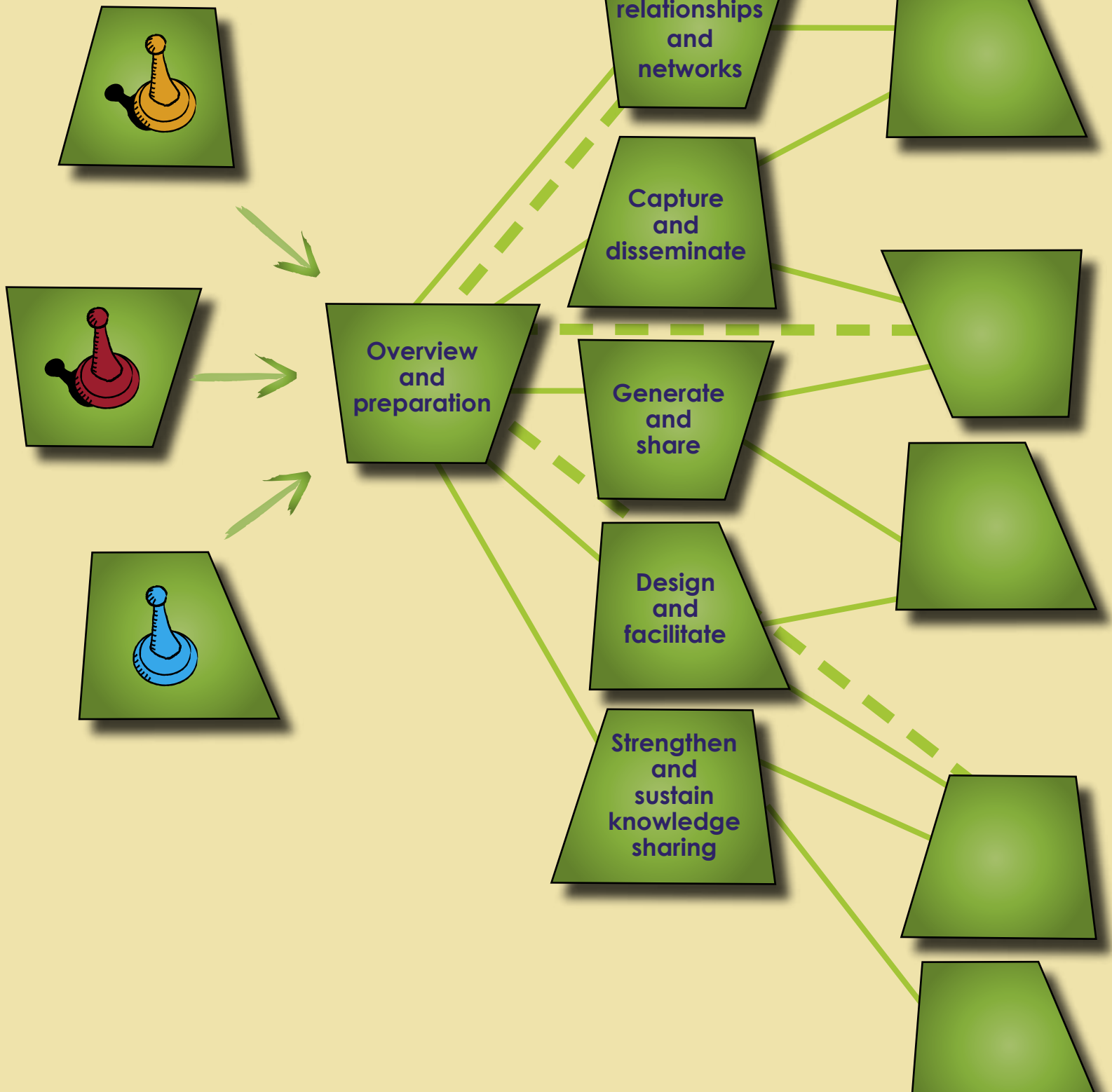


INTRODUCING
**Knowledge Sharing
Methods and Tools**
A FACILITATOR'S GUIDE

by Allison Hewlitt and Lucie Lamoureux



This publication has been funded by Canada's International Development Research Centre (www.idrc.ca) and the International Fund for Agricultural Development (www.ifad.org) as a component of the ENRAP initiative (www.enrap.org).

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Enabling poor rural people
to overcome poverty



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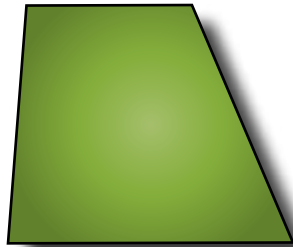
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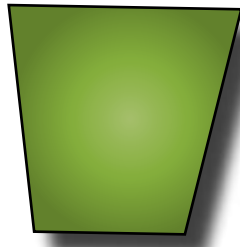
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ACKNOWLEDGEMENTS

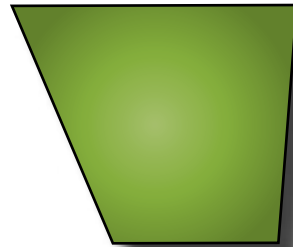
We wish to acknowledge the following people for contributing content and feedback in the development of this guide.



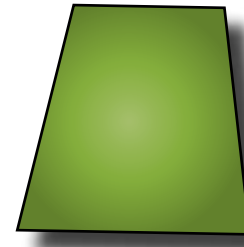
IFAD Knowledge Facilitators (KFs) and Country Program Officers (CPOs) past and present, in particular those who participated in the Rome February 2010 meeting and/or shared their stories with us: Niaz Ahmed Apu, Yolando Arban, Bashu Aryal, Svetlana Balkhova, Ankita Handoo, Anura Herath, Vikash Kumar, Mariam Rikhana, Meng Sakphouseth, Manivong Saomany, Nguyen Thanh Tung, Sun Yinhong, as well as Vincent Darlong, IFAD Country Office Coordinator, India.



A special thanks to Ankita Handoo and Pawan Kumar who piloted the guide during a KS workshop in Delhi and provided us with invaluable feedback.



We also wish to express our gratitude to Apoorva Mishra and Sucheta Rawat of IDRC SARO in Delhi for their logistical and administrative support during the KS workshops and India pilot.



And finally, a huge thanks to Chase Palmeri, KM Facilitator for Asia Pacific, IFAD, Rome and Shalini Kala, ENRAP Coordinator, IDRC SARO, Delhi who were instrumental in the the development of this guide from day one. We are most grateful for their experience and support.

PREFACE

The world's most difficult development problems relate to improving lives of remote, isolated and marginalised communities. Problems typical to such communities need specialised response taking into account the local context, culture and practices. Efforts that are informed in this manner and are dynamic in responding to changing needs have probably the best chance to successfully deliver development services.

Years of experience suggests that learning and innovation may be the key to designing such developmental initiatives. Understanding isolated communities; their ability to play with the changing world conditions; their changing needs and the like require continuous learning and sharing at all levels in the development space. From donors and governments to researchers, field workers and community members, all need to learn from each others experiences to make a real dent at poverty.

International Fund for Agriculture Development (IFAD) and International Development Research Centre (IDRC) of Canada have been at the forefront of changing lives through research, development and implementation of programmes for the poor. Both institutions value learning and knowledge sharing as important elements of their work. For a number of years IDRC has supported global and regional collaboration, and knowledge sharing practices through programmes such as Bellanet. IFAD has increasingly put great emphasis on knowledge management (KM) and knowledge sharing (KS) to improve programme delivery.

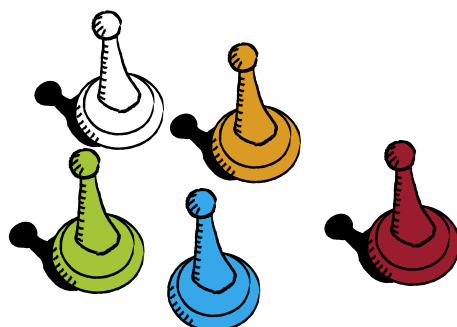
Over ten years ago, IFAD and IDRC joined hands to support Knowledge Networking for Rural Development in Asia-Pacific Region (ENRAP) to nurture knowledge-networks amongst IFAD's projects and partner. Building capacity at regional, national and project level, to share knowledge has been key to building and integrating regular knowledge sharing and management within IFAD operations.

This process gained speed with the formation of a knowledge facilitator's (KF) group as a key connector in the network, comprising of IFAD's officers based in country offices. Their exposure to KS techniques led to a lot of excitement in working with new ways to enhance learning for better results in tackling poverty; and from country offices soon spread to projects and partners. Driving the learning and exchange processes in Asia-Pacific, members of the KF group are recognised as experts and are invited by other divisions at IFAD and institutions outside to share their insights on KM and KS processes to improve learning.

This guide introducing KS tools and methods for facilitators was put together in response to their needs and as a result of their tremendous effort. Over several months they provided inputs, tested methods in the field, piloted the draft version and provided feedback. Allison Hewlitt and Lucie Lamoureux held our hands through out this journey leading with their specialised understanding of learning and sharing methods.

I hope this guide will help support integration of KS-KM practice in IFAD operations further; and in doing so serve as a resource to the Knowledge Sharing Skills initiative of IFAD and FAO. I also hope it helps bring the benefits of improved learning to poverty alleviation efforts through the use of interesting and innovative KS tools and methods not only across Asia-Pacific but beyond.

Shalini Kala
ENRAP Coordinator
October 2010



The idea of a facilitator's guide for introducing KS methods and tools stems from the first of several ENRAP KS methods and tools workshops delivered by Allison Hewlitt and Lucie Lamoureux in Bangkok in November 2008 (see appendix for additional information on what is ENRAP). It resurfaced again in April 2009, following IFAD's Asia and the Pacific Division's Annual Performance Review workshop (APR). Here is the text drawn from the APR report which captures what we heard in Bangkok, back in November 2008:

“Following the APR, the KFs made explicit areas in which they would like KS support. One of the most identified areas, as requested by the Philippines, Nepal, Cambodia and China, focused on the development of KS curriculum—specifically a training course or material that could be used by KFs to develop KS/KM capacities within their own countries. The ideal approach for this activity would be through a process of co-creation whereby interested KFs would convene in a facilitated workshop to develop the curriculum themselves. This f2f development workshop, or writeshop, would build on existing materials and result in the production of a draft curriculum both in terms of a delivery process and accompanying resource materials. The process itself would be learning oriented in that it would continue to enhance the capacities of the KFs in facilitation, workshop design and the application of social media tools and their understandings of the field of KM. While participating in the process would be a valuable experience for the KFs, it is expected that those unable to contribute could benefit from the resulting outputs generated at the workshop.”

With the support of ENRAP, conceptualisation of the guide got underway led by KS facilitators Allison Hewlitt and Lucie Lamoureux. A conceptualisation meeting was held in September 2009 to help clarify the needs, identify target audience and craft a vision. Follow-up emails concluded that KFs did not have adequate time to invest in the development of the guide's curriculum. However, they did feel that they could provide some feedback and input into a first version to be drafted by Allison and Lucie.

From December 2009—February 2010, the structure of the guide was developed. Content was drawn on experiences and lessons from designing and delivering a series of ENRAP KS methods and tools workshops including two KS regional training courses organized in 2008 and 2009, as well as two national trainings held in India and the Philippines in 2009.

In February 2010, a rough draft of the guide was presented to a group of KFs at a consultation meeting held in Rome. The feedback provided informed the guide's future development - including the explicit addition of users beyond those who felt they had the capacity and resources to design and deliver a KS methods and tools workshop.

In June 2010, the Knowledge Sharing (KS) India workshop was held to develop KS capacities among IFAD funded projects in India. It provided a means to pilot the guide for User 1. Notes from the debrief sessions with the workshop's facilitators Ankita Handoo and Pawan Kumar were captured in a report on the pilot experience and proved to be invaluable in transforming the content and structure of the guide into its final format.

The development of the guide also fits squarely within the fourth strategic component of the IFAD Knowledge Management Strategy—"Promoting a supportive knowledge-sharing and learning culture". As noted on page 22 of the strategy:

"IFAD will provide training to ensure that staff at all levels are familiar with knowledge-sharing and learning processes and tools, and with the appropriate behaviours and attitudes. Examples of areas that will be addressed as a priority will be the thematic networks, specific knowledge-sharing and learning tools, and the use of the information technology platform."

It is expected that this guide will serve as a resource in these efforts more specifically tied to their capacity building efforts starting in the fall of 2010.

INTENDED USERS

The Introduction to KS Methods and Tools: A Facilitator's Guide, developed under the ENRAP programme, is intended, in particular, for Knowledge Facilitators (KFs), IFAD CPOs and other people within the IFAD Asia and Pacific Regional Network that ENRAP supports who may have a responsibility to train others on knowledge sharing (KS) tools and methods.

More specifically, it has been designed with three potential user groups in mind.

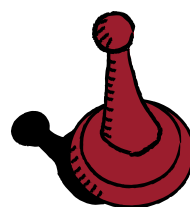


USER 1

User 1 wants to develop capacities in the use of KS methods and tools among their IFAD project colleagues or stakeholders. They have the time, capacity and financial resources to design and facilitate a workshop and can provide ongoing support or coaching following a workshop as part of their larger KS strategy.

User 1...

- ✓ is acquainted with the KS tools and methods—possibly having participated in a KS Methods and Tools workshop themselves and/or gained substantial experience in introducing KS methods and tools in the workplace
- ✓ is comfortable facilitating groups of up to 25 people
- ✓ has the ability to invest serious time and energy (especially compared with the two other user groups) and is comfortable taking on a higher degree of risk that comes with the investment.

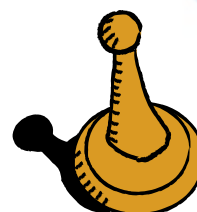


USER 2

User 2 wants to introduce and possibly develop capacities in the use of KS methods and tools but doesn't necessarily have the resources i.e. time, capacity and finances to design and deliver a full KS workshop program and provide ongoing support post-workshop.

User 2...

- ✓ sees the integration of KS methods and tools into a meeting, workshop or event as a way generate interest and awareness in KS
- ✓ would be comfortable organising a mini-KS workshop i.e. possibly between 2-4 hrs to introduce a couple of methods or tools as an activity within a larger KS strategy
- ✓ is comfortable identifying relevant and appropriate KS entry points for their context and related methods and tools
- ✓ is not necessarily trained as a facilitator but understands process having previously facilitated groups of various sizes
- ✓ recognises the work as an opportunity to enhance their own facilitation practice prior to the delivery of a KS Methods and Tools workshop.



USER 3

User 3...

- ✓ is simply interested in the integration of KS methods and tools to enhance their work.

GETTING THE MOST OUT OF THE GUIDE

This guide has been developed to support three approaches to the integration of KS methods and tools into IFAD funded projects:

USE 1

To plan and deliver a “KS Methods and Tools Workshop” that would provide hands-on practice in the use of the methods and tools.

The guide was initially developed with this use in mind. As a result, the bulk of the content can be found in the section User 1: A KS Methods and Tools Workshop Approach.

By following User 1 through this guide, you will be led through the following stages of planning and delivering a KS Methods and Tools workshop:

WORKSHOP PREPARATIONS:

This section covers aspect related to workshop planning including considerations before moving forward with the workshop approach. It highlights elements of a workshop design such as objectives, agenda structure and flow, timing etc., assessing needs, characteristics of adult learning and facilitation roles and responsibilities.

WORKSHOP DELIVERY

KS Entry Points

This section provides workshop facilitators with a potential outline for a KS methods and tools workshop starting with an overview of topics to be covered in a workshop opening all the way to its close.

As felt needs, objectives and experiences are diverse among individuals, groups and projects, this guide does not provide a set training plan or approach to follow. Instead, it provides users with several options to choose from within a set of possible KS entry points. These are defined as needs, opportunities or challenges related to collaboration, participation or communication that could be approached using KS methods and/or tools.

In this guide, a selection of method and/or tool options have been chosen for each entry point. A detailed overview as well as process and facilitation notes are provided to support the planning and delivery of a workshop session that introduces the suggested method or tool option.

The five entry points covered in this guide include:

How can we...

- Strengthen relationships and networks
- Capture and disseminate lessons learned, case studies and good practices: A look at some tools
- Generate and share lessons learned, case studies and good practices
- Design and facilitate better meetings and workshops
- Strengthen and sustain knowledge sharing

It is assumed that users will take the time to determine which entry points and options are the most appropriate in their context and revise them accordingly. In other words, users might consider how to best mix and match the options and entry points to meet their needs. The choice should be determined according to the understood needs of the group as well as the context in which the work is being done.

WORKSHOP LEARNING: BEFORE, DURING AND AFTER

KS methods and tools, if effectively introduced, should allow for considerable flexibility and a high degree of responsiveness. Obtaining feedback before, during and after their introduction—especially if they are being introduced in the context of a KS methods and tools workshop—is crucial to ensure that the approach is meeting (or has met) their needs. It can also help understand intentions with respect to the application of newly developed skills.

Participant feedback can be collected in a variety of ways. The “Learning Before, During and After” section offers ideas on concrete ways to elicit and capture feedback before, during and after the introduction of KS methods and tools.

WORKSHOP RESOURCES

This section outlines all workshop related resources including:

- Workshop presentations and documents
- Icebreakers and energizers
- Sample KS Method and Tools Workshop agendas
- ENRAP related experiences

USE 2

To introduce and potentially develop skills in the use of specific KS methods and tools in series of mini-KS workshops (of between 2-3 hrs) or by integrating the methods and tools into a meeting, workshop or event on a range of topics such as gender or M&E.

Based on early feedback, the scope of the guide had to be expanded to take into consideration those who wanted to introduce KS methods and tools but didn't feel that they had the capacity or resources to do through a KS methods and tools workshop. A “just do KS rather than talk about it” approach was developed and incorporated into the guide through the introduction of User 2.

An organisation event or meeting during which a method or tool could be incorporated would make for a great entry point. You might also want to hold short one-off trainings on certain methods or tools.

If you are interested in using the guide to introduce specific methods and tools, follow User 2 through the following sections:

PREPARATION

This section covers some of the questions you may be asking regarding the considerations of introducing a method or tool during a meeting or workshop, or a focused KS training session. It also takes a look at what others have done, or are doing, and gives you tips on how to use this guide for your own needs.

OPTIONS OFFERED IN THIS GUIDE

Once the most appropriate methods and/or tools are chosen, User 2 can refer to the session overview, and process and facilitation notes (as outlined for User 1) to get a sense of how they can be introduced.

USE 3

To enhance a personal work related activity or task through the integration of a KS method or tool.

KS tools and methods are easily integrated in ongoing activities or projects; it's simply a question of doing it. By being aware of the different KS methods and tools, and knowing how to apply them, they can be introduced to enhance knowledge sharing in an every day setting.

If you are interested in using the a KS method or tool to enhance your work, follow User 3 through the sections:

PREPARATION

This section offers examples on how KS methods or tools can be integrated in every day work and also contains tips on how to use this guide for doing so.

OPTIONS OFFERED IN THIS GUIDE

A detailed overview as well as process and facilitation notes are provided to support the application of selected KS method or tool options.

Note that translation all or parts of the guide—as in the case for Vietnam—may be required.

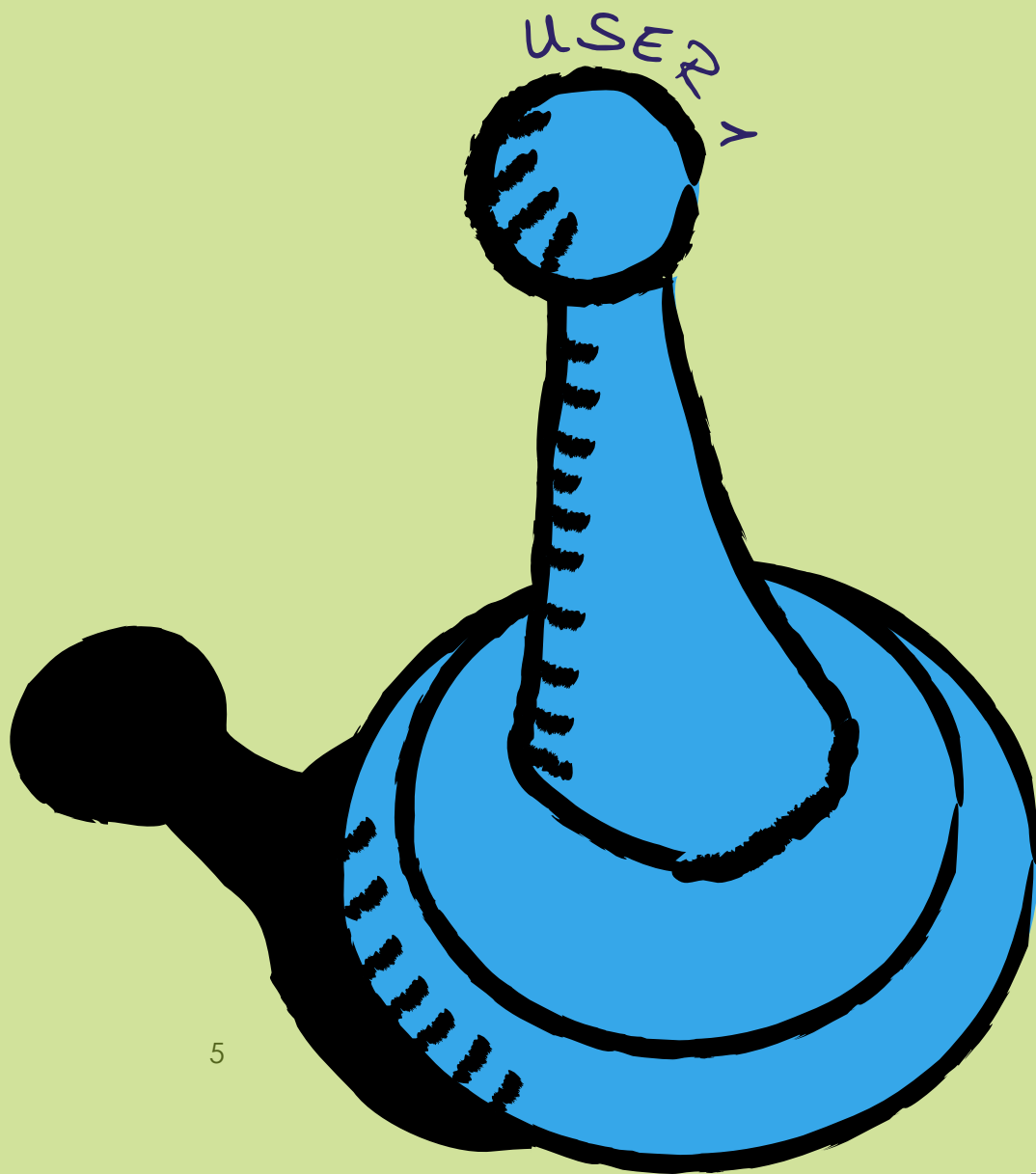
CONTRIBUTING TO THE GUIDE

A wiki was used to promote a collaborative and open approach to the development of the guide. Although the wiki is not being regularly maintained, it will continue to remain open for those who would like to contribute new content. Availability of funding and interest in the guide will contribute to the decision to re-publish an updated version of the guide in the future.

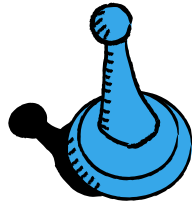
Link to the ENRAP Curriculum wiki: <http://enrapkscurriculum.pbworks.com>

PRINTING THE GUIDE

A pdf version of the guide was created to facilitate printing in its entirety or in sections depending on the needs of the user. Note that the guide can also be printed page-by-page directly from the wiki by clicking on the "Printable version" icon on the bottom right. Although the quality of the print, although they can be useful as a quick and easy resource.



USER 1



AN OVERVIEW

In developing this guide, we discovered a fabulous online resource: **Facilitators Guide for Gender Training** developed by Kønsnet (Gendernet). It was quickly apparent that there were significant overlaps in our respective approaches to designing and delivering workshops even though the guide's content was not the same.

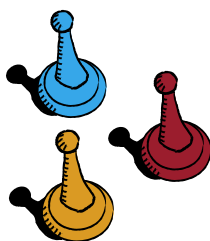
Rather than re-invent the wheel, we sought and were granted permission from Kønsnet (Gendernet) to reference and incorporate text from the gender guide in the **KS Workshop: A Facilitator's Guide**. As a result, if you are familiar with Kønsnet's (Gendernet) Guide for Gender Training, you will note that this section draws heavily on ideas presented there.

Thanks Kønsnet (Gendernet) for sharing and allowing us to build on your work. We encourage others to do the same with ours.

WHAT'S DRIVING THE WORKSHOP?

A KS workshop should be supported as a **part of a larger learning strategy**. For example, in the case of ENRAP, KS was a component of the project plan. KS workshops were part of a larger capacity development effort which would provide support to KFs in identifying and delivering on activities which would promote KS across IFAD funded projects at the country level. These KFs were motivated to participate in the workshop as they were responsible for implementing activities at the country level that would support knowledge sharing across projects, as outlined in their ToRs.

The objectives of the workshop - to discuss and explore methods and tools that could support the identification and implementation of country-level activities - reflected the needs of the KFs. In addition, it was evident that the process would have to go well beyond a one-off workshop to include follow-up support in the application of the concepts and skills gained during the workshop. As a result, funds were put aside to provide ongoing coaching/mentoring as well as field exchanges so KFs could learn from each other.



WHAT CAN BE DONE?

At the start of a workshop planning process, it is crucial to understand what drives a KS workshop particularly if there is a supporting or host organisation involved. **Needs should be addressed** at two levels—the supporting organizations as well as the learners (which are discussed further in the Needs Assessment). The following questions may be useful to help discuss and clarify expectations with the supporting organization (or with a planning team):

- What are the felt needs?
- What do we want this place to become? A place where....
- What is being offered to those who participate?
- Who are the right people to take part? What kinds of qualities and experience should they have?

In identifying who are the right people, the supporting organisation should ensure that potential learners have some kind of support from their own organisations, projects, programs or networks so that they can apply what they learn. While post-workshop support is important, the environment “back home” should be conducive to piloting the approaches and methods and reflecting on why they might or might not work.

The conversation which stems from these questions should give you a sense of the extent to which the workshop is part of an organization's broader learning strategy. If it is being planned as an isolated event, probe to find out why. Caution should be given about a workshop's limitations. If they are open to discussing a broader learning strategy, share examples of KS or KM strategies, i.e. IFAD's, and provide some examples or stories of how ongoing support or follow-up could be provided i.e. coaching, peer-to-peer learning opportunities via field exchanges etc.

TIME-BOUND NATURE OF A WORKSHOP

We purposefully avoided the use of the word "training" since we want to get away from the notion that a KS training, delivered in the form of a workshop, is a technical exercise that prepares people for a test of skill. In addition, gaining a solid understanding of the methods and tools comes from their ongoing application and reflection—practices that can be initiated in a 3-5 day workshop but require a longer term strategy which enables further development of understandings and skills as well as changes in attitudes.

PRESSURE FROM HIGHER UPS FOR THEIR PARTICIPATION

It's a reality of life in international development organizations that the higher a person is in the hierarchy, the more likely he or she will be the one attending events or workshops. This can be quite frustrating if you are trying to convene participants who have commonalities in terms of work experiences and who can most benefit from sharing.

WHAT CAN BE DONE?

There is a need to **manage expectations** for learners and well as workshop organisers of what can be presented, discussed and applied during a time bounded KS workshop. What is presented is essentially ingredients in a recipe. They cover the tip of an iceberg. Courses which focus on KM and/or KS are now offered as university programs making it even more apparent that everything cannot be covered over the course of a 3-day learning event.

WHAT CAN BE DONE?

You can start by **explaining that this workshop is different from more traditional, i.e. less interactive, events** and that participants are expected to share what they know with others. **Letting them know who the workshop targets are** by sending the list of invitees might dissuade them as well. Dealing with hierarchy is a tricky issue and in the end, decision may be based on politics. If all else fails, here is a [story about venue choice](#) from Niaz Ahmed Apu, Knowledge Facilitator, IFAD Bangladesh, which might help to get around office politics.

APPLYING LEARNING POST-WORKSHOP

In a workshop setting it is often easy to apply learning since the environment is usually supportive. Workshop venues provide an isolated space—often removed from a learner's realities especially when it is held in a location far from home. Participants can bond quickly with each other so they often feel comfortable testing out new methods or tools especially when they feel as though they come from shared levels of understandings. It is easy to generate energy for the tasks at hand—the challenge often surfaces when learners return home, and find themselves isolated, without a need or enough incentive to apply what they have learned.

WHAT CAN BE DONE?

The section *What's next?* helps participants identify for themselves the kinds of activities participants are interested in taking on post-workshop. **However, identifying what kind of follow-up support is available to participants** should be done in the planning stage so that during the workshop, a clear message can be communicated before participants consider what activities, if any, they wish to pursue. Follow-up support can increase the chance that more than a handful of participants end up incorporating tools and methods into their work.

Based on our experience, there are usually several workshop participants who seem to quickly identify with the methods and tools. The reasons why aren't clear - perhaps for some, the methods and tools strongly resonate with the way they already work or because they immediately see how and where they can be applied. Whatever the reason, consider ways that these "**KS Champions**" can help support other participants following a workshop i.e. mentoring or coaching their peers.

For participants considering the implementation of a KS method or tool post-workshop but not feeling confident about their abilities, **discuss with them ways in which they might get the experience that they need.** One idea might be to have them shadow you or a KS Champion as you introduce and/or develop capacities in KS methods and tools before attempting to do so on their own.

A KS WORKSHOP?

In delivering KS workshops for over 10 years, we've discovered that it is often **more useful to NOT TALK about KS but rather “CONTEXTS” or “Entry-points”** and the tasks within them which are addressed using KS methods and tools. For example, a workshop (or part of) could focus on “Meetings”. The tasks to be explored include but are not limited to:

- How can I make meetings f2f or virtual more effective?
- How can I organize face-to-face meetings that are more engaging and participatory?
- How can visuals support meetings?
- How can facilitation support a meeting?

RESISTANCE

For a variety of reasons, there is a level of skepticism and resistance around KM and KS efforts and initiatives. As a result, a KS workshop may not be the best way to generate some support for, and interest in, the application of KS method and tools.

WHAT CAN BE DONE?

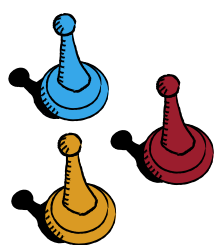
Prior to the workshop, **identify what areas of work learners would like to address during the workshop**. For more information on one approach, see the guide's section on [Needs Assessment](#). Highlight these areas of focus - possibly in the title as well as the workshop agenda. During the workshop, place emphasis on these rather than the methods and tools which become secondary. The result is that learners experience how KS methods and tools add value—something that generally can't be taught.

Ensure that there is commonality among learners. What brings them together could be similar roles, thematic areas of work, staff of the same organisation etc. Use methods that help the commonalities surface, almost organically rather than forced. These could be as basic as dialogue but the peer assist approach also works well. A brief online discussion pre-workshop could also help work towards this end.

WHAT CAN BE DONE?

Consider using a different approach to introducing or discussing KS ie. just “do” KS rather than talk about it. An organisation event or meeting during which one method or tool could be incorporated would make for a great entry point. Follow “User 2” in the guide for ideas including possible approaches.

WHAT ARE THE ELEMENTS OF A WORKSHOP DESIGN?



WORKSHOP DESIGN

This section deals with the preparatory and practical activities related to the design of the workshop. Much of what is written below is taken directly from the Kønsnet's Facilitator's Guide for Gender Training as we felt that the practical information provided was applicable to most, if not all, workshops.

