One Planet network

Knowledge Management Training

May 2019
What is knowledge?

The Columns of Knowledge, Vienna 2008
Fundamentals of Knowledge Management
Knowledge Management is

- a targeted, integrated, and systematic approach

- to identifying, acquiring, creating, sharing, applying, and capturing knowledge,

- relevant to achieving the specific objectives of OPN.
Knowledge Management Process

- Knowledge goals
- Measuring knowledge
- Identifying knowledge
- Capturing knowledge
- Acquiring knowledge
- Applying knowledge
- Creating knowledge
- Sharing knowledge

Flowchart description:
1. Knowledge goals → Measuring knowledge
2. Measuring knowledge → Identifying knowledge
3. Identifying knowledge → Capturing knowledge
4. Capturing knowledge → Acquiring knowledge
5. Acquiring knowledge → Applying knowledge
6. Applying knowledge → Creating knowledge
7. Creating knowledge → Sharing knowledge
8. Sharing knowledge → Knowledge goals
7.1.6 Organizational knowledge

• The organization shall determine the knowledge necessary for the operation of its processes and to achieve conformity of products and services.

• This knowledge shall be maintained, and made available to the extent necessary.

• When addressing changing needs and trends, the organization shall consider its current knowledge and determine how to acquire or access the necessary additional knowledge.”
  
  • internal sources (e.g. learning from failures and successful projects, capturing undocumented knowledge and experiences of topical experts within the organization);

• external resources (e.g. standards, academia, conferences, gathering knowledge with customers or providers).
KM Value Chain OPN

LEADERSHIP and MANAGEMENT

Finding Acquiring

Creating Sharing

Using Capturing

KNOWLEDGE LIFECYCLE

Human Assets: Change Facilitators

Structural Assets: user-oriented resources

Relational Assets: Linked communities

KNOWLEDGE ASSETS

• SCP Policy implementation
• Sust. Tourism
• Consumer info
• Building/constr.
• Food systems
• Lifestyles and Edu.
• Publ. Procurement
• others

PROCESSES /SCP-IMPLEMENTATION

Resource Efficiency

Environmental impact

Human Well-being

SUSTAINABLE DEVELOPMENT

LEARNING and INNOVATION
Establish IFAD as a thought leader in rural development

Maximize field experience and knowledge

Bring best knowledge into projects

Build a learning culture at IFAD

Build an evidence base

Connect people

Source: Presentation of Helen Gillman, K at IFAD, at K4DP-Meetint 9-2018
KM at IFAD: Insights

Source: Presentation of Helen Gillman, K at IFAD, at K4DP-Meetint 9-2018
Knowledge Management methods and tools
# Integrative KM

<table>
<thead>
<tr>
<th>Strategic KM</th>
<th>Operational KM</th>
<th>Personal KM</th>
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</thead>
<tbody>
<tr>
<td>Strategy &amp; Organization</td>
<td>Processes, Projects &amp; IT</td>
<td>Personal use of knowledge</td>
</tr>
<tr>
<td>Leadership &amp; Culture</td>
<td>Teamwork &amp; Collaboration</td>
<td>Creativity &amp; Innovation</td>
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### Knowledge Resource Matrix

