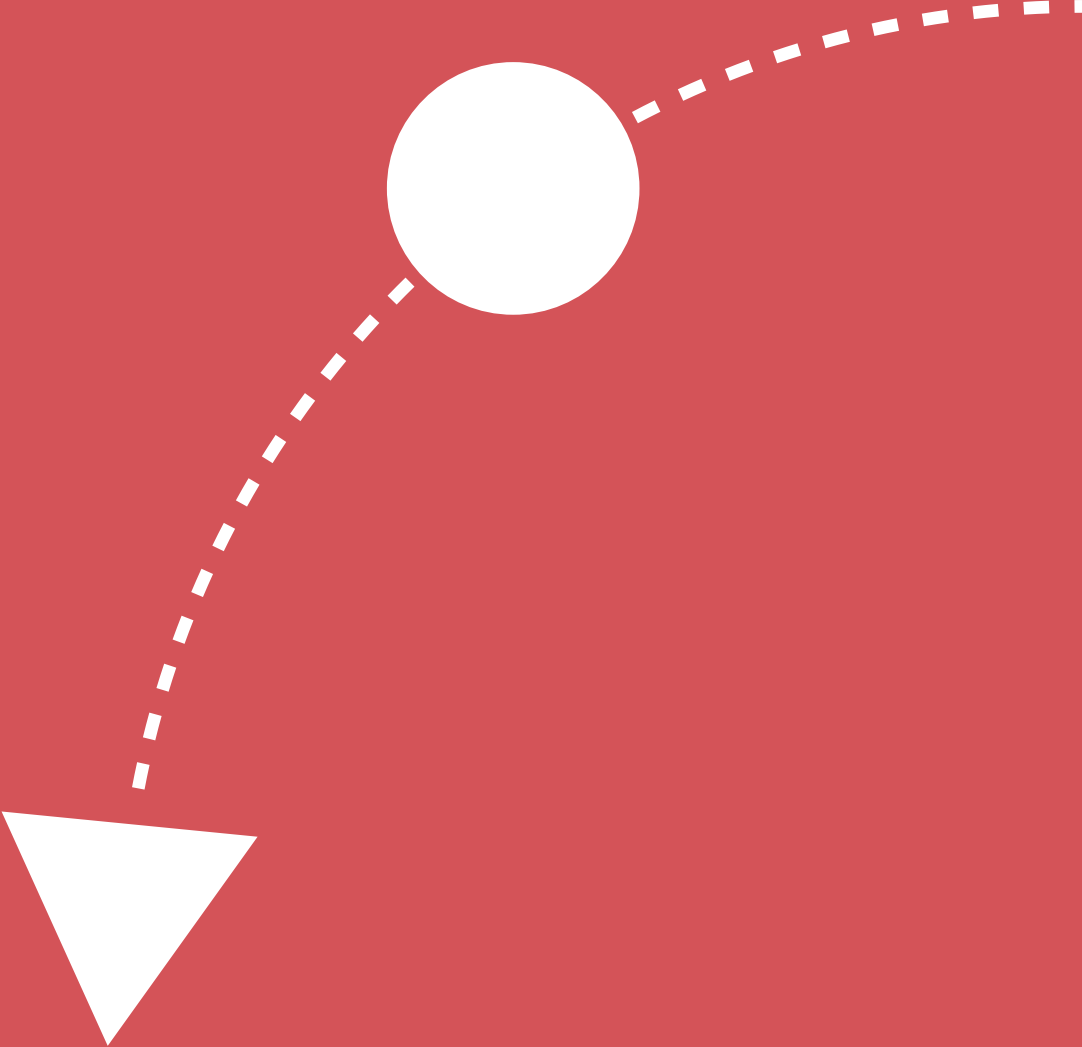




THE ART OF DESIGNING AND IMPLEMENTING STUDY TOURS

A Guide Based on
The Art of Knowledge Exchange Methodology

Shobha Kumar & Ryan Watkins



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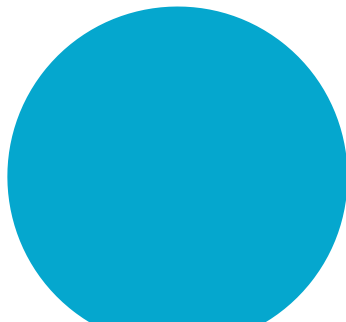
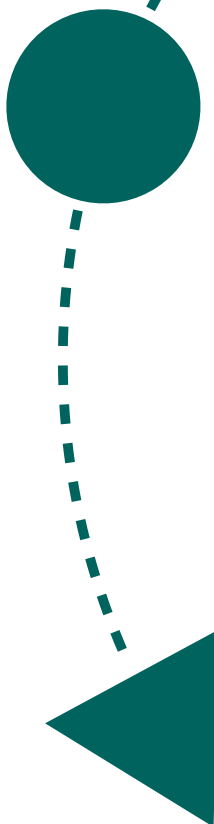
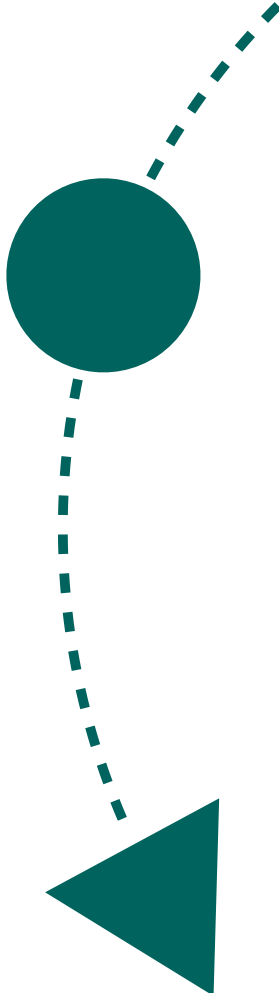
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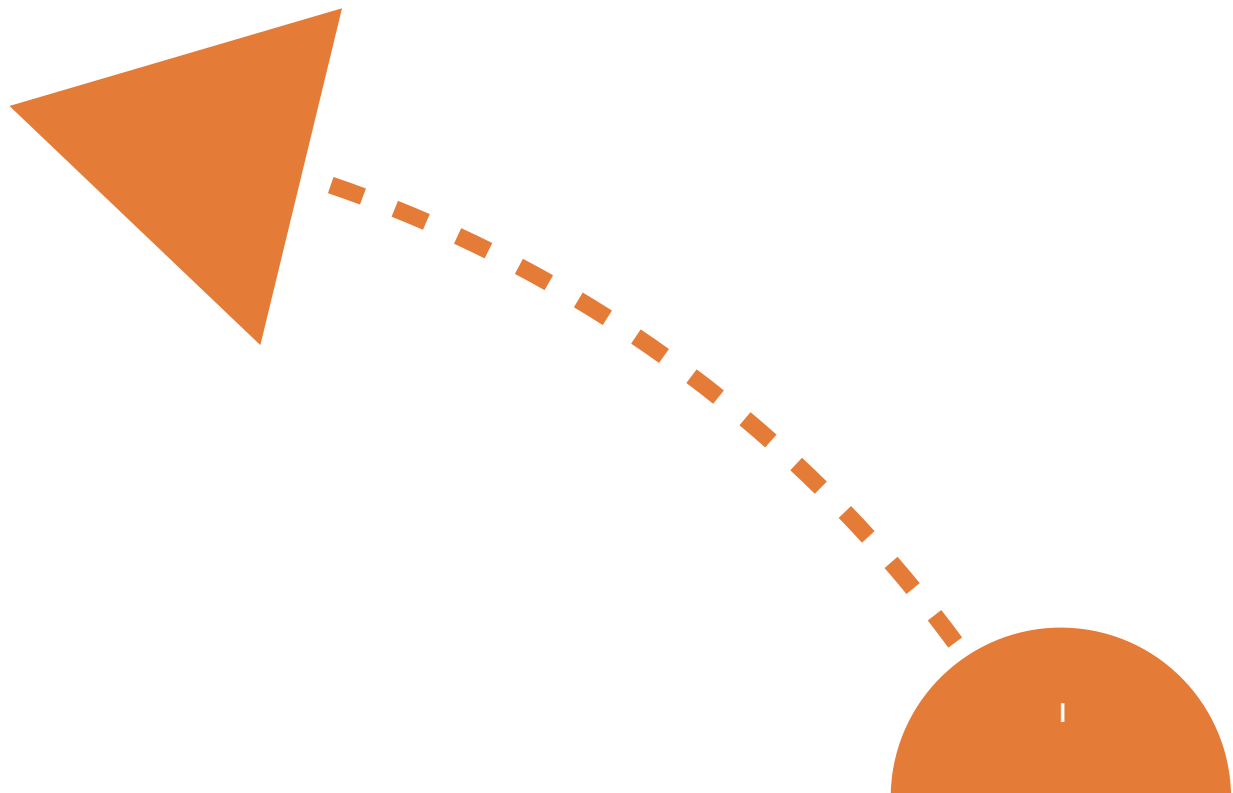


INTRODUCTION TO THE ART OF DESIGNING AND IMPLEMENTING STUDY TOURS

Designing and implementing Study Tours that get results can be a big undertaking. This Guide, *The Art of Designing and Implementing Study Tours*, aims to take out the guesswork by breaking down the process into simple steps. The Study Tour Guide is written specifically for those who broker or coordinate or facilitate Study Tours between knowledge seekers and knowledge providers. A Study Tour is a learning journey for both the knowledge providers and seekers as it truly taps into the power and potential of peer-to-peer learning. When designing a Study Tour, it is useful to consider the different needs and characteristics of these two groups separately.

Based on the World Bank Group's flagship publication, *The Art of Knowledge Exchange: A Results-Focused Planning Guide for Development Practitioners*, this Study Tour Guide benefits greatly from the tried and tested roadmap and results-focused methodology of The Art of Knowledge Exchange. It is an effort to delve deeper into one of the knowledge exchange instruments from the Art of Knowledge Exchange Toolbox, and provide detailed guidance on how to design and implement Study Tours for higher development impact.

This Guide uses a primary case study, *Study Tour in Action*, to illustrate the five steps in The Art of Knowledge Exchange methodology. These five steps — Anchor, Define, Design, Implement, and Evaluate — provide the roadmap for effective Study Tours that get results. The Guide also highlights four additional examples to illustrate how Study Tours have supported development outcomes when systematically designed and integrated as a part of a larger change process.





What is a Study Tour and Why Use One?

A visit or series of visits — learning journey(s) — to one or more countries or sites by an individual or group with a specific-learning goal in mind; participants learn firsthand from the experience of their peers how a challenge was solved or solution implemented.

Study Tours are best used for...

- » Raising awareness of what is possible, gaining new knowledge, and learning different ways of doing things from others who have gone through or are going through similar challenges.
- » Forging networks and partnerships with people working in similar areas.
- » Building consensus and developing shared understanding and motivation for collaborative action among different stakeholder groups.
- » Customizing, replicating, and scaling up tried and tested development solutions.

What is needed to get results from a Study Tour?

Study Tours that get results require close attention to intentional design of learning and experience sharing beyond the technical content. The key is to allocate adequate time and resources, have a strong design and delivery team, and give adequate attention to design and implementation — from beginning to end — with a focus on the results you want to accomplish from the Study Tour.

Who should be involved in a Study Tour?

Study tours are a team effort and require coordination with several partners and stakeholders:

- » **Knowledge seekers** who learn from others and share their experiences.
- » **Knowledge providers** who share their experiences and learn from others. Knowledge provider also refers to, and includes, the country sharing its knowledge and experience.
- » **Host institutions** that share their organizational knowledge and experiences.
- » **Brokers** who bring knowledge seekers and providers together.
- » **Local delivery partners** who make sure that implementation of the Study Tour moves forward efficiently.



STUDY TOUR IN ACTION:

INDIA LEARNS ABOUT PUBLIC-PRIVATE PARTNER-SHIP OPTIONS FROM ALGERIA AND SPAIN

The Challenge. The Government of Karnataka, a southern state in India, has undertaken significant efforts to improve urban water and sanitation service levels for its population of more than 23 million living in urban centers (38 percent of the state's population). These efforts included the World Bank-supported Karnataka Urban Water Sector Improvement Project. This water project lacked clarity and consensus on suitable models for engaging the private sector. There was also a lack of trust and understanding between public and private sectors which proved to be an impediment to successful public-private partnerships (PPP).