The following topics are explored:

Workshop objectives

Agenda structure and flow

Timing

Duration

Mix of activities

Learners

- Who should come
- Numbers
- Diversity

Working in a team (organisers/facilitators)

Logistics

Training venue

General equipment

WORKSHOP OBJECTIVES

In general, the broad workshop objectives guiding KS methods and tools workshops have remained quite consistent for the past 5 or so years. They include:

- Increase understandings of knowledge sharing (KS) in the context of our work
- Develop skills in the use of selected KS methods and tools
- Identify and outline approaches for the integration of KS in our work

AGENDA STRUCTURE AND FLOW

"The workshop should have an overall flow where sessions are sequenced in a logical manner (e.g. from general to specific, concepts to application) not only so the design makes sense but also learners can follow the training and its "logic". It is useful to introduce the logic of the workshop at the beginning. Use of a metaphor to describe the logic (for example, describing different sessions as building blocks, or mapping the workshop as a journey) can help learners as well as the facilitator keep track of the learning process."

Source: Kønsnet - Gender

TIMING

"There is never a perfect time to conduct training but some times are better than others. To increase the relevance and impact of training, consider connecting training to key organizational moments (e.g. annual or strategic planning, or a policy development process) so learners will have immediate opportunities to apply their new knowledge. To facilitate logistics, consider scheduling training around other meetings or workshops (without overloading the agenda). At the same time, it's also good to avoid peak busy periods in the organizations annual cycle (e.g. when proposals or reports are due) as such events compete with training, affect participation and distract learners attention. Different training structures (see below) can also help accommodate individual and organizational schedules and take advantage of 'windows of opportunity'."

Source: Kønsnet - Gender

DURATION

"The length of training depends on the learning objectives and participant's availability. In principle, training of less than 2 days starts to compromise learning; issues can only be touched upon. Training of more than 3 days, especially if sequential, starts to put onerous demands on people's time."

Source: Kønsnet - Gender

MIX OF ACTIVITIES

"In general, using a mixture of activities will help to maintain the interest and motivation of diverse learners. Use activities that appeal to the diverse ways people learn (e.g. listening, doing, watching, engaging with theory, presenting and/or giving feedback, working alone or in groups) and that engage individuals on different levels (e.g. activities should engage learners' intellect, emotion, sense of fun). However, it is also important to take the specific audience into account; depending on the context there may be a general preference for lectures, practical exercises, etc.

- Carefully structuring small groups is critical, particularly with diverse groups. Instead of randomly picking groups, it may be necessary to pre-set them before training and/or restructure groups during training to ensure that
- Memberships of small groups change so learners work with different people throughout the training
- Members complement each other in terms of experience, enthusiasm, temperament"

Source: Kønsnet - Gender

LEARNERS: WHO SHOULD COME

"There is often a tendency to want everybody from the organization, project or network to come to training. There are advantages and disadvantages with this approach, and often the best choice will depend on the culture and dynamics of the organization.

Advantages

- presence of all personnel, allows senior staff to demonstrate leadership and commitment to all staff
- efficient and can support organization-wide understanding and team building

Disadvantages

- leads to an audience that is diverse in position and learning needs
- content has to be more general, as addressing all specific learning needs is impossible
- presence of senior managers may stifle participation, openness (particularly if the emphasis is on self-reflection) as well as criticism of the organization itself
- depending on the size of the organization, there may be too many people to manage in one workshop

One approach is to design the training in a way that certain groups come at certain times. For example, general gender awareness training could be for all staff (so that everyone understands the importance of gender to the organization's mission), followed by training on gender analysis and planning for programme staff, followed by a closing session with senior management and programme staff."

Source: Kønsnet - Gender

What's helpful is if learners see KS as part of their job and even better if any responsibilities associated with follow-up is already included in their ToRs. Otherwise, they may see it as additional work and be uninterested in the discussions and activities.

One final consideration: In the identification of who are the 'right people' to participate, you might want to consider inviting those who are interested and open to the idea of building their KS practice and willing to get there by doing. How do you get to Carnegie Hall (a famous concert hall in New York)? Practice, practice, practice. This means that learners must be able to make mistakes and being able to learn and move on from them.

LEARNERS: NUMBERS

"The ideal number of learners is conditional upon need (training needs, who needs training), size of training venue, time available for training and number of facilitators. Larger groups can be addressed by ensuring a sufficient number of facilitators and appropriate venue size. Groups can be too small (8-12 seems minimum in order to maintain energy and enthusiasm) while groups can also be too large, despite having many facilitators and large enough training venue (40 people seems maximum)."

Source: Kønsnet - Gender

LEARNERS: DIVERSITY

"Learners can be diverse in terms of their positions in the organization, experience or knowledge of gender and development and/or professional backgrounds. As mentioned previously, there is a tendency to want to include as many people from the organization as possible, which makes for a diverse audience. When participants are diverse, learning outcomes are most often reduced to the lowest common denominator.

With diverse groups, it is important to:

- establish a base or levelling-off of knowledge at the beginning of training so there is some common understanding among participant
- strike a balance between addressing learning needs of those less experienced and the more experienced (for example, organize some small group activities that bring people with similar levels of experience together to work on exercises suited to their capacity, and other small groups that allow people to benefit from different perspectives and experience)
- use training activities that allow learners with different interests and levels of experience to engage at different levels, for example by grouping more experienced learners together. At the same time, it is important to use activities so all learners can benefit from each others' perspectives, such as small group that includes a diversity of experiences
- prevent less experienced learners from being intimidated or shut down
- use the different levels of experience strategically (e.g., more experienced can act as mentors and less experienced as naïve challengers)"

Source: Kønsnet - Gender

WORKING IN A TEAM (ORGANIZERS/FACILITATORS)

"Working as a team of trainers is preferable for many reasons. There is always a lot that needs to be simultaneously coordinated, managed and delivered during training, in addition to the need to 'read' the dynamics of the group and the extent to which the training is effectively engaging various learners. In addition, different trainers will each bring their own expertise in terms of content (for example, knowledge of gender issues in diverse sectors) and methods, as well as different styles which will appeal to different learners. But working as a team also adds a level of complexity requiring good coordination, planning and communication."

Source: Kønsnet - Gender

LOGISTICS

This workshop guide doesn't provide information related to logistics since it is another activity that often requires significant resources especially if learners are funded and require flights to be arranged on their behalf. Ensure that you have someone who has logistics experience as their work can often make or break any event. Also, include them on your organising team and from the beginning, be clear about responsibilities, timelines and communications.

TRAINING VENUE

An optimal meeting space includes:

- natural light
- a room big enough for 2 kinds of seating arrangements ie. round tables and a "U" (chairs only)
- chairs and tables that can be moved fairly easily
- access to the outdoors
- walls on which paper can be posted using blue tack or painter's tape
- day-to-day flexibility on the part of the venue
- accommodate breaks and lunches that vary
- different seating arrangements ie. round tables, a "U" (chairs only)
- since these workshops introduce social media, having reliable internet access is essential

GENERAL EQUIPMENT & MATERIALS

- computer connected to an LCD projector
- projection screen or white wall space
- 1 computer per 3-4 participants (if social media session is introduced)
- access to the internet (wireless preferably)
- digital camera
- at least 1 flipchart & pad of paper for every 8 participants
- non-toxic markers of various colours; 1 per person. NOTE: in many countries, markers for whiteboards are provided. These are not ideal since they have a strong smell and dry out quite easily
- blue tack or green painter's tape
- scissors
- 100 sheets of A4 (8.5 x 11) paper

HOW CAN I ASSESS PARTICIPANT NEEDS?

A WORKSHOP NEEDS ASSESSMENT

WHY DO A NEEDS ASSESSMENT?

The value of a needs assessment can be easily debated. The benefits and limitations are discussed below. An example of an approach to a needs assessment is also provided.

BENEFITS

In the context of the ENRAP initiative, we have seen several benefits of conducting a needs assessment. First, it provides an introduction to the workshop's facilitators and content—both of which are likely unfamiliar to most, if not all, learners. If the assessment is conducted via email, using a mailing list, learners are introduced to each other and can get a sense of who is interested in what. The assessment also helps validate (or not) the entry points to be addressed in the workshop. A prioritization process gives a better sense of the degree of importance of each entry point—how well they ring true with whom. This can provide information to be used in the design of the workshop agenda.

LIMITATIONS

One of the biggest criticisms of traditional needs assessments is that they aren't able to surface real needs. How does a learner know what they need to learn? If they knew, they would have probably learned it already. In addition, if the assessment is conducted via email, there is a good chance that many learners won't contribute—perhaps because they aren't comfortable responding over email (especially in what may be their second or third language). Alternative and more time intensive approaches, including phone conversations, are encouraged.

Here is Ankita Handoo's experience regarding doing the needs assessment prior to a KS workshop:

"Based on our experience, I feel we should modify our needs assessment and have additional interaction with the participants prior to the workshop as sometimes senior managers are sent to these workshops rather than the managers responsible for KM/KS if the training venue is in another city or outside the country. The participants should be involved from early stages of preparation, so that they can decide accordingly."

CONDUCTING AN ASSESSMENT

Recognizing their limitations, this section shares the approach used to assess the needs of learners supported by ENRAP. The results were reflected in the design of the workshop agenda. By no means is it the 'perfect' approach so feel free to modify to best suit your needs.

Process: About 4-5 weeks prior to the event, we send out a Training needs assessment email to help design the training to the specific needs of the participants. Following is a template which can be translated, adapted and used for your own purposes:

SAMPLE EMAIL

"Dear Knowledge Sharing workshop participants,

We would like to welcome your participation in the upcoming workshop: "How can we Improve KS at Work: Knowledge Sharing Workshop... (for e.g. insert own title here)" The purpose of this email is to briefly share with you some of our expectations around the workshop and invite your input into the design of the event.

Expectations: This workshop will provide you with an opportunity for professional growth in the field of knowledge sharing and more specifically in the tools and approaches that can help individuals work together better. Our approach is one that is designed around a few principles which include the following:

1. Everyone has a contribution to make: We believe that everyone has expertise in their own domain and as a result, we will tap into your individual experiences throughout the workshop
2. Connections make a difference: It is often who you know not what you know that will make the biggest difference in improving knowledge sharing at work. The workshop approach will support ways in which you can get to know each other better.
3. Movement is healthy: This doesn't mean that we will incorporate aerobics into the workshop but we will often change the configuration of the room or run a session in which people need to physically move.
4. We all have a stake in making the workshop a success: This is about inviting you to take personal responsibility for what you want to get out of the workshop.

Your input: In order to design a training workshop that is relevant to your interests and needs, it would be useful to get a sense of the issues and ideas that you want to explore in the field of knowledge sharing. We would specifically like your feedback on a proposed a number of entry points—areas where KS methods and tools could be applied to help you do your job better:

- Designing and facilitating better meetings and workshops
- Working in teams/groups
- Capturing and disseminating information
- Building relationships
- Identifying lessons learned
- Other?

Taking into account the above information, you are invited to respond to the following questions:

1. Of the KS entry points listed above, which 3 do you feel need the most attention during the workshop and why? What other KS entry points, if any, are missing from the list?
2. What excites you most about your involvement in this workshop? Where do you think you may be challenged?
3. Support from senior project staff is required in order for you to put into practice some of the KS tools and approaches that you take away from this workshop. Describe the level of support that would be available to you in applying new tools and approaches?
4. Is there anything that you would like us to consider in designing the KS workshop to best meet your needs.

We look forward to hearing from you by (ENTER DATE) and using your input to help us design an effective workshop agenda."

WHAT TO DO WITH THE RESULTS?

Given the potential diversity of the participants, develop a draft agenda that best balances learning outcomes, needs and expectations with the goals of the organisation supporting the workshop while still keeping to its purpose of developing capacities in KS methods and tools.

At least two weeks prior to the workshop, send the draft agenda to participants, summarizing the results of the assessment, explaining the rationale for the focus of specific entry-points and responding to any expectations that may be unrealistic or off topic.

If necessary, explain and validate the rationale for any revised learning objectives and the overall strategy with the supporting organisation, who may have been unrealistic or unclear in what they feel the workshop will address.

WHAT CHARACTERISTICS OF ADULT LEARNING WOULD BE IMPORTANT TO CONSIDER IN WORKSHOP DESIGN AND DELIVERY?

WORKSHOP LEARNING CHARACTERISTICS

The approaches outlined in this guide take into consideration characteristics of adult learning—in other words, how adults learn best. Essentially, they follow these characteristics that have been outlined by the pioneer of adult learning, Malcom Knowles (sourced from the Honolulu Community College)

Adults are autonomous and self-directed. They need to be free to direct themselves. Their teachers must actively involve adult participants in the learning process and serve as facilitators for them. Specifically, they must get participants' perspectives about what topics to cover and let them work on projects that reflect their interests. They should allow the participants to assume responsibility for presentations and group leadership. They have to be sure to act as facilitators, guiding participants to their own knowledge rather than supplying them with facts. Finally, they must show participants how the class will help them reach their goals (e.g., via a personal goals sheet).

Adults are practical, focusing on the aspects of a lesson most useful to them in their work. They may not be interested in knowledge for its own sake. Instructors must tell participants explicitly how the lesson will be useful to them on the job.

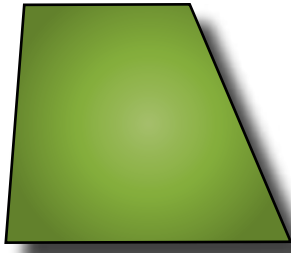
Adults have accumulated a foundation of life experiences and knowledge that may include work-related activities, family responsibilities, and previous education. They need to connect learning to this knowledge/experience base. To help them do so, they should draw out participants' experience and knowledge which is relevant to the topic. They must relate theories and concepts to the participants and recognize the value of experience in learning.

Adults are relevancy-oriented. They must see a reason for learning something. Learning has to be applicable to their work or other responsibilities to be of value to them. Therefore, instructors must identify objectives for adult participants before the course begins. This means, also, that theories and concepts must be related to a setting familiar to participants. This need can be fulfilled by letting participants choose projects that reflect their own interests.

Adults are goal-oriented. Upon enrolling in a course, they usually know what goal they want to attain. They, therefore, appreciate an educational program that is organized and has clearly defined elements. Instructors must show participants how this class will help them attain their goals. This classification of goals and course objectives must be done early in the course.

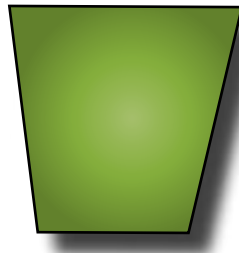
As do all learners, adults need to be shown respect. Instructors must acknowledge the wealth of experiences that adult participants bring to the classroom. These adults should be treated as equals in experience and knowledge and allowed to voice their opinions freely in class.

There is a wealth of information on adult learning though most of it from a North American perspective. Google it (or adult education) or visit the Honolulu Community College.



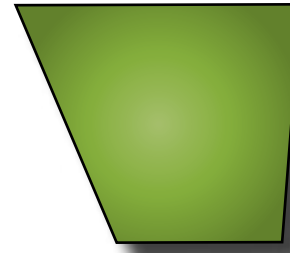
WHAT ARE THE ROLES I WILL LIKELY HAVE TO TAKE ON?

Workshop facilitators wear several hats and juggling them can sometimes be a difficult act. At the start of the workshop, it is helpful to acknowledge your roles. At the same time, you could invite learners to help you deliver on these roles by taking some of them on themselves.



Focusing on content AND process:

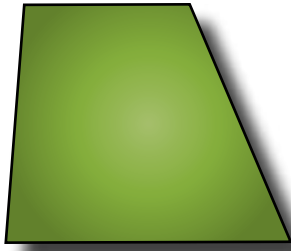
During a workshop, the hats most worn by a KS facilitator are a content hat and a process hat. For example, in a workshop session which introduces the chat show as an alternative method to panel presentations, a facilitator might introduce and briefly explain the session wearing his/her process hat. S/he would then put on a content hat to host of the show and switch back to the process hat to facilitate a debrief of the the chat show as a KS method. The switching between hats is a fine balancing act. We find that making it explicit which hat is being worn when helps us, as well as the learners, make the switch.



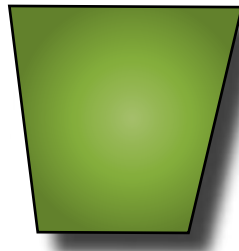
Time keepers: Facilitators are also time keepers—responsible for delivering the workshop within an agreed timeframe. As a result, striking a balance between “sticking to the agenda” and being flexible with the schedule to allow for inevitable unforeseen circumstances can become a challenge. It is preferable to allow for legitimate, reasonable delays (e.g. extended helpful discussions, points for clarification, answering learners’ questions) than rush learners because even if the workshop finishes late or the planned agenda isn’t delivered, there will at least be quality learning.

In circumstances when the training is going overtime, it’s best to acknowledge the situation and provide solutions for getting on track, whether it’s working more quickly, revising activities and/or adapting schedules. Also, it’s important for learners as well as facilitators to take responsibility for delays (e.g. learners starting late). It is not advisable to ask learners for their ideas of how to make up for lost time as getting consensus is usually difficult and time consuming.

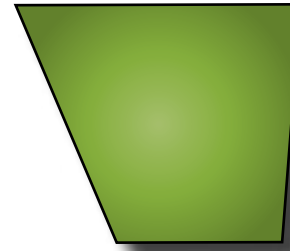
(Source: Kønsnet - Gender)



Documentation: KS Facilitators can greatly contribute to the real time documentation of the workshop - however, it is advised that this is not taken on by a sole facilitator. If there are two facilitators, the job becomes manageable though it can take some practice depending on the documentation objectives and timeline. It is suggested that for each session, identify among the facilitators who takes a lead facilitation role leaving the other to document. Use flipcharts whenever possible and enter any raw notes into the wiki as soon as possible. You may need to work into the evening to make the documentation available electronically but it is a really rewarding experience to have all workshop related content captured and accessible to participants by the time they return home. Finally, introduce the documentation spaces—the blog and wiki—early on and give participants responsibility for documenting some of their discussions. There are usually 1-2 people in the group who see it as an opportunity to learn and enjoy taking up the task.



Herding: Getting people back into the workshop room following a breaks or lunch can be like herding cats. Giving learners sufficient time for breaks (20 mins) and lunch (1 hour) can help but so can gentle reminders that you are about to begin. You can test out different approaches or instruments to find out what works best for your group but we recommend avoiding the use of loud bells.



Feedback: Working with one or more co-facilitators can be challenging—especially if you aren't yet familiar with their strengths and style. In the planning stages of the design, figure out what steps you can put in place to support each other in your work. For example, early on, you could discuss what each of you brings to the work helping to identify your strengths and any gaps that may need to be sourced elsewhere. You may want to discuss how you approach each session—maybe alternating lead facilitation responsibilities and documentation. During the workshop, you might want to provide each other with constructive feedback identifying specific actions that you might take on to work together better the following day.

PREPARATION TIMELINE

3 MONTHS pre-workshop

CONCEPTUALISING AND INVITING

- Ideally, face-to-face workshop preparations should begin well in advance i.e. at least 3 months prior to the workshop. This is suggested for logistical reasons but also to provide enough time to:
 - become familiar with the guide and identify other needed resources
 - clarify the purpose of the workshop
 - develop the concept note
 - initiate discussions on the agenda during regular weekly meetings
 - create a workshop discussion list
- Consider who is needed on the workshop planning team.
- Identify who will take responsibility for logistics. It is challenging, if not impossible, to effectively lead a KS workshop especially when having to deal with issues related to participant travel and/or accommodation.
- Workload increases over the weeks with the last month more intense than previous ones. It is often difficult to confirm workshop dates well in advance.



2 MONTHS pre-workshop

PLANNING AND RELATIONSHIP BUILDING

- Develop the approach to documentation. What is needed by whom, when?
- Clarify the approach to workshop learning and evaluation. What do you want to learn? How can “Learning During” and “Learning After” approaches support what it is you want to know. Who are the evaluation users and what do they want from an evaluation?
- Become familiar with participants' backgrounds, experiences, perceived needs and interests. To help in establishing relationships consider going beyond a needs assessment by contacting participants one-on-one and engage with them in a conversation about their involvement in the workshop.
- Create a workshop discussion list.
- Initiate the development of the agenda discussed at weekly meetings.



1 MONTH pre-workshop

COMMUNICATIONS

- Finalise documentation and learning and evaluation plans.
- Invite learners to introduce themselves on the discussion list noting that some people might find it to be an intimidating space especially when they don't know already each other.
- Create a wiki to share information about the workshop i.e. participant list and profiles, summary of needs assessment, agenda, logistics note etc.
- Invite participants to the wiki providing them with information about its purpose and how it works. Here is a sample email that could be drafted. It shouldn't be expected that they will even check out the wiki so continue corresponding via email as well.
- Expect to provide technical support helping participants with early navigation through the wiki.



3 WEEKS

pre-workshop

REHEARSING

- Begin rehearsing sessions, especially with co-facilitators. This can help refine the workshop design (especially in terms of structure, flow and coordination) and prepare for possible unintended outcomes. It's important to walk through activities in detail to imagine how they will unfold and anticipate possible areas of confusion or where activities may get off-track.

COMMUNICATION

- Communicate results of needs assessment (or one-on-one interviews) managing expectations by outlining what will be covered, what will be omitted and the rationale for both.
- Invite participants to add their profiles to the wiki or in a [template doc](#) (that you would later enter into the wiki on their behalf).
- Let participants know what work needs to be done, if any, prior to the workshop. If readings are provided, take into consideration that they are working full-time already and the additional work could be difficult for some to complete.



2 WEEKS pre-workshop

CLARIFY ROLES

- Agree on how co-facilitators can support each other during the workshop i.e. provide constructive feedback.

COMMUNICATION

- Provide ongoing wiki support
- Create the workshop blog. Know how to create the entry, upload media and add users (at a minimum). See 'Preparing Online Documentation' section for more information.



2 DAYS pre-workshop

DETAILED PLANNING

- If it hasn't been done already, plan to meet for 2 days minimum as co-facilitators to work through the agenda in specific detail. Agree on who is leading which sessions.
- Finalise and print out any handouts to avoid any last minute scrambling.



PREPARING ONLINE DOCUMENTATION

Documenting workshop discussions and outcomes in real time is often more challenging than one might anticipate. Be realistic how much can get done during the workshop especially if wiki and blog administration is new. Preparing and getting comfortable with the online documentation spaces prior to the workshop can save valuable time during the event.

DECIDE ON A TAG

Decide on a workshop tag—a unique identifier—that helps define your workshop. Keep it short but descriptive i.e. “ksindia2010” and use the tag in the title of the blog or wiki.

CREATING A WIKI

We have used pbworks for several workshops and find that it is fairly intuitive as far as wikis go. The only one issue, and it is a substantial one, is that it can't be accessed from China (and possibly other countries that survey and censor the internet). There are work-arounds but unfortunately they require some technical know-how to implement them.

If you decide to use pbworks, you will need to go to the pbworks.com website and follow the “Education” use option. Click on “Sign up now” and then select the “Basic” or “Free” account. Using the tag “ksindia2010”, the assigned url will be “ksindia2010.pbworks.com”. For more information on getting started, refer to the [Getting Started page at pbworks](#).

Note that you can choose to set the wiki as private or public. For ease of access, it is encouraged to make it open i.e. anyone can view but only those you have authorized can contribute.

Refer to one of our sample wikis such as [ENRAP KS 2009](#) and start entering your own content in the weeks leading up to the event i.e. the agenda, summary of the needs assessment, workshop homework etc.

Remind participants that they can find workshop related information in the wiki by forwarding them the url.

We haven't included detailed instructions for adding users to the wiki as the steps will depend on which application is chosen. Also, any “Help” pages will provide better instructions than ours. Simply do a search on 'adding new users' and you will find all the information you need. If you decide to go with pbworks, for example, you can find step-by-step instructions [here](#).

CREATING A BLOG

Choose a blog application ([wordpress](#), [blogspot](#), etc.)

If you decide to use [wordpress.com](#), sign up and click on “Gimme a blog!” and then create a new blog. Enter your tag i.e. “ksindia2010” in front of “wordpress.com”. This will mean that your blog's URL will be “ksindia2010.wordpress.com”. For further instructions, see the [Getting Started](#) page.

Note that you can choose to set the blog as private or public. For ease of access, it is encouraged to make it open i.e. anyone can view but only those you have authorized can contribute

Create a welcome message and upload a photo.

Update the blog with information about the workshop (the venue, social activities etc.) and send an email to participants with its url.

We haven't included detailed instructions for adding users to the blog as the steps will depend on which application is chosen. Also, any "Help" pages will provide better instructions than ours. Simply do a search on 'adding new users' and you will find all the information you need. If you decide to use wordpress, for example, you can find step-by-step instructions [here](#).

ASSIGNING ROLES FOR NEW USERS

Note that users can be assigned various roles. For example, if you are using a wordpress blog, they can be Contributors, Authors, Editors or Administrators and for pbworks, they can be Readers, Writers, Editors and Administrators. It is suggested that for the blog, they be given the role of "Author" (allowing them to edit, publish and delete their posts, as well as upload files/images) and for the wiki, the default role of "Writer" (allowing them to edit pages and revert pages to previous versions, upload new files and create new pages).

ACTIVATING ACCOUNTS

Participants will need to activate their accounts prior to the workshop by following the instructions in the email sent by the wiki and blog applications. Just be aware that a lot of the workshop participants will either not receive the notifications that they were added to the blog and wiki because they deleted it thinking it was spam, or else it got stuck in their spam filters. Try to ensure that at least a handful of people have access to the blog and wiki to facilitate workshop exercises and online documentation.

TIPS FOR ONLINE

DOCUMENTATION

Based on our own experiences of creating and using wikis to capture workshop related content, here are a few tips you might want to consider:

- Add users prior to the event but don't expect them to sign up even if you include a really nice invitation to do so.
- Expect that the invitation email, generated and sent to a new user once you have added them to a wiki, will get stuck in their spam. You will likely need to help them find it so that they can accept the invite.
- The process of creating new accounts with the wiki and blog applications can take some time and often requires troubleshooting (which will come from practice but also playing with and testing the applications ahead of time). It is difficult if not impossible to ensure that all accounts are created and in working order prior to the workshop so leave some time i.e. a longer lunch or break ahead of the session which introduces participants to the applications.
- During the workshop, once participants have some hands-on experience in using the wiki, encourage them to document the outcomes of their sessions i.e. peer assist write-ups, open space discussion reports etc.

HOW CAN I ADAPT THE GUIDE TO SUIT MY CONTEXT?

This section was included to remind workshop facilitators that the content provided in this section of the guide is intended as a resource in designing and delivering KS methods and tools workshops. It should be adapted to meet the needs of the groups with whom you work as well as your own approach to facilitation. Feedback received after a piloting exercise of the guide suggested that we be more clear that the guide SHOULD NOT be followed to a tee. Modifications are strongly encouraged—even if on the surface they might seem subtle.

Here are some ways you might want to consider appraising, modifying and adapting the guide:

SELECTING APPROPRIATE ENTRY POINTS AND OPTIONS

It is assumed that entry points and related methods and tools will be adapted according to the objectives, context and culture of the workshop, the needs and experiences of the participants and the strengths and resources of the facilitators.

ORDERING THE KS ENTRY POINTS

The entry points have been presented in an order that we have found works well. This isn't to say that they can't be re-arranged just that the flow in which they are presented seems to work well. For example, on Day 1, we suggest an introduction to some tools which would then be used to help document the workshop outputs.

ADDING AN ENTRY POINT

Depending on the needs of participants, and your own skills and experiences in using different methods, you may wish to adapt the guide by adding an entry-point. For example, you could potentially add an entry-point that introduces knowledge sharing approaches during field visits:

WORKSHOP SESSIONS

Consider the type, timing and sequencing of session activities to ensure a diversity of training methods and the appropriate allocation of time. For example, in designing your agenda, note that the lengths of the sessions are generous estimates—based on working with a group size of 15 - 25 participants. If you are working with a smaller group, you will likely require less time—perhaps closer to 75% of what's suggested.

Sometimes you might find that in order to cover the material in the time that you have, you will need to reduce the time of a session or two. If that happens to you, be careful which sessions you choose to cut. For example, avoid reducing the time each storyteller has during Jumpstart Storytelling. The session doesn't provide storytellers much time in the first place to share their stories so reducing it there, might cause some frustration in addition to reducing the equal opportunities for them to tell their stories.

PRESENTATIONS

The use of slides is not necessary though they are often appreciated by those who tend to be visual learners. When presentations accompany the introduction of a method or tool, review the set of resource slides to decide how appropriate and clear they are for your context. Modify accordingly and if necessary, translate them.

LANGUAGE

One example of a subtle modification was observed during the pilot workshop. One of the facilitators chose to use an introductory icebreaker provided in the guide, however, when he described the icebreaker, he tweaked the wording of the question. Instead of asking: "What is one word you would use to describe yourself?", he asked them to identify "one word other people would use to describe you?". Although the difference is subtle it may be significant in some cultures where describing yourself personally (especially in a more positive light) can create some discomfort.

WHAT HAVE OTHERS LEARNED ABOUT FACILITATING KS WORKSHOPS?

Are there tips that I might want to pay attention to?

The following generic tips are provided to support facilitators in planning and delivering workshops.

WORKSHOP FACILITATION TIPS

MAKING THINGS CLEARER

Ensure that session objectives are well understood before describing the process

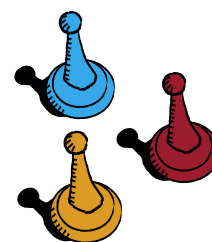
Process instructions should be as clear and concise as possible. Jotting down key points and talking them through prior to the workshop can help

- Avoid providing process instructions when people are moving around the room or organising themselves in groups
- Ask if there are any clarifications about the process once it is outlined and before moving into the task at hand
- Consider including a summary of the session either before or after the debrief
- During the debriefs:
 - Make it clear what the debrief relates to i.e. in the case of this guide, participants may want to debrief on the session's content and/or process. If participants start discussing the content when the debrief is about process, you might want to remind them that for the purposes of the debrief, you are focusing on process. Consider whether a content debrief is needed.
 - Stick to one open-ended question to get the conversation going. If time and space allows, ask a second or third question

FACILITATION STYLES

Allow for some experimentation between being a "control freak" and trusting your process. Take time to reflect on where you see yourself on the spectrum and where you would like to be

Identify and discuss the challenges of working with another facilitator, especially when you haven't yet worked together and don't already know each other's strengths, when to add or contribute, when to jump in and when to keep quite, etc.



WORKSHOP FACILITATION TIPS

BEING PREPARED TO BE SURPRISED

Prior to the workshop, discuss with your co-facilitator(s) how you might avoid or handle the unexpected. Based on previous experience, this could include:

- The internet goes down (or was never working in the first place)
- Last minute participant cancellations or substitutions
- Interruptions by administrative people who remove participants from the workshop to collect documentation or disperse funds
- Room set-up not being conducive to KS work i.e. a boardroom or banquet tables which makes group work a challenge, no 'empty space' etc.
- Requests to add new participants at the last minute
- People who insist on using their cell phones or laptops to do other work during the workshop

MANAGING TIME

Don't try to cut the days shorter than planned even if you feel that you can finish early. There is always the possibility that something unexpected might come up over the course of the day and more time to address it may be needed.

Start and end according to the times communicated. Avoid extending the day later than planned. At the end of an intense day, participants usually need the break so going longer than planned can be counterproductive

To help participants track time in small groups, ask them to identify someone in their group to be timekeeper.