**General (shortened) example to demonstrate process:**
Consulting company implementing a project

<table>
<thead>
<tr>
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<th>People’s knowledge</th>
<th>Codified knowledge</th>
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<tr>
<td>Clarifying concepts/needs/mandate/success criteria...</td>
<td></td>
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<tr>
<td>Make proposal/estimate costs/timelines...</td>
<td></td>
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<tr>
<td>Staff the project/define roles/establish relevant contacts</td>
<td></td>
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<tr>
<td>Define procedure/meetings with implementers/feedback loop</td>
<td></td>
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<tr>
<td>Respond to problems/mediation/interactivity with project</td>
<td></td>
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<tr>
<td>Close down/evaluation and reporting/lessons learned/next steps</td>
<td></td>
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<tr>
<td>Steps</td>
<td>People’s knowledge</td>
<td>Codified knowledge</td>
<td>External knowledge</td>
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</tr>
<tr>
<td>Clarifying concepts/needs/mandate/success criteria...</td>
<td>market experts, product experts</td>
<td>Customer data, Sales kit, CRM-Tool, Presentations,..</td>
<td>Market intelligence, Business data</td>
</tr>
<tr>
<td>Make proposal/estimate costs/timelines...</td>
<td>Technical experts, calculation experts, legal experts, etc.</td>
<td>Proposal templates, legal documents, References, CVs, etc.</td>
<td>Legal advisors, partner companies, insurances, etc.</td>
</tr>
<tr>
<td>Staff the project/define roles/establish relevant contacts</td>
<td>HR experts, Technical experts,..</td>
<td>Personal profiles, Assessment tools, Expert Networks,..</td>
<td>Expert networks, communities of practice,..</td>
</tr>
<tr>
<td>Define procedure/meetings with implementers/feedback loop</td>
<td>Technical experts, implementers, project managers,..</td>
<td>Processes, procedures, guidelines, checklists, lessons learned,..</td>
<td>Consultants, trainers, certification bodies,..</td>
</tr>
<tr>
<td>Respond to problems/mediation/int eractivity with project</td>
<td>Supervisors, mediator, coaches, community of practice, etc.</td>
<td>Creativity techniques, mediation procedure, etc.</td>
<td>Coaches, external mediators, legal advisors,..</td>
</tr>
<tr>
<td>Close down/evaluation and reporting/lessons learned/next steps</td>
<td>Project managers, LL facilitators, Librarians, document managers,..</td>
<td>Project documentation procedure, Document Management System,..</td>
<td>Conferences, auditors, academic partners,..</td>
</tr>
</tbody>
</table>
## Knowledge Resource Map

**General (shortened) example to demonstrate process:** **Doing a webinar series**

<table>
<thead>
<tr>
<th>Steps</th>
<th>People’s knowledge</th>
<th>Codified knowledge</th>
<th>External knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defining audience/topics/success criteria</td>
<td>Thematic experts, M&amp;E experts, specialized consultants..</td>
<td>Portfolios, Reporting data, Network list/members directory, Presentations, Recordings</td>
<td>Benchmarks of similar efforts, webinar archives</td>
</tr>
<tr>
<td>Establishing a timeline for the series</td>
<td>Project managers, Potential presenters</td>
<td>Event calendars, databases</td>
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<tr>
<td>Choosing most relevant presenters / reaching out to presenters</td>
<td>HR experts,</td>
<td>Portfolios, Reporting data, Network list/members directory, Personal profiles, Performance reviews</td>
<td>thematic expert networks, communities of practice</td>
</tr>
<tr>
<td>Promoting the webinars</td>
<td>Communication experts, project managers,..</td>
<td>Communication and outreach guidelines, contact lists</td>
<td>Social media networks, presenters’ networks</td>
</tr>
<tr>
<td>Define procedure/do the webinars/respond to problems/feedback</td>
<td>Project managers, IT, audience, presenters</td>
<td>Processes, guidelines, checklists, creativity techniques, mediation procedure,</td>
<td>Coaches, external mediators, legal advisors,</td>
</tr>
<tr>
<td>Close down/evaluation and reporting/lessons learned/next steps</td>
<td>Project managers, M&amp;E experts, participants</td>
<td>Documentation procedure, Document Management System, lessons learned, Reporting</td>
<td></td>
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</tbody>
</table>
Knowledge Resource Map

Just for visualization, to fill in use the xls provided

<table>
<thead>
<tr>
<th>Project steps:</th>
<th>People´s knowledge</th>
<th>EoA 0-3</th>
<th>Codified knowledge</th>
<th>EoA 0-3</th>
<th>External knowledge</th>
<th>EoA 0-3</th>
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EoA= Extent of availability:  
0 = to an extent insufficient for the operation in the process  
1 = to an extent sufficient for operation, but unsatisfying in time or cost or quality  
2 = to an extent sufficient for operation on a satisfactory level  
3 = to an extent as needed for excellent operations
Knowledge sharing at all stages of the „life line“

Staff/member/partner → Organization/Network

- Expert Onboarding
- Expert Debriefing
- K-sharing as a personal responsibility
- K-sharing as a leadership role
- Innovation and Creativity
- K-sharing in processes and projects
- Knowledge Loss Risk Assessment
K-Transfer after conferences, projects, etc.:

K-Transfer plan

<table>
<thead>
<tr>
<th>Critical knowledge</th>
<th>Measures to transfer</th>
<th>Who?</th>
<th>When?</th>
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</table>
Title
subtitle, subtitle, subtitle

lead-text lead-text lead-text lead-text lead-text lead-text lead-text lead-text lead-text lead-text lead-text