The Solution. To address these challenges, as part of the ongoing Karnataka Urban Water Supply Modernization Project, officials of the Karnataka Government engaged in discussions with the World Bank Global Water Practice to identify other countries implementing alternate PPP models to improve urban water asset management and service delivery. Algeria and Spain offered a range of successful examples.

The World Bank funded a knowledge exchange to increase awareness and understanding of how innovative PPP options are arranged and executed. The exchange offered Karnataka an opportunity to explore a range of different options as a basis for decision-making.

A Study Tour was arranged. An Indian delegation had the opportunity to visit project sites in Algeria and Spain. The delegation included key policy-makers, senior managers, and technical staff of water utilities; senior officers from the Ministry of Urban Development and Planning Commission and from the Department of Economic Affairs; and representatives from the Government of Karnataka.

During the StudyTour, the participants had a valuable opportunity to share the India water supply experience and to interview key stakeholders in Algeria and Spain's water projects.

Two post-tour workshops, one at national level and another at state level, were organized in India. Experiences from Algeria and Spain were shared with a broader stakeholder group. The core stakeholder group reached a consensus on specific elements from the Algeria and Spain PPP models could best be adopted or adapted for the India context.

The Result. Informed by the exchange, new service delivery arrangements have been incorporated in the design of the Karnataka project to enable 24/7 water supply with private sector participation.

Team Leader. Vandana Bhatnagar, Senior Institutional Development Specialist, The World Bank Group.

"We need to see and understand the range of PPP options to determine what would work best in the Indian context." Study Tour participant.

"We were able to meet and interview all cadres of staff within the utility in Algeria to get candid feedback from them about what they felt about the change process and their roles before and after the change." Study Tour participant.

"This knowledge exchange was a great opportunity to help participants consider innovations outside the normal way of doing business. It was also very useful to explore many of the trust issues currently existing between the public and private sectors and which needed to be addressed as a priority within the India context." Study Tour team leader.





STEP 1



ANCHOR THE STUDY TOUR

Before designing a Study Tour, you should work with clients to...

- ✓ Understand the broader development priorities which the Study Tour will support/contribute to,
- ✓ Define the challenge(s) that the Study Tour will help resolve,
- ✓ Consider what will change as a result of the Study Tour.

Study Tours and other types of knowledge exchanges can be used to a powerful effect as part of a larger change process. At its best, a Study Tour generates relevant knowledge and timely insights about what is possible. It can also help overcome obstacles stemming from either lack of awareness or lack of consensus, support collaborations, and build strong networks among partners. But for a Study Tour to work well, it should be anchored in the larger development context and driven by stakeholder priorities.

The success of a Study Tour depends on having the right people involved, knowing what knowledge seekers need to learn and do in order to lead or influence change, and giving support through a systematically designed series of activities that help these participants achieve their learning outcomes. Another critical contributor to success is close collaboration with knowledge providers to ensure that the activities included in the Study Tour, along with materials and messaging, address the intended goals and objectives (results).



TIP

TIPS FROM THE FIELD

"Study tours often address a gap in an operation, where knowledge is weak or something is not working to fully realize planned outcomes."

STEP 1: ANCHOR THE STUDY TOUR

STEP 1.1 UNDERSTAND THE DEVELOPMENT PRIORITIES

Working closely with clients, sponsors, partners, and stakeholders, you should define the development objective for the Study Tour within the context of the overarching development priorities. Typically, priorities are at the institutional, community, or country level; the Study Tour should play a catalytic role in moving stakeholders closer to achieving their development priorities.



STUDY TOUR IN ACTION: STEP 1.1

India, Algeria, and Spain exchange — Development priority

The development priority in Karnataka, India, was to ensure continuous 24/7 water supply to its growing urban centers.

STEP 1.2 DEFINE THE CHALLENGE(S) THE STUDY TOUR WILL HELP RESOLVE

You can use Study Tours to address specific challenges or problems being faced by your client or participants to achieve their development priorities. Study Tours can be a strategic part of a longer-term program (for example, a policy-focused tour in year one, followed by technical tours in years two and three) or can be used as a just-in-time activity during project implementation (for example, visiting a neighboring country to learn how to implement imminent reforms).

In all cases, you will want to work with your partners and stakeholders to clearly identify what challenges the Study Tour should help resolve. When the challenges are clearly defined, they help shape the scale and scope of your Study Tour(s).

COMMON CHALLENGES

Weak environment for change

- » Stakeholders do not all agree on the challenge or on possible solutions; there is lack of consensus on the development priority among key stakeholders.
- » Limited or no mechanism exists for stakeholders to voice their opinions.
- » Information is either not accessible to, or not shared with, stakeholders.
- » Stakeholders are skeptical about whether a particular solution will really work and whether it will have the intended impact.

Inefficient policy instruments

- » Ineffective policies fail to address “real world” challenges.
- » Institutions have insufficient technical capacity to implement a policy or ensure compliance.
- » Weak administrative rules, laws, and regulations hinder implementation of policy solutions.

Ineffective organizational arrangements

- » Institutions struggle to successfully implement policy changes or reforms.
- » Stakeholders are focused on “ideal solutions” rather than practical and relevant solutions that will work in their context.
- » The “same old” solutions are not working. Innovation is required to get improved results. Stakeholders are struggling to think “outside of the box” when trying to solve complex challenges.
- » Institutions do not have the financing, staffing, incentives, and other resources to address the development priorities.

Work with your clients and other stakeholders to identify the priority challenges that the Study Tour will address. *What has to change in order to get results?*

STUDY TOUR IN ACTION: STEP 1.2

India, Algeria, and Spain exchange sought to address two key challenges:

Weak environment for change. Lack of consensus on models for effective engagement of the private sector, as well as lack of trust between public and private actors, to deliver on service delivery goals in the water supply sector.

Ineffective organizational arrangements. Insufficient technical knowledge to be able to manage and maintain effective public–private partnerships.



You can use Study Tours for different outcomes throughout the lifecycle of a project:

- » At the identification stage, it can build awareness of the range of possibilities and new directions, and increase the confidence of stakeholders to initiate practical changes and reforms.
- » At the design stage, it can form the basis of customizing development solutions that have been tried and tested elsewhere; many lessons come from the experiences of others who have faced and overcome similar challenges.
- » During implementation, it can build understanding and know-how on improving systems and processes and help overcome implementation bottlenecks; for example:
 - › Strengthening relations among agencies working together,
 - › Accelerating decisions on a difficult project component,
 - › Conducting a diagnostic or preparing a plan for a component,
 - › Building capacity for a particular component.
- » As part of evaluation, it can help to document what worked and why.

STUDY TOUR IN ACTION: STEP 1.2

India, Algeria, and Spain exchange sought to address two key challenges:

Institutional challenge	Change objective
Lack of consensus, trust, and understanding between public and private sector officials.	<ul style="list-style-type: none"> » Understand different models for public–private partnerships, » Increase trust and create stronger relationships between public and private sector officials.
Insufficient technical knowledge in order to manage and maintain effective public–private partnerships.	<ul style="list-style-type: none"> » To set realistic performance standards for public–private partnerships.



STEP 1.3 CONSIDER WHAT WILL CHANGE AS A RESULT OF THE STUDY TOUR

You should work with your counterparts and stakeholders to answer the questions, How will we know when we have achieved the desired change? What will be different? The answers will shape the desired changes and ensure that the Study Tour targets measurable results.

The desired changes resulting from the Study Tour should be:

- » Relevant to your clients and other stakeholders;
- » Timely, in that stakeholders are ready to make changes;
- » Consistent with other changes or activities they are implementing;
- » A good match with their social norms and values.



STUDY TOUR IN ACTION: NIGER, KENYA, AND ETHIOPIA EXCHANGE

SANITATION AND THE PUBLIC AND PRIVATE SECTORS: DEFINING ROLES AND RESPONSIBILITIES

The Challenge. Niger, one of the world's poorest countries, continues to face many challenges in providing access to sanitation, particularly in rural areas. With only 7 percent of the population having any type of sanitation, Niger has the highest rates of open defecation globally. The Government, with support of its development partners, has implemented disparate and isolated actions that have been based on sparse or stand-alone intervention strategies and methodologies. Not seeing the desired results, the Government of Niger identified three key challenges:

- » Lack of synergy among different actors due to fragmentation of roles within several line ministries;
- » Ineffective guidance to policymakers to ensure inclusion of sanitation sector among government priorities; and
- » Lack of a unified framework for action in the area of hygiene and sanitation.

The Solution. The Government of Niger requested support from the World Bank's Water and Sanitation Program (WSP) to learn from the experience of others who have solved similar challenges. The WSP identified Kenya and Ethiopia as countries that have achieved significant social indicators on access to hygiene and sanitation services. Working with a facilitator from WSP in Niger, the principal stakeholders from the three countries held initial discussions by videoconferencing through which they agreed on the take-away objectives of the knowledge exchange: Learn about approaches to (a) setting up transformative policy and legislation, (b) formalizing institutional arrangements for strengthened delivery, and (c) creating behavioral change among citizens with the involvement of the private sector.

Niger sent a multi-disciplinary delegation on a Study Tour to Kenya and Ethiopia to address the issue of fragmentation among responsible ministries and departments. The Study Tour participants included representatives from the Ministry of Water and Sanitation; Ministry of Public Health; Ministry of Primary Education, Literacy, Promotion of National Languages, and Civic Education; Ministry of Urban Development and Housing; and Association of Niger's Municipalities. A journalist from the Journalists Network for Water and Sanitation accompanied the delegation in order to document the Study Tour and write about it in the national press to keep the team accountable to commitments made on the Study Tour.

The Results. Interaction continues with private sector players in Kenya to explore how to transport products into Niger or to set up a manufacturing plant in the West Africa region. For starters, products are now being imported from Kenya. The Government of Niger has developed an action plan to accelerate the implementation of an operational strategy for sanitation based on the good practice approaches shared by Kenya.

Team Leader: Taibou Adamou Maiga, Senior Water and Sanitation Specialist, The World Bank Group.



STEP 2



DEFINE THE STUDY TOUR

In Step 1, you anchored the Study Tour by...

- ✓ Linking the Study Tour to development priorities of your stakeholders,
- ✓ Defining challenges that the Study Tour will address,
- ✓ Considering what will change as a result of the Study Tour.

In Step 2, you will...

- » Identify groups of people needed to address the challenge and bring about the desired change,
- » Identify intermediate outcomes for the Study Tour,
- » Identify the most appropriate knowledge providers,
- » Prepare participants,
- » Organize the design and delivery team.

STEP 2.1 IDENTIFY KNOWLEDGE-SEEKING PARTICIPANTS

The success of a Study Tour depends upon having the right people involved. Talk to your clients about possible groups of people who are in a position to make change happen.

STEP 2: DEFINE THE STUDY TOUR

Change agents can belong to different stakeholder groups (government, civil society, private sector, academia). What they should have in common is the ability to lead, influence, convene, or act on the challenges to achieving the priority development goal(s):

Who will Lead?

Who will champion the cause and make the envisioned changes happen?

Who will Influence?

Who are opinion leaders on the topic?

Who has a broad professional network across the various stakeholders?

Who will Convene?

Who has the capacity to bring people together to discuss the topic?

Who will Act?

Who is in a position to apply what they learn?

And will this help realize the desired change?

The knowledge seekers should be selected based on the role they can play in achieving the desired changes. Sometimes the objectives may require focusing on technical staff or a mix of stakeholders, while at other times senior policy-makers may be your target audience if the enabling environment needs to be influenced.

Selecting participants is a juggling act. The list of knowledge exchange participants will often change again and again as your planning progresses. This is a natural part of the process so don't get discouraged. Tailoring the exchange to the capacity needs of the participants is what is most important. At the same time, be careful not to lose sight of the change objective. It helps to have the knowledge-seeking participants complete the Pre-Study Tour Survey (Toolbox Sample page 51) to get a quick grasp of their learning objectives and the challenges they need to address.