To indicate when it is time to move on, as in the case of speed sharing or jumpstart storytelling, consider the use of a bell or chime, instead of voice

MAKING PRESENTATIONS

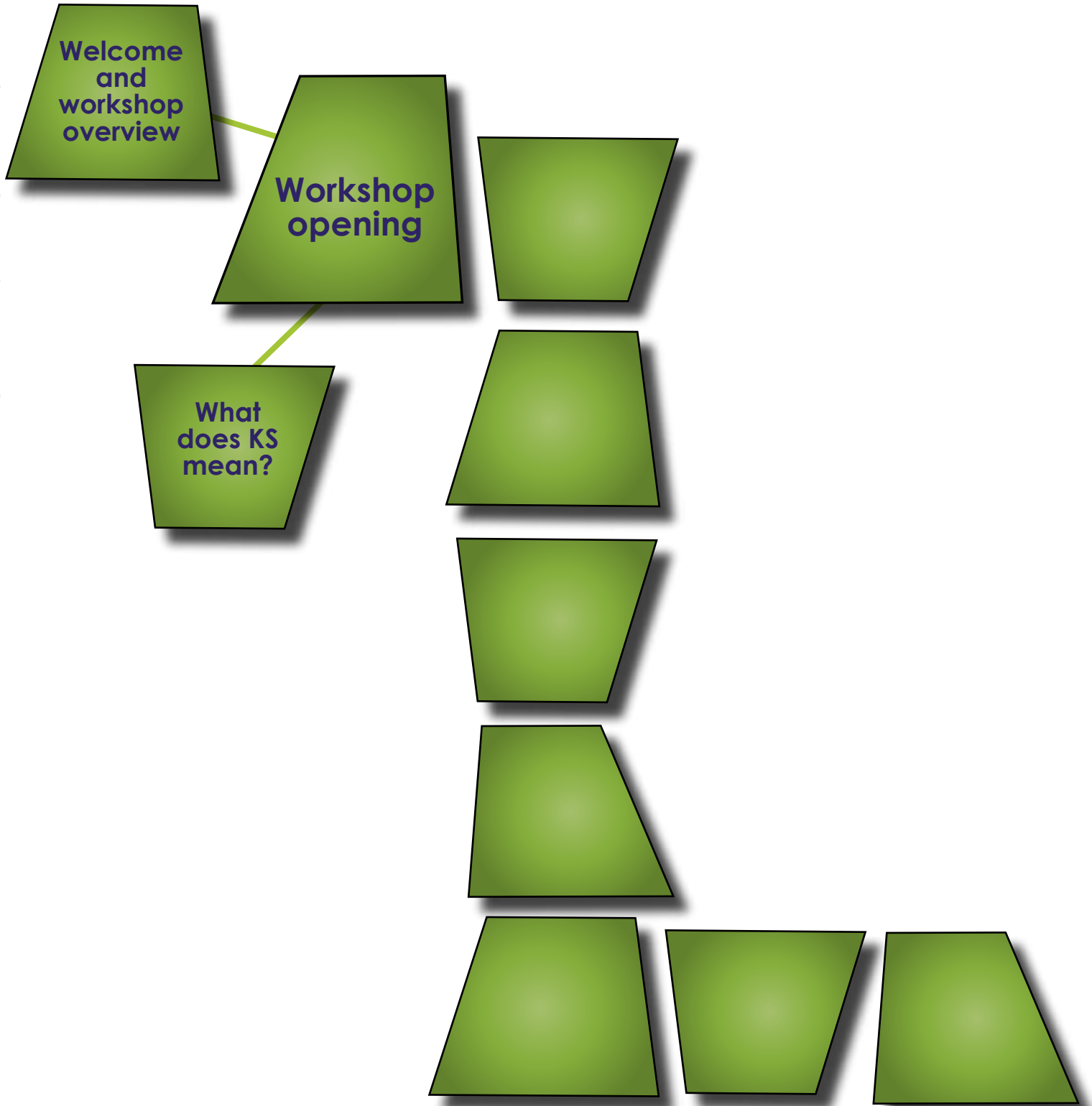
Try to incorporate visuals rather than filling the page with text. The adage "A picture is worth a thousand words" holds true in presentations.

If you decide to disregard the above tip, at least give people the time to read through the slide. They will likely be reading it any ways as you present so you might as well not try to compete.

Download a free copy of an excellent resource on making better presentations called [Why bad presentations happen to good causes](#).

WORKSHOP OPENING

WORKSHOP DELIVERY KS ENTRY POINTS AND OPTIONS



WELCOME AND WORKSHOP OVERVIEW—SESSION OVERVIEW

Objectives	<p>Set the tone for the workshop. Clarify the workshop objectives, design of the agenda and principles. Initiate and/or strengthen connections among participants.</p>
Approach and timing	<p>In plenary:</p> <ul style="list-style-type: none"> • Welcome (5 mins) • Introductions (20 mins) • Review of workshop expectations and broad objectives (10 mins) • Overview of agenda (5 mins) • Workshop principles (5 mins) <p>Total time: 45 mins</p>
Key learning points	<ul style="list-style-type: none"> • Participants should have a better sense of how the workshop will unfold. • An introduction exercise that goes beyond inviting everyone to introduce themselves and principles that aren't rule based are likely to provide some participants with the sense that the KS methods and tools workshop is somehow different than other workshops.
Room set-up	<ul style="list-style-type: none"> • How you set up the room can influence the work environment. For example, theatre style arrangements bring attention to those at the front of the room—often considered the 'experts' on a particular topic. This workshop aims to tap into the experiences and know-how of the entire group, so consider how the arrangement of the tables and chairs can work towards that end. • Ideally, source small roundtables that seat 5 people comfortably. Avoid using banquet tables as it is difficult, if not impossible, to have all table members engaged in a conversation at any table that size. • Some sessions suggest different ways to arrange a room. We have found that participants appreciate the variety of arrangements. Sourcing chairs and tables that are easily movable i.e. light, on wheels etc. can speed up the amount of time that it takes to re-arrange. • For more on what you might want to look for when choosing a workshop venue, read the Training Venue section in the Workshop Design.
Equipment and materials	<ul style="list-style-type: none"> • Flipchart paper • Various coloured markers • Tape or blue tack
Presentations/handouts	<ul style="list-style-type: none"> • Distribute copies of the agenda (noting that it is flexible in that it may change in response to issues or surprises) • Use visuals when walking participants through the objectives, expectations and agenda for day one. These could be in the format of a powerpoint presentation but flipcharts can be as effective as, if not more than, the sheets posted on the wall, and can be left up for the duration of the workshop reminding participants of where they are going and how they are getting there. • Consider creating a set of slides to help illustrate the workshop principles or note them in a flipchart
Resources	<p>Sample agenda: KM Training 2009: Draft workshop agenda</p>

00:05

Welcome (Plenary)

Customize your welcome to suit your personality and facilitation style. Some of the key points you might want to consider incorporating into your welcome include:

- An introduction—who are you? where are you from? what's your story?
- The experience and expertise that you bring to the workshop—both in terms of KS and workshop facilitation/training
- Why is this workshop relevant? How does it fit into a larger program or initiative of developing a KS culture and capacity across the organisation, within projects etc.?

FACILITATION NOTES

Decide ahead of time if it is necessary to have an “official” open the workshop. Having senior representation (from within the unit or organisation) can make some participants feel that the workshop is more credible. It can also demonstrate that KS is being taken seriously by different levels of the unit/organisation.

00:20

Introductions (Plenary)

There are many ways to approach workshop introductions. We tend to avoid having each person introduce themselves in a ‘tour du table’ (or table go around) and choose approaches that are more in line with the spirit of the workshop i.e. participatory, engaging etc. We have found that the “Tagging” exercise creates a bit of energy and humour in the room but there are certainly lots of other options out there for you to consider.

FACILITATION NOTES

Introduce the individual(s) responsible for logistics.

00:10

Review of workshop expectations and broad objectives (Plenary)

This is an opportunity to manage participant expectations and to share a few of your own. One approach is to review any expectations that were shared prior to the workshop - possibly in response to a KS needs assessment or questionnaire. Provide a sense of how some of the ideas and needs expressed were incorporated into the workshop and a rationale for when they were not.

As each session has its own set of objectives, we don't tend to spend too much time covering the broad objectives of the workshop (which could be posted on a flipchart). However, it might be useful to remind participants what they are early on in the workshop:

- Increase understandings of knowledge sharing (KS) in the context of our work
- Develop skills in the use of selected KS methods and tools
- Identify and outline approaches for the integration of KS in our work

00:05

Overview of agenda (Plenary)

We tend to avoid reviewing the agenda in its entirety especially if copies of the agenda have been printed out and distributed to participants. Instead, we provide an outline of what we hope to accomplish in Day One and only briefly address how the rest of the workshop will unfold.

FACILITATION NOTES

- Consider providing time each morning to invite any announcements and review the day's agenda (which could be posted on a flipchart)
- It is often useful to remind participants that the agenda is flexible. In other words, it could change depending on any issues that develop or surprises that emerge.
- Try to fix the lunch hour so that it falls at the same every day. That way, if participants have other work or calls that need to be made, they have a good sense of when they can be done. Breaks are critical but their timing could be more flexible. They should be introduced before energy levels drop too low and to help support the transition in between sessions.

00:05**Workshop principles (Plenary)**

Like the rest of the opening session, these should represent the kind of workshop you would like to deliver. In designing this guide and previous KS workshop, we have found that the following principles are central to the work that we do:

- Everyone has something to offer. As a result, the workshop is oriented to participation
- Connections make a difference: We will encourage connections by suggesting that you organise yourselves at mixed tables (rather than sitting with the same people throughout) and by introduce exercises that will help you get to know each other
- Movement is good: Rather than sitting all day, we will introduce formats and activities that have you moving
- We all have a stake in and responsibility for making the workshop a success. You will find that you get out what you are able to put in.

FACILITATION NOTES

- Slides with pictures or simple graphics can help convey the essence workshop principles.
- Ask if there are any questions before moving on

WHAT DO WE MEAN BY KS?—SESSION OVERVIEW

Objectives

- Situating the KS methods and tools workshop within IFAD's KM strategy
- Bring about greater clarity on what is meant by KS particularly in the context of the workshop

Approach and timing

- Session overview - Plenary (5 mins)
- IFAD KM strategy presentation - Plenary (10 mins)
- KS presentation - Plenary (20 mins)
- Question generation - Small groups (15 mins)
- KS panel - Plenary (20 mins)

Total time = 1 hr + 10 mins

Key learning points

- Although data, information and knowledge are often presented sequentially, they shouldn't be treated as linear objects.
- Knowledge is highly contextual but also quite intangible and difficult to measure. The vast majority of knowledge is tacit i.e. in our heads, sometimes without us knowing it!
- Knowledge sharing can be seen as one component within the broader field of KM and can appear in many places within a project's cycle.
- There are many reasons why one would share knowledge or experiences. It can lead to better learning and problem-solving, less reinventing or duplicating, and more innovating.
- There are many ways to support knowledge sharing. KS methods are group processes that support interaction—especially conversations—among individuals or groups. They are mainly—but not exclusively—used face-to-face. Tools are media or technologies which help create connections and codify knowledge. This workshop covers both.
- This workshop has been designed to introduce a variety of methods and tools to support knowledge sharing. Experiencing the methods and tools and in some cases getting hands-on practice will help participants decide for themselves how and when they can be used within their own context.

Room set-up

- Groups of 4-5 people per table

Equipment and materials

- Large cards (half an A4)
- Markers
- Tape or blue tack

Presentations/handouts

- KM within IFAD projects, slides by Ankita Handoo, Knowledge Management Specialist, IFAD India
- What do we mean by KS presentation slides

Resources

- IFAD's KM Strategy
- The KM4Dev community
- The KM4Dev wiki

00:05

Session overview (Plenary)

Review objectives for the session and how it will unfold

00:10

IFAD KM strategy presentation (Plenary)

This 10-minute session is intended to be a short overview of IFAD's KM strategy to help participants understand how the work they will do fits into the overall institutional context in which they work in connection with IFAD-financed activities.

The following learning points are important to convey:

1. The underlying KM principles that are most important to IFAD (See Executive Summary and Vision, page 7 of IFAD's KM Strategy)
2. How IFAD structures its thinking about KM in 4 strategic components: (i) KM processes, (ii) KM infrastructure, (iii) KM partnerships, (iv) KM culture (See pages 17-22 of IFAD's KM Strategy)
3. The kinds of results and outcomes IFAD is seeking to achieve (See page 34 IFAD's KM Strategy)

In addition, it would be helpful to effectively convey the following points:

- Every COSOP has a section on KM and that each such section should be in harmony with the IFAD KM strategy. Note: You may want to briefly highlight the points in the KM section of your COSOP and how they fit with the overall IFAD KM strategy.
- Knowledge sharing is just one facet of knowledge management. And, within KM generally one can also think about KS specifically in terms the same 4 areas ie. Process, Infrastructure, Partnerships and Culture.

Communicating key points: Options

- PPT slides (see slides prepared by Ankita Handoo, Knowledge Management Specialist, IFAD India)
- Flipcharts
- Simply speak about the strategy with some visual aids like photos, cards or other props.

Preparing the presentation

Prior to the session, you may want to review the [IFAD KM Strategy](#) and identify what you think are the most important KM principles, look at the 4 strategic components, and review the results framework.

Identify examples that illustrate each of the four KM strategic components, the outcomes and results IFAD is seeking. It could be very helpful if you choose examples of KM results or outcomes in your own country that fit with your COSOP and with the results framework of the IFAD KM strategy.

Note that as at July 2010, IFAD has revised its results framework. As you will see, the one in the strategy document had a three year time horizon, that ended in April 2010. The new framework is currently an internal document. That is, it contains expected results and outcomes for which IFAD HQ staff have responsibility for achieving. For the most recent results framework you may contact Chase Palmeri (ch.palmeri@ifad.org).

FACILITATION NOTES

Use concrete examples KM activities from your own country programme to help people understand what IFAD means by KM processes, infrastructure, partnerships and culture.

Contact our colleagues in the Asia Division at least 3 weeks before the workshop so that they can send you glossy copies of the IFAD KM strategy for participants to keep as a reference document in their work.

00:20

KS presentation (Plenary)

The following outlines key discussion points related to the “What is meant by KS” presentation slides:

These introductory slides are meant to take a step back and ensure that everyone is on (or at least close to) the same page when it comes to what is meant by knowledge sharing. In order to do so, we review the differences between data, information and knowledge. It is key for participants to know that even though slide 2 puts them one alongside the other, they are not linear and there is no judgment call (for e.g. “information is better than data” or “knowledge is better than information”). The slide is meant to illustrate that when we talk about knowledge, we are talking about the tacit, what goes beyond data and information because it isn’t devoid of context.

That is why the slide 3 elaborates on the nature of knowledge and the fact that it is about experience, insights, skills, concepts, feelings, ideas, and ways of thinking or working. This makes knowledge—by nature—highly contextual but also quite intangible and difficult to measure. This is partly why the term “knowledge management” is such a misnomer; knowledge is incredibly difficult to measure, or even to manage. This is where we can stress that there is really a small proportion of what we know that can be codified, or be made explicit. The vast majority of knowledge is tacit (i.e. in our heads, sometimes without us knowing it!) and difficult to codify, as illustrated in the iceberg on slide 4. This means that we have to do bring in ways (methods, techniques) to bring out this tacit knowledge and share it with others.

Knowledge sharing is one part of what is called Knowledge Management (KM) and it can appear in many places within a project cycle. Knowledge creation, knowledge capture, knowledge sharing and, hopefully, knowledge application and learning, can all be seen as part of a KM cycle. It’s important to point out that in this workshop, we are mainly focusing on one part of the KM cycle and that is knowledge sharing (although we do touch upon capturing what is shared). So, slide 5 serves to illustrate an example of a KM cycle within a project and potentially where the knowledge sharing can occur, using a project activity as a starting point

Slide 6 segues into motivation, to underline some of the reasons why people share what they know. This is not meant to be an exhaustive list, as people can have other reasons that are far more contextual to their work. But generally speaking, sharing knowledge or experiences can lead to better learning and problem-solving, less reinventing or duplicating, and more innovating. Slide 7 was included to highlight the benefits of KS within a community—one of the project’s key stakeholders.

Those are some of the reasons why people share but there are factors that can make a difference in terms of what people get out of knowledge sharing. Three of those factors are listed in slide 8. The more commonality of purpose, usefulness and trust there is, the more successful the sharing will be. This is why it should be stressed that knowledge sharing is not a generic or blanket, “everyone shares everything”. Knowledge sharing should be encouraged when people are doing similar or common work, when it is useful for those concerned, and where a basic trust level already exists and can be build upon.

There are many ways to support knowledge sharing. We like to discern between methods and tools. In slide 9, we lists a variety of methods that can be used to share what we know. By methods, we mean group processes that people can use to interact with each other, which are mainly—but not exclusively—used in face-to-face interactions. In slide 10, we lists some of the tools that can be used to capture this shared knowledge. By tools, we are here referring to either different media or technology. Again, it is important to stress that we will be looking at a selection of methods and tools during the workshop but that there are many more out there.

FACILITATION NOTES

Check out the Making presentations section within the [Facilitation Tips](#) for ideas on how to make more effective presentations.

Note that most people tend to lump information and knowledge sharing together. Sometimes it can be useful to illustrate how they can be different parts of the same spectrum. Information sharing tends to be done through codification whereas knowledge sharing is based on connecting individuals and ideas.

Find ways to bring in examples or stories that are country/program specific. This might require the identification of successful knowledge sharing initiatives or activities led by participants, prior to the workshop.

Feel free to make this an interactive presentation in that you invite participants to ask questions along the way and/share for their views or ideas. For example, on slides 6 and 7, before showing the slide, you could ask them to suggest reasons why they might share what they know. Note that you might need to allocate more time to this session if you go the interactive route.

00:15

Question generation (Small groups)

Invite table groups (of 4-5 people) to reflect on the KS presentation and identify what aspects of the presentation need further clarification. Provide each table with 1-3 cards and ask them to note any questions they have, clearly, on the cards provided (1 question per card).

FACILITATION NOTES

It is useful to schedule the break before moving into the KS panel. This provides time to review and sort the cards according to any emerging themes or issues

00:20

KS panel (Plenary)

If there are external folks with KS expertise in the room, invite them to be part of the KS panel. During the break, sort the cards. Take note of any themes across the cards. Group accordingly. Set up a chairs for the panelists in a semi-circle at the front of the room.

Through conversation, invite the panelists address the questions posted to the cards. Real-life examples are helpful to convey meaning.

Ask if there are any questions or clarifying points before moving on.

FACILITATION NOTES

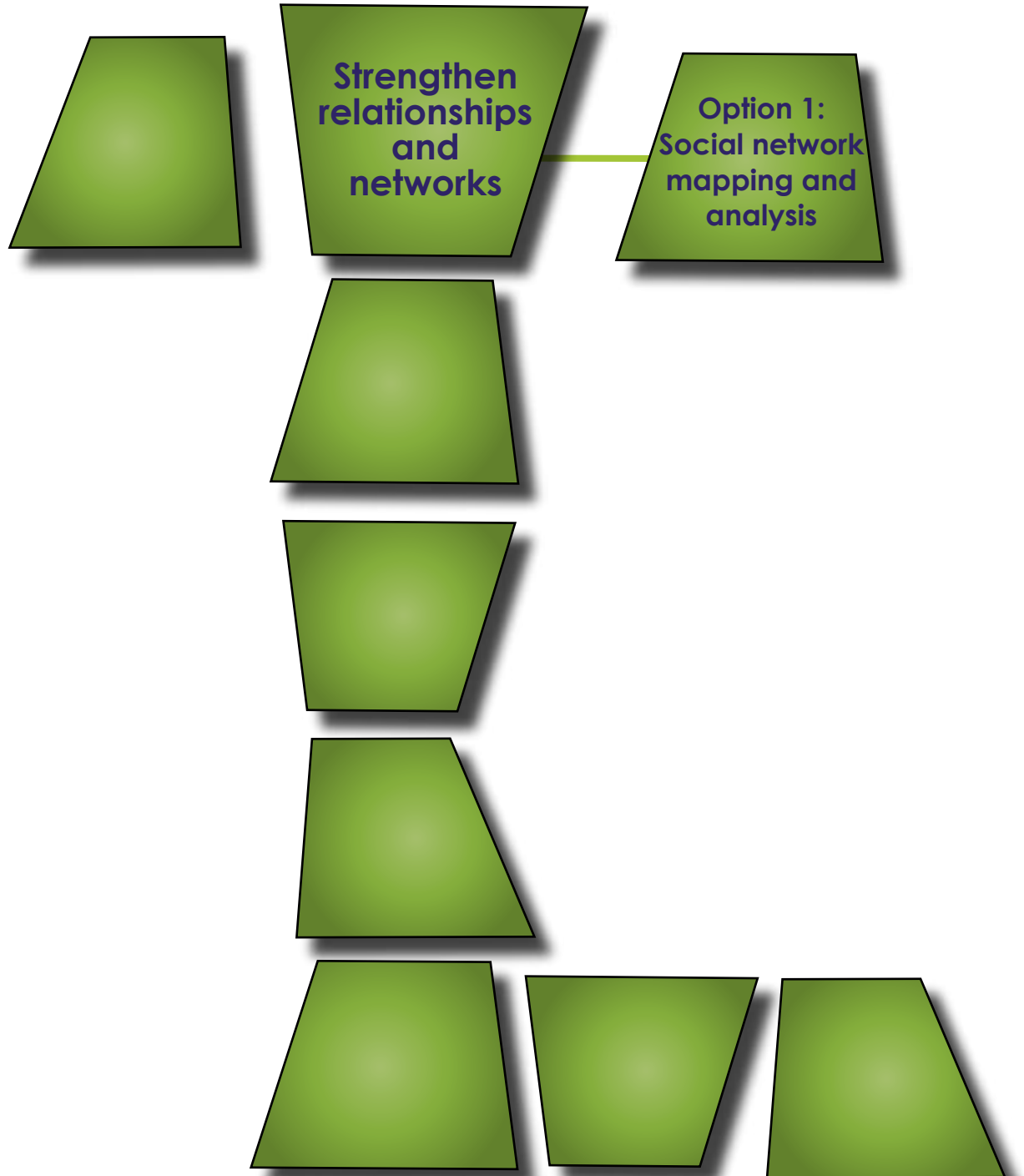
Agree who within the KS panel will “moderate” the discussion ensuring that the questions get addressed. Note that the moderator can also contribute ideas, reactions in response.

While adding external people to the KS panel may make the session more interesting, they aren’t necessary to make it work. You can take on full responsibility as the workshop facilitators.

STRENGTHEN RELATIONSHIPS & NETWORKS

WORKSHOP DELIVERY

KS ENTRY POINT 1: STRENGTHEN RELATIONSHIPS AND NETWORKS



KS ENTRY POINT 1

How can we strengthen relationships and networks?**WHY IS THIS ENTRY POINT RELEVANT?**

"It's not what you know but who you know."

In every country and situation, strong relationships and networks help get things done. This could involve getting information that is needed to make a decision, learning about a new way to tackle a challenge or finding a new contact who has needed know-how. In some instances, for example when dominant hierarchies are at play, they may be the only way to get things done. In others, a strong relationship can help speed up the rate at which they get done.

Understanding where your linkages are strong and weaker can help to focus information and knowledge sharing efforts. Understanding how technologies can be leveraged to connect people—especially those, such as M&E officers, who don't have anyone with whom they can connect on a regular basis to learn from each other on common practices and processes.

WHAT ARE SOME OF THE COMMON CHALLENGES IN STRENGTHENING RELATIONSHIPS AND NETWORKS?

Challenges include:

- The time and energy that it takes to build networks is significant. As a facilitator, you need to go the extra mile to nurture a network - connecting people with each other, responding to requests, providing updates etc. There is often little recognition and reward for doing this kind of work
- Building relationships is an art and requires an awareness of cultural sensitivities when working with specific groups - even in simple greetings with senior staff
- Building trust. Even more critical in getting senior people on board, if you are junior
- Finding ways to include people who have limited access or capacities to use technologies which support networks
- Even within an existing network, it can sometimes be difficult to find out who knows what

WHICH KS METHODS AND TOOLS CAN HELP STRENGTHEN RELATIONSHIPS AND NETWORKS?

An entire workshop could be devoted to the topic of strengthening relationships and networks. For the purposes of the curriculum, we have decided to introduce the topic of networks through a social network mapping exercise. Network maps, drawn by participants, provide a useful lens to analyse networks, surface learnings and generate ideas on how to strengthen them.

Other methods, drawn from the KS Toolkit include:

- Visioning Exercises
- Peer Assists
- Social Media Listening
- People bingo

And some of the tools that might be useful to strengthen relationships and networks are:

- Yellow Pages
- Dgroups
- Tagging/Social Bookmarking
- Social Networking (sites)
- Wikis
- Photo Sharing

ENRAP RELATED EXPERIENCES

- An organizational network analysis (ONA) of the IFAD Asia Pacific project network was commissioned by ENRAP, which was completed in November, 2008 by Patti Anklam. The results of the network analysis were presented to the IFAD country managers and staff in Rome in July 2009
- A more in-depth analysis of a country network was subsequently done for Bangladesh and the results were presented to the IFAD Bangladesh project directors and selected staff in a NetWorkShop in Dhaka in March 2010
- **How can we link isolated individuals, communities and networks?** Read the [Coconut wireless](#) story by Vikash Kumar, Knowledge Facilitator, Pacific Islands

SOCIAL NETWORK MAPPING & ANALYSIS—SESSION OVERVIEW

Objectives	Introduce social network mapping as a tool to visualize networks and generate conversations on ways in which they can be strengthened.
Approach and timing	<ul style="list-style-type: none"> • Session overview and introduction to networks - Plenary (20 mins) • Network connections - Individual work (15 mins) • Share maps - Small groups (45 mins) • Strengthening networks - Plenary (15 mins) • Debrief - Plenary (10 mins) <p>Total time: 2 hr 15 mins (or 1 hr 45 mins, if participants prepare their maps ahead of time)</p>
Key learning points	<ul style="list-style-type: none"> • Relationships within a network are often perceived differently by members of the network • The process of drawing and analysing a map is as important, if not more, than the resulting map • Network maps can help surface surprises and challenge perceptions • There is no one 'right' approach to strengthening networks but rather a myriad of ideas and approaches that one could adopt and adapt for their own work
Room set-up	<ul style="list-style-type: none"> • Groups of 4-5 people per table
Equipment and materials	<ul style="list-style-type: none"> • Flipchart paper • 5 flipchart stands (if you aren't allowed to post flipchart paper on the wall) • Post-it notes • An assortment of coloured markers
Presentations/handouts	<ul style="list-style-type: none"> • Network Mapping Homework.doc • Network Mapping Exercise - Questions.doc
Resources	<ul style="list-style-type: none"> • Social Network Analysis (described in the KS Toolkit) • Building Smart Communities through Network Weaving by Valdis Krebs and June Holley • Eva Schiffer's Net-Map Toolbox • Patti Anklam's website
Acknowledgements	Thanks to Nancy White for sharing this approach with us.

00:20

Session overview and introduction to networks (Plenary)

Review the objectives for the session

Briefly outline how the session will unfold:

- Session overview and introduction to networks - Plenary (20 mins)
- Network connections - Individual work (10 mins)
- Share maps - Small groups (45 mins)
- Strengthening networks - Plenary (15 mins)
- Debrief - Plenary (10 mins)

Introduce networks

What do we mean by “network”.

Provide a definition of a network i.e. “an interconnected group or association of people” then invite examples of a network—work or personal—in which they belong. Clarify, as necessary, and capture some of the key words used to describe their networks on a flipchart. Review the points, add to them and ask for any observations on what was captured. Note that for the purposes of the workshop, the kind of networks being discussed refer to groups of people or organisations who are interconnected by formal and/or informal arrangements.

Invite participants to reflect on why networks are relevant to their work. How have they personally benefitted from being a member of a network. Ask for specific examples and capture any key points on a flipchart. Ask if anything is missing before moving on.

FACILITATION NOTES

Prior to the workshop, ask participants to prepare for this session by creating their maps, as outlined in the [Network Mapping Homework.doc](#).

In a break before the start of this session, let participants know that they will be sharing their maps after break. This allows some participants to complete their maps and gives the 1-2 participants who didn't complete the work ahead of time, a chance to put something on paper which they can share.

Post the session's objectives and process on a flipchart or as a slideshow

Words people use to describe networks may include (but are not limited to): relationships, supportive, helpful, connected, work, people, diversity, shared practice, community, family etc.

Ways that people may have benefitted from being part of a network include: help with problem solving or generating new ideas, keeping up to date on trends and new approaches, reduces feelings of isolation etc.

00:15

Network connections (Individual work)

Distribute copies of the [Network Mapping Exercise - Questions.doc](#) and read through the questions together:

- With whom do you have the strongest connections?
- With whom do you THINK you should have the strongest connections? If they are not the same as in (1) what might you do to strengthen them?
- Who is an important knowledge intermediary or connector in your network? Which have very few connections and what are the implications for your work?
- What might you do to strengthen weak connections? To manage where you have too many connections? If you are the only 'connector', who else might help play that role?

Ask if there are any questions. Let participants know that they have 10 - 15 mins to jot down their responses before going into small group discussion rounds.

Network connections (Individual work) continued*FACILITATION NOTES*

Participants don't often reflect on these questions as part of the homework exercise. Even if they have, the additional 10 - 15 minutes are often used by participants continuing to work on their maps. Gauge how much time is needed and if participants are talking to each other rather than working independently, consider moving on.

Some participants may belong to the same organisation/project so have only one map to share. You might want to encourage them to reflect for themselves then compare their responses rather than answering them together.

00:45

Sharing network maps (Small groups)

Invite participants to form small groups (up to 5 maps). Ask each person in the group to take up to 10 mins to walk others through their map.

Let them know when they have 10 minutes remaining.

FACILITATION NOTES

The sharing of maps generally generate substantive discussion without guidance or interruption from the facilitators especially when workshop participants are part of each others networks. If conversation isn't flowing so well, suggest a question or two to generate conversation such as "What do people find surprising and why?".

Consider grouping participants who have created maps based on a project or activity that are similar.

Some groups work quickly through this exercise. Consider a second or even third round where participants share their maps with in a new group of 5.

00:15

Strengthening networks (Plenary)

Ask participants to take a minute or two to think about ways in which networks could be strengthened. These could be ideas and approaches they have either seen work or think could contribute. Invite participants to share the ideas, which are noted on a flipchart, in plenary.

