Philippines Knowledge Exchange Recipe

The following blend of Instruments:

1. Multi-stakeholder Dialogues & Consultations
2. Workshop (Bootcamp)
3. Workshop (Social marketing)
Instruments linked to Intermediate Outcomes

- New Knowledge
- Improved Consensus
- Enhanced Skills
Key Characteristics

- Building blocks for Instruments
- Contribute to desired intermediate outcomes
- Choice affected by several factors
  - Participant profile
  - Project phase
  - Duration
  - Ability to capture knowledge
  - Resources and logistics
  - Access to technology
  - Cost
  - Language

Distinct strengths and limitations
Review of Activities
<table>
<thead>
<tr>
<th>Presentation</th>
<th>Discussion</th>
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<tbody>
<tr>
<td>Demonstration</td>
<td>Anecdote circle</td>
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<tr>
<td>Expert Panel</td>
<td>Brainstorming</td>
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<td>Lightning Talks</td>
<td>Buzz Session</td>
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<td>Poster Session</td>
<td>eDiscussion</td>
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<td>Report</td>
<td>Knowledge Café</td>
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<tr>
<td>Storytelling</td>
<td>Peer Assist</td>
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<td>Experiential</td>
<td>Analytical</td>
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<tr>
<td>Action Planning</td>
<td>After-Action Review</td>
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<td>Field Visit</td>
<td>Focus Group</td>
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<td>Fishbowl</td>
<td>Interview</td>
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<td>Learning Station</td>
<td>Self-Assessment</td>
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<td>Role Play</td>
<td>Survey</td>
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<td>Secondment</td>
<td>SWOT Analysis</td>
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<tr>
<td>Simulation</td>
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Sequence activities for:

- Planning Phase
- Delivery Phase
- Follow-up Phase
Example: Sequence of Study Tour

<table>
<thead>
<tr>
<th>Planning</th>
<th>Delivery</th>
<th>Follow-up</th>
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<tbody>
<tr>
<td>Action Planning</td>
<td>Presentation</td>
<td>Poster session</td>
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<td>Discussion</td>
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<td>Survey</td>
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<td>Interviews</td>
<td>Interviews</td>
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<td></td>
<td>Learning Stations</td>
<td>Action Planning</td>
</tr>
</tbody>
</table>
Multi-stakeholder Dialogues

Planning
✓ Brainstorming
✓ eDiscussions

Delivery
✓ Action Planning

Follow-up
✓ Reports
Workshop (Boot camp)

Planning
✓ Focus Groups
✓ Action Planning

Delivery
✓ Expert Panels
✓ Role Plays
✓ Action Planning
✓ Poster Session
✓ Story-telling

Follow-up
✓ Survey
✓ Report
Workshop (Social Marketing)

Planning
✓ eDiscussions

Delivery
✓ Brainstorming
✓ SWOT
✓ Simulation
✓ Demonstration
✓ Dance & Jingle
✓ Action Planning

Follow-up
✓ Survey
✓ Report
Tools & Technologies

- Collaborate
- Communicate
- Capture
## Tools & Technologies: Primary Purpose

<table>
<thead>
<tr>
<th>Collaborate/communicate</th>
<th>Capture/collaborate</th>
<th>Communicate/collaborate</th>
</tr>
</thead>
<tbody>
<tr>
<td>- GChat</td>
<td>- Box</td>
<td>- Blogs</td>
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<td>- WhatsApp</td>
<td>- Dropbox</td>
<td>- Twitter</td>
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<td>- WeChat</td>
<td>- Poll Everywhere</td>
<td>- Facebook</td>
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<tr>
<td>- Viber</td>
<td>- Survey Monkey</td>
<td>- Instagram</td>
</tr>
<tr>
<td>- Skype</td>
<td>- Google Drive (Team Drives)</td>
<td>- Storify</td>
</tr>
<tr>
<td>- Google Apps (docs, sheets, etc.)</td>
<td>- One Drive</td>
<td>- Paper.li</td>
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<tr>
<td>- Microsoft Office 365 (Yammer, etc.)</td>
<td>- ...</td>
<td>- Scoop.it!</td>
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<td>- iOS Apps (Facetime, etc.)</td>
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<td>- Pearltrees</td>
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SMARTSeas PH
Facebook for Communication & Collaboration
Step 3: DESIGN & DEVELOP Recap

3.1 Select the Participants ✓
3.2 Verify the Change Objective and Desired Intermediate Outcomes ✓
3.3 Organize the Design and Delivery Team ✓
3.4 Assemble the Knowledge Exchange Initiative ✓
Step 4: IMPLEMENT
Step 4: IMPLEMENT

4.1 Guide the participants along their learning journey

4.2 Orchestrate engagement and build relationships

4.3 Systematically document your implementation and track results
Step 4: IMPLEMENT

Keep in mind!