For more details see page 16 of the *Art of Knowledge Exchange* (<http://hdl.handle.net/10986/17540>).



STUDY TOUR IN ACTION: STEP 2.1

India, Algeria, and Spain exchange — Knowledge-seeking participant profiles

- » Senior officers from the Ministry of Urban Development and Planning Commission who have helped develop PPP programs in other states of India;
- » Officers from the Department of Economic Affairs who guide PPP programs;
- » Representatives from the Government of Karnataka who are involved in the scale-up of pilot 24/7 water projects in the three cities of Belgaum, Hubli-Dharwad, and Gulbarga;
- » Representatives from the private sector.

STEP 2.2 DETERMINE INTERMEDIATE OUTCOMES

Intermediate outcomes are what you would most commonly expect to see, measure, and report after a Study Tour. They reflect what participants want to learn. Determine which intermediate outcomes would best assist your change agents in resolving the problem and accomplishing the development goal.

It is helpful to identify concrete results indicators related to each selected intermediate outcome as these can be used as evidence to demonstrate achievement of results.

The following table exemplifies intermediate outcomes and types of progress that can be made towards the outcomes. You can develop results indicators based on the types of progress the Study Tour seeks to generate.

INTERMEDIATE OUTCOME	TYPE OF PROGRESS TOWARDS THE OUTCOMES
New knowledge. A person is more likely to act because of changed attitude, improved understanding, or learning.	Raised awareness, improved motivation/ attitude, greater confidence, increased understanding, and acquisition of new knowledge.
Enhanced skills. A person is more capable of acting because of what they learned or how they applied new knowledge or skills.	Application of knowledge.
Improved consensus. A group with a common interest or agenda is more likely or able to act because of new knowledge, changed attitudes, shared understanding, and improved collaboration.	Improved communication, stronger coordination, increased cohesion, stronger agreement, and increased commitment to the group or agenda.
Enhanced connectivity. A group is more likely or able to act because of new or improved relationships, greater affinity, improved trust, and reduced isolation.	Increased membership, increased network density, increased sense of belonging, greater agreement and trust, faster communications, and fewer isolated members.
New and improved actions. A person or group initiates or modifies its activity because of what was learned, practiced, or realized.	Preparation for action, change in routine or working in new ways, and maintenance of change.

For more details on results, including how to develop indicators of success, see pages 20-24 of the Art of Knowledge Exchange (<http://hdl.handle.net/10986/17540>).

STUDY TOUR IN ACTION: STEP 2.2

India, Algeria, and Spain exchange — Intermediate outcomes

New knowledge. The Indian delegation will have an increased understanding of the value of PPP models established in Algiers, Algeria; and Alicante, Spain, and their application in the Indian context.

Improved consensus. The Indian delegation will have greater agreement on which alternative PPP models should be considered for the water sector in Karnataka, India.



STEP 2.3 IDENTIFY THE MOST APPROPRIATE KNOWLEDGE PROVIDERS

Knowledge being shared during a Study Tour must match the learning needs of those participating in the Study Tour. In your role as a broker or coordinator, you may be able to connect your clients to the relevant knowledge and experience based on your own connections and knowledge, or you may have to collaborate with others to find and share the most transferable and useful knowledge.

STEP 2: DEFINE THE STUDY TOUR

When selecting knowledge providers, consider whether their experience includes the following:

- » **Demonstrated success** in effectively addressing similar development challenges;
- » **Relevant experience** in providing this knowledge to people from different places, cultures, and learning backgrounds;
- » **Familiarity** with the cultural and historical contexts of participant groups;
- » **Resources** to plan and implement the knowledge exchange in the proposed timeframe;
- » **Readiness** to deliver, shown by confirmed commitment and understanding of responsibilities;
- » **Prior relationship** with the knowledge-receiving institutions, groups, or individuals;
- » **Understanding** of potential logistical complications and risks such as language issues or travel challenges.

Choose knowledge providers with diverse perspectives and experiences

Try to find a good mix of knowledge providers who can share different perspectives on the issue. Consider knowledge providers from other regions; go to where the most relevant and applicable knowledge can be found.

Remember knowledge flows in many directions

Knowledge flows in many directions between receivers, providers, and other stakeholders. Take the opportunity to explain that the knowledge provider can equally learn from the knowledge seekers. Each group will learn from each other's experience, and the Study Tour will assist each group in achieving their goals.

Reach out early to providers

Contact potential knowledge providers early in the process. Once they agree to participate, you should share background information on the knowledge-seeking participants and what outcomes they are looking to achieve.



TIP

TIPS FROM THE FIELD

"All information that could be compiled and delivered through printed materials or videos or any other multimedia tools should be delivered before, during or after the visit. This information should NOT be given as a presentation by the hosts. The visit would be used to enhance the experience and not to transfer information."

STUDY TOUR IN ACTION: STEP 2.3

India, Algeria, and Spain exchange — Knowledge providers

- » Algeria's SEAAL (Algiers Water and Sanitation Company), including senior management, operating staff field functionaries, and trade union representatives;
- » Algeria's ministry counterparts and government agencies;
- » Spain's AEAS (Spanish Association of Water Service Operators);
- » Aguas Alicante (Water Utilities of Alicante) and Canal de Isabel II (Madrid), including senior executives and practitioners at operational facilities;
- » Local government officials from Algeria and Spain who were selected for having implemented a range of successful public-private partnerships in their cities to improve urban water asset management and service delivery.

STEP 2.4 PREPARE PARTICIPANTS

Detailed preparation of both the knowledge providers and seekers is an essential prerequisite for a successful Study Tour.

Preparing the knowledge providers

The knowledge and experience providers must be prepared ahead of time. An otherwise well-designed Study Tour can end up being ineffective if the content is not aligned to the learning priorities of the knowledge seekers or is not well presented and organized.

While designing the Study Tour, you should keep the providers informed. With better understanding of the challenges and opportunities for the seekers and the intended outcomes, the providers can better customize the learning experience. And ask the providers as well about their desired outcomes from hosting the Study Tour. As already stated, providers will find many opportunities to learn from the knowledge seekers.

You can also initiate any of the following ideas for preparing the knowledge provider for the Study Tour:

- » Seek input from knowledge providers on the Pre-Study Tour Survey questions (see Toolbox page 51). They may want to include some specific questions in the survey to customize the learning experience.
- » Share the Knowledge Providers Checklist (see Toolbox page 62) with providers early in the planning process.
- » When feasible, use videoconferencing to begin building relationships with the knowledge seekers and knowledge providers before the Study Tour.
- » Contact the providers well ahead of the Study Tour to review the itinerary and materials, as well as the knowledge they will be sharing.

Invest the time to do a pre-visit to the field sites along with the knowledge provider to customize the learning experience for the knowledge seekers. Discuss engaging and interactive ways for sharing experience.

- » Encourage knowledge providers to include practical information on how knowledge seekers can apply the lessons they are sharing, what pitfalls to avoid, and what they wish they had known earlier.
- » If possible, help providers prepare their presentations and documentation for sharing.
- » Discuss a plan to capture the knowledge-sharing activities.



TIP

TIPS FROM THE FIELD

“Plan your Study Tour in-depth, not only in terms of venue and logistics but also in terms of overall sequencing of activities and participant engagement before the actual visit.”

“Select participants who will be able to apply what they learn in practical ways.”

“Prepare knowledge providers with the information they require to make the learning relevant to the participants.”

A robust preparation phase will also help knowledge providers formulate ideas for what they can learn from other Study Tour participants.

Preparing the knowledge seekers

Preparing knowledge seekers for the Study Tour should begin on the day they are selected. Understanding what they hope to learn and how they will later use that knowledge will help you design an effective Study Tour that gets results. All effort should be made to get seekers' early input into the design of the Study Tour:

- » *Email a Pre-Study Tour Survey to the participants as part of the design process (see Toolbox Samples, page 51).*
- » *Share the Checklist for Knowledge Seeker (see Toolbox Checklists, page 61) with knowledge-seeking participants a few weeks before the Study Tour.*

Operating environment of the providers and seekers

In addition to learning from the provider's experiences, it is critical to be keenly aware of their operating environment. Work with providers to understand:

- » *What can they learn from participants from other regions or countries?*
- » *How is their situation similar to and different from the situations of visiting participants?*
- » *What, if any, constraints might exist in sharing information?*

Knowledge seekers in Study Tours often come from more than one institution or from different departments of the same institution. These participants also have operating environments that shape their perspectives and their ability to bring about desired changes after the Study Tour. Work with the participants to understand:

- » *How their organization does, or does not, support their work?*
- » *What is their mandate for bringing about change?*
- » *What constraints are present in their context?*

STEP 2: DEFINE THE STUDY TOUR

STEP 2.5 ORGANIZE A DESIGN AND DELIVERY TEAM

Since the Study Tour is typically a complex event to coordinate, you should organize a design and delivery team to share in the responsibilities to the extent that your budget allows.

Role of team members	Typical responsibilities for design and delivery
Project leader	<ul style="list-style-type: none"> » Plan, design, and deliver the knowledge exchange; » Select or guide in selecting knowledge seekers and knowledge providers; » Select, organize, and manage the design and delivery team; » Prepare terms of reference for all team members; » Engage participants, build relationships, guide their learning journey, and inspire them to act on lessons learned; » Monitor and report results to different stakeholders.
(Local) Delivery partner(s)	<ul style="list-style-type: none"> » Provide logistics and administrative support; » Identify key local contacts and resource individuals; » Support identification of appropriate target audiences; » Prepare knowledge providers; » Facilitate of logistics; » Organize for translation of documents; » Capture the learning journey and results for reporting.
Professional facilitator	<ul style="list-style-type: none"> » Develop a clear understanding of participant profiles, their goals, roles, and challenges; » Engage and guide participants toward targeted learning outcomes; » Facilitate discussions, knowledge and experience sharing, and create a dynamic learning and knowledge-sharing environment; » Handle conflict management and resolution; » Identify emerging learning needs; » Facilitate exchange and agenda adaptation, as needed, working in close collaboration with team leader and instructional designer.
Instructional designer	<ul style="list-style-type: none"> » Support the planning, design, and delivery of the Study Tour, working in close collaboration with the team leader; » Align the design and delivery with the results sought from the Study Tour; » Plan for and support the preparation of knowledge seekers; » Plan for and support the preparation of knowledge providers; » Use participatory planning and design approaches; » Facilitate instrument and activity selection, sequencing, and detailed design of the agenda with an objective to create a dynamic and engaging environment where learning and knowledge sharing can thrive.
Communications coordinator	<ul style="list-style-type: none"> » Pull together a communication plan for Study Tour in close collaboration with the team leader; » Assure that communication plan includes strategies for communicating with all participants, partners, stakeholders, and media before, during, and after the exchange.

STUDY TOUR IN ACTION: STEP 2.5

India, Algeria, and Spain exchange — Design and delivery team

- » Task team leader,
- » Project task team leader and co-task team leader,
- » Local delivery partners in Algeria and Spain,
- » Professional facilitator/synthesizer,
- » Administrative coordinator.





STUDY TOUR IN ACTION: HONDURAS AND COLUMBIA EXCHANGE

IMPROVING DISASTER RISK MANAGEMENT IN HONDURAS: INCORPORATING RISK MANAGEMENT INTO LAND USE PLANNING

The Challenge. Honduras is among the countries most affected by climate change and disasters triggered by natural events. Its vulnerability to hurricanes, floods, and landslides poses significant development challenges. In light of this, Honduras established a formal national disaster risk management (DRM) system (SINAGER) in 2009 to develop capacities for risk reduction, preparedness, response, and recovery from disasters. However, Honduran authorities lacked the institutional capacity for mainstreaming disaster risk considerations into development planning processes. Specifically, Honduras needed to find ways to better define institutional responsibilities and enhance technical assistance to municipalities to achieve resilient development planning.