FACILITATION NOTES

Ideas for strengthening relationships and networks suggested by participants include:

- Get to know each other better face-to-face
- Socialise
- Acknowledge the strengths within the group
- Include tasks and responsibilities in TORs for key network people ie. KFs
- Strengthen capacities via workshops, meetings etc.
- Find ways to motivate people ie. provide incentives, demonstrate value, engage people

00:10

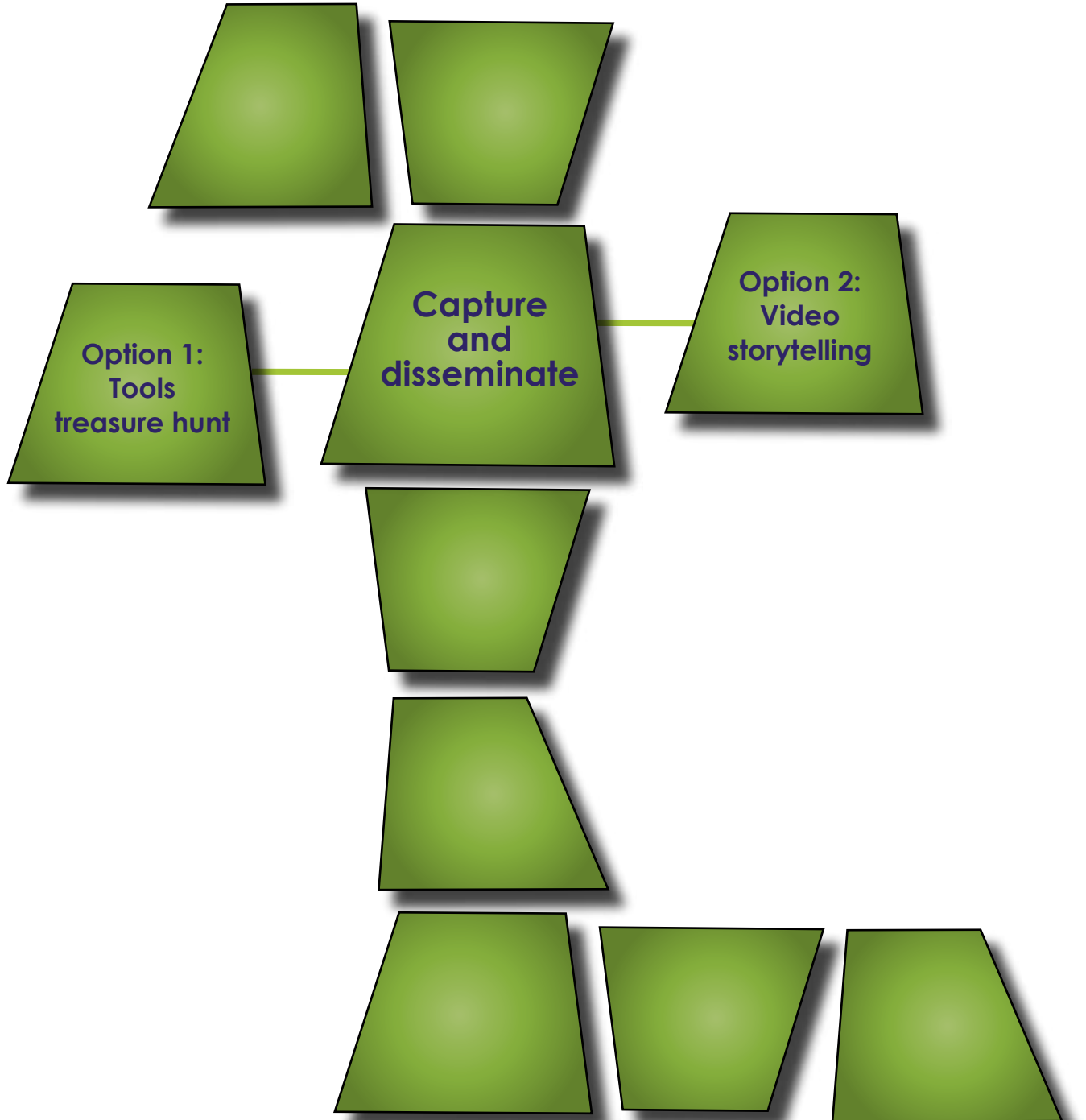
Debrief (Plenary)

Explore with participants how they might use this social network mapping in their own context. Provide the story which illustrates the application of the ENRAP supported SNA across IFAD's Asia & Pacific Division.

Ask if there are any questions or points of clarification before bringing the session to a close.

CAPTURE AND DISEEMINATE

KS ENTRY POINT 2: CAPTURE AND DISSEMINATE
LESSONS LEARNED, CSE STUDIES AND GOOD
PRACTICES



WHY IS THIS ENTRY POINT RELEVANT?

There is high demand from policy makers and practitioners to (i) learn from lessons and good practices, (ii) replicate and institutionalize innovative practices, and (iii) avoid duplicating past mistakes. IFAD responds to this demand, in part, through Knowledge Facilitators who are responsible for coordinating activities related to the capture and dissemination of lessons learned, case studies and good practices.

Lessons and practices could be captured in regular reporting formats such as the M&E system or progress report, however, the processes currently in place miss the mark as lessons aren't clear and easily accessible. Better approaches are needed.

There is opportunity to broaden the reach of lessons learned through the use of media and reporters who can make information captured by professional staff more "attractive" for different kinds of learners. In addition, the interactive nature of communities of practice provides a forum to help keep learning alive.

WHAT ARE SOME OF THE COMMON CHALLENGES IN CAPTURING AND DISSEMINATING LESSONS LEARNED, CASE STUDIES AND GOOD PRACTICES?

The value of capturing and disseminating lessons learned, case studies and good practices isn't always recognised by programme and project stakeholders. In addition, there are no incentives and/or support to carry out the work. As a result, related activities aren't planned and implemented. When asked to contribute a story or article for a newsletter, the request goes unanswered.

Stories should come from the grassroots level, however, there is often a lack of incentive and support to capture these stories.

Capacity is needed at the project level to identify, analyse and document lessons—not produce general information about the progress of the project.

IFAD's current M&E system and progress reports don't support the effective capture and communication of lessons learned and good practices.

All project staff's TORs should include tasks related to capturing and disseminating learning—not just the responsibility of M&E. Capacity needs to be built.

Human and financial resources need to be allocated to help institutionalise a learning culture which values the capture, analysis, evaluation and dissemination of lessons and good practices.

WHICH KS METHODS AND TOOLS CAN SUPPORT THE CAPTURE AND DISSEMINATION OF LESSONS LEARNED, CASE STUDIES AND GOOD PRACTICES?

As with the other entry points, an entire workshop could be devoted to the capture and dissemination of lessons learned, case studies and good practices. For the purposes of the curriculum, focus is given to a few tools for sharing and communicating lessons (through a [Treasure Hunt exercise](#)) and the method of [Video Storytelling](#). More information on identifying and analysing lessons is covered in the entry point “Generating lessons learned, case studies and good practices”.

Related methods and tools for creating, publishing and sharing content can be found in the [KS Toolkit](#).

ENRAP RELATED EXPERIENCES

Chase Palmeri, IFAD KM Facilitator for Asia-Pacific, shares her experience regarding the capture of lessons learned during supervision reports.

TOOLS TREASURE HUNT—SESSION OVERVIEW

Objectives	<p>Provide participants with hands-on experience in the use of tools which can be used to capture and share lessons learned, case studies and best practices. These tools will use electronic means to capture text (e.g. in the workshop blog), visuals (e.g. photos) and video/audio (e.g. record of their lesson learned/story).</p>
Approach and timing	<ul style="list-style-type: none"> • Session overview and introduction to the tools - Plenary (20 mins) • Introduction to the treasure hunt & team formation - Plenary (10 mins) • Treasure hunt - Teams of 3 (2 hrs) • Debrief - Plenary (15 mins) <p>Total time: 2 hrs 45 mins (though could be more or less depending on the number and difficulty of Treasure Hunt tasks)</p>
Key learning points	<ul style="list-style-type: none"> • A sense of the variety of media that can be used for capturing what people know • An increased ability to capture and disseminate what people know • Hands-on application of the tools in a fun, collaborative environment
Room set-up	<p>3 person computer stations set up with 1 computer per station</p>
Equipment and materials	<ul style="list-style-type: none"> • Reliable Internet access • Ideally, 1 computer per team of 3 i.e. for 15 participants, 5 teams = 5 computers • At least one digital camera that can be borrowed by teams (with accessories for downloading photos and videos on computers) • LCD projector, flip chart or handout which outlines Treasure Hunt tasks
Presentations/handouts	<ul style="list-style-type: none"> • Treasure Hunt instruction handouts (1 per team) • Links to the URLs for the blog, wiki, flickr and YouTube (see below in Resources and Facilitator's Instructions and Notes), as well as to the tag used
Resources	<ul style="list-style-type: none"> • KS Toolkit • Wordpress (blog) • PB Works (wiki) • Flickr (photo sharing) • You Tube (video sharing)
Acknowledgements	<p>Thanks to Nancy White for sharing a variation of this approach.</p>

Prior to the session: See [Preparing online documentation](#) for information on creating a workshop wiki and blog prior to the workshop. Immediately prior to the session, create a link on the front page of your workshop wiki for each Treasure Hunt team (eg. Team 1, Team 2, etc.) so they know where to post their task outputs in the wiki.

Following the session: Facilitators need to review the teams' entries and see how they did. In some case, teams will have missed some of the tasks, or have done very well according to some criteria but not other. Unless there is a team that did an overwhelming job in all criteria, consider announcing winning teams according to each criteria. It's always nice to have a prize to hand out (i.e. sweets) so if you have multiple "winners", everyone can share the treats.

Note that photos uploaded by individuals with new accounts usually take 24 hrs to be publicly accessible making the announcement of the winning teams not always possible the following day.

00:20

Session overview and introduction to the tools (Plenary)

Review the objectives for the session

Briefly outline how the session will unfold:

- Session overview and introduction to the tools - Plenary (20 mins)
- Introduction to the treasure hunt & team formation - Plenary (10 mins)
- Treasure hunt - Teams of 3 (2 hrs)
- Debrief - Plenary (15 mins)

Introduce the tools:

Provide a brief overview of what is a wiki and a blog. Find examples of each that are related to their work. It is important to highlight the main differences between the two as participants often get confused between them:

- A blog (or "web log") is a type of website usually maintained by an individual who regularly writes entries of commentary, descriptions of event or posting material such as photos or video on a particular subject. The entries are usually displayed in reverse-chronological order
- A wiki is website that allows the easy creation and editing of a interconnected web pages. It is intended to support the co-creation of documentation. A wiki that most people have heard of is wikipedia.

Referring to the KS Toolkit, introduce photo sharing i.e. flickr and/or picasa, video sharing i.e. YouTube and tagging.

FACILITATION NOTES

Use the projector to demo sample blogs and wikis as well as the KS toolkit.

Use a flipchart or white board to write all of the URLs/links to the tools you will use. Add the links to the front page of the wiki ensuring that they are accessible.

00:10

Introduction to the Treasure Hunt and team formation (Plenary)

Announce the members of each team (see "Facilitator notes" below). Ideally, teams of 3 people "compete" to complete the tasks according to speed, quality and originality). The "winning" team can be awarded a prize (preferably one that can be shared with the whole group i.e. chocolate) or compete for the glory!

Here are a few ideas of treasures for teams to find :

1. Identify a name for your team. Create a blog entry that introduces your team and its members. Include a photograph of the team in your blog post.
2. In the workshop wiki, under your team number, write-up one thing that you liked about Day 1 so far, and one thing that could be improved, OR (second option), in the workshop wiki on Day 1, where your team number is, create the page and write-up the three ways that

work best (for each, according to team consensus) in response to: What are you doing to document/capture project experiences?

3. Take a photo of one of the network mapping/flipcharts. Have at least one of you create a Flickr account and upload the photo. Make sure that you include the workshop tag so that it can be found, OR (second option), for bonus points, add your network maps to flickr which you can log into if you have a yahoo account. If you don't have a yahoo account you will need to create an account with flickr.
4. Ask one of your team members to recall a lesson learned story and record it on video, then post it on YouTube (remember to tag it!)
5. When you are finished with all of the tasks, scream out your team name together!

FACILITATION NOTES

We have found that teams of 3 are optimal (max 4 people), otherwise some participants end up as observers.

Create the teams ahead of time in order to balance them out. For example, if you know among the participants who is very technology saavy, you can split them across the teams. The same goes for those whom you think would be slower to learn new tools, split them up in the different teams.

01:45

Treasure Hunt (Small groups)

Start the clock on the Scavenger Hunt. Depending on the number of tasks given, the exercise can take up to 1 hour and 45 minutes. Make sure that the teams know that timeliness isn't the only criteria, they have to play around with the tools as well.

FACILITATION NOTES

Walk around to help out with the tools, or to take team photos, videos, etc.

If participants decide they want to upload several photos in flickr, suggest that they download the application [Uploadr](#) as it reduces the file size during the upload.

00:15

Debrief (Plenary)

If possible, allow for all teams to finish the exercise before the debrief. You can get some quick feedback on their initial experience with the tools by asking questions like:

- Which tools worked best for you? Why?
- How do you see these tools being used to capture lessons learned, case studies and best practice in your work?
- What are the perceived limitations? How do you see them being overcome?

You can also mention that the "winner" of the Treasure Hunt will be announced the following day, to allow the "judges" to review the work of each team.

Ask if there are any questions or points of clarification before bringing the session to a close.

VIDEO STORYTELLING—SESSION OVERVIEW

Objectives

To carry out an interview process that invites participants to share their “good practices” or lessons learned experiences in a story format.
To experiment with the the use of video to communicate stories.

Approach and timing

Session overview and introduction to video storytelling - Plenary (20 mins)
Hands-on practice through role play - Groups of 3 (2 hrs)
Debrief - Plenary (20 mins)
Total time: 3 hrs (includes a 20 min break)

Key learning points

Real-life, personal experiences make for powerful stories
Asking good questions is one of the most important skills to enable learning
Video is an easy and powerful tool to capture and share stories

Room set-up

Space for groups to three to convene. No tables needed.

Equipment and materials

LCD projector
Flipchart stand and paper
Markers
Tape or blue tack
1 digital camera per small group

Presentations/ handouts

Instructions on Video storytelling slides

Resources

Using Video for Knowledge Sharing from the KS Toolkit
Video introduction to Digital Storytelling from the University of Houston

00:30

Session overview and introduction to video storytelling (Plenary)

Review the objectives for the session

Briefly outline how the session will unfold:

- Session overview and introduction to stories, interviews and video documentation - Plenary (20 mins)
- Hands-on practice through role play - Groups of 3 (2 hrs)
- Debrief - Plenary (15 mins)

Introduce the topic of stories, interviews and video documentation:

In plenary, bring a flipchart to the front of the room and start by asking the group, "What do you think makes a good story?" or, alternatively, "What are the elements of a good story?". Ask people to "shout out" these elements and write them down with bullet points on the flipchart. These may include ideas such as:

- Captures people's interest
- Has a good "twist" in the storyline
 - Realistic and true
- Is a first person account and relates a personal experience
- etc.

After about 10 min on "What makes a good story?", tear off the flipchart paper(s) with the bullet points and stick it (them) to a wall so everyone can see them. Then, you can ask the following question, "So what makes a good interview?". Again, get people to raise the points which you'll note down on the flipchart. These may include:

- Comfortable ambiance to put interviewee at ease
- Avoid being biased
- Do not interrupt too much when the interviewee is talking
- Clear questions
- etc.

Finally, after about 10 min tear off the flipchart paper(s) and post them on the wall. Then ask the last question, "how can you best document stories using video?". Some of the points might be about breaking up the story in little chunks, or doing the video in an interview format. It could also be about keeping them relatively short so they are easier to watch (and to upload). Once the ideas run out, make sure all flipcharts are visible so participants can refer to them in the next round.

FACILITATION NOTES

You can also ask for a volunteer to write down the bullet points on the flipchart.

Remember to keep an open mind regarding the answers. If someone comes up with something that is really off base, ask them why they think this is the case.

When the ideas slow down, ask if there is anything missing, or that hasn't been covered before moving on to the next question.

Note: this discussion can also be done in small groups of 4-5 people (20 min), with a short report back at the end. Depending on the number of groups, the session can take a bit longer than 30 min with the report back.

02:00

Hands-on practice through role play (Groups of 3)

Let the group know how the hands-on practice will unfold i.e. in groups of three, each person will have the opportunity to share a successful approach or method for capturing lessons learned, case studies or good practices. Give them a few minutes to think about an approach or method. If an experience doesn't come to mind, suggest that they propose an approach they feel would be successful and why

Invite participants to group themselves in threes and identify who will take on which of the three roles:

- A storyteller

- ii. An interviewer
- iii. A videographer

Remind them that each person will get the chance to play each role in three rotating rounds
Invite the first storyteller to share their successful approach or method to capturing lessons learned, case studies or good practices (up to 5 mins)

Once the story is told, the interviewer asks his/her questions to draw out more details about the approach or method. Why is it so successful? What are the factors that contribute to its success? How can the approach be used in other contexts, if at all? (10 min)

The storyteller gets a chance to ask questions about how the approach or method has been understood. Together, the three review the couple of segments which hold the richest insight (10 min)

The documenter captures at least one 3 min segment, which could be either a conversation between the storyteller and the interviewee or the storyteller's private reflection (10 min)

Once the first round (40 min) is done, change roles. It doesn't matter who takes which role, as long as everyone gets to play each in the three rounds. Once the second round is done (40 min), get them to change roles for the last time and go through the steps again.

FACILITATION NOTES

Walk around and check on the groups to see if they need any help or clarification

A good place to schedule the break would be after the second rotation

00:20

Debrief (Plenary)

Content debrief:

- Take 5 - 10 minutes to learn what participants took away from the exercise. They could be asked to identify a new or different approach to generating project outputs that they feel might work in their own context? Or, to highlight a key insight or idea that they took away.

Process debrief:

- Take 10 - 15 mins to reflect on the process and in particular the technique of video storytelling. Questions to initiate the discussion may include:

- What was it like playing the role (of storyteller, interviewee, video documenter)? Were some roles easier or harder than others? Why?
- What new insights or ideas did you take away about video storytelling as a knowledge sharing methods?
- What one tip would you offer to others thinking of using video storytelling to capture and disseminated lessons learned, case studies or good practices?

Debrief (Plenary) continued

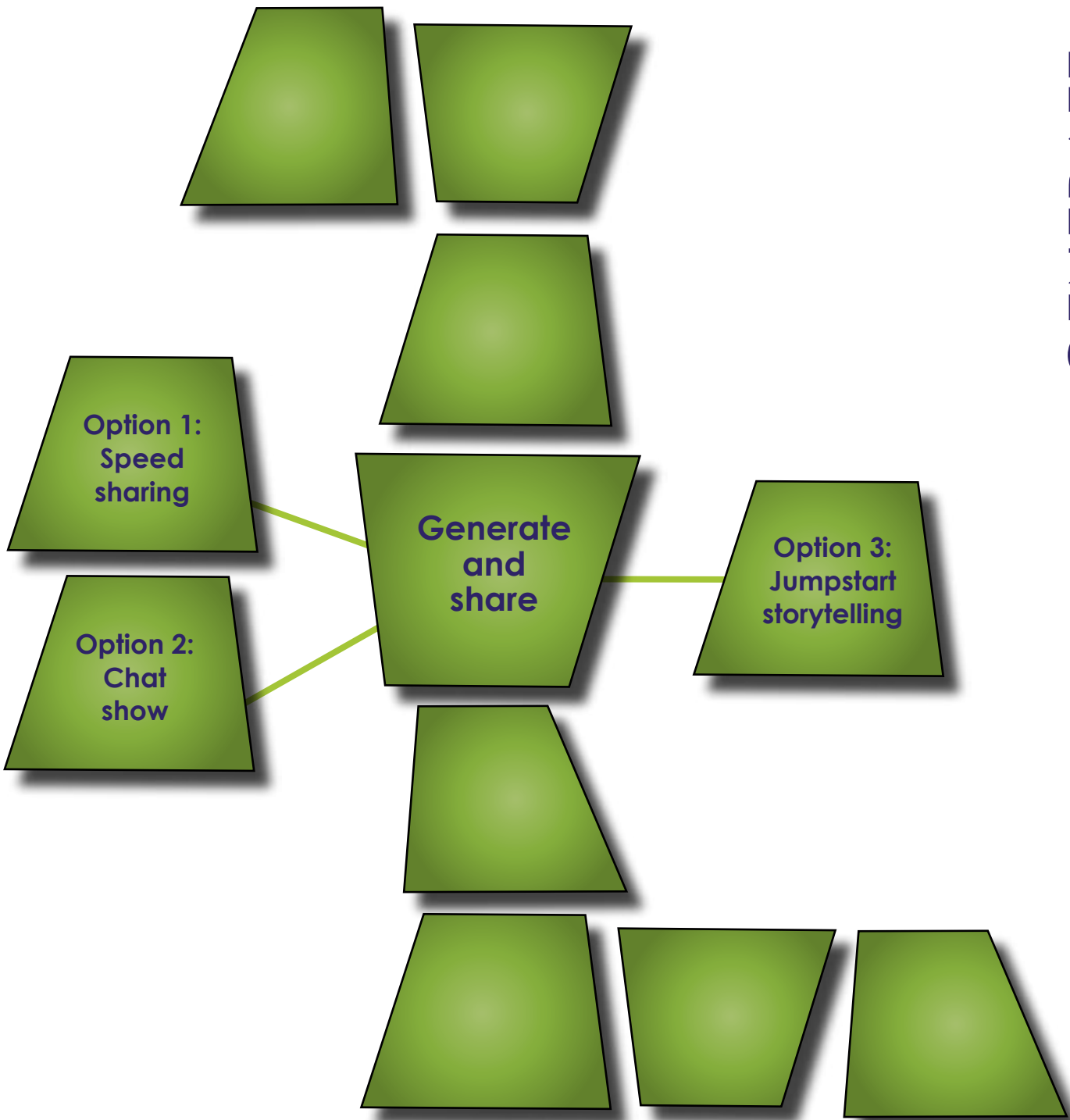
FACILITATION NOTES

It is useful to separate out reflections on the process and the content even though they are linked. There is no "right" order or questions to be asked but it is often useful to put one question to the group at a time rather than throwing several out at once.

Consider alternative approaches to the debrief round. It doesn't have to be done all in plenary. For example, you could invite pairs or groups of 3 to share their reflections first amongst themselves before sharing 1-2 insights and ideas in plenary.

Ask if there are any questions or points of clarification before bringing the session to a close.

KS ENTRY POINT 3: GENERATE AND SHARE LESSONS LEARNED, GOOD PRACTICES AND CASE STUDIES



GENERATE & SHARE

WHY IS THIS ENTRY POINT RELEVANT?

Funded projects are often required to document successful practices and learning that result from the design and delivery of a project. Learning and good practices are often captured in official reports but are also shared through organisational newsletters or blogs. The implicit understanding is that these lessons and good practices can improve future performance—not only within a project but, if successfully communicated, with others who may benefit from the learning passed on.

Projects stakeholders sense that they could do a better job in capturing and sharing what they are learning and in facilitating processes of reflection which can draw out tacit knowledge and generate new knowledge. These processes, and well as the creation and sharing of knowledge products such as good practices and case studies, could be better understood.

WHAT ARE SOME OF THE CHALLENGES IN GENERATING AND SHARING LESSONS LEARNED, CASE STUDIES AND GOOD PRACTICES?

There are three kinds of challenges identified:

1. Level of effort required may be high: Systematizing learning is challenging work. It requires:

- leadership and support from senior staff who perceive value in the effort
- knowledge of the kinds of processes that facilitate collective learning
- an understanding of what is a learned lesson or a good practice
- a commitment of time
- facilitators who can create a safe learning environment
- an appreciation of how lesson learned, case studies and good practice can be useful

2. Product or process: While both are important, the purpose of both should be made clear. This will help identify appropriate processes and relevant knowledge products.

3. The hierarchy of knowledge: The validity of processes and products can come into question in contexts where certain knowledge is under valued ie. indigenous and experiential knowledge vs expert knowledge.

WHICH KS METHODS AND TOOLS CAN HELP GENERATE AND SHARE LESSONS LEARNED, CASE STUDIES AND GOOD PRACTICES?

An entire workshop could be devoted to the topic of generating and sharing lessons learned, case studies and good practices. For the purposes of the curriculum, we have decided to introduce the topic through the following KS methods:

Option 1: Speed sharing (for reporting back on small group work)

Option 2: Chat show

Option 3: Jumpstart Storytelling

To deepen understandings, each method is introduced in the context of lessons learned, case studies and good practices.

Other methods, drawn from the KS Toolkit, include:

- After Action Review
- Appreciative Inquiry
- Experience Capitalization
- KM Self Assessment
- Most Significant Change
- Peer Assists
- Storytelling

ENRAP RELATED EXPERIENCES

- A story on Involving mid-level staff in best ("good") practice sharing exercises, by Niaz Ahmed Apu, Knowledge Facilitator IFAD Bangladesh
- Reflexions on older generations sharing with the younger, as well as capturing elders knowledge through storytelling, by Ankita Handoo, KM Specialist, IFAD India

SPEED SHARING—SESSION OVERVIEW

Objectives

Familiarise participants with the Speed Sharing method—also referred to as Speed Geeking or Round Robin
 Introduce Speed Sharing method to identify common challenges in the generation of project outputs and provide approach to address them

Approach and timing

Session overview and introduction to project outputs - Plenary (10 mins)
 Clarifying project outputs - Small groups (35 mins)
 Speed Sharing rounds - Rotating small groups (30 mins)
 Addressing feedback - Original small groups (15 mins)
 Report backs (Option 1) or Sharing conclusions (Option 2) - Plenary (up to 20 mins)
 Debrief - Plenary (10 mins)
Total time (based on approximations) = Up to 2hrs and 15 mins

Key learning points

Speed sharing offers an alternative to plenary report backs - and is especially useful following group work. People tend to be more attentive and engaged - perhaps because they are working in small groups and required to physically move around the room to learn about the work of others.
 Speed sharing is a method that gives people the opportunity to learn about a range of things in a short period of time.
 There are many variations of the Speed Sharing method. None are necessarily better than the other. Investing time in planning how the session will unfold would be time well spent.
 There are clear benefits to generating case studies, lessons learned, best practices and success stories but they also come with their set of challenges. Identifying them and discussing how they could be overcome before embarking on a process of generation will be time well spent.

Room set-up

Small groups of 4-5 chairs only around a flipchart OR small groups of 4-5 seated around a table (with flipchart paper on the table)

Equipment and materials

Flipchart paper and stands (tables work just as well)
 Markers (enough for each group of 4-5 people)

Presentations/handouts

Generating Lessons Learned, Good (or Best Practices), Case Studies and Success Stories: Sample Definitions

Resources

Round Robins in the KS Toolkit

Acknowledgements

Marc Steinlin, Indigenous Peoples' Knowledge

Prior to the session:

- Figure out how you will divide the group. Ideally, you want 4-5 people per group but if you have slightly more or less, it can still work. You could do a count-off i.e. each person takes the next number in a count of up to 4 then all the 1's form a group, the 2's form a group etc. Alternatively, invite groups to self-organise and suggest that they work with someone who they haven't already had the chance to work with.
- Ensure that each group has markers and flipchart paper (preferably on a stand but on a table will do).
- Set up a time plan (see approximate times above). Consider experimenting with what is proposed. For example, for the group sharing component, you could allocate 10 minutes for the first round and decrease each round by a minute. Whatever approach you choose, let the participants know how much time they have.
- Choose the approach i.e. for the group sharing component (report backs vs review) and the plenary (report backs vs reflections)
- Outline the session's process in bullet points on a flipchart.
- Print out copies of the [Generating Lessons Learned](#), [Good \(or Best\) Practices](#), [Case Studies](#) and [Success Stories: Sample Definitions](#)

00:10

Session overview and introduction to project outputs (Plenary)

- Outline the session's objectives
- Briefly outline how the session will unfold:
 - Introduction to the session - Plenary (10 mins)
 - Clarifying project outputs - Small group (35 mins)
 - Report backs - Rotating small groups (30 mins)
 - Revising project outputs - Small groups (15 mins)
 - Report backs (Option 1) or Sharing conclusions (Option 2) - Plenary (up to 20 mins)
 - Debrief - Plenary (10 mins)
- Introduce the types of project outputs being discussed i.e. lessons learned, good (or best) practices, case studies and success stories. Avoid reading through the definitions provided allowing the groups to discuss them amongst themselves.
 - **Lessons learned:** A lesson learned is knowledge or understanding gained by experience that has a significant impact for an organisation, and that is important enough to be communicated to one's peers. This knowledge is derived from the reflection, analysis and, conceptualisation of the experience, that has potential to improve future action.
 - **Good (or best) practice:** A good or best practice is a technique, method, process, activity, incentive or reward that is believed to be more effective at delivering a particular outcome than any other technique, method, process, etc. The idea is that with proper processes, checks, and testing, a desired outcome can be delivered with fewer problems and unforeseen complications. Best practices can also be defined as the most efficient (least amount of effort) and effective (best results) way of accomplishing a task, based on repeatable procedures that have proven themselves over time for large numbers of people.
 - **Case study:** A Case Study is one of several ways of doing research whether it is social science related or even socially related. It is an intensive study of a single group, incident, or community. Rather than using samples and following a rigid protocol to examine limited number of variables, case study methods involve an in-depth, longitudinal examination of a single instance or event: a case. They provide a systematic way of looking at events, collecting data, analyzing information, and reporting the results. As a result the researcher may gain a sharpened understanding of why the instance happened as it did, and what might become important to look at more extensively in future research. Case studies lend themselves to both generating and testing hypotheses.
 - **Success story:** A Success Story is anecdotal evidence for the benefits of a project, policy or organization, often in the form of an account of the achievement of success.
- Plenary debrief: The group will be asked to reflect on the Speed Sharing method
- During the session, KS Facilitators will circulate among the groups (to contribute as needed) and help track time by providing occasional reminders of the remaining time for each activity
- Ask if there are any questions related to the objectives and process before inviting the group to organise into 4 small groups.

00:35

Clarifying project outputs (Small groups)

- Ask the group to organise themselves into 4 groups of equal size i.e. 4-5 people per group
- Once organised, outline the task... to discuss, for clarification purposes, their understandings of the output provided to them (noting any improvements to be made to the definition) and identify the benefits, challenges and possible approaches related to its generation.
- Groups clearly record the outcomes of the discussion as a poster on flipchart paper so that they can be understood by others without a verbal explanation.
- Provide each groups with a project output and its definition
- Let them know that they have 30 mins to discuss and produce a poster highlighting the outcomes of their discussions and that you will let them know when they have 10 mins
- Remind the group when they have 10 mins remaining.

FACILITATION NOTES

- Circulate among the groups and answer questions as needed.
- Some groups may not be able to complete the exercise in 30 mins. If everyone needs more time, you might want to consider allocating an additional 10 mins. Otherwise, let the groups know that they will be convening again after the speed rounds to finish their work.
- Participants will draw on their own experiences to identify the challenges of generating outputs. Be prepared to provide them with an idea or two if you find that they are struggling to get started. For example, when projects work with ethnic minorities, language can become a hurdle for case study writers who are unable to communicate with project beneficiaries.

00:30

Speed Sharing rounds (Rotating small groups)

Decide prior to the session how you want to share back i.e. Option 1 or Option 2 outlined below

- Option 1 - Small group report backs: One person from each group reports back on the outcomes of their discussion in rotating rounds of 7 minutes (4 mins to present + 3 minutes to solicit feedback). Before getting started, groups should identify who present their work and can choose to alternate presenters or have the same person for each round (if s/he agrees). The rest of the group moves as a whole listening to new report back in each round.
- Option 2 - Poster reviews: Also in rotating rounds of 7 minutes, groups will review and add feedback directly to the posters which speak for themselves (rather than being presented to the groups as in Option 1). They will move as a group in each round.

Explain how the speed round work and its purpose i.e. to be exposed to and build on each others' work by adding, complementing, specifying and exemplifying. Remind them that each round is 7 mins and you will let them know when the time has elapsed and they need to move on.

Track time for the group inviting them to move as a whole

FACILITATION NOTES

Noise can be an issue if there are lots of people in the room. Try to spread out the groups —perhaps in the corners of the room.

You might need to do something more than let people know that the 7 mins has elapsed. Using something besides your voice ie. clapping, a bell, music etc. can help.

Try to be as clear as possible when giving out instructions on when, how and where to move. It can help save some confusion and time.

Note that a group can alternate presenters during the Speed Sharing rounds allowing different members of the group to present.

Addressing feedback (Original small groups)

After the 3 rotating rounds, invite each group to return to its point of departure and, for 15 mins, discusses and possibly incorporate the comments received by others.

Let them know that they have 15 mins to do the following:

00:15

- review the comments and ideas related to their output
- consolidate the feedback and incorporate into the poster
- identify who will report back in plenary and prepare for a 3 min max presentation (option 1) or share any conclusions related to the content (option 2)

FACILITATION NOTES

Before groups return to their original point of departure, decide which of the plenary report back options you will be inviting them to do.

00:20

opt 1

Option 1: Report backs or Option 2: Sharing conclusions (Plenary)*Option 1: Report backs*

Remind the group that each has 3 mins max to present. Ask for a volunteer to get started

Option 2: Sharing conclusions

Invite the group what insights they take away with respect to the generation of lessons learned, best practices, case studies and success stories

00:10

opt 2

FACILITATION NOTES (FOR OPTION 1)

If the group is less than 20, you could consider moving the group from poster to poster rather than having the presenter stand and everyone else sit.