• pictures, infographics, sidebars, factsheets

• subheads, statements, citations, testimonials

• Summary, conclusion

• Call for Action, Recommendation

Source:
http://www.schrockguide.net/uploads/3/9/2/2/392267/410653951.png
## Knowledge products and services – Make your assessment

### How would your targets assess the knowledge products?

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Remarks</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
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<tbody>
<tr>
<td>The knowledge service and its content is relevant for my work</td>
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<td>I can get a good orientation on the content very quickly and can deepen the use according to my needs.</td>
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<tr>
<td>The knowledge service provides all relevant information for my purposes.</td>
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<tr>
<td>The knowledge service is up to date and represents the state of the art.</td>
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<tr>
<td>I can find and use the knowledge service quickly.</td>
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<tr>
<td>The knowledge service is adequate for my given knowledge and experience. I can understand it easily.</td>
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<tr>
<td>The time required to use (read, listen, view..) this knowledge service is adequate.</td>
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<tr>
<td>It is very easy and comfortable to apply this knowledge in my context/business process.</td>
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<tr>
<td>I can fully understand the terminology and language used in this knowledge service.</td>
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</table>

* 1=true   ...   6=not true
• Facilitating connections, handling diversity

• Collecting, sharing, discussing, reflecting and disseminated knowledge in a wider community.

• Leverage innovational potential of complementing resources. Co-creativity is key.

• Making new methods, tools, technologies visible and accessible at a very early stage.

• Finding partners for projects and implementation activities

Community-Meeting of the Austrian kPartnership
Knowledge Networking

From loose relations to professional communities

**From loose relations...**
- Spontaneous, ad hoc, regional limits
- Low transparency of needs and capacities
- Informal, missing rules
- Sustainable commitment low
- Mostly bilateral relations
- Low methodological diversity
- Missing technical support
- High variety of knowledge products
- Occasional, scattered meetings
- Weak financial commitment
- No facilitation, targets; unmanaged

**...to a professional community**
- Strategic, organizational, international
- Increased transparency of the market and broader collaboration
- Facilitated dialogue with clear rules
- Balanced inputs and benefits
- Primarily multilateral
- Blended activities for k-sharing
- Professional tools for k-sharing
- Common knowledge products
- Continuous collaboration
- Adequate, shared financial commitment
- Facilitated, agreed targets, managed
Roles in KM

• **Management / Leaders**
  Define the Knowledge Strategy, establish a knowledge culture, define knowledge services as a relevant part of the job, enable knowledge workers to perform, promote and recognize (appraise) internal and external knowledge services, establish expert careers.

• **KM Group**
  Includes representatives of units, that work closely with knowledge: HR, IT, Operations, Communication, etc.). Alignment of activities and coordination.

• **Knowledge Manager**
  Coordination of the overall knowledge agenda; consulting, training, informing, supporting, facilitating, measuring results.

• **Knowledge Workers:**
  Competent use of knowledge and application of the offered resources. Providing internal and external knowledge services.

• **Lead Expert:**
  Cares for the excellence and innovation in a specific thematic field, enables and coordinates the community of practice.
Lead expert career?
Professional knowledge work requires clear goals, resources and recognition.
Train the Expert – modules

**Personal Knowledge Management**
- How Experts benefit from Personal KM
- Define and develop the personal knowledge profile
- Build knowledge partnerships with key experts and institutions
- Take a unique position in the international knowledge community
- Manage your competences and your knowledge services
- Deal with information overload; take your not-knowing with humour

**Knowledge Acquisition**
- Identify and develop sources of knowledge and new ideas
- From searching to finding to acquiring: how to get access to relevant knowledge

**Knowledge Communication and Capturing**
- Design your knowledge services better
- Communicate complex knowledge
- Build up trainees and followers in your thematic field, capture knowledge

**Knowledge Networking and Co-creativity**
- Expand your personal relationships
- Learn to moderate a knowledge network and to enhance co-creativity
- Build sustainability in your networks
Clear, sound and motivating knowledge policy: Mission Statement + Principles