The Solution. Honduras requested help to learn how other countries have implemented strategies to integrate DRM considerations into territorial planning practices at all administrative levels. The World Bank Group brokered an exchange based on its long-standing engagement with disaster risk management in Colombia and Honduras. Colombia has more than 15 years of experience with consolidated policy and planning frameworks that mainstream DRM and environmental concerns across watershed and municipal boundaries. A Honduran delegation held preparatory workshops before embarking on a Study Tour to Colombia. The Honduran delegation included participants from the Honduran Disaster Risk Management Agency (COPECO), Ministry of Environment (SERNA), Ministry of Planning and External Cooperation (SEPLAN), and Honduran Association of Municipalities (AMHON). The delegates met with the Colombian entities that led the development of policy frameworks and instruments in land use planning for regional and municipal governments. They visited the municipalities of Bogota and Manizales, which have implemented the approach. After the Study Tour, a workshop in Honduras helped to systematize the learning experience. Attendees included officials of AMHON, COPECO, and SERNA; and the Ministry of Justice, Human Rights, Government, and Decentralization (SDHJGD) in its capacity for land use policies. This wide participation facilitated detailed discussion about lessons learned in Colombia and how these might apply to the Honduran context.

The Results. Honduran authorities strengthened their institutional capacity for mainstreaming disaster risk considerations into development planning processes with a focus on land use planning at the municipal level. They improved inter-institutional communication, collaboration, and coordination among national entities responsible for disaster risk management, territorial planning, and environmental management. They subsequently agreed upon a Strategic Action Plan to continue refining disaster risk management in Honduras. This plan included recommendations to clarify institutional responsibilities, formulate guidelines and tools for resilient development planning, and implement a national strategy to enhance technical assistance to municipalities.

Team Leader: Enrique Pantoja, Operations Advisor, The World Bank Group.



STEP 3



DESIGN THE STUDY TOUR

In Step 2, you defined the Study Tour by...

- ✓ Identifying the groups of people needed to address the challenge and bring about the desired change,
- ✓ Identifying the intermediate outcomes for the Study Tour,
- ✓ Preparing knowledge providers and seekers,
- ✓ Organizing a design and delivery team.

In Step 3, you will...

- » Design for intermediate outcomes,
- » Support the selection of knowledge seeking participants,
- » Select the blend and sequence of activities,
- » Design each Study Tour activity,
- » Plan the logistics.

A Study Tour can achieve one or more intermediate outcomes for participants. Depending on their development goals, you may design the tour to achieve numerous intermediate outcomes, or you may use the Study Tour to achieve one specific intermediate outcome. Your priority is to closely link the design of the Study Tour to the intermediate outcomes sought by these participants so that it helps them overcome the challenges toward achieving the priority development goals.

STEP 3: DESIGN THE STUDY TOUR

STEP 3.1 DESIGN FOR INTERMEDIATE OUTCOMES

Alignment across the goals is beneficial for all the stakeholders involved with the Study Tour, including the knowledge seekers, knowledge providers, funders, and brokers. Be sure that you don't design a Study Tour that only supports the goals of one group.

When possible, have the knowledge-seeking participants answer these questions in the preparation phase of the Study Tour:

- » *What new knowledge or skills do you want to gain from the Study Tour?*
- » *How will you apply the new knowledge or skills gained?*
- » *What benefits do you anticipate from applying this new knowledge or skills?*
- » *What group of stakeholders do you hope to share your new knowledge with? Toward what outcomes?*
- » *During the Study Tour, whom would you like to get to know better, and why?*
- » *How would you like to continue your engagement with the other Study Tour participants?*



STUDY TOUR IN ACTION: STEP 3.1

India, Algeria, and Spain exchange — Verify objective and intermediate outcomes

Selected participants for the knowledge exchange validated that the objectives and goals remained important.

STEP 3.2 SUPPORT THE SELECTION OF KNOWLEDGE-SEEKING PARTICIPANTS

In Step 2 you considered the participant profiles required for a successful Study Tour. Now it's time to choose specifically who will join you on the Study Tour from the knowledge-seeking side.

In this phase, you will want to:

- » Work with your counterparts and any participants already identified as knowledge seekers.
- » Work with your counterparts to identify participants who are leaders, conveners, key actors, or others who have the potential to take on these roles within their institution or government.
- » Seek the champions—those who are open to reform and can drive the desired change; and don't forget to look for the influencers, those in a position to secure stakeholder support.
- » Use the development goal and change objective as a guide when selecting each participant.
- » Ask your counterparts for a brief explanation why each potential knowledge seeker should be included and what they will contribute. You can use these explanations later to ensure that any substitute participants could still make the desired contributions.



STUDY TOUR IN ACTION: STEP 3.2

India and Algeria, and Spain exchange — Selected knowledge-seeking participants

Participants from India included:

- » Joint Secretary and Economic Advisor from the Ministry of Urban Development;
- » Section Officers, Department of Economic Affairs;
- » Advisor, Planning Commission;
- » Managing Director, Deputy Project Director, Sanitation Engineer, and two Task Managers from Karnataka Urban Infrastructure Development Finance Corporation;
- » Engineer, Gulbarga City Corporation.

STEP 3.3 SELECT THE BLEND AND SEQUENCE OF ACTIVITIES

Activities are the essential building blocks of a Study Tour. There should be a clear results chain that links the activities to the outcomes sought by the Study Tour. Therefore, the blend and sequence of activities will be guided by the outcomes sought from the Study Tour. Also keep in mind the participant profile, group size, timeframe, logistical constraints, and resources.



TIP

TIPS FROM THE FIELD

“Make good use of all the tools and technologies, including social media, that allow us to collaborate, capture, communicate, and share the learning experience before, during, and after the study tour.”

When selecting the blend and sequence of activities for your Study Tour, consider the following:

- » **Development priorities** that the Study Tour will contribute to,
- » **Intermediate outcomes** that the Study Tour will help achieve,
- » **Good practices** that participants want to learn from,
- » **Operational environment** that could have significant impact on the potential and limitation of a Study Tour,
- » **Opportunities for providers** to best engage and share with knowledge seekers,
- » **A mix of interactive, engaging, and reflective activities** to stimulate learning for all participants.

Since operating environment can have a significant impact on the design and implementation of a Study Tour, keep in mind the list of considerations below.

Consider the operating environment

The potential and the limits of a knowledge exchange initiative are most often determined by budget, people (knowledge seekers and providers, and brokers), timeframe, technology and guidance tools, and context. In each case, try to turn constraints into opportunities:

Budget

- » Look for cost-efficient ways to achieve results. Bring people together virtually instead of flying them around the world.
- » Build Study Tours into larger operations. You might include it in the capacity-building component of a new loan or grant.

People

- » Convene participants on their terms. Ministers tend to prefer to meet in person or in a private videoconference.
- » Make preparation a requirement of participation.
- » Ask partners and sector/country experts to help identify the best-suited people for participation.

Timeframe

- » Divide tasks (design, logistics, facilitation, etc.) among team members and local partners.
- » Consider whether the exchange is part of a longer-term initiative or if it needs to meet immediate learning needs. You might be able to delay or trim down some parts of the Study Tour to make it timely and relevant.

Technology

- » Use the Study Tour to build participant capacity and motivation to use technology that facilitates future sharing of knowledge.
- » Meet participants at their technological comfort level. Start with technologies and communication methods with which they are most familiar (such as email, Facebook, Twitter).



STUDY TOUR IN ACTION: STEP 3.3

India, Algeria, and Spain exchange — Operating environment

- » *Budget:* US\$70,000.
- » *Seekers:* Government departments (senior officials and practitioners).
- » *Providers:* Senior executives, government officials, and practitioners.
- » *Broker for the exchange:* The World Bank.
- » *Timeframe:* Three-months planning phase for a week-long Study Tour that took place during the first quarter of 2013.
- » *Technology and resources:* Mostly audio-conferencing.
- » *Operating environment:* With no local World Bank presence in Algeria and Spain, the design and delivery team worked closely with the local knowledge provider in Algiers and coordinated all logistical details for exchange. Similarly, the team worked closely with contacts at Agbar in Spain to structure the program in Alicante.

Explore varied types of interactions

Not all activities have to be structured technical learning events; objectives related to creating professional networks and building relationships can be achieved through fun social activities throughout the Study Tour as well.

When trying to decide which activities to select and how they should be sequenced, consider the type of communication and interaction the participants need to engage in. The activities can fall in one of the four categories:

Presentation activities primarily consist of a one-way flow of information and also require use of creative techniques to engage and involve the audiences. These activities include demonstration, expert panel, lightning talks, poster session, and storytelling.

Discussion activities consist of multi-directional knowledge sharing, require group participation, and are often used after presentation-type activities. These activities include brainstorming, buzz session, e-discussion, knowledge café, peer assists, and anecdote circle. Experiential activities move the participants beyond knowledge sharing and discussion and allow them to experience something new, reflect on the experience, and translate the knowledge into action. These activities include action planning, field visit, fishbowl, role play, secondment, and simulation.

Analytical activities enable participants to examine and make sense of topics or situations from a prospective and/or retrospective lens. These activities include after-action review, focus group, interview, self-assessment, survey, and SWOT analysis.

Descriptions of 14 activities that are especially useful for Study Tours are provided in the Toolbox, pages 34-48.

Select activities that engage participants

Well-designed activities should allow participants to:

- » Experience something new;
- » Internalize the significance of the new experience;
- » Observe, question, reflect on, and contribute to the pool of experience;
- » Interact with experts and other participants, and consider new ideas;
- » Develop a collective understanding based on shared experience;
- » Translate the knowledge into action plans;
- » Summarize new knowledge in written and audiovisual formats and make these available for other stakeholders.



Sample design for an Awareness-Raising Study Tour

It is useful to group activities around three phases: planning, delivery, and follow-up. For example, a Study Tour of policy-makers who want to see how several new agricultural innovations are being implemented, may have the following sequence of activities:

PLANNING

- » Brainstorming and action planning meeting to agree on key change objectives;
- » e-Discussion to identify participants, key speakers, and partners and to decide on implementation team.

DELIVERY

- » Field visit to observe how programs are being implemented;
- » Expert panel to discuss trends and challenges, followed by a Q&A session;
- » Demonstrations face-to-face with visiting experts and implementing agencies to share how similar solutions have worked in another context;
- » Informal presentations by participants after dinner each evening;
- » Knowledge café to enable creative sharing of ideas around common interests among those in attendance.

FOLLOW-UP

- » Survey to assess impact and usefulness of Study Tour;
- » Action planning to prioritize key findings and follow-up actions.

Sample design for a Building Consensus and Networking Study Tour

For example, a Study Tour of private and public sector officials who are considering several options for improving utilities in rural areas may have the following sequence of activities:

PLANNING

- » Action planning, face-to-face and virtual, with key stakeholders to define scope of Study Tour, agree on participants, and select facilitator;
- » Storytelling to share how implementation actually gets done.

DELIVERY

- » Buzz session to engage every participant early in the tour;
- » Expert panel to get multiple perspectives on a topic of focus;
- » Field visit to meet with those running rural utilities;
- » Anecdote circle during coffee/tea to engage the group in sharing their experiences;
- » Role play to take on the perspectives of others and prepare to advocate for behavior change;
- » Action planning to determine next steps and how to implement.

FOLLOW-UP

- » e-Discussions via video-conference to keep up momentum;
- » Report to share learning and agreements from the Study Tour with a wider stakeholder group.

Sample design for a Knowledge/Skills Development Study Tour

For example, a Study Tour of ministry staff who will have to implement new privacy standards for health records would benefit from the following sequence:

PLANNING

- » Action planning with participants and host(s) to prepare a strategy for the Study Tour;
- » Discussions with key partners and participants to discuss agenda and scope of Study Tour.

STEP 3: DESIGN THE STUDY TOUR



DELIVERY

- » Presentations from both knowledge providers and tour participants to share experiences,
- » Field visits to see firsthand what is possible and interact with project implementers and beneficiaries,
- » Peer assist sessions to gain input on specific challenges from peers and practitioners from knowledge-providing country,
- » Storytelling to share how implementation actually gets done,
- » Interviews with key decision-makers, practitioners, and beneficiaries and to record feedback from participants.

FOLLOW-UP

- » Poster sessions to share findings and lessons learned with a larger stakeholder group,
- » Surveys and interviews to gain feedback from participants,
- » After-action review to determine future learning requirements.