Invite the next 'presenter' group to track time during the report backs. Agree that they let the group know when 20 seconds remain and when their time is over.

You could also use coloured cards to help track time. Green to go, yellow as the 20 sec warning and red to indicate time is up.

Ask groups to hold back any questions unless they are for clarification.

Following the presentations, ask if there is anything that needs to be added.

00:15

Debrief - Plenary

Use the next 15 minutes get some spontaneous feedback on Speed Sharing as a KS method.

Possible discussion questions could include:

- Why might you choose to use Speed Sharing instead of a plenary report back session? What are some of its benefits?
- How could you see this method introduced in your work?

If participants are already familiar with the World Café, ask when they might choose one method over the other.

FACILITATION NOTES

Why use Speed Sharing? Some reasons include:

- Participants get to learn about lot of different things in a short time and make connections that can be explored more deeply at a later point in time
- Presenters are forced to stick to the time frame, making their presentations more concise and time-effective
- There is a great deal of energy in the room created by movement, audience participation and noise levels so people aren't as likely to fall asleep
- The method can be used with large groups i.e. up to 150 people as long as the size of the rotating groups doesn't exceed 10

Consider alternative approaches to the debrief round. It doesn't have to be done all in plenary. For example, you could invite pairs or groups of 3 to share their reflections first amongst themselves before sharing 1-2 insights and ideas in plenary.

Ask if there are any questions or points of clarification before bringing the session to a close.

CHAT SHOW—SESSION OVERVIEW

Objectives

Introduce the chat show as a means to:

- Highlight the differences between project related outputs (such as lessons learned, case studies, best practices), how they are generated and why they are useful
- Learn about effective ways in which projects are already generating of outputs.
- Discover an alternative format to panel presentations

Approach and timing

- Chat Show - Plenary (1 hr - 1 hr + 20 mins)
- Optional question generation - Small group (10 mins)
- Debrief - Plenary (20 mins)

Total time: Between 1 hr + 20 mins and 1 hr + 40 mins

Key learning points

Like most sessions outlined in this curriculum, there are learning points related to both the process as well as the content - in this case the generation of lessons learned, case studies and best practices.

Process

- The chat show is an alternative to panel presentations which invites key participants to share their experience without getting into dry presentations
- Most countries have their own version of a chat show so most people, if not all, can relate to the format which is generally more lively than panels since it isn't always clear where the discussion is going.
- A Chat Show can be hammed up to make it theatrical and fun (where culturally appropriate), or done in a more serious discussion format. Either can work but avoid anything "dumbing" it down.
- Chat Shows can be scaled up. What's needed is a host, 2-3 guests and an audience of approx 10+. Larger groups can also break up into parallel chat show sessions but it isn't necessary.
- The Chat Show format can be less intimidating for those who have difficulty with formal public speaking.

Content

- There are obvious overlaps between M&E practices and what we are calling "Generating Lessons Learned, Case Studies and Best Practices". Generating outputs, from a KS perspective, focuses on processes which support reflection and learning.
- There are no silver bullets for generating lessons learned, case studies and best practices. The process will depend, in part, on one's context and should consider diverse ways in which people learn.
- The Chat Show can help illustrate methods by highlighting successful experiences of selected participants (or external guests). For some participants of the chat show, being a guest can also provide an opportunity in which new thinking and learning is generated.
- Before discussing methods and tools that can help generate outputs, it is sometimes useful to first identify the 'felt needs'. For example, for whom is the output intended and how what is its intended use.

Room set-up

- Best if the chairs are arranged in a semi-circle, double semi-circle if necessary
- Comfortable chairs for the guests and host and a coffee table for glasses of water

SESSION OVERVIEW

Equipment and materials

- Flipchart & markers
- Microphones (if needed). Lapels seem to help the flow of conversation. At least one wireless microphone to take questions from the audience

Presentations/handouts

Chat Show Methodology (to be distributed as a post-session resource for participants)

Resources

KS Toolkit
Nancy White's tips for hosts

PROCESS AND FACILITATION NOTES

Prior to the session:

Ensure that the theme of the show is clear and has a title that effectively communicates its meaning. The show's host is assumed to be one of the KS Workshop facilitators. In choosing who might best suit the role, consider that ideally, the host should be:

- Familiar with the show's theme but not so familiar that they get so caught up in the conversation and sharing of their own experiences that they forget their responsibilities as host
- Familiar with the guests and their work. If they have published or documented materials, read them prior to the show.
- Dynamic, lively and inquiry-oriented. S/he likes being in front of an audience and can facilitate their engagement.
- Comfortable not following a script or needing to read from notes
- Check out other [host tips on Nancy White's blog](#)

Identify 2-3 guests for show:

- Like the host, guests should be comfortable not following a script or reading from notes.
- Guests should be chosen based on their experiences in generating project related outputs ie. those who can illustrate successful approaches
- Chat shows work best when the guests' experiences relate to each other but still reveal different perspectives

Arrange a meeting between the host and the guests:

- This could take anywhere from 30 mins - 1.5 hrs and is best done face-to-face.
- Review the show's theme and run through how the session will unfold. Share with them chat show documentation.
- Find some time for the guests and host to get to know each other - and specifically their work. One approach could invite the guests to share their expertise and stories with each other then brainstorm on key questions that could be introduced during the show.

Set-up:

- Create chat show signage which illustrates the theme (on a flipchart will do).
- Find out the name of a popular local chat show. This can be referred to when explaining the process.
- Decide how much you want to want the chat show to emulate a televised show. For example, you could create a role for a producer ie. someone who introduces the host as well as someone who holds up an "Applause" sign to encourage feedback from the audience.

Note that you may need an hour (at a minimum) in order to best prepare for the session.

00:60
to
01:20**Chat Show (Plenary)**

Unlike other workshop sessions, this one doesn't need much in the way of an introduction. Provided that the theme is well articulated and relevant to the group, the purpose, objectives and process generally emerge quite quickly as the audience gets caught up in the show.

The following outlines the Chat Show process which would be guided by the Host (assumed to be one of the KS Workshop Facilitators). Tips are included below.

The host...

- Opens the chat show, welcomes the audience and introduces the theme of show.
- Provides an introduction to the guest perhaps using the chat show metaphor ie. "My first guest will be well known to you. He was formerly..") or a story that is suggestive of the relationship between the host and guest
- Invites the first guest to come on the 'stage'. Clapping seems to liven things up a bit.
- Begins the discussion. The host could ask the guest to talk a bit about themselves, how they got to where they are today etc. (sometimes useful to encourage) and begins the discussion
- Should use open ended questions (as opposed to ones with yes or no answers. Ideally, they should elicit stories from the guest i.e. "Tell us about your experience in generating lessons learned, best practices, case studies. How did you get involved in this work? Why is it important to you? Probe for interesting details.
- Repeats the process with the other guests
- Stimulates a conversation among the guests—perhaps by asking them to respond to the same question—or turns to the audience to either questions to the guests or contribute their own experience.
- Could end the session by asking guests a specific "wrap up" question such as "If there was one piece of advice you would want to give someone who wants to generate new and improved project outputs, what would that be?"

FACILITATION NOTES

The host should avoid taking copious notes. Their attention should be directed at the guests.

Instead of asking the audience to individually identify questions for the guests, give them 5 or so mins to identify 1-2 in in groups of 3 or 4 which are then fed into the plenary.

00:20

Debrief (Plenary)**Content Debrief**

Take 10 minutes to learn what participants took away from the show. They could be asked to identify a new or different approach to generating project outputs that they feel might work in their own context? Or, to highlight a key insight or idea that they took away.

Process debrief

Use the last 10 minutes get some spontaneous feedback on the chat show as a method. Questions that could be used to initiate the discussion include:

- What did you observe about the chat show?
- What was it like to be a host, guest and/or audience member?
- How could you see this method being introduced into your own work?
- What are the conditions that you think would help make the session a success (see above for ideas)?
- When might it not work?

FACILITATION NOTES

Consider alternative approaches to the debrief round. It doesn't have to be done all in plenary. For example, you could invite pairs or groups of 3 to share their reflections first amongst themselves before sharing 1-2 insights and ideas in plenary.

Ask if there are any questions or points of clarification before bringing the session to a close

JUMPSTART STORYTELLING—SESSION OVERVIEW

<p>Objectives</p>	<ul style="list-style-type: none"> • Seth Kahan developed and shared this methodology. As he explains, Jumpstart Storytelling can: <ul style="list-style-type: none"> • Efficiently engage every participant in the business objectives • Accelerate collaboration without compromising diverse perspectives • Effectively introduce each person to 10-15 other participants • Improve learning through high quality idea exchange. • For the purposes of the KS methods and tools workshop, Jumpstart Storytelling is introduced to: <ul style="list-style-type: none"> ◦ demonstrate an approach to experience exchange that is engaging and productive ◦ exchange ideas and approaches related to a shared content area of interest ◦ increase understandings of what makes a good story
<p>Approach and timing</p>	<ul style="list-style-type: none"> • Session overview & getting organised - Plenary (10 mins) • Jumpstart Storytelling Round 1 - Small groups (Between 8 - 10 mins) • Jumpstart Storytelling Round 2 - Small groups (Between 8 - 10 mins) • Jumpstart Storytelling Round 3 - Small groups (Between 8 - 10 mins) • The most meaningful story - Plenary (20 mins) • Debrief - Plenary (15 mins) <p>Total time: 1 hr 15 mins (Note that this will vary depending on the number of participants and number of groups formed)</p>
<p>Key learning points</p>	<ul style="list-style-type: none"> • Everyone has change stories stemming from their work • Telling and listening to each other's stories engages the hearts and minds of people and is a great way to involve everyone in the room, even if done very succinctly • A method like Jumpstart Storytelling requires little preparation and is easy to do (it is also a great <i>icebreaker</i> to start a meeting)
<p>Room set-up</p>	<p>Only standing room is needed Open space with no tables or chairs is ideal</p>
<p>Equipment and materials</p>	<ul style="list-style-type: none"> • Bells/chimes • Computer • LCD projector • Post-it notes • Digital camera to video the most memorable stories • Flipchart/markers to capture debrief discussion points • Stopwatch or second-hand watch for timing purposes
<p>Presentations/handouts</p>	<p>Jumpstart storytelling slides</p>
<p>Resources</p>	<ul style="list-style-type: none"> • Seth Kahan's introduction to Jumpstart Storytelling • SDC Storytelling Guide (p.28)
<p>Acknowledgements</p>	<p>Seth Kahan</p>

Prior to the session:

Identify how many groups and rounds are needed to ensure that participants won't be telling their stories to the same people over again. For example, if there are 18 people in the workshop, you could have 6 groups of 3. When calculating the amount of time needed for the session, include at least a minute or two for new groups to form.

00:10

Session overview & getting organised (Plenary)

After outlining the objectives, explain how session will unfold i.e. each person will have an opportunity to talk about a time when they witnessed their work make a difference to project stakeholders. Each person will have 2 mins to tell their story in small groups.

Before organising into groups, invite participants to take 5 mins to reflect on their work identifying a story that best illustrates how their work helped bring about change. If they are having difficulty identifying of story, suggest that they think of a time when their work gave them a sense of accomplishment or pride.

Explain that you will help in tracking time during the storytelling rounds, i.e. after each 2 mins have elapsed, you will let them know that it is time to move on to the next storyteller and when the next round begins.

Invite participants to form small groups.

00:10

Jumpstart Storytelling Round 1 (Small groups)

Once participants have arranged themselves into their group, begin the first round.

Signal (gently) the end of each 2 min interval as well as the end of the round

Before moving into new groups, ask the participants to think about the stories they heard and the tellers who told them. Invite them to bring to mind the story that was the most memorable or had the most significant impact on them and to remember the teller.

Participants self-organise into new groups of with new faces. They may need to be reminded that group re-arrangements are needed to ensure that the newly formed groups have all new faces (avoiding having to retell the same stories to the same people)

FACILITATION NOTES

Put up the slides with the question and process (slides 1 and 2)

Make sure to tell people they will only have time to share the essence of their experience but need to give enough background to explain why the work made them proud

00:10

Jumpstart Storytelling Round 2 (Small groups)

Same as Round 1

FACILITATION NOTES

Same as Round 1

00:10

Jumpstart Storytelling Round 3 (Small groups)

In a new group with as many new faces as possible, each person takes 2 min to re-tell the story told in the first and second rounds.

FACILITATOR NOTES

It isn't a problem if they find themselves with a person they've been with before but if 3 or all 4 people have been together before, support the organization of groups so they are as mixed as possible.

Again, let them know when the 2 mins have elapsed so that the next person can start telling their story.

When the last round of stories is done, ask the participants to think again about the stories they heard and the tellers who told them. Invite them to bring to mind the story that was the most memorable or had the most significant impact on them and to remember the teller.

00:20

The most meaningful story (Plenary)

Hand out a post-it note or sticker to each participant

Ask each person to recall the story that was the most meaningful to them from any of the 3. Write down the name of the person who told the story on a post-it note

Tell them to find the person who told that story, stand next to them and give them the post-it or sticker (which they are free to stick on themselves).

Ask those who received 1 or more post-its to raise their hand. Then ask those who received 2 or more to continue raising their hand. Then 3 until there is only 1-3 people remaining.

Invite these individuals to re-tell their stories to the plenary group.

If useful, document each of these stories on video.

FACILITATION NOTES

You can project the third slide from the Jumpstart storytelling PowerPoint on the overhead screen

Avoid suggesting that the stories receiving the most "votes" is better than the rest

Make sure that the storytellers are ok with having their change stories captured in video before filming them

00:15

Debrief (Plenary)

Invite participants to explain why they chose the story they did. What made them meaningful?

Ask for any observations or reactions on the method "Jumpstart Storytelling". How might they use it in their work?

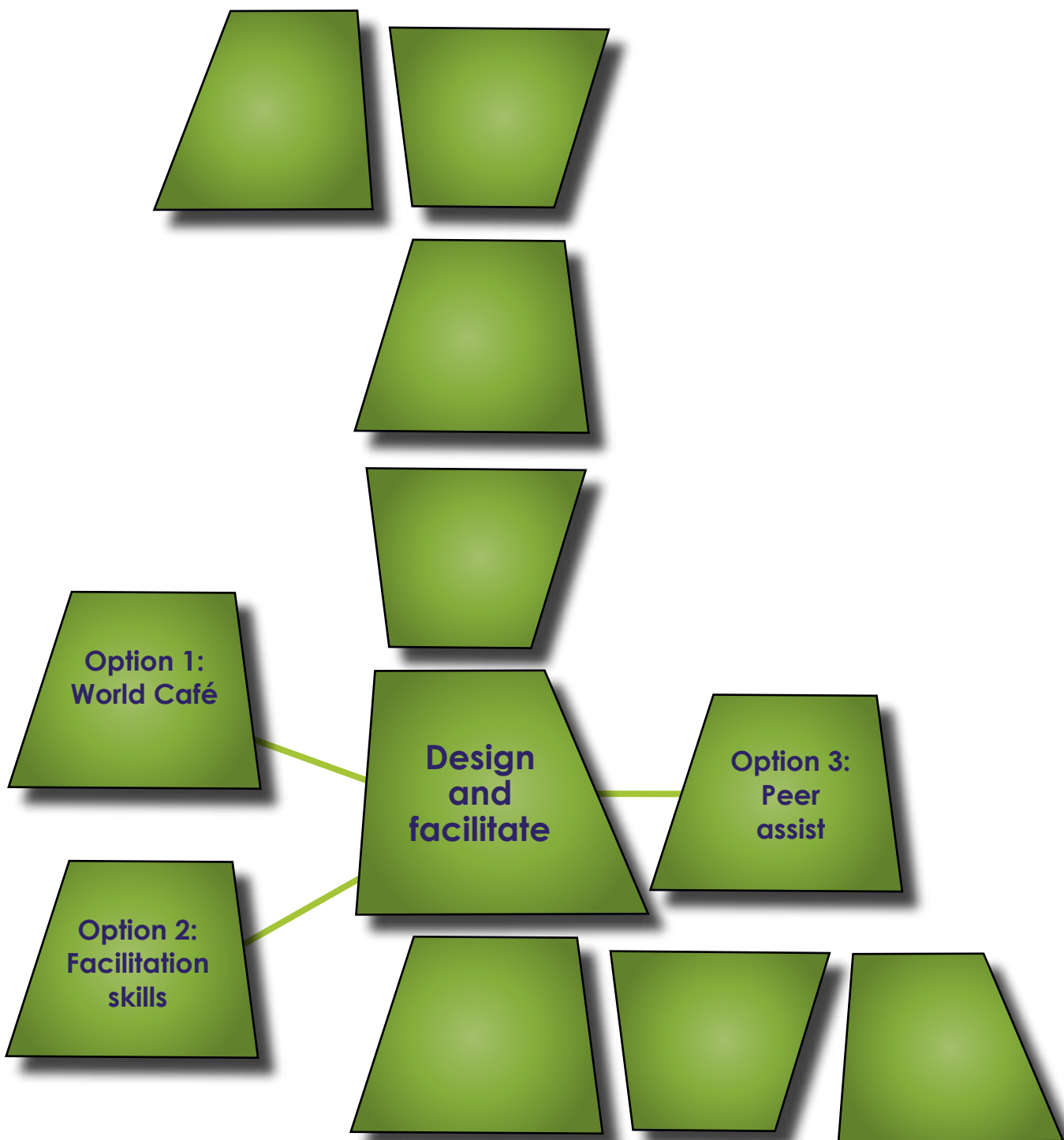
FACILITATION NOTES

Use a flipchart to capture the bullet points from the plenary discussion (i.e. what made the stories meaningful). Alternatively, you can ask for a volunteer to capture the points, as you facilitate the discussion

Ask if there are any questions or points of clarification before bringing the session to a close

DESIGN & FACILITATE

KS ENTRY POINT 4: DESIGN AND FACILITATE BETTER MEETINGS AND WORKSHOPS



WHY THIS ENTRY POINT?

Meetings are a regular part of work life yet they are often seen as wasted opportunities—especially when they are used to simply disseminate information which could be communicated via more effective means such as email, in a document or video etc. Few meetings are learning opportunities, where participants are actively—rather than passively—involved.

There are plenty of ways to increase the effectiveness of meetings and workshops. For example, agendas could be designed in such a way that interactions among participants are welcomed. Facilitation could provide the opportunity for everyone to express their views or opinions thereby reducing a domination affect when there are only a handful of people in the room who either have the authority or courage to speak. KS methods and tools offer a host of possibilities for designing and facilitating better meetings and workshops.

WHAT ARE SOME OF THE COMMON CHALLENGES IN DESIGNING AND FACILITATING BETTER MEETINGS AND WORKSHOPS?

Many of the challenges in designing and facilitating better meetings and workshops are a result of a limited appreciation of process. In other words, how a meeting or workshop unfolds in response to a clearly articulated purpose and set of intended outcomes as opposed to list of topics that need to be discussed. Planning a process is certainly more time-intensive than identifying the discussion topics and until the value of a well planned process is appreciated, it will be difficult to change how meetings are organised and run especially as people show resistance to “alternative” ways of doing meetings.

In meeting and workshop facilitation, a number of specific challenges have also been shared related to:

- Managing a large group
- Dealing with diverse communication and learning styles ie. dominant participants, people who don't like to speak in plenary
- Reaching consensus
- Timing the meeting in a realistic way
- Keeping people on task yet not be so structured that there is no allowance for emergence
- Competing with distractions such as cell phones

Finally, some people have suggested that the options for facilitating more interactive meetings aren't always clear and as process is rarely documented, it is difficult to learn new methods. Hopefully this guide is able to bring about clarity and contribute to one's confidence and capacity in designing and facilitating better meetings.

WHICH KS METHODS AND TOOLS CAN HELP DESIGN AND FACILITATE BETTER MEETINGS AND WORKSHOPS?

As pointed out with each entry point, an entire workshop could be devoted to this topic. For the purposes of the guide, we have decided to introduce the topic of designing and facilitating better meetings and workshops through 3 different sessions:

- Option 1: **World Café** - Sharing experiences and views on effective meetings
- Option 2: **Facilitation skills**
- Option 3: **Peer Assist** - Supporting each other in a meeting's design

Other methods you can use to design and facilitate better meetings can be found in the **KS Toolkit**, such as:

- Round robin
- Open space (technology)
- Knowledge fairs

ENRAP RELATED EXPERIENCES

An alternative to World Cafe: using the Round Robin method in a workshop, a story by Anura Herath, CPO and Knowledge Facilitator, IFAD Sri Lanka

Strategies to mix participants during the workshop and keep them until the end by Ankita Handoo, KM Specialist, IFAD India

WORLD CAFÉ—SESSION OVERVIEW

Objectives	Identify new approaches and tools that could be used to improve meetings (both face-to-face and online), through 3 rounds of conversation
Approach and timing	<ul style="list-style-type: none"> • Session overview and introduction to the World Café - Plenary (10 mins) • World Café Round 1 - Small groups (35 mins) • World Café Round 2 - Small groups (30 mins) • World Café Round 3 - Small groups (25 mins) • Debrief - Plenary (20 mins) Total time: 2 hrs
Key learning points	<ul style="list-style-type: none"> • Most individuals know what makes a good one, whether they are aware of this or not. • To get the most out of a World Café, think very carefully about the questions you ask. They have to be clear, engaging to the participants and build on one another. • Having conversations - and building on each other's experiences - can actually increase one's capacity to plan and facilitate a face-to-face or online meeting.
Room set-up	Tables (preferably round) with 4-5 chairs each
Equipment and materials	<ul style="list-style-type: none"> • Brown packaging paper or sheets of flip chart paper taped together to create a paper tablecloth • 4-5 multi-coloured markers per table
Presentations/handouts	<ul style="list-style-type: none"> • World Café Powerpoint presentation • Café to go
Resources	<ul style="list-style-type: none"> • http://www.theworldcafe.com • http://www.kstoolkit.org/The+World+Cafe • Café to Go

00:10

Session overview and introduction to the World Café (Plenary)

After a brief review of the session objective, provide a short introduction to the World Café. This can be done verbally, or using the slides provided in this guide.

The important points to cover on the World Café method are:

- Why this method? To stimulate conversations, or collaborative dialogue
- How it will unfold? World Cafes are built around a set of three related questions—each questions being asked in a conversation round lasting from 30 to 40 minutes. At the end of each round, one person remains at each table as the host, while each of the others travel to new tables. Hosts welcome newcomers to their new table and share the essence of the conversation that has taken place so far. The newcomers relate any conversational threads, which they are carrying and then proceed to address the next question in the set
- The role of the host: To welcome newcomers, share the main ideas, themes and questions, and encourage guests to link and connect ideas but is NOT a facilitator, moderator, or Chair
- The meaning of the tablecloth: Participants should use it to doodle, draw and to play with ideas but it is there to SUPPORT the conversations. It can be seen as an artifact (or a by-product) of the conversations but is NOT meant to be a literal transcript, or notes. Try to discourage the use of bullet points!

Ask if there are any clarification questions before moving into the World Café session (but don't get into long explanations... let them start and get into the process).

00:35

World Café Round 1 (Small Groups)

Start off by reminding participants of the World Café topic: How do we plan more effective meetings and workshops? Then introduce the first question, which may be something along the lines of...

"In your group, talk about a meeting or workshop that you took part in (and/or developed) which was FANTASTIC in terms of KS, learning, networking, etc. (this can be a face-to-face or online event). What happened? Who was involved? What made it stand out above the rest?"

FACILITATION NOTES

Prior to the session, identify the set of questions that would be most relevant to your group. The ones provided here are examples only and should be modified especially if the World Café is being introduced with another KS entry point.

There isn't much to do during the rounds but consider:

- Walking around to ensure all is going well at the tables
- Encouraging people to be creative and draw, doodle, etc.
- Taking photos of the participants and their tablecloths

End of World Café Round 1 and Start of Round 2 (Small Groups)

00:30

Communicate with the group that round 1 is over. Before inviting everyone, except for the table hosts, to find a new table and new group, remind them what will happen in round 2 i.e. in their new group they can introduce themselves, quickly share any key points that emerged in the first round (noticing any patterns or themes) before diving into the question for Round 2 which could be something along the lines of:

“What factors contribute to the success of a meeting or workshop? Specifically, what can be done to make a meeting more effective and productive?”

Once the process is explained and the question posed, invite participants to move to a new group with new faces.

FACILITATION NOTES

Some of the things you can do during the round:

- Walk around to ensure all is going well at the tables
- Encourage people to be creative and draw, doodle, etc.
- Take photos of the participants and their tablecloth

00:25

End of World Café Round 2 and Start of Round 3 (Small Groups)

Communicate with the group that round 2 is over. Before inviting everyone, except for the table hosts, to find a new table and new group, remind them what will happen in round 3 i.e. in their new groups, introduce themselves, quickly share any key points that emerged in the previous rounds (noticing any patterns or themes) before reflecting on the Round 3 question, which could be something along the lines of

“Think of a regular meeting or workshop (of any type) and come up with its IDEAL format or design. Please include approaches, tools, roles, etc.”

FACILITATOR NOTES

Some of the things you can do during the round:

- Walk around to ensure all is going well at the tables
- Encourage people to be creative and draw, doodle, etc.
- Take photos of the participants and their tablecloth

00:20

Debrief

Content debrief

- Take 5-10 minutes get some spontaneous feedback on the approaches and tools discussed.
- What new insights or ideas did you take away that could be used to improve meetings? Are there any ideas that participants would like to further investigate or try out themselves?

Process debrief

Take 5-10 minutes get some spontaneous feedback on participating in the World Café itself. Questions to initiate a conversation might include:

- What observations or reflections do you take away from the World Café?
- What was it like to be a table host? How was it as a participant?
- How might you see this method used in your own work?
- If the speed sharing method has already been introduced, invite participants to think about when they might choose one method over the other

FACILITATOR NOTES:

Ask if there are any questions or points of clarification before bringing the session to a close.

FACILITATION SKILLS—SESSION OVERVIEW

Objectives

- Explore useful facilitation skills
- Get some hands-on practice to develop facilitation skills further

Approach and timing

- Session overview and introduction to facilitation skills - Plenary (20 mins)
- Practicing facilitation skills (Round 1) - Groups of 3 (20 mins)
- Practicing facilitation skills (Round 2) - Groups of 3 (15 mins)
- Practicing facilitation skills (Round 3) - Groups of 3 (12 mins)
- Debrief - Plenary (15 mins)

Total time: 1 hr + 22 mins

Key learning points

- It is impossible to become a great facilitator overnight. Practice, practice and more practice are needed
- A facilitator is a great listener. She or he is someone who doesn't try to control the conversation but can support groups in doing their best thinking by using skills such as asking questions, paraphrasing, summarizing and encouraging to make people feel heard and understood.

Room set-up

Participants sit closely together in groups of threes. No tables needed.

Equipment and materials

- Flip chart stand and paper
- Markers
- Tape/blue tack
- LCD projector and screen

Presentations/handouts

- [Facilitation skills presentation slides](#)
- If you have access to Sam Kaner's *Facilitator Guide to Participatory Decision-Making* (New Society Publishers), and assuming that you are working as a not-for-profit, photocopy the pages which outline the four facilitation skills discussed: Asking questions, Paraphrasing, Summarizing and Encouraging

Resources

[The Role of Facilitator by Sam Kaner](#)

Acknowledgements

Thanks to Sam Kaner ([Community at Work](#)) and the Evaluation Unit at IDRC for sharing this method

TIMING

PROCESS AND FACILITATION NOTES

Prior to the session

Decide which three questions to be addressed in the three rounds of practicing facilitation skills. Sample questions are provided but feel free to modify these according to your group's interests and need. If using the presentation slides to outline the session, update the slides to include your questions.

00:20

Session overview and introduction to facilitation skills (Plenary)

- Introduce session objectives and outline of session (i.e. three rounds of small group work followed by a plenary discussion)
- Explain that there are four key skills (written down on a flipchart or whiteboard) that are needed by a facilitator whether working face-to-face or online:
 - Asking questions
 - Paraphrasing
 - Summarizing
 - Encouraging
- Encourage a discussion around the skills. Before having someone read the definitions out loud, invite the group to share their own understandings of what the skills are all about.
- Invite the group to think of these skills as they move into the next exercise

FACILITATION NOTES

Taken from Sam Kaner's Facilitator's Guide to Participatory Decision-Making

- **Asking questions:** "The facilitator asks open-ended, clarifying and, occasionally, closed questions to expand the understanding of the situation. Open-ended questions usually begin with "what", "how", "when", "where" and are posed in a way in which the person responding cannot answer "yes" or "no", but must expand the base of information. Clarifying questions are posed in order for the facilitator to become more clear about the situation and often begin with "which", "why", "do you mean to say..." etc. Closed questions can be answered with a "yes" or "no" and are asked to get specific information"
- **Paraphrasing:** "The facilitator uses her/his own words to reflect what the speaker is saying and how the speaker is feeling. The purpose of paraphrasing is to determine if the facilitator understands what the speaker is trying to get across, and also, the affective (emotional) aspect of what is being shared. This gives the speaker the opportunity to acknowledge the facilitator's understanding, or to correct it. This skill is extremely useful when clarifying and understanding a situation."
- **Summarizing:** "The facilitator, when appropriate during the conversation, describes the key elements or details of the conversation up to that point. The purpose of summarizing is to end one phase of the conversation and either terminate or move on to the next phase. Summarizing is valuable in controlling the pace and amount of time spent listening and conversing."
- **Encouraging:** "The facilitator through feedback and comments, encourages the speaker to say more about the situation. When encouraging another to speak the facilitator should be aware of making positive comments about a response. Body language and facial expressions, including behaviours such as nodding and eye contact, should also be encouraged."

00:20

Practicing facilitation skills - Round 1 (Groups of 3)

- Form groups of 3. Individuals in each group number off from 1, 2 and 3. Note that each person in the group will have a chance to take on each of the roles but for the first round:
 - 1 = Speaker
 - 2 = Facilitator
 - 3 = Observer
- Provide the following instructions (5 mins):
 - Speaker: "Talk for the 5 minutes by answering the question: "NEED TO DECIDE ON THE QUESTION TO BE INCLUDED"
 - Facilitator: "For 5 minutes, facilitate the conversation. Help the speaker using the skills discussed earlier
 - Observer: You're not going to speak for the next 4 minutes but you need to watch the conversation very carefully. At the end, you'll be giving the facilitator feedback.

- Focus on the facilitator as though he/she is the leader of the conversation and the speaker. You can note your feedback.
- Ask if there are any questions about the process
 - Begin Round 1 (4 mins)
 - Stop the conversations and provide the following instructions in plenary (5 mins):
 - Tell learners that they will now provide and receive feedback.
 - Observers are first invited to provide feedback and could use the following reminders:
 - Observers are setting the norm for how feedback will be given. The quality of the feedback they provide will affect the quality of the feedback they get later, when they facilitate
 - A balanced list should be given... what did the facilitator do well and what could they work on to improve.
 - If the observer runs out of feedback for the facilitator then the speaker can also give feedback.
 - The facilitator is invited to just listen and take in the feedback without interruption as difficult as it may be. Rather than being defensive or trying to explain why they did what they did, they are invited to absorb what is being said to them.
 - Ask if there are any questions on the process
 - Observers (and speakers) provide feedback to the facilitator (4 mins)
 - Before going into round 2, ask if there are any points of technique that should be discussed (4 mins)

00:15

Practicing facilitation skills - Round 2 (Groups of 3)

- Explain that the second round is similar to the first except new roles are assigned: Number 2 is now the facilitator; 3 is the speaker and 1 is the observer:
 - 1 = Observer
 - 2 = Facilitator
 - 3 = Speaker
- Provide a question for the speaker to discuss: "XXX - could be process or content related". Remind the groups that they have 5 mins to discuss
- After 5 minutes, stop the conversations. Remind the groups how effective feedback can be provided. Give 5 mins for feedback
- Debrief: "Do any points of technique need to be discussed?"