**Leadership:**
Leaders as role models; support for knowledge work

**Appraisal System:**
Careers, incentives and clear limits of knowledge work

**Processes:**
Knowledge Mgt. as a natural and accepted activity within the processes

**Space:**
Enabler for communication, innovation, learning

**Cultural fit:**
No conflict with other cultural elements
Appreciation and recognition are key

Knowledge Management Awards
Knowledge Portal – typical use cases

- Team collaboration with externals
- Sharing information
- Easy access
- Project tool
- Expert searching
- Application Platform (Forms & Workflows)
KM Assessment results
Knowledge Management Assessment: Process

- Gathering insights from the participants on the different elements in the knowledge management cycle.
- Evaluate the current situation: What works well, what needs improvement
- Qualitative and quantitative
Knowledge Management Assessment: Participants

- Eight assessments in total (1 per programme, 1 with National Focal Points in English, 1 with National Focal Points in French)

- Participants from Coordination Desks, MAC, Partners, and National Focal Points.

- The participants were from different stakeholder groups:
  - Government (9)
  - Private sector (4)
  - Civil Society (6)
  - Scientific/Technical (4)
  - Int’l organisation (6)
1. Identifying knowledge: searching & finding

This works well:

✓ There is a general sense that the codified knowledge can be identified by different topics, regions, and themes without too much trouble.

That should be improved:

• There needs to be more of an effort to provide meta information for members of the network to be in touch with the right people, including facilitating face-to-face meetings at conferences, etc.

• Relevant external knowledge to be identified more easily
2. Acquiring knowledge

This works well:

- Access to knowledge material is free including to training materials, and webinars have been a useful vector for knowledge transfer.
- Getting in contact with people works well and easily

That should be improved:

- Open knowledge (a service portfolio for peer-to-peer learning), language barriers and local contextualisation of knowledge.
- Services/support are needed to make best use of the available knowledge.
This works well:

✓ One Planet network has opened up a space for collaboration, working groups and task forces that would not have existed without

That should be improved:

• Improving the collaboration and co-creation on the national local level, making more explicit the rules, benefits, and available spaces for knowledge co-creation.
4. Sharing knowledge

This works well:

✓ Wherever sharing is social - through f2f-meetings or active socialization by coordination desk – it works well, and willingness to share is high.
✓ Coordination desk plays a vital role in linking people and projects.

That should be improved:

• Strengthen communities of practice, specifically across the programmes, focus on socialisation and trust-building.
• Focus stronger on knowledge needs, the purpose of sharing.
• Clarify roles and mobilize more stakeholders to share.
• Improve sharing of relations.
5. Applying knowledge

This works well:
✓ Comprehensive content, but often too big documents
✓ „I have a good user experience and want to use it more often“

That should be improved:
• Create smarter knowledge products (shorter, more user-friendly and applicable)
• Provide knowledge services, like (peer) consulting, coaching, mentoring, trainings, conferences: all online and f2f
• Increase marketing, awareness
6. Capturing knowledge

This works well:

✓ Lot of effort in capturing has been done, many instruments are available
✓ Strong institutional memory

That should be improved:

• Turn captured knowledge into actionable resources
• Spotlight stories from beneficiaries; success stories, savings and cost reductions
• Provide time, funds, tools, space to capture
• Simplify reporting system
KM Assessment results
7. Managing knowledge

This works well:

✓ A lot is happening without being called Knowledge Management
✓ KM Unit, secretariat and coordination desks playing a vital role doing a professional job with clear roles
✓ Good geographical distribution and diversity

That should be improved:

• Clarify focus: Which knowledge is most urgently needed?
• Build partnerships with other networks and institutions
• Last mile: manage the local networks
• Manage who is in the network
• Clarify roles, responsibilities, and qualify
• Qualify partners in KM and give support in implementation
Key recommendations

**Sharpen OPN´s focus and diversify roles**
Focus OPN knowledge agenda on practical challenges
Widen the number of contributors, strengthen local roles and capacities

**Strengthen and connect communities**
- Socialize knowledge (even more) through professional facilitation of communities
- Foster local/thematic communities to contextualize and adjust knowledge to user needs

**Foster knowledge services**
- Create a portfolio of SCP knowledge services – online and f2f
- OPN key services, professional services, peer2peer-services; external services

**Optimize use of documents & resources**
Structure knowledge - documents, people, external knowledge – along use cases
Provide guidance and training in Knowledge Management
Backup Communities of practice
Typical targets of CoPs

- Connecting people
- Collecting experience and material
- Sharing ideas
- Providing knowledge services
- Collaborating on new ideas
- Mutual support
- Retaining the knowledge in a group
- Reflecting and developing practices
- Providing good practice guidance and material
- Building mutual trust and appreciation
- Sense-making and testing
- Addressing informal or immature issues
Facilitator’s role

• Bring members of the Community together and build trust and appreciation

• Develop targets and strategies for the Community together with members

• Design formats and methods for creativity, collaboration, learning, transfer,..