STUDY TOUR IN ACTION: STEP 3.3

India, Algeria, and Spain exchange — Activity selection and sequencing

Workshop	Planning	Brainstorming	Brainstorming enabled key stakeholders who participated in the Study Tour to come to an agreement on scope of workshop.
		Action Planning	After the brainstorming, key stakeholders determined that it was important to conduct two workshops, one focusing on participants at the national level and the other targeted at the state level.
	Delivery	Reports Presentations	Reports and presentations focused on learning from the experiences of the Study Tour. Discussion-based activities yielded consensus for follow-up action planning.
		Group discussions Action Planning	
Follow-up	Report	Reporting was designed to share knowledge that emerged from the workshops.	

From Study Tour to Action

Study Tours typically end with follow-up activities that help knowledge seekers identify practical strategies for applying what they have learned. Don't wait until after the Study Tour to define how lessons will be applied and sustained and what on-going support may be required to bring about desired results.

Knowledge seekers should be encouraged and supported to do after-action reviews (see page 53) and action planning (see page 52) during the Study Tour to develop clear plans for how they will implement what they have learned. Follow-up support can be provided through expert visits, video conferences, peer networks, twinning arrangements, or other activities to ensure that knowledge sharing continues and leads to results.

Your Study Tour design will also be influenced by the types of participant groups:**Design considerations for policy-makers**

- » Be aware of rank and prestige when identifying knowledge providers.
- » Include adequate time for asking questions of knowledge providers.
- » Share background profiles for both knowledge seekers and knowledge providers.
- » Raise awareness so that everyone is “on the same page”.
- » Building consensus with the group is often an important intermediate outcome.

Design considerations for groups of technical staff

- » Survey knowledge-seeking participants before the tour to identify specifics of the knowledge/skills required.
- » Learn as much as you can about the skill levels of knowledge providers and seekers to ensure good matches.
- » Include adequate time for “hands-on” learning.

Design considerations for mixed stakeholder groups

- » If participants have diverse backgrounds and interests, consider forming smaller groups for some tour activities. The whole group does not have to experience all of the same activities.
- » New and improved actions (such as pilot programs) often come from having diverse groups working together. Consider action planning for a pilot program as a potential activity for a mixed stakeholder group.
- » Mixed groups frequently offer excellent opportunities for building relationships among Study Tour participants. Include informal networking opportunities in your design. Many important relationships are built during tea/coffee breaks.

What Influences Study Tour Activity Selection

When selecting the blend and sequence of activities for your Study Tour, consider:

- » The results the Study Tour should accomplish for the project/program in which it is being used;
- » The intermediate outcomes you want to achieve;
- » What the participants want to learn;
- » The operational environment (budget, people, time, technology, political context, etc.);
- » How providers can best engage and share knowledge with participants;
- » How participants can be active, rather than passive, in the learning.

STEP 3.4 DESIGN EACH STUDY TOUR ACTIVITY

There are numerous, activities that you can consider for inclusion in a Study Tour. For a week-long Study Tour, you might include more than 15 distinct activities. The participants will be more engaged if you use a variety of activities rather than the same formula each day. Once selected, each activity must be effectively designed.

The Study Tour Toolbox (beginning on page 32) is your resource to plan for and select an appropriate mix of activities for your Study Tour. It includes brief descriptions, and practical how-tos on a range of frequently used activities for Study Tours.

- | | |
|---|--|
|  Action Planning - Page 35 |  Field Visit - Page 42 |
|  After Action Review - Page 36 |  Fish Bowl - Page 43 |
|  Anecdote Circle - Page 37 |  Focus Group - Page 44 |
|  Brainstorming - Page 38 |  Interview - Page 45 |
|  Demonstration - Page 39 |  Survey - Page 46 |
|  e-Discussion - Page 40 |  Knowledge Café - Page 47 |
|  Expert Panel - Page 41 |  SWOT Analysis - Page 48 |

STEP 3: DESIGN THE STUDY TOUR



STUDY TOUR IN ACTION: STEP 3.4

India, Algeria, and Spain exchange — Designing and delivering the activities

Much of the design and delivery of the activities was done by local partners, including representatives from the public and private sectors. They also coordinated logistical support.

Design Tips for other Study Tour activities are available in the Art of Knowledge Exchange toolbox (<http://hdl.handle.net/10986/17540>). Liberating Structures website also offers a range of activities that you can choose from to design an engaging and results-focused Study Tour (<http://www.liberatingstructures.com/>).

STEP 3.5 PLAN FOR LOGISTICS

There are many logistics that must be arranged for any Study Tour and planning for them starts early in the design phase. Work with the local delivery partner to prepare a checklist; you can start with these:

- ✓ **Detailed budget.** Develop early in the design process so you do not over (or under) spend.
- ✓ **Dates and locations.** Determine early since these will impact everything from available knowledge providers and Study Tour participants to travel arrangements and costs.
- ✓ **Travel visas.** Once Study Tour participants are selected begin the process of arranging for travel visas.
- ✓ **Invitations** should be sent to participants at least 3 weeks prior to the Study Tour, along with information on travel, dining, and hotel arrangements.
- ✓ **Background information** on knowledge-seeking participants and their goals should be shared with knowledge providers at least 2 weeks prior to the Study Tour.
- ✓ **Transportation** (including airport pick-up, hotel-to-field transport, etc.) requires careful planning and should be considered throughout the design process. Take into account local traffic patterns and delays.

Cultural differences and practices should be identified and considered when planning the logistics of the Study Tour. Work with your local delivery partner to plan accordingly for any religious practices, holidays, or events during the time period of the Study Tour. Sometimes, but not always, consideration of these cultural and religious practices can be quite important to the success of the Study Tour. If appropriate, you should brief participants about local practices and sensitivities of the host country (or community) and what behaviors possibly to avoid. Knowledge providers should also be aware of any important cultural practices of participants.

You should ask all participants about personal food allergies, dietary restrictions, special accommodations with regard to disabilities, and other issues that might need advanced arrangements. Make sure that you have emergency contact information for all participants.

A useful communication tool prior to the Study Tour is to distribute **welcome packets** to participants. Packets could include information on local cuisine, cultural sites, and customs; area maps; transportation options; local shopping; and other information. If local shopping is an attraction, consider building time into the Study Tour agenda for shopping so participants do not have to skip sessions.



TIP

TIPS FROM THE FIELD

“Create a social space for participants to network and explore ways to adapt lessons learned to their own context.”

“Plan to document lessons learned and disseminate them among participants within one month of visit. A followup workshop can also be considered to check how participants are taking forward their learning.”





STUDY TOUR IN ACTION: INDIA AND MEXICO EXCHANGE

SHARING EXPERIENCE IN PROMOTING INCLUSIVE GREEN GROWTH

The Challenge. As one of India's main sources of clean energy through hydropower, the state of Himachal Pradesh in India's Himalayas is of major environmental importance to its neighboring states. The three rivers that flow through Himachal Pradesh join the river Indus, bringing water to more than 200 million people. The state's development goal was to promote inclusive green growth that benefits everybody while respecting the environment and transforming different areas of the economy, including energy, watershed management, industry, and tourism. However, the State Government had inefficient policy instruments, and its officials lacked the skills to design new policies and to finalize and implement the development strategy. Additionally, there was lack of coordination across different sectors and an inability to inspire stakeholders to cooperate.

The Solution. The Government of India recognized the shortfall and decided that a Study Tour would be of value for the state of Himachal Pradesh. Mexico was chosen as knowledge provider due to the progress it had made in stimulating green economic growth across different sectors of its economy. Specifically selected for successful green growth promotion were the state of Oaxaca, one the most biodiverse states of Mexico and home to a number of indigenous cultures; and the state of Quintana Roo, known for its tourism opportunities.

An internet-based platform was established to enable the Indian and Mexican officials to share documents and their expectations prior to face-to-face meetings. The Indian officials also met with World Bank staff who would effectively engage in the role of knowledge brokers. The Indian officials then visited Mexican counterparts at the federal level as well as in Oaxaca and Quintana Roo. They discussed Mexico's experience and challenges in making urban and rural development more environment-friendly, efficient, and resilient to climate change while being inclusive to all social groups.

A video documenting the Indian officials' visit was a visual reminder of the lessons learned in Mexico and two newsletters helped to disseminate the lessons to a wider audience. The officials of Himachal Pradesh incorporated what they had learned in Mexico in a presentation delivered at the India Climate Policy and Business Conclave meeting.

The Results. The Study Tour and exchange enhanced the knowledge and skills of Himachal Pradesh officials in designing green growth policies that now include a benefit-sharing mechanism in hydr power development and payment for ecosystem services. It also led to stronger coalition building and network coordination among different stakeholders involved in design and implementation of green growth policies, including civil society and academia. The improved consensus among different stakeholders resulted in the amendment of existing legislation and the adoption of the Sustainable Tourism Development Policy.

Team Leader: Pyush Dogra, Senior Environmental Specialist, The World Bank Group.



STEP 4



IMPLEMENT THE STUDY TOUR

In Step 3, you designed a Study Tour by...

- ✓ Preparing for intermediate outcomes,
- ✓ Selecting the participants,
- ✓ Selecting and sequencing a blend of results-focused activities,
- ✓ Preparing the design of activities,
- ✓ Planning the logistics.

In Step 4 you will...

- » Guide participants along their learning journey, orchestrate engagement, and build relationships;
- » Help participants in achieving learning outcomes and support their action plans;
- » Document and track results.

STEP 4.1 GUIDE PARTICIPANTS ALONG THEIR LEARNING JOURNEY

As the Study Tour draws near, your role changes from that of a designer to that of a guide. As a Study Tour guide, you will provide opportunities for knowledge-seeking participants to assume leadership over their own learning journey, help these participants overcome any obstacles they might have in achieving their desired learning outcomes, reflect on and internalize their learning and document their experience, and coalesce around action plans to achieve change.

Close engagement with the knowledge providers and seekers is integral to a successful Study Tour. During implementation, this becomes especially significant:

- » **Solicit input early.** This helps participants get involved and stay involved.
- » **Do your homework.** Verify that knowledge providers are well prepared and that materials and messaging are clear; a “dry run” will help to ensure that the Study Tour proceeds smoothly.

STEP 4: IMPLEMENT THE STUDY TOUR

- » **Build trust.** The more participants are involved and the more you listen, the more they will trust you.
- » **Show gratitude.** Acknowledge active participation by all participants. Publicly acknowledge the good work of knowledge providers and delivery partners.
- » **Be a model host.** Encourage respectful and friendly behavior from your delivery team that will be appreciated and reciprocated by the participants.
- » **Be a team builder.** Make sure this is a consultative process. Your participants are your best allies in making a Study Tour successful.
- » **Be personable.** Get to know all participants, know their work, be cognizant of their primary learning objectives, and ask them to share their experiences with the group.
- » **Be a networker.** Build in ample time for participant networking, socializing, and group collaboration. These networks may endure and perhaps become the most significant driver of change in the longer term.



STUDY TOUR IN ACTION: STEP 4.1

India, Algeria, and Spain exchange — Engaging the knowledge-seeking participants

Debriefing sessions were organized throughout the Study Tour so that participants had a chance to reflect on what they were learning and to consider their next steps. Participants were also encouraged to take notes, photos, and videos to capture their learning.

Share contact information

Study Tours frequently lead to many intended and unintended professional relationships. It is valuable to share the contact information of knowledge providers and seekers. Make sure that everyone is agreeable with having their information shared beforehand. You can also use social media (Facebook, WeChat, or WhatsApp) to help the participants stay in touch during and after the Study Tour.

STEP 4.2 HELP PARTICIPANTS ACHIEVE LEARNING OUTCOMES AND SUPPORT THEIR ACTION PLANS

Another aim of the implementation journey is to bring the participants together around their action plans, keeping in mind the outcomes they seek. The action plans can range from drafting a simple roadmap of next steps at individual level or group action plans involving teams and diverse stakeholders.

It helps to recognize that participants process new ideas and react at different speeds. Some will recognize a potential solution right away and “hit the ground running”. Others will wait before making any commitments. Find a pace that is acceptable to all, even if it is not perfect for everyone.

Discuss possible course corrections with participants whenever possible. Make sure you have majority support before proceeding too far with the changes.