00:12

Practicing facilitation skills - Round 3 (Groups of 3)

- Explain that the third round is similar to the first two except that everyone will play the one role that haven't yet played:
 - 1 = Facilitator
 - 2 = Speaker
 - 3 = Observer
- Provide a question for the last speaker to discuss: "XXX - could be process or content related". Invite them into the final 5 min round
- After 5 minutes, stop the conversations. Give 5 mins for feedback

Debrief (Plenary)

- Invite reactions to the exercise:
 - How did you find that experience?
 - What surprised you?
 - What did you learn?
 - How do you see these skills being applied in your work?

PEER ASSIST—SESSION OVERVIEW

Objectives	<ul style="list-style-type: none"> • Note that as with most of the methods and tools, the peer assist could be introduced when discussing any of the entry points. We have found it useful to include when discussing the KS entry point Design and facilitate better meetings and workshops simply because most participants have experience in designing and facilitating meetings and there are always 2-3 participants who are in the midst of carrying out this work. • The objective of this session is to introduce the peer assist as a means to generate ideas and new lines of thinking in response to a specific challenge. • By tying the peer assist to the KS entry point Design and facilitate better meetings and workshops, the intent is to explore ways in which “real” meetings can be improved through a small group brainstorming exercise.
Approach and timing	<ul style="list-style-type: none"> • Session overview and introduction to the Peer Assist - Plenary (10 mins) • Peer Assist Round 1 - Small groups (35 mins + 5 mins to move groups) • Peer Assist Round 2 - Small groups (30 mins + 5 mins to move groups) • Peer Assist Round 3 (if applicable) - Small groups (25 mins) • Debrief - Plenary (20 mins) <p>Total time: Between 1 hr 40 mins to 2 hr 10 mins (depending on number of rounds)</p>
Key learning points	<ul style="list-style-type: none"> • In a peer assist, everyone benefits, not just the “peer assistee” • Participants often face similar challenges, even if they seemingly do different work • You know more than you think you do
Room set-up	Small circles of 8-10 chairs centered around a flipchart
Equipment and materials	Flipchart stand, paper and 2 markers for each peer assist group
Presentations/handouts	Peer Assist Tips Peer assist video
Resources	KS Toolkit: peer assists
Aknowledgements	Authors Geoff Parcell and Chris Collison for sharing the Peer Assist in their book Learning to Fly

Prior to the session:

- Depending on the size of the full group, you will need to identify 2 or 3 volunteer peer assistees (2 for a maximum of 20 participants, 3 for a maximum of 30 participants). You can also have more peer assistees if you want smaller groups but it is recommended to do no more than 3 rounds.
- You will also need to identify the equivalent number of people to act as facilitators
- Prior to the session, ask all peer assistees and facilitators to meet with you to discuss the purpose and process of the peer assist. Realistically, 30 minutes is needed. Briefly explain to them the process and possible roles, which you can also hand out to them ([Peer Assist Tips sheet](#)). Try to ensure that you have time to have them to tell their story to you and the others, just as they would during the session and give them feedback. The challenge should be concise and to the point so if it appears to be too broad or general, encourage the peer assistee to think about how it could be narrowed or focused. Let them know that the insights and ideas they receive tend to be more concrete if they are specific at least when their challenge is introduced.
- Set up the room in advance in 2-3 small groups of chairs, each around a flipchart. Try to place them as far away from each other as you can (for e.g., in the corners of the room). Try to keep all participants in the same room, if the size allows. You can do the introduction while in this setting and go straight into the rounds.

00:10

Session overview and introduction to the Peer Assist (Plenary)

After a brief outline of the session objective, introduce the peer assist method. This can be done verbally but may be complemented by the [Peer Assist video](#). The important points to convey include what is a peer assist:

- It is an event which brings together individuals to share their experiences and knowledge on an identified issue, challenge or problem
- The main objective is to help the "peer assistee" identify possible approaches or new lines of inquiry to deal with their challenge BUT peer assists also promote shared learning and develop contacts
- The issue, challenge or problem addressed needs to be real and faced by the peer assistee him or herself
- The method is based on brainstorming so all suggestions are legitimate and should be welcomed

Provide an overview of how a Peer Assist is organised:

- We split into small groups of no more than 8-10 people. Each group has:
 - A Peer Assistee: An individual or team embarking on a new project or facing a challenge open to ideas and new insights from his/her peers
 - A facilitator: A person who has met with the peer assistee ahead of time, understands their issue and is able to help move the conversation in a positive direction by taking notes, summarising the discussion person and bringing out ideas
 - Peer supporters: A group of 6-8 people who can contribute ideas and insights related to the new project or challenge at hand
- The Peer Assistee shares their issue or challenge. This could relate to a meeting, workshop or other event they have been tasked to organise. This should take no longer than 5 mins.
- The facilitator asks for any clarifying questions in order to better define the issue. Once all questions have been answered, the discussion will begin and the facilitator will help to move it along by capturing key points on a flipchart
- After 30 or so minutes, a noise ie. bell, clapping rings to mark the end of the first round. The facilitator and peer assistee move, along with their flipchart, to another group to start a second round

- Once in a new group, the peer assistee re-tells their challenge. The facilitator summarizes the main points that were raised, invites questions for clarification before building on ideas from the previous round
 - If time (and group size) permits, a third round can be held
- Before moving into the first Peer Assist round, ask if there are any questions for clarification

FACILITATION NOTES

It is important to prepare a peer assist beforehand, either the previous day, or in the morning/lunchtime of the same day (if the session is in the afternoon).

00:35

Peer Assist Round 1 (Small groups)

The Peer Assistee outlines their issue or challenge

Their facilitator can invite questions of clarification

Ideas, feedback, suggestions, etc. are solicited from the peer supporters

Facilitation notes

Walk around and see how things are going in the groups. If the peer assistee is talking too much or being defensive, or if the participants aren't talking, gently suggest to the facilitator ways they could effectively intervene. For example, the facilitators can ask for a tour de table (i.e. go around the circle). If the facilitator is being too directive or taking up too much space, you can take them aside quietly and suggest that they step back a bit to open up space for participant

Keep time and give the "10 mins left" and then "5 mins left" notice to facilitators (this can be on a sign that you flash in front of them)

Ring the bell, or let people know time is up and ask the peer assistees and their facilitators to move (if 3 groups, clockwise is often easier)

00:05

End of Peer Assist Round 1 (Small groups)

Remind the group what will happen:

- The Peer Assistee and the facilitator will move to a new group of peer supporters
 - In the next round, the peer assistee will re-tell their issue or challenge
 - Their facilitator will summarise the key points raised in the previous round and invite questions for clarification
 - Peer supporters will then be asked to build on the ideas of the previous round
- Invite the Peer Assistee and Facilitator to move to their new group (carrying with them their flipchart and notes)

00:30

Peer Assist Round 2 (Small groups)

The Peer Assistee re-tells their issue or challenge

Their facilitator summarises the key points raised in the previous round and invite questions for clarification

Peer supporters build on the ideas of the previous round

FACILITATION NOTES

See "Peer Assist Round 1" (above)

00:05

End of Peer Assist Round 2 (Small groups)

Very briefly remind the group what will happen:

- The Peer Assissee and facilitator will move to a new group of peer supporters
- In the next round, the peer assissee will re-tell their issue or challenge
- Their facilitator will summarise the key points raised in the previous round and invite questions for clarification
- Peer supporters will then be asked to build on the ideas of the previous round

You might want to let the group know that this is the final round for the peer assists.

Invite the Peer Assissee and the facilitator to move to their new group (carrying with them their flipchart and notes)

00:25

Peer Assist Round 3 (Small groups)

The Peer Assissee re-tells their issue or challenge

Their facilitator summarises the key points raised in the previous rounds and invite questions for clarification

Peer supporters build on the ideas of the previous rounds

Facilitation notes

See "Peer Assist Round 1" (above)

00:20

Debrief (Plenary)

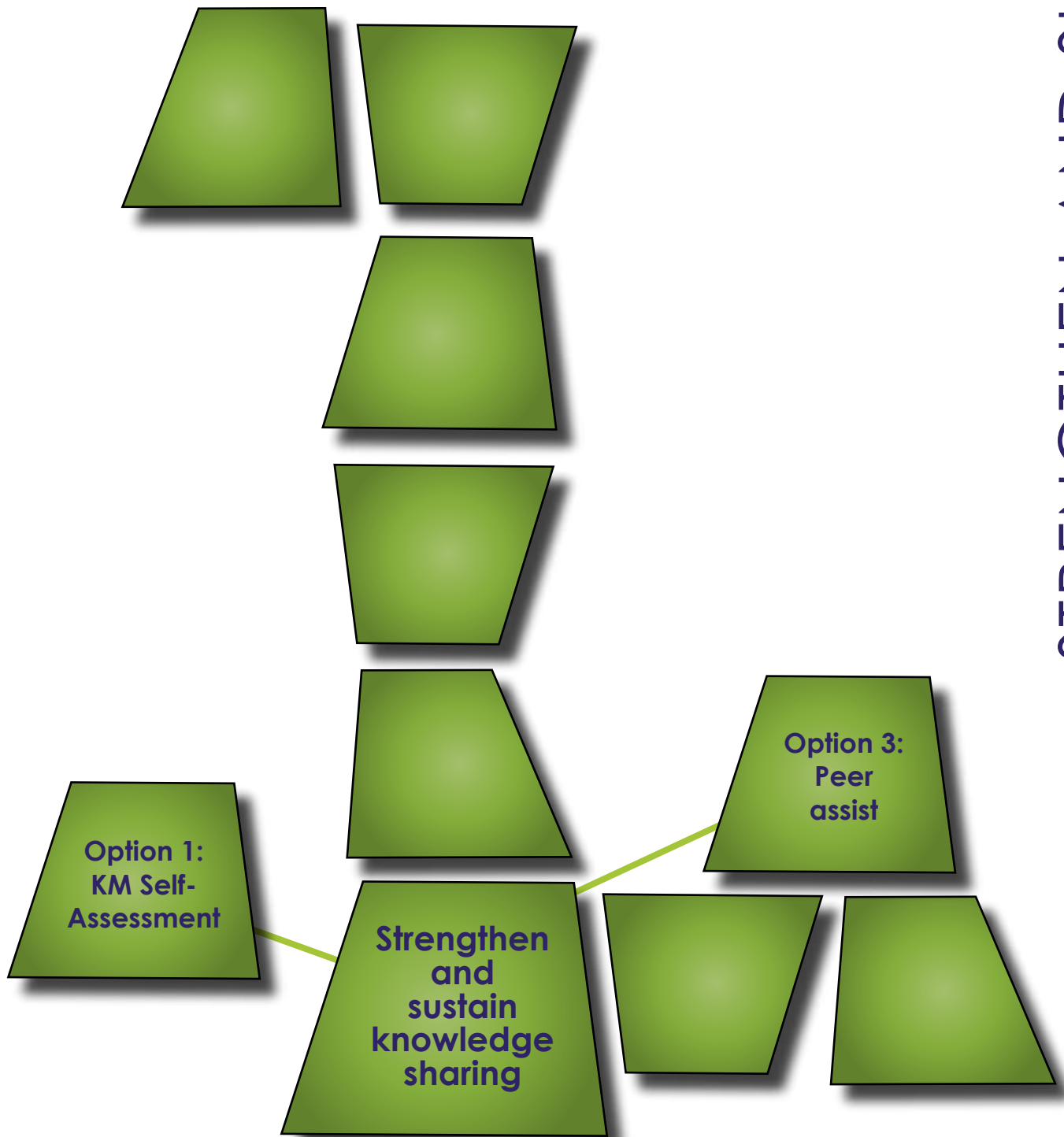
Generate spontaneous feedback on the peer assist as a KS methods

Questions could be directed to the different groups of participants:

- To the Peer Assissee: What was it like to be a peer assissee? Tell us one good idea you heard and that you would like to take forward in organizing your meeting/event?
- To the facilitators: What was it like as a facilitator? What worked well? What could have been done better?
- To the Peer Supporters: What was it like as a participant?
- To all: How would you see this method introduced into your own work?

Ask if there are any questions or points of clarification before bringing the session to a close.

KS ENTRY POINTS: STRENGTHEN AND SUSTAIN KNOWLEDGE SHARING



STRENGTHEN AND SUSTAIN KS

WHY IS THIS ENTRY POINT RELEVANT?

IFAD has been striving to introduce KM in its business processes through the corporate KM strategy and most country offices have done the same in their own context. While these documents are important to have, their existence does not ensure that knowledge sharing actually occurs, nor does it ensure there is a culture that actually promotes knowledge sharing. This needs to be developed over time and continually sustained through very concrete, integrated activities, which help to better understand and strengthen knowledge sharing.

Strengthening and sustaining knowledge sharing involves making sure that there is a common language and understanding of what it entails, as well as continuing to build awareness of which knowledge sharing behaviours nurture a KS culture. Ongoing assessment and reflection can contribute to these efforts.

WHAT ARE SOME OF THE COMMON CHALLENGES IN STRENGTHENING AND SUSTAIN KNOWLEDGE SHARING

Challenges include:

- KM strategies propose ways and means to share knowledge but how can you ensure the institutionalisation or embedding of KM or KS?
- Staff are often at a loss as there is often no platform to build common language, nor a framework to discuss knowledge management
- There are no benchmark to assess the level of KM maturity across a team, organisation or network
- Staff don't actually know how to integrate KS in their work, let alone sustain it

WHICH KS METHODS AND TOOLS CAN HELP STRENGTHEN AND SUSTAIN KNOWLEDGE SHARING

An entire workshop could be devoted to the topic of strengthening and sustain knowledge sharing. For the purposes of the curriculum, we have decided to introduce the topic through the following KS methods:

- Option 1: KM Self-Assessment
- Option 2: Peer assist (on integrating KS in IFAD business processes)

Other methods, drawn from the KS Toolkit, include:

- Appreciative Inquiry
- Experience Capitalization
- Most Significant Change
- Storytelling

ENRAP Related Experiences

A blog post by Nancy White on the corporate IFAD KM self-assessment process.

KM SELF-ASSESSMENT—SESSION OVERVIEW

Objectives

Introduce a KM Self-Assessment tool which can:

- help provide a common language and framework to discuss knowledge management
- establish a benchmark to assess the level of KM maturity across a team, organisation or network
- Familiarise participants with the tool so that they would be comfortable enough to facilitate a KM Self-Assessment exercise within their own project or team

Duration

- Session overview and introduction to the KM Self-Assessment - Plenary (10 mins)
- Reviewing and adapting the competencies - Small Groups (45 mins)
- KM self-assessment - Independent + Small groups (45 mins)
- Brainstorm on the potential applications - Groups of 3 (10 mins)
- Debrief on potential applications - Plenary (10 mins)

Total time = 2 hrs

Key learning points

- The process of assessing competencies can be as valuable, if not more, than the levels at which people assess themselves. It creates dialogue which can help negotiate meanings and clarify understandings.
- The tool can help identify areas of strength and area which need improvement. Once these are identified, the peer assist method could be used to generate new ideas and insights.
- Introducing the tool within an organisation or across a series of teams may require some sensitivity as it can surface disparities or differences across teams or work divisions. Always be clear how the tool will be used i.e. for learning and improvement. Consider acknowledging "most improved performers" who are tracked over time.
- The tool supports ongoing learning and reflection by providing a benchmark which can be referred to at key points in time.

Room set-up

Space for a variety of group sizes to work together. Tables are not essential.

Equipment and materials

Materials to create a wall size KM Self-Assessment matrix. See IFAD's [colourful example](#) which would require the following:

- print-outs of the competency levels descriptions (could be on letter size or half letter size paper)
- tape or blue tack
- markers
- stickers or sticky dots

Presentations/ handouts

[KM Self-Assessment matrix](#)

Resources

- [No More Consultants](#) by Geoff Parcell & Chris Collison
- [Learning to Fly: Practical Knowledge Management from Leading and Learning Organizations](#) by Chris Collison & Geoff Parcell
- [KM self-assessment](#) (in the KS Toolkit)
- [IFAD's experience with the KM Self-Assessment](#)

Aknowledge-ments

The KM Self-Assessment process described is based on the work of Chris Collison and Geoff Parcell developers of the [KM Self-Assessment framework](#) used by organisations for assessing strengths in KM. The authors kindly request that people contribute the results of their brainstorms to www.nomoreconsultants.ning.com so others can benefit too, either as a blog or as a discussion

[Nancy White](#) (Full Circle Associates)

[Roxy Samii](#) (IFAD)

Prior to the session:

Decide which of the competencies to include in the matrix. You may choose to include additional ones but it is suggested to focus on no more than 5. If you create new competencies, for example based on the KS entry points in this guide, you will need to identify the activities and behaviours you would expect to see at each level)

00:10**Session overview and introduction to the KM Self-Assessment (Plenary)**

Explain the session's objectives and how the session will unfold:

- Part 1: Each group will be responsible for reviewing, adapting and presenting one of the competencies within the *KM Self-Assessment matrix*.
- Part 2: Participants exchange stories which highlight examples of knowledge sharing being applied to their work. Referring to the self-assessment, they will assess the "KM maturity" levels of their story. A debrief will follow.
- Part 3: In groups of 3 then in plenary, participants will discuss potential applications of the KM Self-Assessment could be used within a project team or across an organisation

Ask if there are any questions on the process for the session

Distribute a copy of the *KM self-assessment matrix* to participants

Invite participants to form into the same number of groups as the number of competencies. If group size exceeds 6 people, have some of the groups work on the same competencies.

00:45**Adapting the competencies (Plenary)**

Explain how the competencies can be adapted

- Each group will be asked to review and discuss one of the competency areas of the self-assessment. Review the maturity level descriptions so that they resonate with the realities and context of the group.
- After 20 mins, each group should be prepared to present their competency area in plenary. They will have 3 mins to present.

Check to make sure that the process is understood before assigning each group a competency area and its related level descriptions

FACILITATION NOTES

- Suggest that the groups decide which team members will report back, record the changes to the competency area and track time before getting started
- Consider using the *speed sharing method* as a means to report back on the group work
- Post the modified descriptions on the wall size KM Self-Assessment matrix

00:45**Assessing KS experiences using KM Self-Assessment (Independent + Small groups)**

Outline the process for putting the KM Self-Assessment into practice:

- Participant will be given 5 or so minutes to think on their own about a time, in 2009, when they were successful in applying a knowledge sharing method or tool in their work. Who was involved? What happened? What challenges did they overcome? What was the result? What did they learn from the experience?
- In new groups of 4, participants will be invited to exchange their experiences.
- Once each member of the group had shared their story, they will identify which of the competency areas it relates to and assess its KM maturity level.
- Debrief on the process

Ask if there are questions about the process

Invite participants to take 5 mins to think about the experience they want to share. Suggest

that they jot down some of the points they want to convey. They should be prepared to share their experience in 3 minutes or less.

Invite the formation of groups of 4. Let groups know that they have 30 mins to exchange their stories, identify the competency areas and assess maturity levels.

Use the remaining time (which should be around 10 mins) to ask participants about their experience of identifying competency areas and levels of KM maturity

FACILITATION NOTES

Create a flipchart or other visual (such as a slide or handout) that list the questions they are being asked to address in their knowledge sharing story.

Suggest that someone in each of the groups take responsibility for tracking time—allocating approximately per person 3 minutes to tell their story and 5 minutes to identify the competency area and level.

00:10

Brainstorm on the potential applications of the KM Self-Assessment (Groups of 3)

Invite the formation of groups of 3 to discuss ways in which they see the KM Self-Assessment and associated exercise put into practice. What are the opportunities? What would be some of the challenges? How could they see the results being used?

Let them know that they have 10 minutes for their discussion before sharing some of their ideas in a plenary debrief

00:10

Debrief on potential applications of the KM Self-Assessment (Plenary)

Using a flipchart, capture ideas emerging from the group discussions:

- What are the opportunities?
- What would be some of the challenges?
- How could they see the results being used?

Since this is a brainstorming session, all ideas emerging in plenary should be supported.

After participants have suggested potential applications, provide them with a concrete example of how the *KM Self-Assessment has been used within organisations such as IFAD*. In IFAD's case, staff were able to come up with an overall rating for each level based on the shared experiences and then agreed on which KM competencies to improve in the next 12 months.

Ask if there are any questions or points of clarification before bringing the session to a close.

Acknowledge the source of the KM Self-Assessment- attributed to Geoff Parcell and Chris Collison in their book "Learning to Fly: Practical Knowledge Management from Leading and Learning Organizations."

FACILITATION NOTES

The assessment could be used at an individual, team or organisation level. The value doesn't come so much from the results, but the discussion and debate that emerge as the exercise unfolds.

It is important that people not see the exercise as a race to the top of the scale, but rather notice where they are, where they want to be and what improvements will help them get there.

It is easy for judgement to cloud people's thinking. For example, low competency levels shouldn't imply that an individual, team or organisation is bad in a particular competency but that they need to learn something new. Also, it isn't necessary to be at the top level in all of the competencies all of the time. What matters now?

The assessment can be used to identify the spread in strengths across teams or individuals. This could feed into a discussion on areas and ways in which knowledge and skills could be transferred.

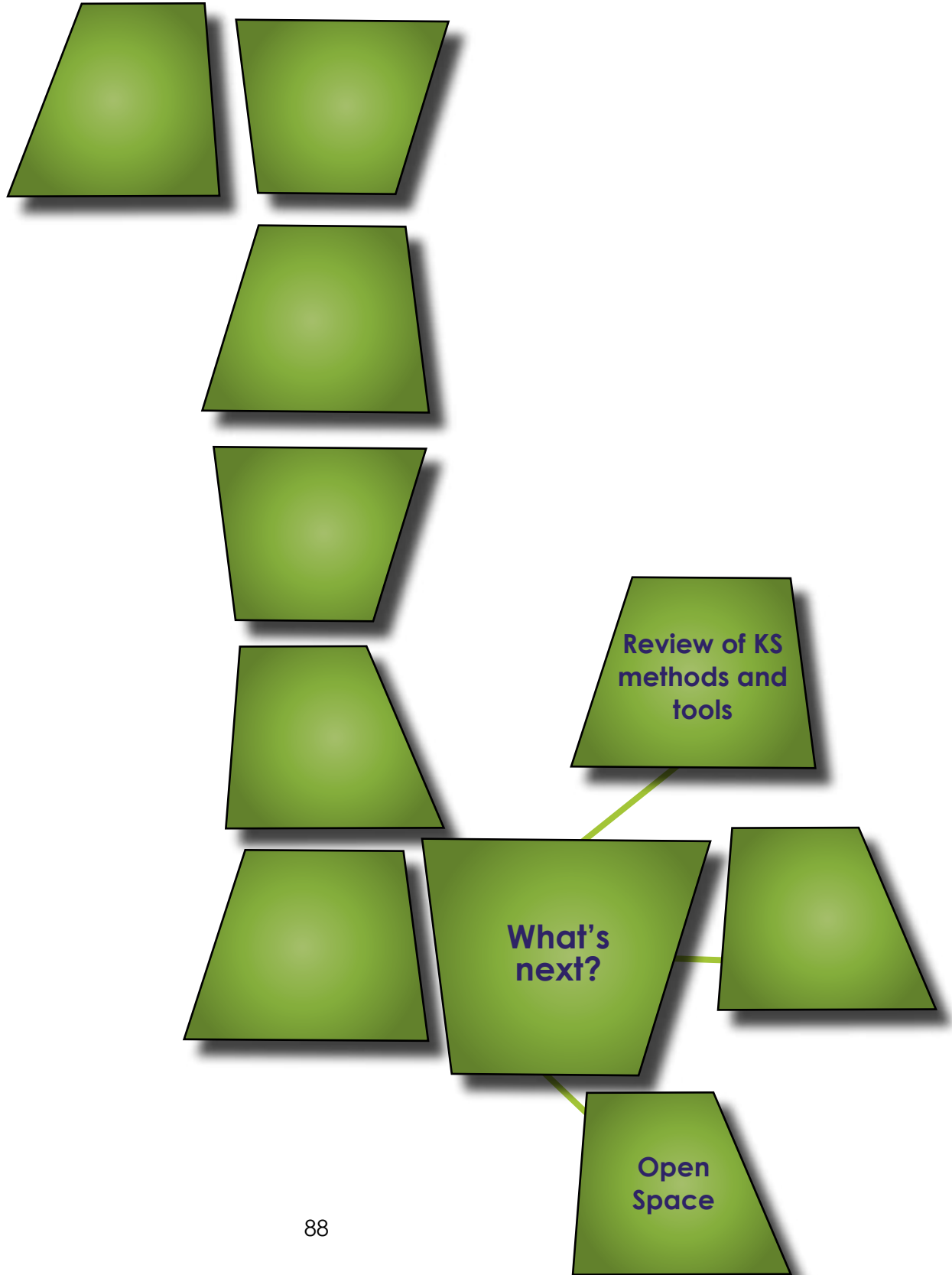
OPTION 2: PEER ASSIST

In small groups, identify possible approaches on new lines of inquiry to address challenges related to the integration of knowledge sharing methods and tools in IFAD business processes.

Refer to the Session Overview and Process and Facilitation Notes on pages 77-80.

WHAT'S NEXT?

WHAT'S NEXT?



REVIEW OF KS METHODS AND TOOLS—SESSION OVERVIEW

Objectives	Review the methods and tools covered in the workshop
Approach and timing	<ul style="list-style-type: none"> • Session overview and introduction to the exercise - Plenary (5 mins) • Card sorting and review - Small groups (20 mins) • Session close - Plenary (5 mins) <p>Total time = 30 mins</p>
Key learning points	This session is intended more as a refresher covering the methods and tools introduced in the workshop and what they are best suited for. It also tends generate a bit of energy in the room.
Room set-up	Space for groups to lay out cards - can be on a large table but the floor tends to work best.
Equipment and materials	<ul style="list-style-type: none"> • Each team of 4 requires its own set of cards. Each set should have a card for the following: <ol style="list-style-type: none"> 1. Every KS method and tool covered in the workshop 2. The entry point associated with each method and tool 3. What the method or tool is best suited for • This document provides a possible list of cards to be created. To facilitate the exercise, choose three different colours for the cards representing the KS methods or tools cards, the entry points and what the methods and tools are best suited for. For a visual of what this looks like, check out this photo posted in flickr. • A prize, that can be shared across all teams but given to the quickest and most accurate group, is a nice offering
Presentations/handouts	None
Resources	None
Acknowledgements	None

00:05

Session overview and introduction to the exercise (Plenary)

Briefly outline the session's objectives

Invite groups of 4 to form

Explain how the exercise works.

- Each group will be given a set of cards.
- Within each set, there are 3 categories of cards ("KS methods and tools", "KS entry points" and "Best suited for...") grouped according to 3 different colours.
- For each KS method or tool, groups have to associate the corresponding workshop entry point and what they are best suited for.

FACILITATION NOTES

Mix each set of cards before handing them over to the groups so that they aren't already ordered in some way.

The exercise is fairly intuitive - minimal instructions should be needed

You can introduce a healthy level of competition by offering a prize to the first group who finishes AND correctly matches the cards.

00:20

Card sorting and review (Small groups)

Groups work to match the cards

Once a group has completed the matching, review their work (as most tend to have at least 1 card, if not more, incorrectly matched)

00:05

Session close (Plenary)

If the exercise was done as a competition, present the "prize" to the winning team

Before closing the session ask if there are any questions

OPEN SPACE—SESSION OVERVIEW

Objectives	<p>Introduce the open space methodology as a means to identify activities or ideas participants would like to pursue.</p>
Approach and timing	<ul style="list-style-type: none"> • Opening circle - Plenary (25 mins) • Discussion rounds - Small groups (2.5 hrs) • Discussion highlights - Plenary (15 mins) • Closing circle - Plenary (20 mins) <p>Total time: 3.5 hrs</p>
Key learning points	<ul style="list-style-type: none"> • This is a modified version of open space condensed for demonstration purposes. Meetings or events using open space tend to last anywhere between 1.5 and 3 days and have accommodated up to thousands of participants • Open Space is an effective approach to meeting or workshop design as it allows participants to build their own agenda based on issues and ideas that are important to them. Choosing the theme for the event is an important step to ensuring that the theme is one that people really care about • Open Space invites participants to take personal responsibility for what they want to have happen. It is important that the facilitator - the person who opens the space—let go of any perceived control especially in organising sessions and discussion groups. • Open Space shouldn't be used when the outcome is already determined, there is little scope for change, or when the organiser isn't willing to share leadership responsibilities
Room set-up (30 mins to 1 hr is required)	<ul style="list-style-type: none"> • Main circle with the same number of chairs as participants (see room set-up) • Discussion topic stations: Circles of chairs centered around a flipchart (& markers) set up and numbered around the room • A marketplace wall. You will need to help people identify where and when their discussions will take place. This could be done on post-it notes which include the discussion topics start and end times and a number which corresponds to the discussion topic station. Alternatively, you could create a matrix on the wall. Numbers across the top indicate the discussion topic station and time slots down the side indicate the discussion topics start and end times. • Marketplace wall and signage • Coloured markers (15+) and sheets of paper in the centre of the circle. Leave a few sheets of paper and a couple of markers on an empty chair or raised platform to assist those who are unable to bend down • A computer station with internet access. A handful of computers should be available so participants are able to document their discussions in the wiki.
Equipment and materials	<ul style="list-style-type: none"> • blue tack / masking tape (whatever you can use to stick paper to the wall) • markers • 4 flipchart stands and paper • A4 paper
Presentations/handouts	<ul style="list-style-type: none"> • Discussion report templates • On flipcharts or signage posted to the wall, post the theme, the 4 principles of Open Space as well as the Law of Mobility large enough so that they can be read from the other side of the room (see OS Principles and Law)

SESSION OVERVIEW

Resources

It is strongly suggested that before hosting an open space event, *Open Space Technology: A User's Guide, Revised and Expanded* (3rd edition) by Harrison Owen is read. The following resources will also be helpful in planning and hosting an OS event:

- [Lisa Heft's website](#)
- [Open Space World](#)
- [Open space methodology](#) (outlined in the KS Toolkit)

Aknowledgements

Thanks to [Diane Gibeault](#) for sharing documents such as the room set-up and principles.

TIMING

PROCESS AND FACILITATION NOTES

Prior to the session:

Prepare the room—See above (30 mins - 1 hr)

- Ensure that you have time to set-up the room. Part of it could be done the previous evening but a break is generally not often enough time to arrange the room especially as tables need to be removed.
- Take the time to practice the opening circle. Do a dry-run. Ask your co-facilitator or a trusted colleague to listen and provide some feedback.
- If needed, write out talking points on a sheet of paper and don't worry so much about referring to them during opening circle.

Consider running an exercise that would have participants review the KS methods and tools covered during the workshop. ([See Option 1: Review of KS Methods and Tools](#)). There are several benefits we have seen in conducting this kind of exercise. The visual representation provides an impressive overview of the amount of material covered in a relatively short period of time. By identifying what the methods and tools are best suited for, the exercise also serves to reinforce learning.

00:25

Opening circle (Plenary)

Welcome participants

State the theme of the session i.e. "Incorporating KS methods and tools into our projects: What are the ideas and issues we want to explore?"

Describe how the process will unfold:

- Momentarily, they will be invited to the centre of the circle to pick up a marker and a piece of paper on which they can jot down a few words that describe the topic they would like to discuss. Remind them that they should also include their name along with the 3-4 word topic title.
- Before making their way to the Marketplace wall, they will introduce themselves and announce their topic to the group. No explanation is needed.
- At the wall, they will choose a time and a station where the discussion will take place. (Note: Some additional information could be given on how the wall has been set-up i.e. as a matrix or post-it notes)
- Once they have chosen a discussion time and station, they are invited to return to their seat to listen to other topics as they are announced. If they want, they can post more than one topic.