Don’t fall in love with the plan!
Planning is the key, not the plan.

pp. 58-60
Learning Journey

Participants had the opportunity to
✓ See how they could improve from what they have done
✓ Confirm that they were on the right path
✓ Focus beyond immediate needs
Social marketing is not typically part of my work as an Aqua Culturist. Through the workshops, I realized that I have somehow been doing campaign work through my engagement with coastal communities, but just needed to better understand and apply the art and science behind influencing behavior change. Some local government staff may see it as additional work, but for me, it is an opportunity to grow and take my advocacy to a higher level. — Daisy Teves, Senior Aqua Culturist and Campaign Team Leader, Bais City.
Action Plans for Change

✓ Participants prepared action plans collaboratively with their teams.
✓ These became the roadmap for each local government unit.

For much of the time with our team of learners, we had to re-frame concepts, design activities, quite fun and engaging. This also enabled us to uncover how we intend to move forward. I learned in the
IrwinGamma Team Model.
For most of us, it was the first time we participated in this kind of learning event. While we had to work hard to internalize concepts and theories, the session design and activities were quite fun, interactive, and engaging which made it easier for us to understand the material. I intend to replicate and apply what I learned in our municipality." ~ Irwin Gamallo, Campaign Team Member, Samboan, Cebu
Learning New Things!
Be prepared to be surprised!

Expect the unexpected!
Relationship Building

✓ Songwriting played a key part in sharing perspectives and creating connections among the participants.
I was delighted to meet over 60 fellow campaign teams and staff from the Protected Area Office though the SMARTSeas campaign launch, boot camp, and social marketing workshops! We all contributed in drafting a public service announcement, Atong Tañon song, and had fun with choreography and dance moves. The sense of camaraderie was palpable. We all share the same objective of improving fisheries management in our localities.” — Mr. Benito “Jun” Secuya Jr., Municipal Agriculture Officer, Badian Cebu.
Creating Together!
Document Implementation and Track Results

- Capture results as they happen to help you determine if you are on the right path
- Systematically document and organize your findings to reduce the time you spend post-implementation
- Help participants track results for their follow-up actions and sharing with relevant stakeholders

pp. 63-64
Implementation

Journey Documented

✓ Participants kept track of their learning journey through journal writing.
✓ Photos, videos, press stories, and testimonials were also captured during the exchange.

It felt like a whole new world. I hope our teams can continue our responsible campaigns.

~ Charlie

Jose, Negros
Inspired Together!
Step 4: IMPLEMENT

Recap

4.1 Guide the participants along their learning journey

4.2 Orchestrate engagement and build relationships

4.3 Systematically document your implementation and track results
Step 5: MEASURE & REPORT
Step 5: Measure and Report the Results

5.1 Synthesize implementation data
5.2 Measure effectiveness across expected and unexpected results
5.3 Report results
5.1 Synthesize implementation data

- Collect and review your data
- Look for patterns or connections in relation to intermediate outcomes
- Consider ways to fill information gaps

pp. 68-69
Implementation data:

The survey results from each workshop as well as the campaign plans from each local government unit were compiled and synthesized to determine the success of the exchanges.
5.2 Measure Results

5.2A Measure achievement of intermediate outcomes
5.2B Assess progress on the change objective
5.2C Assess design and implementation
Knowing what *did* work and why allows you to attribute results.
RESULTS
Outcomes reached:

✓ New Knowledge
✓ Enhanced Skills
✓ Improved Consensus
DIRECT RESULTS
Multi-stakeholder Dialogue:

- Activation of the Protected Area Management Board,
- Selection of sites and orientation about the project,
- Communication plan involving all stakeholders working in Tañon Strait,
- Tañon-wide campaign (i.e., Atong Tanon branding).
DIRECT RESULTS

Workshop (Boot Camp):

- Trained 63 LGU campaign teams, PAO staff, and other partners on campaigns,
- Developed toolkits on campaigns and social marketing on fisheries management for use of campaign teams in 17 local government units.
DIRECT RESULTS

Workshop (social marketing):

- Institutionalized campaign team set up per local government unit (through the issuance of executive order by the local chief executive)
- Social media campaigns efforts started.
Knowing what did *not* work and why is another form of success!
Reporting RESULTS

✓ Report

- Local Government Units

✓ Social Media Stories

- Wider distribution
Step 5: MEASURE & REPORT
THE RESULTS - Recap

5.1 Synthesize implementation data
5.2 Measure effectiveness across expected and unexpected results
5.3 Report results
The journey continues…
February 2017 Update from the Philippines project
Tañon Strait Management Board requires monitoring of all fishing vessels

April 2017 Update from the Philippines project
Managed access is a key feature of the approach RARE is piloting in the Tañon Strait

Our Design Journal

Ingredients of Today’s Workshop

✓ Report
✓ Storytelling
✓ Buzz Session
✓ 25% Solution
✓ 1-4-All
✓ Harvesting
✓ Role Play
✓ Survey/Polling
Intermediate Outcomes from Today’s Workshop

- New Knowledge
- Improved Consensus
- Enhanced Connectivity
Closing Circle

• One thing that surprised you in today’s workshop
• What stage of your project cycle would you use KE in the future?
• What will you use it for?
Augmented Reality

https://blippar.com/en/
THANK YOU!