Focus on facilitating an experience that allows participants to:

- » Plan and prepare for what they will see, learn, and do;
- » Try something new;
- » Internalize the significance of what they do and reflect on its application in their own contexts;
- » Observe, ask questions, share thoughts, and contribute their own experiences;
- » Interact with experts, other participants, and new products and approaches;
- » Develop a collective understanding with other participants;
- » Take action on what they learn.



TIP

TIPS FROM THE FIELD

“Verify the languages spoken and read by both the participants and the knowledge providers.”

“Decide on how to distribute per diems (up front, daily, in cash, etc.).”

“Check with local banks for cash limits.”

“Know the level of each participant in the delegation. Protocols may differ depending on seniority.”

STUDY TOUR IN ACTION: STEP 4.2

India, Algeria, and Spain exchange — Action plans for change

A technical expert conducted a session at the end of the Study Tour to help participants identify and synthesize the key takeaways that could help inform decision-making on the project design and that could also be shared with others upon their return.

**STEP 4.3 DOCUMENT IMPLEMENTATION AND TRACK RESULTS**

As you navigate the implementation terrain, Study Tour objectives may shift (especially in more complex situations). Unexpected results may also emerge. That is why it is critical to capture results as they happen. Doing so will help you and your participants know whether you're on the right path or need to take another route. Find simple ways to document milestones, highlights, and lessons.

Before you start documenting and capturing, answer these questions to help with your planning:

- » *Is the effort to capture more than the value of what you can get?*
- » *How will you use this information once you've collected it?*
- » *What decisions can be made based on this information?*

During the Study Tour, use some of these ideas to get feedback on how things are going:

- » Get together over an evening meal with the group. This is the simplest (and tastiest) way to capture participants' impressions. It also builds relationships and trust.
- » Encourage participants to keep a journal (written, photo, audio, or video). A simple notebook and a pen is a great enabler. Go the extra mile and print the Study Tour title and date on the cover. People will use it, keep it, and refer back to it!
- » Record your own impressions, including key decisions, in a simple journal or blog.
- » Allocate reflection time at the end of each day. Ask participants to use this time to journal and share with the group.
- » Ask participants to share photos and videos after each activity. Lead by example. Create a group distribution list or community page to facilitate sharing.
- » Include a documented after-action review process.
- » Capture group reflections on flip charts or, even better, on post-it notes that you can stick to a wall.

At the end or immediately after the Study Tour, use these ideas to sustain learning, scale up activities, and share ideas with stakeholder groups:

- » Set up an online group space and ask participants to post content, questions, and thoughts from the day. Monitor it and regularly refer to it to increase participant engagement.
- » Collect presentations, handouts, training guides, policy guidelines, technology manuals, and other materials from knowledge providers and put them on a shared cloud drive.
- » Create a detailed action plan to guide the next steps in applying what participants learned.
- » Routinely share information with participants, especially examples of what other participants have been able to achieve since the Study Tour.

STUDY TOUR IN ACTION: STEP 4.4

India, Algeria, and Spain exchange — Documenting the implementation journey

The implementation journey was documented through:

- » *Individual participant notes,*
- » *Joint report by the knowledge facilitators,*
- » *Notes from debriefing sessions,*
- » *Interviews with staff in the utilities,*
- » *Expert interviews.*





STUDY TOUR IN ACTION: VIETNAM, BULGARIA, LATVIA, AND TURKEY EXCHANGE

The Challenge. The Government of Vietnam (GOV) wanted to reform its inadequate and inefficient social security administration in favor of a modern, fair, and transparent system. Although the government had outlined a strategy, it felt that its institutional capacity was limited.

The Solution. The GOV requested World Bank support in learning how Latvia, Turkey, and Bulgaria had modernized their systems of old age pensions and health insurance. Before the exchange, World Bank staff in each participant country worked together to identify the right sources of knowledge. After reaching a consensus, country representatives shared information and key documents by e-mail to prepare participants for a Study Tour.

Staff from Vietnam's Social Security (VSS) headquarters and from three provincial offices then visited Latvia, Turkey, and Bulgaria to learn about their social security reform experiences. The World Bank distributed a report on lessons learned from each visit and recommendations for Vietnam. The Vietnamese government team also shared their thoughts and takeaways after each trip through back-to-office reports.

After the Study Tours, Vietnamese officials held a workshop for VSS staff from all related technical departments as well as a wider audience, including the Ministry of Labor and Social Affairs and the Ministry of Finance, representatives from civil society, and think tank personnel. At the workshop Latvian, Turkish, and Bulgarian officials presented on their successes and best practices in project management and VSS officials spoke about lessons learned from the Study Tours. Participants also viewed videos on other countries and other social security systems that could provide more insight.

Results. Vietnam learned how Latvia's, Turkey's, and Bulgaria's Social Security Agencies (SSA) managed business process re-engineering and implemented ICT upgrades. *"It was interesting that lessons could also be learned from mistakes... [This was] the first time [Vietnamese] officials learned about the importance of business processes re-engineering. Before the trip, [they] always thought of social security reform as development and application of ICT,"* says Nga Nguyet Nguyen, who helped broker this exchange. Vietnam also learned how each SSA had managed human resources and learned procedures for overseeing and managing social insurance reserves. Perhaps most important, the GOV acquired the analytical tools to strengthen its administrative management capacity. It improved its understanding and capacity to document, analyze, and develop a vision for re-engineering Vietnam's social security business processes. As an immediate policy outcome of the exchange, the GOV is assessing whether to integrate tax and social security revenue collection.

Team Leader: Nga Nguyet Nguyen, Senior Economist, The World Bank Group.



STEP 5



EVALUATE THE STUDY TOUR

In Step 4, you implemented a Study Tour that...

- ✓ Guides the participants on their learning journey,
- ✓ Keeps participants engaged and helps them achieve valuable learning outcomes,
- ✓ Documents implementation and tracks results.

In Step 5, you will...

- » Measure the success of the Study Tour,
- » Report on and share the results of the Study Tour.

STEP 5.1 MEASURE THE SUCCESS OF STUDY TOUR

A well-designed and well-implemented Study Tour achieves many results. Some results can be directly attributable to what the participants experienced and learned. For other results, the Study Tour may have just contributed to one of many factors that lead to change. Some results occur only after the participants go home (literally or figuratively) and apply what they have learned.

The following table lists a variety of ways to measure results at the end of the Study Tour in the context of achieving intermediate outcomes:

STEP 5: EVALUATE THE STUDY TOUR

INTERMEDIATE OUTCOME	WAYS TO MEASURE RESULTS
New knowledge	<ul style="list-style-type: none"> » Ask participants to give presentations on the last day of the Study Tour. » Interview participants in person at the end of the Study Tour. » E-mail participant survey 6 weeks after the Study Tour. » Use a knowledge-based pre-test and post-test with participants.
Enhanced skills	<ul style="list-style-type: none"> » Review monthly application of skills (e.g., error logs, number of reports) at 1-, 2-, and 3-month intervals after the Study Tour. » Use a skills-based pre-test and post-test of participants. » Directly observe participant performance 6 months after the Study Tour. » Survey participants about the application of skills 9 months after the Study Tour.
Improved consensus	<ul style="list-style-type: none"> » Attend weekly team meetings to observe collaboration. » Review meeting minutes to determine if the group has been able to reach consensus on key issues. » Follow-up with group members to assess progress toward change objective. » Send email survey to team members at 3-, 6-, and 9-month intervals after the exchange to self-assess effectiveness of collaborations.
Enhanced connectivity	<ul style="list-style-type: none"> » Review documentation of group to determine if it is growing (e.g., more individuals, strategic partners, member organizations) at 3-, 6-, and 9-month intervals after the Study Tour. » Interview members about their experience with group (e.g., numbers of conversations with other members, trust in peers, satisfaction with peer responses) before and then again 6 months later. » Track data from quarterly surveys of group member activity (e.g., conversations with group members), satisfaction (e.g., useful guidance), and results (e.g., what came from conversations).
New and improved actions	<ul style="list-style-type: none"> » Document participants' agreement on an action plan at the end of the Study Tour. » Call (or e-mail) participants 3 months later to learn if they have started new (or improved) processes within their organizations.

STUDY TOUR IN ACTION: STEP 5.1

India to Algeria and Spain exchange — Intermediate outcomes and results

New Knowledge. Alternate models for service delivery arrangements based on public-private partnership arrangements are being explored for implementation of 24/7 water supply projects within the India context. In particular, this helped inform thinking among the project counterparts at the state level.

Improved Consensus. There was improved agreement among various state/local counterparts on the model for engagement of private sector under the Karnataka Urban Water Supply Modernization Project. This included provisioning for a municipal company model to enable improved coordination and accountability vis-à-vis the private operator.

**Surveys**

Participant surveys are one way to get feedback on what worked and didn't work in the Study Tour.

As you design the surveys, focus the questions being asked of participants that will be meaningful for your next steps in follow-up or for reporting to stakeholders. Ask yourself, *how will I use the answer that I get from this question?* If you do not have a clear answer, do not ask that question.

Survey Study Tour participants before they go home

Conduct a short survey at the end of the Study Tour before participants leave for home while their experiences are fresh on their minds. See sample questions for Participant Survey (Toolbox Samples, page 58). In the end-of-tour survey, include results-focused questions like:

- » *Did the Study Tour meet your learning expectations?*
- » *Were you able to make valuable connections with others (either other knowledge seekers or knowledge providers)?*
- » *Which activities were most useful to you?*
- » *How do you plan to apply what you learned?*
- » *What else would you have liked to learn, but didn't from this Study Tour?*
- » *Describe any meaningful professional relationships you developed during the tour.*
- » *What specific changes (new policy, revised processes, etc.) do you anticipate coming from this Study Tour?*
- » *Were the logistics (transportation, hotel, meals, etc.) adequate to support your learning during the tour?*

Survey Study Tour participants after they return home

A short, follow-up survey with participants 6 or 9 months after the Study Tour can answer how they have been able to apply lessons learned. The follow-up survey can provide excellent information for designing future exchanges. In a follow-up survey, you may want to ask:

- » *Since the Study Tour, how have you been able to apply what you learned?*
- » *What specific changes (new policy, revised processes, etc.) have been realized since the Study Tour?*
- » *Have you applied what you learned with other Study Tour participants or knowledge providers since the tour?*
- » *What barriers have you encountered in applying what you learned on the Study Tour?*
- » *What else could you have liked to learn on the Study Tour that would now be useful?*

STEP 5: EVALUATE THE STUDY TOUR

Follow-up with knowledge providers

Knowledge providers have a valuable perspective on what worked during the Study Tour. Following up with them after the tour can provide insights for designing future tour activities and building relationships with knowledge providers for use in other Study Tours. In a short, email survey, you can ask knowledge providers the following questions:

- » *Were you adequately prepared with background information in preparing for the recent visitors during their Study Tour?*
- » *Did you perceive that the participants gained valuable knowledge from the event?*
- » *What knowledge, connections and experience did you gain from this experience? How will you use it?*
- » *What barriers do you believe may have kept participants from gaining the most knowledge during the event?*
- » *Were the logistics of the event adequately managed?*
- » *Have any participants from the Study Tour been in touch with you since the event?*
- » *Would you be interested in meeting with future Study Tour groups to share your knowledge?*
- » *What would you do differently when hosting a Study Tour in the future?*



STUDY TOUR IN ACTION: STEP 5.1

India, Algeria, and Spain exchange — Direct results and influence achieved in India

Knowledge exchange instrument(s)	Direct results (Intermediate outcomes)	Influenced results
Study Tour	<p>Participants gained a better understanding of the different models as well as how public and private engagement works.</p> <p>It became apparent to the Indian delegation how a municipal company can be helpful in enabling alternate structures of public-private partnerships.</p>	
Workshop	<p>A broader audience increased awareness of models through sharing of Study Tour results. National-level workshop focused on innovation and policy. State-level workshop focused on the regulatory processes and the role of the public counterpart. At the city level, results focused on the technical steps needed to move forward.</p>	<p>Ongoing discussion and knowledge sharing about public-private partnership models that would be applicable in the Indian context.</p>

STEP 5.2 REPORT AND SHARE RESULTS

As you come to the end phase of the Study Tour, it is time to report on the results, both expected and unexpected. More than just reporting on who participated and which activities they participated in, it is important to describe the changes and intermediate outcomes achieved through the results-focused Study Tour. You should consider these questions as you prepare your report:

- » *Who has been able to apply what they learned?*
- » *What factors in their enabling environment helped them apply what they learned?*
- » *What have they been able to achieve?*
- » *Where have they been able to bring about change?*
- » *Why are the changes/results important (i.e., to the change objective and/or development goal)?*
- » *How did the knowledge exchange enable these results?*
- » *If they have not been able to achieve results, what were the constraints?*

Your audience and your goals will dictate the approach and format you use for reporting results but would typically include the following sections:

1. Identify the audience. Typical audiences include key stakeholders: management, sponsors, participants, decision-makers (e.g., parliamentarians, policy-makers), civil society groups, design and delivery team members, and others interested in learning more about Study Tour.