• Build up structures and tools for communication and collaboration – together with IT Department.

CoPs without a good facilitator can’t be successful!
Hybrid position of Communities

- Professional
- Targeted results
- Obligatory
- Hierarchy
- Control
- Edutainment
- Spontaneous
- Emerging results
- Voluntary
- Free Market
- Creativity
- Active Contributions

Individual vs. collective benefit
5 Steps to community

1. Mobilise and initiate
2. Develop targets and structures
3. Exchange existing knowledge and ideas
4. Create new knowledge and products
5. Reposition or close the community
If the company maintains an Integrated Management System (including process descriptions), it should also establish a process for CoPs.
Methods to work in communities

**Traditional methods, e.g.**
- Lectures and presentations
- Discussions, fireside chats
- Best practice groups
- Joint breakfast, lunch, dinner with talks, speeches, etc.

**Spaces for communication, e.g.**
- Clubroom
- Communication spaces with open access
- Virtual communication
- Changing hostage of meetings (very recommended!)

**Methods for Tacit Knowledge, e.g.**
- World (Knowledge) Café
- Knowledge Market
- Powerful Questions
- Open Space Technology
- Story Telling
- Peer learning / Peer Consulting
- Appreciative inquiry
- Creativity Techniques

**ICT, e.g.**
- Personal profiles, Wikis, Blogs, Social Tagging & Social, Bookmarking
- Document and Content Management
- Member administration
- Communication spaces: Newsgroups, Chat,..
- Survey tools, news, calendar, RSS feed
- ...
Social Media Overview of applications

- Social Gaming
  - Connect with friends and strangers to play games
- Crowd Sourcing
  - Harness collective knowledge and generate collectively derived answers
- Shared Workspaces
  - Discuss topics in open communities; rapidly access expertise
- Diskussion forums
  - Discuss topics in open communities; rapidly access expertise
-Wikis
  - Search, create and adapt articles; rapidly access stored knowledge
- Social Media Applications
- Social networks
  - Keep connected through personal and business profiles
- Blogs/Microblogs
  - Publish and discuss opinions and experiences
- Ratings, Reviews
  - Evaluate and rate products, services, and experiences; share opinions
- Social commerce
  - Purchasing in groups, on social platforms, and sharing opinions
- Media and file sharing
  - Upload, share, and comment on photos, videos, and audio
Communication in Communities

- Communities need continuity in communication
- Internet platform with a reliable functionality and content (templates, knowledge briefs,..) and communication rules
- Physical meetings in a certain continuity, e.g. monthly
- Participants should know each other as soon as possible and find ways to communicate easily.
- Content must be up to date and reliable.
• Diversity of cultures, disciplines, contexts, interest groups requires additional communication, trust-building.

• Benefit of new and different perspectives

• Group interaction and creativity is a motor, innovation is key, but requires more time, attention and empathy

• Methods of Tacit Knowledge Managements play a vital role, like World Café, Open Space, Stakeholder Panels, Story Telling, Peer Consulting, etc.)

• Development is connected to application, solutions are more sustainable and comprehensive
The World Café was invented 20 years ago by Charles Savage and is one of the most accepted and practices methods for co-creativity.

The World Café is about dialogue and innovation! At small tables (4-6 people) individuals can exchange their ideas related to a given topic or a powerful question.

After sharing the ideas, one person – the “table host” - remains at the table and the others change to different tables. There they continue their dialogue. After 2 or 3 rounds a conclusion is taken and presented to the plenum.

Paper tablecloths are provided to create a visual memory of the conversation.
Before getting started, each group will need to identify a table host who remains at the table during the conversation rounds to:

- Welcome newcomers and share main ideas, themes and questions
- Encourage guests to link and connect ideas (using the tablecloth)
World Café - Rules

• Focus on what matters
• Contribute your thoughts
• Use your minds and hearts
• Link and connect ideas
• Listen to get insights
• Play, draw, doodle