Opening circle (Plenary) continued

- Once all of the discussion topics have been shared, the group will be invited to the wall—their agenda—where they can choose which sessions they would like to join.

Explain that the initiator of the discussion topic i.e. the person who proposed the topic is responsible for ensuring that the key points need to be documented in the wiki before the end of the day. Suggest that they take to their discussion session a [hardcopy version of the discussion report template](#).

Re-assure people that if they are confused, they will quickly catch on especially if they choose to take on the [4 principles of working in open space](#):

- Whoever come are the right "people"
- Whatever happens is the only thing that could have
- Whenever it starts is the right time
- When it's over, it's over

Open space is about taking responsibility for what you want to happen. The law of mobility can help ensure that this is the case. Everyone is invited to adopt the law which is essentially about deciding where they want to be. For example, if a conversation isn't going the way they want or thought it should go, they can say something constructive to move it forward or move to another group or discussion that is more meaningful to them. This law creates two kinds of behaviours—the bumblebees and butterflies. Bumblebees tend to move from group to group, carrying the ideas or noticing patterns, or cross-pollinating as they go. Butterflies tend to be social—not necessarily joining one group but sticking near the coffee pot or in the hallway having conversations with a range of people. If at times you notice that you are a bumblebee or butterfly, know that your contributions are just as valid.

Briefly remind them how the process will unfold.

Instead of inviting questions, let them know that they are now welcome to reflect on the OS event's theme. After restating the theme, invite them to identify and share and ideas or issues they would like to explore.

Give some time for topics to emerge. If things slow down quickly, suggest that they reflect on the topics that have come up so far. What's missing for them?

When you have a sense that all topics have emerged, let them know that the marketplace wall is always open if someone wants to post a topic over the course of the event.

Provide a few reminders (which could also be documented on a flipchart):

- The principles and law of mobility
- The importance of documenting the discussions' key points in the wiki so that they can be shared with others
- The time at which they are expected back in the circle i.e. 5-10 minutes after the end of the last scheduled discussion round
- Back in circle, they will be invited to, briefly, say a few words (less than 2 mins) about their discussion. Specifically, what they intend to do and what is their immediate next step

If there are chairs or other items blocking the wall, ask the group to help move them so people can easily see the marketplace before inviting them to move to the wall and create their agenda for the session.

When it's over, it's over.

FACILITATION NOTES

Create a sample discussion topic page and hold it up when explaining what they are being invited to do

Try not to rush the generation of topics or get involved in discussions on what should or shouldn't be posted

Try not to intervene by taking full control of the session. Encourage personal responsibility. Open space works provided people care about the topic. If you feel it absolutely necessary to do more because the environment isn't ideal i.e. short time frame, not necessarily a topic that is passionate to most participants etc., you could provide a few prompts or encouragement to help get things moving

Sometimes participants think (and point out) that everyone needs to identify a topic so it is helpful to stress that the session isn't about identifying every topic imaginable but rather topics that people really care about and want to take responsibility for discussing and documenting.

As they announce their topics, provide them with a copy of the [discussion report template](#).

Rather than scheduling an official break, arrange for drinks and snacks to be brought in at the start of the discussion rounds and be refreshed over the course of the session

02:50

Discussion rounds (Mixed sized groups)

Participants self-organise taking part in discussions of interest to them

FACILITATOR NOTES

During the first discussion round, create wiki pages corresponding to the discussion topics posted on the Marketplace Wall. Create the pages using a standardised [page template](#) which includes the same information as in the [discussion report template](#)

The intent is that the group takes responsibility for what happens. So, if someone tells you that something should be happening and asks you to do something about it, you could remind them of the principles and law of mobility.

You might be interested in visiting a session in progress, but try not to get hooked into the group. They are responsible for their own facilitation.

People often leave cups and plates on the floor. Picking them up gives you something useful to contribute and saves unnecessary spillage when cups which haven't been emptied get knocked over. "This is not just to ensure a clean and uncluttered physical environment but is one way in which you can rove around and keep your "feelers" out for what is happening while being engaged in legitimate work." (Michael Lindfield)

Arrange the chairs, if needed, to convene back in circle for the next

00:15

Discussion highlights (Plenary)

Remind the group that they will have an opportunity to briefly highlight (in 2 mins or less) any actions that resulted from their discussion groups - specifically what they intend to do and what is their immediate next step.

Ask for someone who wants to go first. Have others follow.

FACILITATION NOTES

Note that report backs are not typical of OS events. Reporting is done in a "Book of Proceedings" - in this case, the wiki, where topics are expected to be documented and shared with others. In typical events, participants would have the opportunity to read through the "Book of Proceedings" before being invited into a final round of open space to identify any ideas to take forward. As mentioned above, the OS process has been modified so that it can be introduced and discussed as method within the KS Curriculum

It may be necessary to keep an eye on the time. Find ways to keep the report back to less than 2 mins i.e. ask participants to track time for each other

Remind the group that if their discussions haven't already been documented in the wiki that they need to be done by the end of day

00:20

Closing circle (Plenary)

Explain the purpose and the process of the closing circle:

- "The closing is an opportunity to reflect not only what has been accomplished but also the manner in which it took place – thereby opening up some space for deeper learning about Open Space, and more importantly the force which lies behind it, Self-organization." —Harrison Owen
- Each person will have an opportunity, if they like, to say a few words about their experience

Lead the closing circle with a question such as "What did you notice about the time spent in open space? How was it different than other ways in which you worked together?"

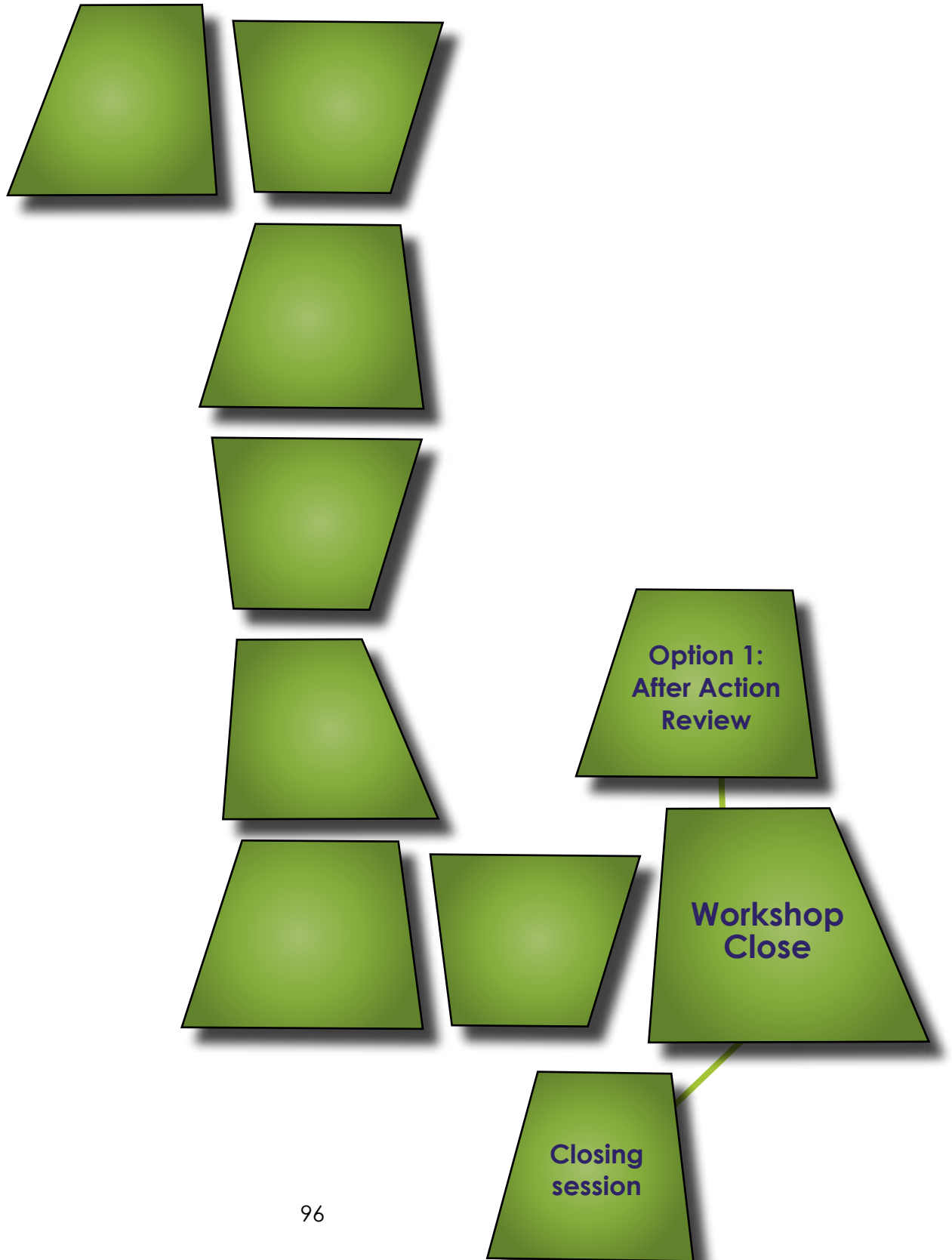
FACILITATION NOTES

In a typical OS gathering - especially those run entirely in OS - a sponsor or the event's host would be involved in the opening circle by acknowledging any constraints or topics off limits and highlighting their support behind the ideas which emerge. Before the closing circle, they might also wish to say a few words of thanks. This would also be an appropriate time to invite any announcements from the sponsor/participants and complete evaluation forms i.e. before closing circle reflections

The closing circle could be done by passing around a talking piece—an object that might have meaning for the group and their gathering. Let them know that the holder of the talking piece has the privilege of being listened to without interruption. With that privilege, they also have the responsibility of leaving time and space for others.

WORKSHOP CLOSE

WORKSHOP CLOSE



AFTER ACTION REVIEW—SESSION OVERVIEW

Objectives	<ul style="list-style-type: none"> • Introduce the After Action Review (AAR) as a means to capture specific recommendations to improve future workshops • Start bringing the workshop to a close
Approach and timing	<p>In plenary:</p> <ul style="list-style-type: none"> • Distribution of workshop certificates and group photo (10 mins) • AAR, or After Action Review (20 mins) <p>Total time = 130 mins</p>
Key learning points	<ul style="list-style-type: none"> • The After Action Review (AAR) is method used to help identify learning moments from past successes and failures with the goal of improving performance. It doesn't seek out who to blame for things that didn't go well or who to praise when things went well but carried out with an open spirit. • An AAR is a group process guided by a set of reflection questions. They can be short and frequent or more extended and in-depth explorations • The AAR could complement an evaluation form or replace it depending on what you are seeking to learn
Room set-up	<p>Ideally, participants are seated in a large circle of chairs. As this session often follows the introduction of the Open Space method, the chairs should already be arranged in a circle so only minor adjustments would be needed.</p>
Equipment and materials	<p>Flipchart stand and paper 2-3 coloured markers</p>
Presentations/handouts	<p>Workshop certificates (if appropriate)</p>
Resources	<p>For the After Action Review:</p> <ul style="list-style-type: none"> • After Action Review as outlined in the KS toolkit. • See the section Learning After in this guide • "Learning to Fly" by Geoff Parcell and Chris Collison. Available in bookstores.
Aknowledge-ments	<ul style="list-style-type: none"> • Geoff Parcell and Chris Collison for sharing the AAR • Diane Gibeault for sharing Closing Circle

TIMING PROCESS AND FACILITATION NOTES

00:10	<p>Distribution of workshop certificates and group photo (Plenary) The creation and distribution of workshop certificates was introduced in response to several requests made by participants. Consider taking a group photo if one hasn't been done already.</p>
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TIMING PROCESS AND FACILITATION NOTES

00:20 **After Action Review (Plenary)**
 Conduct an AAR. Note that the steps are outlined in the section [Learning After](#).

Facilitation notes
 Decide whether or not an evaluation form is required in addition to (or as alternative to) the AAR. What do you need to learn? Will the AAR and/or an evaluation serve your learning needs?
 Note that many participants are exhausted after a workshop. If at all possible, conduct the AAR once people have had a break and time to reflect on the workshop but within 2 weeks so that their memories are still somewhat fresh. If that isn't a possibility, try to keep it short by asking them to reflect only on three questions:

- What worked well? Why?
- What could have been better? Why?
- If there was one thing that should be done differently to improve future workshops, it would be..."

Consider using an alternative format to plenary. For example, participants could discuss the questions in small groups documenting the discussion themselves on cards or flipcharts. The papers could be collected and the recommendations shared in plenary.
 If you find that the recommendations provided to improve future events are quite broad, ask them to make them more concrete - possibly using an example or illustration.

CLOSING SESSION—SESSION OVERVIEW

Objectives	<ul style="list-style-type: none"> • To close the workshop in an inspirational and participatory way
Approach and timing	<p>In plenary:</p> <ul style="list-style-type: none"> • Announcements (10 mins) • Thanks (5 mins) • Closing circle (20-25 mins) <p>Total time: 35-40 mins</p>
Key learning points	<ul style="list-style-type: none"> • Even if some parts of the workshop don't go as well as expected, the closing circle is usually overwhelmingly positive • Allowing everyone to have their say (or not, if they choose) is very important for closure
Room set-up	Circle of chairs (no tables)
Equipment and materials	A "talking object" (can be anything, for e.g. a decorative object, a marker, etc.)
Resources	See the session on after action review for a lengthier reflection on all aspects of the workshop.

00:10

Make any announcements (Plenary)

Deal with any remaining logistics
Open the floor for announcements

00:05

Thanks (Plenary)

Take the time to acknowledge all of the workshop contributors including participants. It is suggested that this be done before the closing circle to increase the likelihood that final comments can focus more on the experience.

FACILITATION NOTES

Decide who is best placed to thank all of those who provided practical support around the workshop. It may be a senior colleague or workshop host.

00:20

Closing circle (Plenary)

Let participants know that the closing circle is a time to share comments about the workshop. They can be observations, "Ah, ha!" moments, how they felt about the experience, what they have seen or learned - whatever they would like to say to their peers before they leave. Introduce the talking piece, if being used. Let people that if nothing comes to mind when it is handed to them, they are free to pass it along to the next person.

Suggest that they avoid planning a speech and instead listen to what others are saying.

Pass the talking piece. When the piece comes back to you, say whatever you feel is appropriate to bring the workshop to a close.

FACILITATION NOTES

Decide ahead of time what you would like them to share in closing circle. Often is best placed to thank all of those who provided practical support around the workshop. It may be a senior colleague or workshop host.

Consider using a talking piece. This can be any object - even a marker that people tend to adopt as a microphone. Explain that the holder of the talking piece has the privilege of being listened to without interruption but with that privilege comes the responsibility of leaving some time and space for the others.

LEARNING BEFORE, DURING AND AFTER

An important feature of the KS methods and tools workshop is its adaptability, which allows considerable flexibility and a high degree of responsiveness. Participants' feedback obtained before, during and after the workshop is crucial to ensure that the workshop is meeting (or has met) their needs and identify how they intend apply these new skills.

Participant feedback can be collected in a variety of ways. The following offers ideas on concrete approaches to elicit and capture this feedback before, during and after the workshop.

LEARNING BEFORE

There are two aspects to learning before a KS methods and tools workshop:

1. As a relatively new facilitator, you might want to learn from others who have experience in designing and delivering KS methods and tools workshops. Consider holding a peer assist to tap into these experiences before moving too far into the design of the workshop.
2. Learning about participant needs is an important step in the agenda design. This topic of how to assess participant needs is covered to some degree within the section on "Workshop Preparations". An assessment can help get a sense of what is most important for participants, however, as eluded to earlier, they also come with a set of limitations. Other approaches, which tend to be more time intensive, can result in a draft agenda that best balances learning outcomes, needs and expectations:
 - Face-to-face or phone interviews: One-on-one informal but directed conversations, using a series of questions, can be very useful to get more detailed feedback. Because interviews allow you to probe for greater depth or explanation, simple yes/no questions or fixed-response questions are not advised. Interviews allow participants to express their thoughts using their own words and are valuable for gaining insight for workshop design. You should prepare a few questions in advance (see Needs assessment questions) but also let the conversation flow and pick up on the reponses that need more probing.
 - Focus group: Basically focus groups are interviews, but of a group of people at the same time (maximum 5-6 works best). They are a very useful tool for collecting more detailed information in order to design the workshop and probe into people's views. They allow you to investigate the potential effectiveness and usefulness of the workshop, while delving into more complex "group" behaviour issues.

LEARNING DURING

Learning during a workshop allows you to respond and make adjustments as you go based. An environment in which people feel comfortable to offer ideas and suggestions for improvement needs to be created for participants but also you, as workshop facilitators. You might want to remind the group of the goal for learning during—to improve future performance—which isn't limited to the activities and behaviours of the workshop facilitators but participants as well. You might also provide suggestions on how to provide constructive feedback—having a specific action to recommend can help.

Here are a few reflection exercises that could support learning during a workshop:

Morning news

You can start the day in the chair circle and ask participants if they have anything they would like to say, any thoughts, ideas or impressions that came to them in the evening or overnight, or any suggestions they would like to make to maximize their learning experience. This very simple session can take 5-10 minutes and is a good way of collecting participant feedback, as well as starting the day.

Evening news

The day ends as it began, with participants seated in a circle of chairs. Depending on the time you have and the energy level of the group, you can do a variety of things:

- Repeat the same exercise as in the Morning news session
- Do a quick [After Action Review](#) type of exercise (i.e. what went well today? What could we improve for tomorrow?)
- Circulate a “talking object”. This can be anything you have on hand (e.g. a marker). You can ask participants for a phrase, or a word, that summarizes how they feel, or what they thought of the day. The significance of the talking object is that the person who holds it is the only one who gets to speak. If participants do not wish to say anything, they can just pass it on to the next person in the circle. For additional information, refer to the Closing Circle outline within the [Workshop close](#) section.

It is useful to capture feedback—possibly on a flipchart—generated through these short but reflective exercises. If you cannot capture all of it, try to retain the comments that provide ideas and suggestions on how to improve the workshop. With a bit of tweaking, you can hopefully introduce some changes that can make the workshop better for all participants.

“Democracy wall”

Another simple means of collecting feedback is through creating a space in the meeting room that can be called the “democracy wall” (or any other name that would be culturally appropriate). The advantage of creating this space is that it allows participants who would not normally speak up, or who would be concerned to appear to criticize, to post a note anonymously. By leaving markers and cards/paper on hand at all times, participants can write their comments and post them when there is no one in the room.

Facilitator reflections

As mentioned in the section outlining [facilitator roles](#), working with one or more co-facilitators can be challenging—especially if you aren't yet familiar with their strengths and style. During the workshop, possibly at the end of the day over a well deserved drink, provide each other with constructive feedback. Together, identify specific actions that you might take on to improve your workshop delivery. To help get the conversation started, you could brainstorm on the set of [After Action Review](#) questions:

- What did you set out to achieve? What actually happened? Why were there differences?
- What worked well? What could have been better?
- What can be done to improve tomorrow?

LEARNING AFTER

What you want to learn with respect to designing and delivering a KS methods and tools workshop should be identified in the planning stages of the initiative. This allows the maximum amount of time possible to develop a learning plan including methods for collecting and analysing relevant information. This plan should also take into consideration existing M&E agendas tied to a greater KS strategy—under which, we assume this workshop falls.

That is the ideal scenario. In real life, however, learning after a project or event - especially workshops are often isolated exercises conducted through a brief, and often uninformative, evaluation. As a result, this guide promotes a process that supports ongoing learning—before, during and after the event.

There are several ways to promote learning after the event. Try to be clear with participants about the purpose of the exercises suggested below—what will you do with the outcomes, how will any comments made by participants be reflected in any official documentation, how does the information feed into a broader KS strategy etc.

After Action Review (AAR)

One of the best ways to obtain final participant feedback is through an [after action review](#) (AAR). This exercise can take as little as 20 minutes and up to 40 minutes—though it is recommended that when carried out at the end of a workshop, it does not exceed 30 mins as participants are generally exhausted.

Here are some tips for carrying out a successful AAR (adapted from Parcell and Collison's book *Learning to Fly*):

1. Hold the AAR immediately. AAR's are carried out immediately whilst all of the participants are still available, and their memories are fresh. Learning can then be applied right away, even on the next day.
2. Create the right climate. The ideal climate for an AAR to be successful is one of openness and commitment to learning. AARs are learning events rather than critiques.
3. Appoint a facilitator. The facilitator of an AAR is not there to 'have' answers, but to help the team to 'learn' answers. People must be drawn out, both for their own learning and the group's learning.
4. Ask 'what was supposed to happen?' The facilitator should start with the workshop objectives.
5. Ask 'what actually happened?' This means the group must understand and agree on facts about what happened.
6. Now compare the objective with reality. The real learning begins as the participants compares the plan to what actually happened in reality and determines 'Why were there differences?' and 'What did we learn?' Identify and discuss the things that worked well and those that didn't work as well.
7. Record the key points. Recording the key elements of an AAR clarifies what happened and compares it to what was supposed to happen. It facilitates sharing of learning experiences within the group and provides the basis for broader learning for organizers, who may need to hold such a workshop again.

Workshop evaluation

An evaluation could be carried out at the end of a workshop but it should be made clear to participants what and whose purpose it serves. In other words, who are the intended users of the evaluation and what are its intended uses. One of the major drawbacks of an evaluation is that, unlike the AAR, there is often ambiguity in feedback provided and if the evaluations are carried out anonymously, no opportunity to clarify.

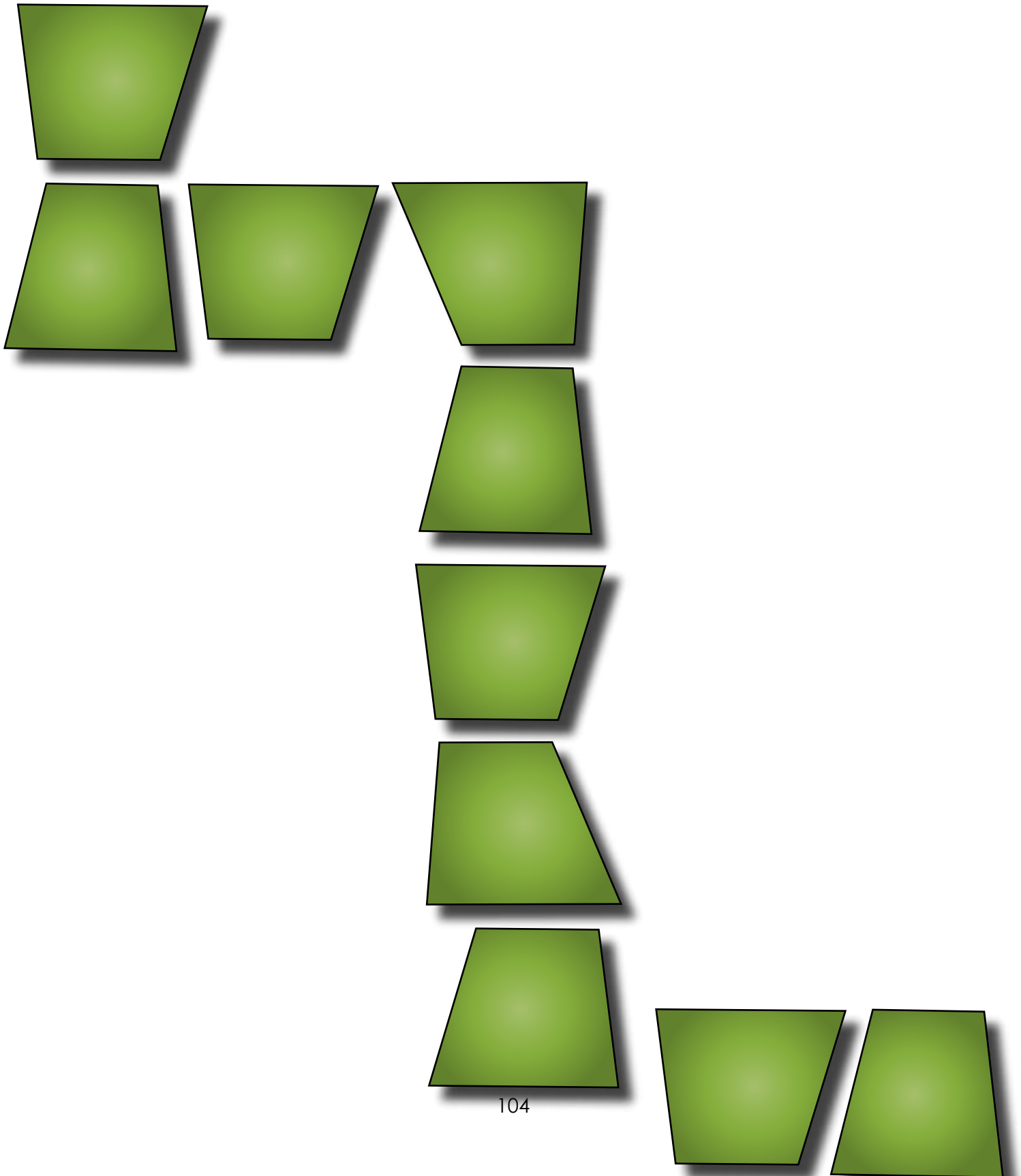
Post-training interviews

Post-training interviews, conducted three to six months after training, is an appropriate way to measure impact of training, particularly retention and changes in skills, attitudes and ways of working. They can be conducted using forms (which allows for a level of anonymity) but more interactive methods, such as interviews or focus group discussion, are more informative (and more time consuming) but can help understand the opportunities and constraints participants faced in applying their learning.

Mentoring/coaching

Even more time intensive—but ultimately very effective - is personal coaching or mentoring of individual participants post-workshop. This entails a longer-term, hands-on approach where the "coach" or "mentor" and the learner seek to further develop the KS skills. This approach can be more informal (i.e. on a case-by-case level), or formalized through a plan with learning objectives.

WORKSHOP
RESOURCES



WORKSHOP PRESENTATIONS, HANDOUTS & DOCUMENTS

List of Presentations, Handouts and Documentation

The following table provides a list of presentation slides, handouts and documentation related to a specific KS method or tool. Click on the links to access the resources in the ENRAP KS Curriculum wiki.

METHOD/TOOL	PRESENTATION, HANDOUTS & DOCUMENTS
Chat Show	Chat show Methodology
Facilitation Skills	Facilitation Skills: Presentation slides The Role of Facilitator by Sam Kaner and Duane Berger
Jumpstart storytelling	Jumpstart Storytelling: Presentation slides
KM Self-Assessment	KM Self Assessment Matrix: Developed by Chris Collison and Geoff Parcell
Open Space	Open Space room set-up Open Space principles Discussion Report Template (Flipcharts)
Peer Assist	Peer Assist tips
Social Network Mapping and Analysis	Network Mapping Homework.doc Network Mapping Exercise—Questions.doc ENRAP SNA report by Patti Anklam
Speed Sharing	Sample definitions (of lessons learned, best practices, case studies)
Video Storytelling	Video Storytelling: Presentation slides
World Café	World Café: Presentation slides Café to Go: A guide to the World Café

ADDITIONAL DOCUMENTATION

The following presentations and documents are also listed as workshop resources—but not tied directly to a specific KS method or tool:

- Participant profile template: To collect and share participant information prior to the workshop
- What is KS? and KM within IFAD projects Presentation slides for the session “Workshop Opening”
- Review of KS methods and tools (a sample): A resource for the session “What’s next?”

ENRAP RELATED EXPERIENCES

The following experiences related to the KS Entry Points were shared by KFs.

STRENGTHENING RELATIONSHIPS AND NETWORKS

The Coconut Wireless Story contributed by Vikash Kumar, Knowledge Facilitator, Pacific Islands

"In rural areas where most of our work is based in, it is often hard to relay messages of program activities, field visits and upcoming events due to poor communication infrastructure and isolation. In such situation how does someone pass messages and receive replies? One way of relaying messages is through coconut wireless! In essence people connection.

The coconut wireless method essentially relies on passing messages via 'people' who have frequent contacts on both the receiver and sender ends.

The following steps outline the process of successfully establishing this method.

- *Identify the people who travel in and out of the community frequently. Paying particular attention to shop owners, Preachers, boat crews, Bus/ truck drivers to these areas, boarding school children who travel home in the weekend from town, extension officers etc. Bus drivers make good messengers!*
- *Take some time out to visit and talk to these people. Establish good relationship with them and explain properly so that they understand and feel the importance of doing this work.*
- *Talk to the people in the community. Identify who is the "Whitehouse person" in the community. A 'Whitehouse person' is someone who is always up to date with what is happening in the community. It's much like the Whitehouse in USA which is always aware of world affairs! This person will be able to relay the message to the right people and to all people in essence.*
- *Make a connection between the traveler 'bus driver' and the 'Whitehouse person.' It will be a surprise if that connection is not already there!*
- *The Traveler is given message through telephone or a local town person where the traveler visits often (a member of the community who is living in a local town makes a excellent hub). The Traveler carries the message to the community and via the 'Whitehouse person' gets it to the right people. The Traveler also receives messages from the "Whitehouse person' to be passed on to the office. Even documents can be passed through this way.*

Some general tips:

- *Allow plenty time for the message to travel to and from.*
- *Make sure the local town hub clearly understands the message. Get them to write it down.*
- *Keep the messages simple and concise to minimize misinterpretation.*
- *Always verify with the people when you visit the community on what messages they had received so that any misinterpretation can be corrected to avoid later conflicts.*
- *Keep a record of all messages sent for future references."*

CAPTURING AND DISSEMINATING LESSONS LEARNED, CASE STUDIES AND GOOD PRACTICES

Capturing Lessons during Supervision Reports contributed by Chase Palmeri, IFAD KM Facilitator for Asia-Pacific

"I have an experience in that we did a review of supervision reports in 2008 to see if they captured lessons learned during supervision. We found that they did not really do so well. Then we made some changes and recommendations to supervision reports with respect to their format, and we introduced an element of structure to the conversations that CPMs have in the form of weekly peer review of supervision reports. As a result there was some improvement in capturing lessons in supervision reports, but not much."

GENERATING AND SHARING LESSONS LEARNED, CASE STUDIES AND GOOD PRACTICES

Involving mid-level staff in best ("good") practice contributed by Niaz Ahmed Apu, Knowledge Facilitator, IFAD Bangladesh

"It was planned at the knowledge sharing workshop at Bangkok, organized by ENRAP, that at Bangladesh we will initiate knowledge sharing process through mid-level staffs of projects that supported by IFAD. It is anticipated that senior level project management has different forum that enable them to share activities as well as progress of the projects.

While I initiated the discussion with a small forum consists of mid-level representatives from different projects, it was difficult to get them understand what Knowledge sharing is all about. Some of them considered that they have been doing it already; what new KS activities can contribute. On the other hand some considered that they have little knowledge about the activities of the projects, even within the project functioning of different components have not been well communicated across the staffs, especially to mid or field level staffs. Some also raised question if KS is required at all for all staffs. Question was also raised how it would contribute to achieve the goal of the project. Who will do it? Some were a bit concern on the legal aspect: 'It was not planned in the project document- how it would be supported? It is a donor driven concept; give us plan and budget we will implement, etc.' In one stage senior management had suggested to provide additional manpower resource (minimum) to carry out the KS activities. They could not think beyond the customary idea of doing things, rather what is important is to strengthen the existing system, has not been acknowledged. It is an issue of mind-set."

"Given the circumstances, considering the limited resources, we had proposed to initiate lesson learning (so far) workshop for mid-level project staffs on best practices across projects. A lesson learning exercise is a common things that held always at the end of the project and limited within senior management. Our proposal was what was unique in our proposal is to involve mid-level staffs of the projects who actually implement the activities; and it was planned to share the achievements while projects are at different stages of implementation- not at the end of the project' period. Interestingly, the debate of what is KS and what is not, when programme lunched for the KS sharing of the project achievements. There had been a consensus that it could be possible with limited resources."