2. Define goals. *What do you want to communicate to your target group(s)?* Your aim might be to raise awareness of outcomes achieved, influence behavior of mid-level management, advocate for reform among policy-makers, inform sponsors about next steps, or inform the full design and delivery team so they can learn from the experience. Your communication and learning goals will shape what, how, and when you connect with each target audience.

3. Develop a plan. Results can be conveyed in many different ways. It bears repeating — the right plan depends on your audience and goals. Determine what each audience would need to know to meet the goal(s) for that group, and how often they should be updated. Then decide on the minimal information needed to meet those requirements.

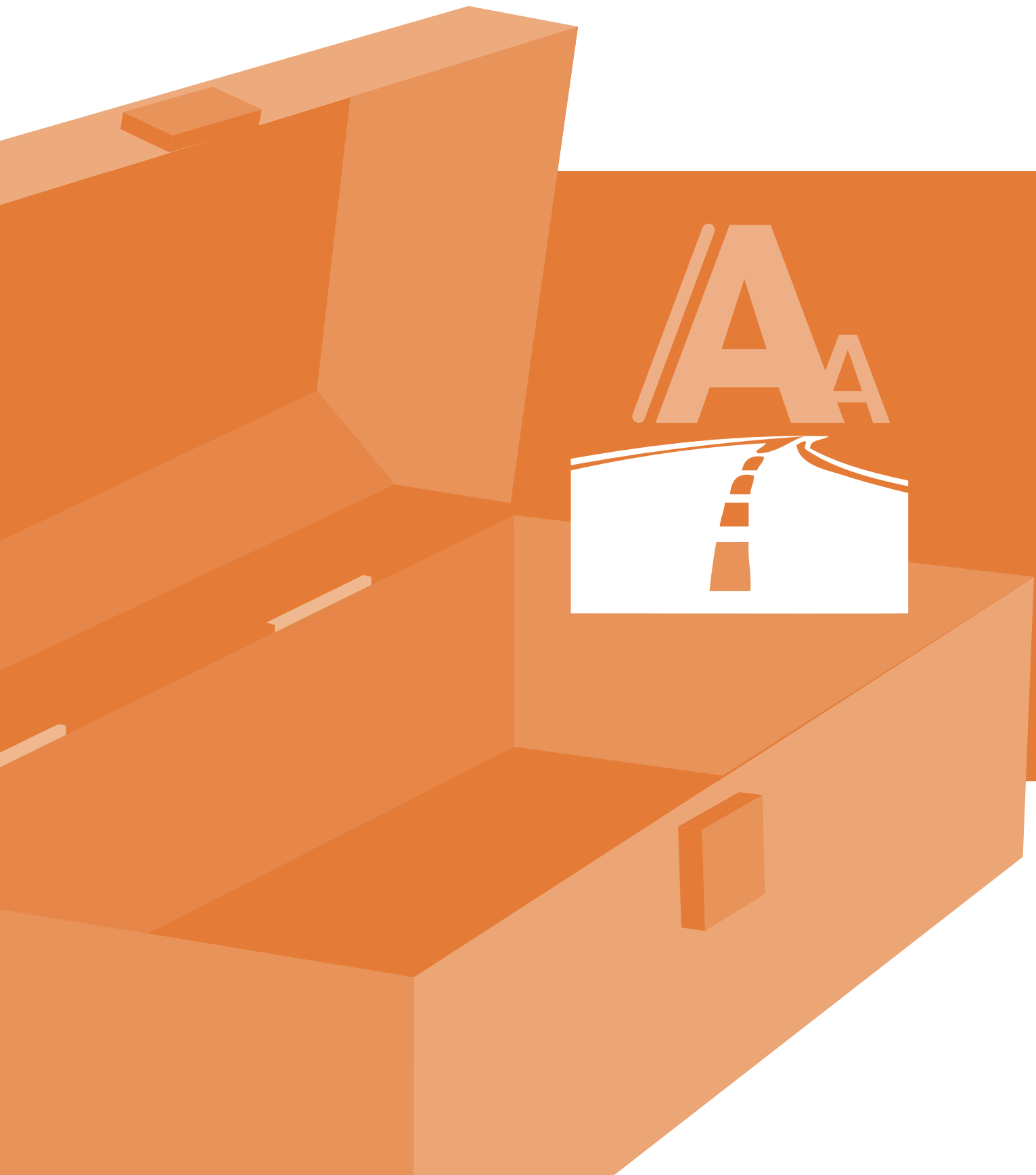
4. Share the results. In many situations, sharing the results requires more than just announcing that the results are available. Beyond sending a final report to the client or sponsor, you will want to share the results with Study Tour knowledge recipients and knowledge providers. In some situations, it may also be appropriate to share the results with influential stakeholders such as bloggers, funding agencies, or leading academics.

STUDY TOUR IN ACTION: STEP 5.1

India to Algeria and Spain exchange — Reporting results

The results from the exchange were shared with key stakeholders (internal unit and management) via email. In addition, a report of the results, including all technical presentations as well as documents and other materials, were shared with the government agencies that participated in the exchange.







STUDY TOUR TOOLBOX

ACTIVITY DESCRIPTIONS AND
TIPS FROM THE FIELD



ACTIVITIES



ACTION
PLANNING



AFTER-ACTION
REVIEW



ANECDOTE
CIRCLE



BRAINSTORMING



DEMONSTRATION



E-DISCUSSION



EXPERT
PANEL



FIELD
VISIT



FISHBOWL



FOCUS
GROUP



INTERVIEW



KNOWLEDGE
CAFÉ



SURVEY



SWOT
ANALYSIS

1. ACTION PLANNING



A strategic exercise that results in a personal or group roadmap or timetable describing the specific steps that need to be taken to achieve a single or multiple objectives.

Action planning may be organized...

- » As a facilitated activity that guides participants through action planning.
- » At national, regional, community, institutional, and/or individual levels.

Use action planning to...

- » Apply and/or localize knowledge.
- » Create a tangible output and roadmap for follow-up action.
- » Encourage ownership of follow-up actions.
- » Enable knowledge transfer.



TIP

TIPS FROM THE FIELD

- ✓ The facilitator of action planning should provide clear guidelines to participants about how to create an action plan; most importantly, the facilitator should guide the participants in writing a realistic plan.
- ✓ For effective action planning, participants should consider using the following steps:
 - » Define what needs to be accomplished.
 - » Assign roles and responsibilities. Also identify key stakeholders, as successful implementation depends on buy in from relevant stakeholders.
 - » Prepare a list of activities, decide what is feasible (consider cost and resources), and prioritize.
 - » Break activities into discrete, measurable steps. It helps to write the projected actions as separate tasks that are both realistic and attainable. Make sure to identify the individual and or organization responsible for each task.
 - » Create a timeline with major milestones.



2. AFTER-ACTION REVIEW

A structured review process for project teams to analyze what happened, why it happened, and what can be done better or differently in the future.

During an after-action review, participants answer the following questions:

- » *What were the anticipated results?*
- » *What were the actual results?*
- » *What produced the actual results?*
- » *What will the team sustain or enhance?*
- » *What are some future opportunities to apply what was learned?*

After-action review may be organized...

- » As a formal or informal review process.
- » With an external facilitator or with the team lead as facilitator.

Use after-action review to...

- » Capture good practice approaches and identify lessons to be learned from implementation experience.
- » Express multiple perspectives of what happened and why.
- » Encourage feedback for improved performance.
- » Enable knowledge transfer.



TIP

TIPS FROM THE FIELD

- ✓ Keep in mind the following if you are the team leader and are facilitating an after-action review:
 - » Remain unbiased.
 - » Do not permit personal attacks among team members.
 - » Engage all team members in providing feedback and solutions.
 - » Within a knowledge exchange initiative, after-action reviews can be conducted at various times (after an event, activity, task, etc.).
 - » Create and maintain an open and trusting environment during an after-action review so that participants may speak freely. This is important to achieve best results.

3. ANECDOTE CIRCLE



An exercise that involves the use of story themes and anecdote-eliciting questions to engage a group in sharing their experiences.

Anecdote circle may be organized...

- » Around themes using anecdote-eliciting questions.
- » For settings with a group of 4 to 12 participants: often the participants are peers or have worked on the same project.
- » With participants sitting in a circle or at a round table.
- » With a facilitator experienced in anecdotal questioning techniques and with blending with the group.

Use anecdote circles to...

- » Support process change such as team and relationship building.
- » Resolve conflicts.
- » Collect stories to evaluate complex projects.
- » Enable knowledge sharing.



TIP

TIPS FROM THE FIELD

- » Record what is being said during the anecdote circle. This way you can harvest stories from the transcript.
- » Make sure that you engage a facilitator who is experienced in guiding and not leading. The group members should be sharing with each other, not telling their stories to the facilitator.



4. BRAINSTORMING

The generation of ideas or solutions about a specific topic by tapping into the wisdom of the group in a non-judgmental environment which encourages creativity and innovation.

Brainstorming may be organized...

- » As a facilitated activity that motivates participants to contribute ideas or solutions.
- » At the initial stages of a project or process.
- » Virtual or face-to-face.

Use brainstorming to...

- » Generate new and creative ideas.
- » Generate lists/checklists.
- » Facilitate problem solving, consensus building, and teamwork.
- » Motivate participants to invest in an idea or solution.
- » Enable knowledge sharing.



TIP

TIPS FROM THE FIELD

- ✓ Since the key goal of brainstorming is to generate as many ideas as possible—original ideas or ideas that build from each other—select a brainstorming topic that is relevant to participants.
- ✓ Quantity is what counts during brainstorming, not quality. It is important that participants be aware that *“no idea is a bad idea.”*
- ✓ Organize the session well. Make sure the brainstorming questions and guidelines are clear and that all participants understand the question and the process.
- ✓ Encourage solutions from all participants; no individual(s) should dominate the conversation.
- ✓ A successful brainstorm should result in many bold and unique ideas that can then be analyzed, prioritized, and applied in relevant contexts.

5. DEMONSTRATION



An expert showing how to use a product or perform a procedure; also used to showcase a new product or process in order to market and spread innovations.

Demonstration may be organized...

- » At the implementation stages of a project.
- » For small or large groups.

Use a demonstration to...

- » Apply knowledge or master a process.
- » Have a high level of participant involvement.
- » Share practical experience or process steps.
- » Share innovations and good practice.
- » Enable knowledge transfer within one's own context.



TIP

TIPS FROM THE FIELD

- » Ensure that the expert has good pedagogical skills and adapts the demonstration for the needs of the audience.
- » Make follow-up discussion, practice, and/ or performance support available to help with practical application in the participant context.
- » It helps to have two people running a demonstration activity — one to run the demonstration and the other to speak about what is being demonstrated.
- » Encourage the presenter(s) to embrace questions and concerns, delve deeper to clarify, and involve the rest of the participants in answering questions.
- » Make sure that participants have an opportunity to practice what was demonstrated



6. E-DISCUSSION

A discussion that takes place online either synchronously or asynchronously.

When planning e-discussion, consider the following questions:

- » Are the expected outcomes of the e-discussion clear?
- » Have you decided how to conduct the e-discussion?
- » How involved should the moderator be in the e-discussion?
- » Have you ensured that all participants can access the e-discussion?
- » Will the selected tool accommodate the number of people wanting to participate?
- » How will you capture the results of the e-discussion?

e-Discussion may be organized...