Reflexions on older generations sharing with the younger contributed by Ankita Handoo, KM Specialist, IFAD India

"India has a very strong oral tradition. A lot of the indigenous knowledge and useful information related to farming, agriculture, health etc. gets passed on generation after generation through oral recitations in the form of tales, stories and songs. Facilitating life stories from village elders in relation to their natural resource and surroundings along with historical transact helps to elicit indigenous and traditional knowledge."

On capturing the knowledge of elders (storytelling): "India has a very strong oral tradition. A lot of the indigenous knowledge and useful information related to farming, agriculture, health etc. gets passed on generation after generation through oral recitations in the form of tales, stories and songs. Facilitating life stories from village elders in relation to their natural resource and surroundings along with historical transact helps to elicit indigenous and traditional knowledge."

DESIGN AND FACILITATE BETTER MEETINGS AND WORKSHOPS

An alternative to World Café: Using the Round Robin method in a workshop contributed by Anura Herath, CPO and Knowledge Facilitator, IFAD Sri Lanka

"Lando (CPO Philippines) and I completed a supervision mission on one of the projects in Sri Lanka. Usually we hold a stakeholder workshop at the end of the mission with all the stakeholders, project officers and implementing agencies and the beneficiaries. We present our results and recommendation for their verification. Usually this was done as a seminar and having a floor discussion and then include the comments into the Aid memo before the wrap-up.

This time we use an adapted version of Round Robin. We had 4 tables and 4 hosts. Each got a section from the Aid Memo to read and comment. Then we had 4 rounds each table moving to the other and host explaining the experience and comments on the findings. So all participants (about 50) had a chance and time to know all about the Aid Memo and to comment and agree / disagree with all the Aid Memo findings. It was a very good knowledge sharing opportunity and all participated fully. The participants were very happy that all had a chance of commenting on all the sections of the Aid memo.

Lessons:

- Careful selection of the host. Selecting a dynamic and open person.
- Educating the host before the session and giving a guide line.
- Providing a good overview of the importance of sharing."

Strategies to mix participants during the workshop and keep them until the end contributed by Ankita Handoo, KM Specialist, IFAD India

In the India experience, it has been observed that during some of the sessions, there is a tendency to form peer groups, especially among the senior staff. In a mixed group, this sometime leads to tacit friction and discomfort not resulting in an interactive learning and sharing session. Moreover, where government officials are concerned, there is a need to follow protocol (based on hierarchy/seniority). To address these issues, we have in the past tried to form groups with similar interests and work area and later have a plenary with all the participants presenting their discussion points and everyone is encouraged to suggest or recommend actions to the discussion points being highlighted during the presentations.

Strategies to attract: One of the ways to attract people to stay back till the end of the meeting is to plan the field visit on the last day of the workshop. It has been observed (based on our experience) that most often people do like to visit the field. Alternatively, the field visit could be planned one day before the workshop ends and it should contribute in the last day's sessions.

ICEBREAKERS

What is an icebreaker? An energiser?

According to wikipedia, an icebreaker is defined as “a facilitation exercise intended to help a group to begin the process of forming themselves into a team. Icebreakers are commonly presented as a game to “warm up” the group by helping the members to get to know each other. They often focus on sharing personal information such as name, hobbies, etc.”

People tend to use the words and the activities associated with icebreakers and energisers interchangeably, however, energisers are less about helping the group begin the process of forming groups into teams. As the word implies, they have more to do with generating energy (and often accompanying laughter) within the group.

When might you consider using one? When to avoid them?

Some people love icebreakers and energisers while others can't stand them. This should be taken into consideration if you are thinking of introducing either into your group work. They should always be optional—allowing individuals to watch from the sidelines.

You might consider introducing an icebreaker if it is a common practice for the group with whom you are working. We have noticed that in some countries, like the Philippines, there is almost an expectation that they are included in any group gathering while in others, they seem to be foreign (but none the less appreciated).

Icebreakers can be used to support group introductions—in helping people get to know each other a bit better. One can often tell when an energiser might be useful—glazed over or spacey looks on people's face (noticeable usually after lunch) are giveaways.

We would suggest avoiding icebreakers that require physical contact as they can create levels of discomfort irrespective of culture.

Sample Icebreakers and energizers

Click on the links below to find detailed information about possible icebreakers and energizers to introduce in a KS workshop such as the objectives, space requirements, room set-up, material and equipment needs as well as an outline of the process.

- [Bingo matrix](#)
- [Group clustering](#)
- [Human evolution](#)
- [Reverse charades](#)
- [Spectrogram](#)
- [Strong wind blows](#)
- [Tagging](#)

ENRAP KS WORKSHOP—DRAFT V2

*Bhubaneswar, Orissa – July 15 - 17, 2009***Day One – Wednesday July 15 (9.00 - 17.00)**

Welcome, participants introduction and workshop overview

In this session, participants and workshop facilitators will get to know each other better through introductions. We will also provide an overview of the workshop which will cover the following:

1. Knowledge Sharing: What do we mean? What frameworks are useful?
2. How do we: Strengthen relationships and networks
3. How do we: Capture and disseminate knowledge especially through the innovative application of ICTs
4. How do we: Generate lessons learned, case studies, best practices and change stories
5. How do we: Design and facilitate better meetings, event and workshops
6. How do we: Develop a KS culture
7. Making connections
8. What's next?

Knowledge sharing: presentation and discussion

Following an icebreaker, we will go into a presentation on knowledge sharing and its components will be introduced and validated by workshop participants.

Some of the elements covered:

- Differentiating data, information and knowledge
- Clarifying the difference between a tool and a method
- Why share knowledge? (i.e. the benefits)
- KS self-assessment framework
- Knowledge sharing success factors

Introduction to the blog and wiki

This session will be used to introduce the workshop blog and wiki as the spaces to capture and document the workshop.

How do we? Strengthen RELATIONSHIPS and NETWORKS

Purpose: This session's purpose is to introduce social network mapping as a tool to visualize focal point networks and support discussion on how they can be strengthened. Using paper, pens and post-it notes, participants will create an informal map and then discuss it with others workshop participants to see the diagram from another's point of view. This exercise allows participants to get a better understanding of their diverse relationships and KS paths, to visualize the linkages that are already strong and find those that need strengthening or building.

Description: Using flipchart paper, Post-it notes and markers, we will lead participants step-by-step through an exercise which they will first do individually, lasting 40-45 minutes. When the map is done, participants will be asked to analyze it and see where relationships are strong and where they are weak or need and write down observations (10-15 minutes). Then, over the course of the next hour, participants will meet in groups of three to provide feedback to each other maps.

Outputs:

Each participant will have a map of their relationships as focal points to help inform their strategy for working with and sharing knowledge

Outcomes:

- An understanding of each other's maps through small group discussions
- An understanding of how social network mapping can be used to build and strengthen relationships

WORKSHOP PREPARATION: Network mapping exercise (instructions to be sent to workshop discussion list on Thursday July 2)

How do we? Capture and disseminate lessons learned, case studies, best practices and change stories

Purpose: To encourage participants to use different tools in order to capture lessons learned, case studies and best practice giving attention to the challenges in doing so. These tools will use electronic means to capture text (e.g. in the workshop blog), visuals (e.g. photos) and video/audio (e.g. record of their lesson learned/story).

Description: In teams, participants will have to answer scavenger hunt questions that will lead them to using the workshop blog, wiki and digital cameras to capture and disseminate photos and videos.

Outputs:

- Results from the scavenger hunt captured in the blog and wiki

Outcomes:

- A sense of the variety of media that can be used for capturing what people know
- An increased ability to capture and disseminate what people know

Evening News (15 mins)

To give time and space for any announcements and reflections on the work done over the course of the day. May consider doing an After Action Review depending on how the day unfolded.

Day Two – Thursday July 16 (9.00 - 17.00)

Morning News

To give time and space for any announcements that need to be made. Reflections on the work done to date will be made provided they were not done at the end of Day One.

An overview of the day's agenda will be given.

How do we? Generate lessons learned, case studies, best practices, change stories

Purpose: To support discussions on the differences between these types of project outputs, why they are important, how they are identified and what makes them effective. The challenges of generating these outputs and possible ways to address them will be identified.

Description:

- Discuss differences between the types of project outputs and why they are important
- Talk show with three guests who can talk to the process of identifying and capturing lessons learned, case studies, best practices and/or change stories
- Participants to go through the process of generating their own output

Outputs:

- A matrix highlighting the differences between lessons learned, case studies, best practices and change stories
- Factors that contribute to an effective product
- Individual outputs generated

Outcomes:

- An increased understanding of what drives the need to capture these outputs and an appreciation of the challenges in doing so

WORKSHOP PREPARATION: Participants are expected to bring with them project experiences. These may include a lessons learned, a best practice identified or a change story related to their area of work that came about because of the project being in place. Participants who have recently joined a project may need to do additional work to identify these lessons, practices or stories by talking to key staff involved in the project.

How do we? Design and facilitate better meetings, event and workshops

Purpose: The purpose of this session is twofold:

1. Differentiate between meeting types (interactive and unstructured vs dissemination and structured)
2. Discuss meeting design and technologies which would be suitable for each meeting type

Description:

- World Café inviting participants to exchange experiences in organising successful gatherings and the factors that contributed to doing so
- Outline 4 different kinds of meeting types and why these are important to consider when planning a meeting and thinking through a documentation process
- In 4 groups (organized by meeting type), participants make a case to use alternative meeting approaches and tools to capture outputs

Outputs:

- steps to plan a face-to-face meeting (or event)
- list of approaches and tools that can support knowledge sharing in meetings (or events)

Outcomes:

- increased understanding of the considerations when planning, facilitating and documenting meetings

Evening News

To give time and space for any announcements and reflections on the work done over the course of the day.

Day Three – Friday July 17 (9.00 - 17.00)

Morning News

To give time and space for any announcements that need to be made. Reflections on the work done to date will be made provided they were not done at the end of Day One.

An overview of the day's agenda will be given.

Nurturing a KS Culture

Purpose: To introduce a knowledge management self-assessment tool as a means to reflect on and discuss ways in which a knowledge sharing culture can be nurtured.

Description: There is no easy recipe for nurturing a KS culture so this session can realistically only begin to address the topic. Participants will be invited to explore which behaviours are representative of a KS culture. Using the knowledge management self-assessment tool as a reference, individuals working in small groups will exchange their views on how the 5 components (KM strategy, Leadership behaviours, Networking, Learning before, during and after and Capturing knowledge) could contribute to nurturing a KS culture.

Outputs:

- Identification of behaviours representative of a KS culture
- Ideas on how the components of the KM self-assessment tool could support nurturing of a KS culture

Outcomes:

- A deeper understanding of the components to explore for nurturing a KS culture

Making connections (time permitting)

Purpose: To make more explicit the linkages between KS within projects, among projects and within the portfolio.

Description: This is dependent on a couple of factors: (1) sufficient time and (2) the identification of challenges faced by individuals at three levels—project, among projects and within the portfolio. The peer assist process would be used to address the challenges—specifically to identify new ideas and insights to be explored.

Outputs:

- Ideas and insights to address the challenges

Outcomes:

- Participants are exposed to another KS approach – the peer assist - and would be comfortable introducing it as a methodology in a meeting/workshop

What's next?

Purpose: To identify areas or components for building sustainable knowledge sharing mechanisms within the projects

Description: Using the open space methodology, participants will be invited to explore issues and opportunities for building sustainable knowledge sharing mechanisms within their own projects

Outputs:

- Key discussion points captured around each idea and issue
- Prioritization of topics

Outcomes:

- People attached to actions that they are interested in moving forward

Workshop Close

Purpose: To bring the workshop to a close by encouraging time and space for reflections

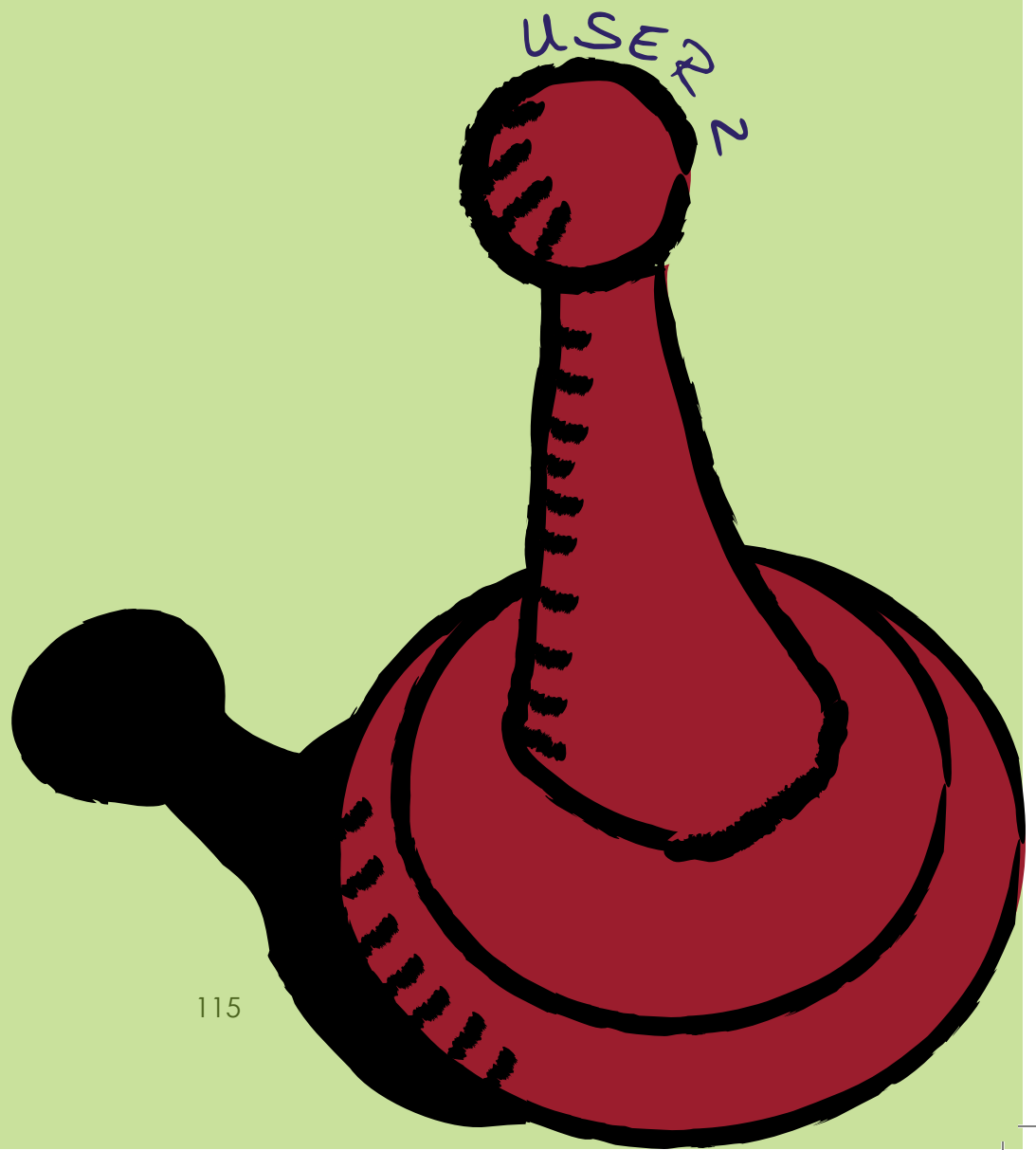
Description: This session will be designed based on the remaining time in the workshop and energy level of the group but will likely involve a reflection on the workshop and main takeaways as well as an evaluation or after action review (AAR).

Outputs:

- Individual reflections and key learnings
- Recommendations for future KS workshops

Outcomes:

- A sense of how participants benefited from their involvement in the workshop



INTRODUCING A METHOD OR TOOL DURING A MEETING OR WORKSHOP OR A FOCUSED KS SESSION

User 2 wants to introduce and possibly develop capacities in the use of KS methods and tools but doesn't necessarily have the resources i.e. time, capacity and finances to design and deliver a full KS workshop program and provide ongoing support post-workshop. S/he:

- sees the integration of KS methods and tools into a meeting, workshop or event as a way generate interest and awareness in KS
- would be comfortable organising a mini-KS workshop i.e. possibly between 2-4 hrs to introduce a couple of methods or tools as an activity within a larger KS strategy
- is comfortable identifying relevant and appropriate KS entry points for their context and related methods and tools
- is not necessarily trained as a facilitator but understands process having previously facilitated groups of various sizes
- recognises the work as an opportunity to enhance their own facilitation practice prior to the delivery of a KS Methods and Tools workshop.

PREPARATION

What do I need to think about?

1. When introducing a method or tool during a meeting or workshop or a focused KS session, the most important thing to consider is purpose: what are you trying to achieve in this session?

There are many methods or tools you can use but they may not be best suited for what you are trying to accomplish.

For example, a [chat show](#) is a great method when scene setting, or wanting an alternative approach to panel discussions. It isn't a good approach if you are trying to encourage a conversation, or brainstorming, among small groups of people in which case you might want to consider [World Café](#).

You might want to look at some of the methods and tools listed in [this document](#) and the third column, where you can see what they are "best suited for".

2. If you are organizing a mini-training on a specific KS method or tool, you will need to consider your own context very carefully. The sessions in this Guide are linked to the five Entry-point contexts. For example, the [World Café](#) session is built on questions regarding [designing and facilitating better meetings and workshops](#). You may need to adapt the material substantially. You can read more about this in [How do I use the guide?](#)

Also, how you invite participants to your session is key to managing their expectations. It is advisable to be very clear on the purpose as well (for e.g. "introducing a new KS method to colleagues in order to discuss topic X").

What have others done?

Some of the participants trained in KS workshops have started to use the methods in the scope of their work. Here is an example of an [alternative approach to introducing KS methods and tools](#) by Ankita Handoo, KM Specialist, IFAD India.

Since the January 2009 Share Fair held at FAO headquarters in Rome, both IFAD and FAO are doing short (2 to 3 hours) capacity building sessions for their staff on KS methods and tools. It is hoped that the session description and facilitators notes contained in this guide can support the work of those tasked with delivering the trainings.

How do I use the guide?

As “User 2” of this guide, you are interested in the stand-alone use of a method or tool. As mentioned, the purpose of what you are trying to achieve in using this method or tool is key.

For each of the individual KS methods and tools selected, we recommend that you read carefully through the “Session Overview” information and the “Process and Facilitation Notes” and the accompanying resource material (if any). Each session concludes with a “Plenary debrief”; you may wish to keep this or not, depending on the purpose of your session.

Please note that the approach and timing should be adapted to meet the needs of the group with whom you work as well as your own approach to facilitation. The very detailed step-by-step, minute-by-minute approach is there to refer to, if you need it. It SHOULD NOT be followed to a tee. Also note that the lengths of the sessions are generous estimates—based on working with a group size of 15 - 25 participants. If you are working with a smaller group, you will likely require less time—perhaps closer to 75% of what's suggested.

The sessions are developed in the context of the five workshop Entry-points, therefore some of the session content may also need to be adapted to your needs. You are also encouraged to tailor the content to your own requirements.

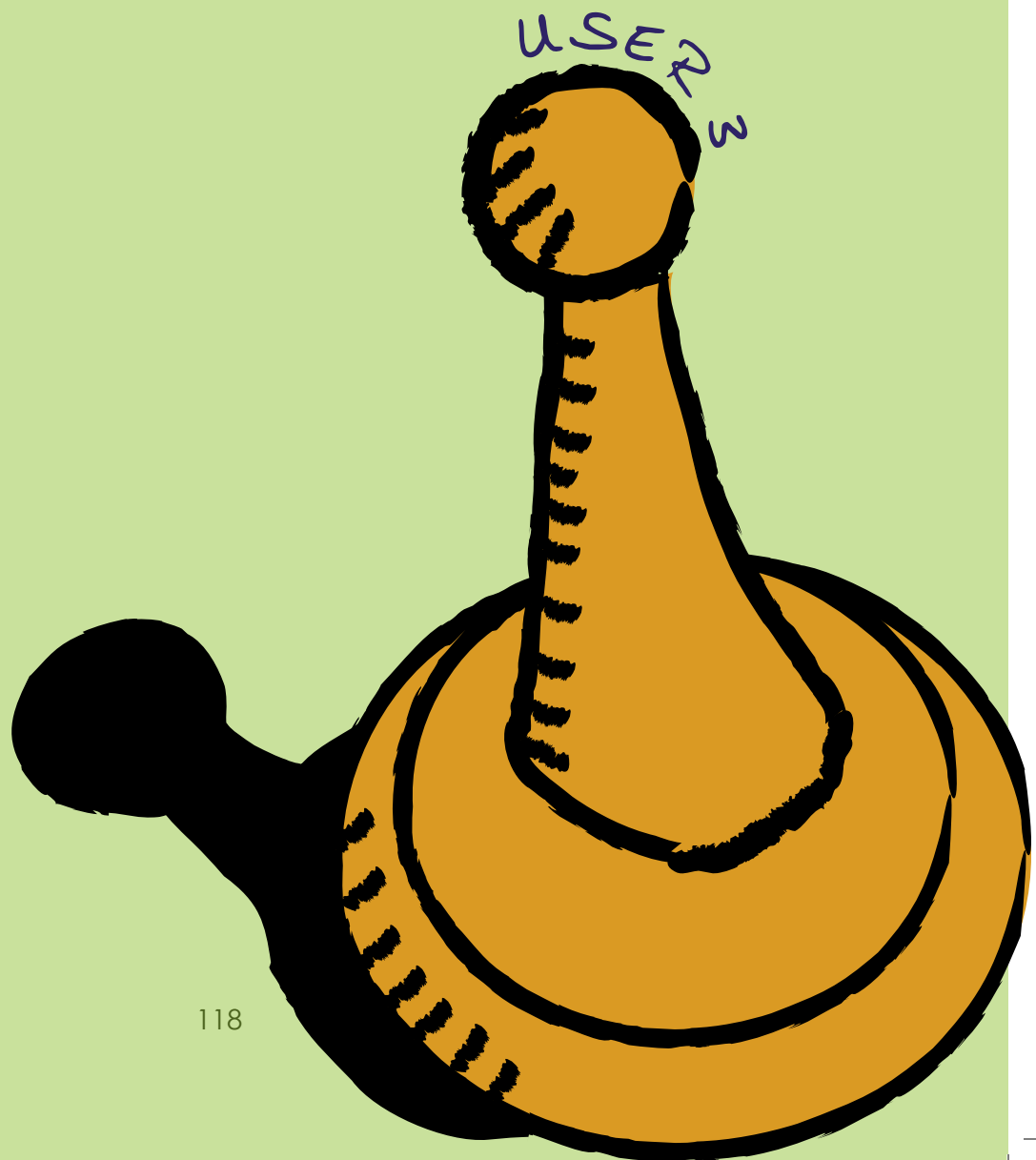
OPTIONS

Methods

- Social Network Mapping and Analysis
- Speed sharing (for reporting back on small group work)
- Chat show
- Jumpstart Storytelling
- World Cafe
- Facilitation Skills
- Peer assist
- KM Self-Assessment
- Open Space
- After Action Review

Tools

- Tools treasure hunt
- Video storytelling



USER 3: USING KS METHODS AND TOOLS TO ENHANCE WORK

User 3 is simply interested in the integration of KS methods and tools to enhance their work.

PREPARATION

How would I integrate KS tools in my work?

A lot of the KS methods and tools in this guide can be easily embedding into “routine” work processes. They can be used to start discussions with your colleagues, reflect on what you've been doing as a team and share experiences and good practices.

Integrating them in your work life is often just a matter of inviting people and doing it. For example, before starting a project or activity which might pose some concrete challenges, you can invite your colleagues to join you in a [peer assist](#). After an event or a workshop that you were involved in organizing, you can invite the other co-organisers to an [after action review](#) to reflect on what worked well and what could have been done better in order to improve next time around.

To find out more about how people are integrating KS methods and tools in their work, take a look at the “Examples and stories” sections under each individual entry in the [KS Toolkit](#). You can also find the contact emails of colleagues who can tell you more on how they do it.

How do I use the guide

As “User 3”, you are interested in KS methods and tools but just looking for potential applications to your work. Like for User 2, the purpose of what you are trying to achieve in using this method or tool is key.

For each of the individual KS methods and tools selected, we recommend that you read carefully through the “Session Overview” information and the “Process and Facilitation Notes” and the accompanying resource material (if any). Each session concludes with a “Plenary debrief”; since your immediate goal is not to build capacity of your colleagues, this reflection is probably not needed.

Also like User 2 but perhaps on an even bigger scale, you will need to adapt the sessions in terms of approach and timing. The very detailed step-by-step, minute-by-minute approach is there to refer to, if you need it. It SHOULD NOT be followed to a tee. Also note that the lengths of the sessions are generous estimates—based on working with a group size of 15 - 25 participants. If you are working with a smaller group, you will likely require less time—perhaps closer to 75% of what's suggested.

The sessions are developed in the context of the five workshop Entry-points, therefore you may also need to adapt the content substantially. Out of all of the intended Users of this Guide, you are the most likely to tailor the methods and tools to integrate them to your own environment.

OPTIONS

Methods

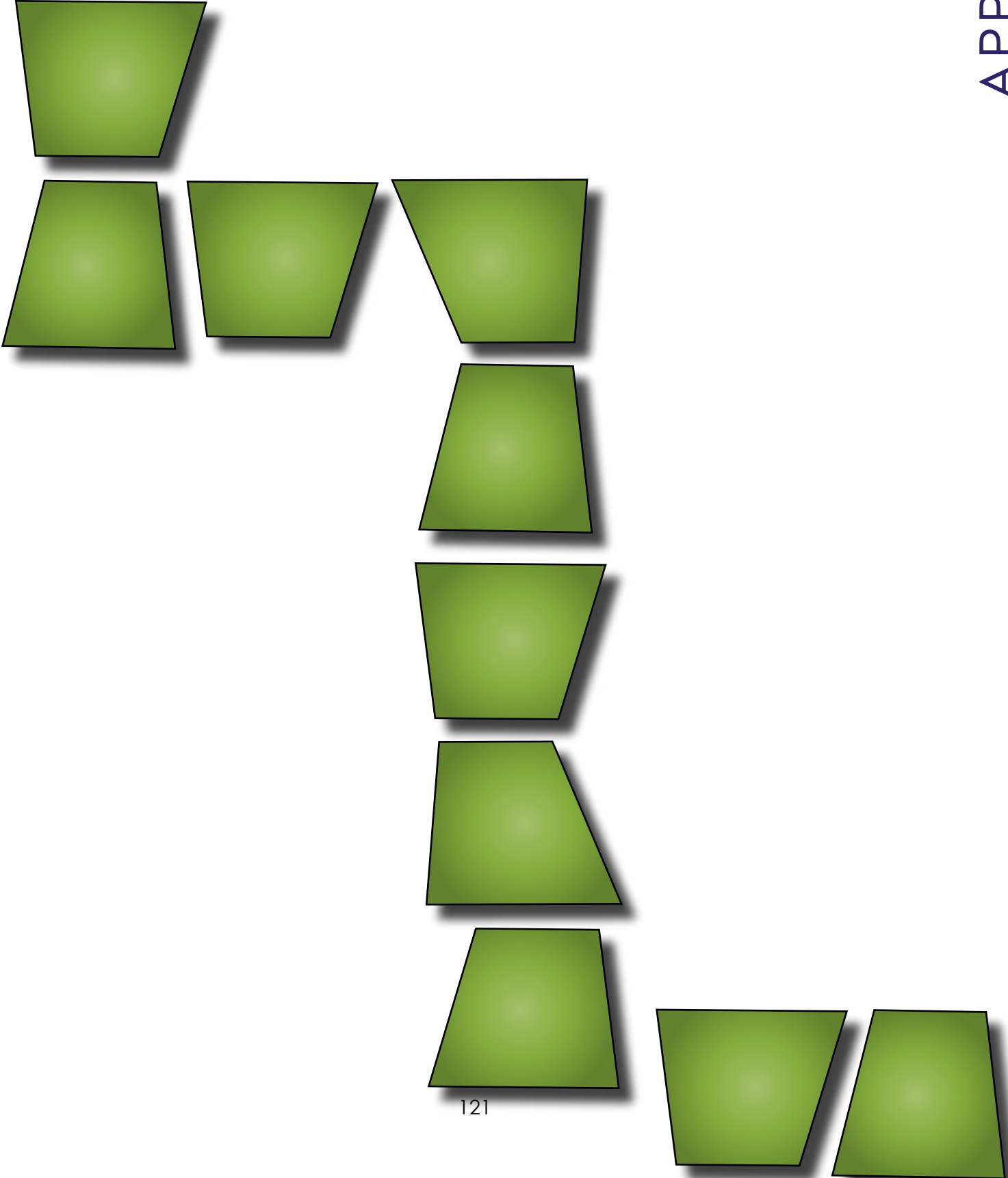
- Social Network Mapping and Analysis
- Speed sharing (for reporting back on small group work)
- Chat show
- Jumpstart Storytelling
- World Cafe
- Facilitation Skills
- Peer assist
- KM Self-Assessment
- Open Space
- After Action Review

Tools

- Tools treasure hunt
- Video storytelling

APPENDICES

APPENDICES



LIST OF ACRONYMS

APR	Annual Performance Review (at IFAD)
CPM	Country Programme Manager
CPO	Country Programme Officer
ENRAP	Knowledge Networking for Rural Development in Asia-Pacific Region
IDRC	International Development Resource Centre
IFAD	International Fund for Agricultural Development
KF	Knowledge Facilitator (at IFAD)
KM	Knowledge Management
KS	Knowledge Sharing

WHAT IS ENRAP?

Currently in its third phase, ENRAP is a joint initiative of IDRC (International Development Research Center) and IFAD (International Fund for Agricultural Development). It is designed to enhance knowledge sharing to reduce rural poverty in the Asia-Pacific region. This is being accomplished through promotion of knowledge-networks amongst IFAD projects and partners and by suggesting ICT applications that have proved successful in improving rural livelihoods.

As a core element of its activities, ENRAP supports capacity to use social media tools for improved knowledge sharing amongst IFAD projects and partners. Initial sessions with IFAD's country focal points in late 2008 led to an enthusiastic response resulting in use of the social media tools at key IFAD events as well as the request to train project staff across countries. Since then, for lack of availability of suitable off-the-shelf materials on the subject, much work has gone into creating materials (mostly related to training) to suit IFAD needs and to explore suitable ways ahead.

The experience evolved into a plan for developing curriculum to be used to train IFAD project staff. This plan included an initial workshop of KFs to validate the direction of the curriculum, conducting a pilot to validate the structure and content of curriculum and the finalising of the curriculum prior to the completion of the ENRAP initiative at the end of September 2010.

International Development Research Centre (IDRC)

IDRC is a public corporation created by the Parliament of Canada in 1970 to help developing countries use science and technology to find practical, long-term solutions to the social, economic, and environmental problems they face. Support is directed toward developing an indigenous research capacity to sustain policies and technologies that developing countries need to build healthier, more equitable, and more prosperous societies. (www.idrc.ca)

International Fund for Agricultural Development (IFAD)

IFAD is a specialised agency of the United Nations that was established in 1977 as an international financial institution. IFAD's goal is to empower poor rural women and men in developing countries to achieve higher incomes and improved food security. Since its inception, IFAD has financed over 550 projects in 115 countries, the main focus of which has been the improvement in productivity of on and off farm activities. (www.ifad.org)

This publication has been funded by Canada's International Development Research Centre (www.idrc.ca) and the International Fund for Agricultural Development (www.ifad.org) as a component of the ENRAP initiative (www.enrap.org).

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Enabling poor rural people
to overcome poverty



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