- » As an open, informal discussion.
- » As a moderated discussion.

Use e-discussion to...

- » Engage members of a community of practice.
- » Sustain learning and engagement both before and after face-to-face knowledge exchange initiatives.
- » Examine topics in-depth and allow for deeper reflection.
- » Crowdsource ideas from diverse stakeholder groups.
- » Support coaching/mentoring.
- » Enable planning and collaboration at any stage of a project or program — especially among geographically dispersed teams.
- » Plan agendas with key stakeholder groups, including participants.



TIP TIPS FROM THE FIELD

- ✓ Consider using an asynchronous e-discussion when you need scheduling flexibility.
- ✓ Participants do not need to be available at a fixed time to discuss a topic; they may engage at their convenience within the established parameters of the e-discussion.
- ✓ Provide moderator and participants with information on how to use the e-discussion tool/environment.
- ✓ Provide clear instructions on how participants can ask questions and provide feedback.
- ✓ Encourage participants to propose and lead discussion topics.
- ✓ Engage participants in capturing and summarizing the discussions.

7. EXPERT PANEL



A moderated set of presentations on the same topic addressed from various angles by a group of people with specialized knowledge.

Expert panel may be organized...

- » Virtual or face-to-face.
- » As a moderated activity.
- » At the delivery stage of a project.

Use expert panel to...

- » Provide multiple perspectives on a topic.
- » Raise awareness about a topic or an issue.
- » Lend credibility to a topic by providing an expert perspective.
- » Enable knowledge sharing.



TIP

TIPS FROM THE FIELD

- ✓ Choose panelists for their knowledge, communication skills, and effectiveness as speakers.
- ✓ Provide panelists with background information about participants and the relevance of the topic area for them.
- ✓ Hold a briefing (virtual or face-to-face) with panelists at least two weeks before the event to familiarize the moderator and all the panelists with the content of the presentations.
- ✓ Encourage participants to learn about the topic before the event; provide or suggest appropriate background documents. This communication can be done virtually.
- ✓ Good moderation is critical to the success of an expert panel.
- ✓ When planning the activity, consider what you will do if:
 - » You are running out of time.
 - » There are too many, or not enough, participants.
 - » Your desired panelists require compensation -- *do you have an adequate budget?*
 - » You can't get enough panelists to participate.
 - » One or more panelists can't participate at the last minute.
 - » The equipment has a malfunction.



8. FIELD VISIT

Physically going to a location that enables participants to experience project realities directly and meet with implementation teams and beneficiaries.

Field visit may be organized to...

- » Last for one or several days.
- » Include one or more demonstrations or hands-on learning opportunities.
- » Include a team consisting of a team leader, who works closely with organizers on the field visit program and is the point of contact during the visit.
- » Attract participants who contribute to field visit conversations and report back based on their expertise.
- » Welcome observers who participate in field visit but do not have any reporting responsibilities.

Use field visits to...

- » Gain new knowledge and/or learn directly from a project or program.
- » Establish direct contact with beneficiaries, community members, and/or key stakeholders.
- » Identify good practices.
- » Build networks and partnerships.
- » Support decision-making.



TIP

TIPS FROM THE FIELD

- ✓ Assign a field visit lead from both the seeker-side and provider-side to finalize the logistics for the visit.
- ✓ Invest the time to do a pre-visit to the field sites along with the knowledge provider to prepare the field visit hosts and to customize the learning experience for the knowledge seekers. Discuss engaging and interactive ways for sharing experience.
- ✓ Encourage the field visit hosts to share not only their good practices but also their challenges, what pitfalls to avoid, and what they wish they had known earlier.
- ✓ Since many field visits include a delegation of visitors, it is important to make sure that all members are prepared. Depending on the purpose and formality of the visit, it may be important to prepare a field visit guide that outlines roles and responsibilities and includes all relevant background information and documentation.
- ✓ Schedule a pre-visit briefing for the visitors to review documents, clarify any questions, and also agree on the desired outcomes from the visit.
- ✓ Consider providing a reporting template for visitors/participants to record their reflections.
- ✓ Consider having a daily debrief for the participants to share and capture key take-aways and reflections.
- ✓ Ensure that the field visit report (detailing the outcomes and next steps) is prepared and shared with relevant stakeholders in an interactive and engaging format/forum.

9. FISHBOWL



A small group conversation or a dialogue process held in a setting that includes a larger group of observers/listeners.

This experiential exercise enables active participation through discussion by those “inside the fishbowl” and active observation by those “outside the fishbowl.” Think of the fishbowl as a center stage with observers sitting around it. A typical fishbowl setup has an inner circle of chairs for about five to eight people with more chairs for observers set around the inner circle.

Fishbowl activity may be organized...

- » As an open session, which allows anyone in the audience to join the fishbowl during the discussion.
- » As a closed session that engages participants in the fishbowl as an intact group, joining and leaving the fishbowl as one.

Use fishbowl to...

- » Increase understanding of difficult or controversial topics.
- » Support multiple perspectives and debate.
- » Support problem solving, especially for complex problems that might have no single-answer solutions.
- » Encourage active listening and reflection.
- » Enable knowledge transfer.



TIP

TIPS FROM THE FIELD

- » Fishbowl requires an experienced coach who, in addition to good coaching skills, is knowledgeable about the subject matter.
- » Identify and work with the coach to decide on the structure of the activity.
- » You need a facilitator in addition to the coach to ensure a smooth transition as members of the audience enter and leave the fishbowl.
- » Select a venue that allows you to set up for a fishbowl conversation that also offers good visibility for those observing.
- » Based on your expected results, prepare an observers’ checklist: *What should observers pay attention to?*
- » At the end of each fishbowl, be sure to provide a summary of the key points, using the observer’s checklist as a guide.



10. FOCUS GROUP

A structured discussion protocol that brings together a group of people, typically unfamiliar with each other but with a common interest, to give their opinions on a particular topic or area.

Focus group is organized...

- » Generally, for groups of 6 to 12.
- » With a facilitator experienced in focus-group processes.
- » As a facilitated, interview-based interaction that also allows for group discussion.
- » To be brief but to last at least one hour.
- » To record the discussion and its outcomes.

Use focus group to...

- » Test assumptions for improved decision-making.
- » Test target audience response/reaction (to products or services or campaigns) before they are launched.
- » Support development of a strategic focus.
- » Encourage participants to build on each other's perspectives.
- » Create a safe space for sharing opinions and deeper reflections.



TIP

TIPS FROM THE FIELD

Find an experienced facilitator who can:

- » Be objective.
- » Listen well.
- » Draw people into conversations in a group environment.
- » Foster an atmosphere that enables information sharing.

Prepare an introduction script that:

- » Explains the purpose.
- » Explains how the focus group will be conducted.
- » Describes the facilitator's role.
- » Make sure you explain to participants how you will capture their opinions.
- » Consider using consent forms, especially if the focus group is to be audio or video recorded.
- » Select a room that is conducive to discussion.
- » Prepare minutes or a summary document in a timely fashion (within three to five days after the focus group session is completed); review carefully before making decisions about next steps.
- » Plan well ahead of the focus group discussion. Planning is key!

11. INTERVIEW



A question-and-answer engagement with an individual about a specific topic, usually following a pre-determined set of questions.

Interview may be organized...

- » With well-known experts and practitioners.
- » Following a formal, semi-formal, or informal protocol.
- » In real-time, virtual or face-to-face.
- » To be captured and shared.

Use interview to...

- » Raise awareness about a topic, issue, or cause.
- » Capture tacit knowledge.
- » Lend credibility to a topic by providing an expert perspective.
- » Share practical experience.
- » Enable knowledge sharing.
- » Replace a presentation.



TIP

TIPS FROM THE FIELD

- ✓ Before conducting the interview, prepare questions and a clear protocol and share these with the interviewee ahead of time.
- ✓ Be ready to dig deeper into the topic with follow-up and clarification questions.
- ✓ Make sure you capture the interview in print, or as an audio or video recording.
- ✓ If you plan to broadcast the interview, consider if it is going to be live or pre-recorded and edited.
- ✓ Decide how you plan to promote and share the interview. Depending on your audience, you may select one or more ways to disseminate the interview such as print, radio, podcast, video blog, television, or other media



12. KNOWLEDGE CAFÉ

Open, creative, facilitator-led conversations to surface collective knowledge, share ideas, and encourage collaborative dialogue in a relaxed, café-type environment.

Knowledge café may be organized...

- » Virtual or face-to-face.
- » As a part of large conferences, workshops, and knowledge fairs.

Use a knowledge café to...

- » Provide multiple perspectives on a topic.
- » Surface and collect tacit knowledge and experience from a large group of participants.
- » Support collective learning and build networks.
- » Identify good practice approaches.



TIP

TIPS FROM THE FIELD

- ✓ Establish café etiquette and environment to enable open dialogue through conversations.
- ✓ Rules might include “Listen carefully”, “Take turns in the conversation”, and “Contribute any and all thoughts”.
- ✓ Remember a knowledge café is only as good as the questions you ask. So spend time in crafting the right questions and keep the following in mind when preparing the questions:
 - » Use open-ended questions that do not have just a yes/no answer.
 - » Use questions that encourage inquiry instead of advocacy.
 - » Test the questions ahead of time with key individuals to ensure that they are easy to understand.
 - » Consider organizing your questions in idea/issue clusters for easier linking of conversation results to the core ideas/issues.
 - » An experienced facilitator is key to the success of a knowledge café. Also consider including scribes and note-takers to harvest the knowledge being shared.

13. SURVEY



The gathering of data or opinions from participants using a structured set of questions.

Survey may be organized...

- » Virtual and/or face-to-face.
- » In real-time with immediate feedback.
- » Over a set period of time.
- » At any stage of a project.

Use survey to...

- » Monitor progress or evaluate results.
- » Capture participants' perspectives and opinions or surface areas of consensus.
- » Conduct a needs assessment or prioritize areas of action.
- » Enable knowledge sharing.



TIP TIPS FROM THE FIELD

- ✓ Use surveys before, during, or after a Study Tour to make learning more relevant, interactive, and useful for the participants.
- ✓ Surveys are effective polling tools to prompt discussions, surface areas for consensus, or stakeholder ownership; and to prioritize important next steps or action items and outputs from Study Tours.
- ✓ Include simple instructions for completing the survey.
- ✓ Determine the right questions for your context, keeping in mind the following:
 - » Check that questions are written clearly and concisely — keep brief, focused, and on one subject.
 - » Check that the questions are not general, ambiguous, or leading. Use close-ended questions when appropriate and if you plan to aggregate responses. Developing the right questions is more time-consuming up front but makes analysis of results simpler.
 - » Use open-ended questions when you require a narrative response, and limit the number of response options. Carefully consider your capacity to process open-ended responses and how you will use them; narrative responses require more intensive data analysis for interpreting the results.
 - » Use balanced rating scales and label each option on the scale to increase the likelihood that respondents understand the scale.
 - » Pretest your survey before distribution—ideally, with individuals similar to your respondents.
 - » Follow good practice in designing the response options.



14. SWOT ANALYSIS

Strengths, Weaknesses, Opportunities, and Threat Analysis: A structured examination to identify a program or organization's internal strengths and weaknesses as well as any external/internal opportunities and threats.

SWOT analysis may be organized to...

- » Manage and eliminate weaknesses.
- » Help increase awareness.
- » Serve as prelude to strategy formation.
- » Stimulate new ideas and uncover opportunities.
- » Enable knowledge transfer.



TIP

TIPS FROM THE FIELD

- » Create a worksheet to help participants document their answers to these key questions:
 - ✓ Strengths
 - » *What do you do well?*
 - » *What unique resources can you draw on?*
 - » *What do others see as your strengths?*
 - ✓ Weaknesses
 - » *What could you improve?*
 - » *Where do you have fewer resources than others?*
 - » *What are others likely to see as weaknesses?*
 - ✓ Opportunities
 - » *What opportunities are open to you?*
 - » *What trends could you take advantage of?*
 - » *How can you turn your strengths into opportunities?*
 - ✓ Threats
 - » *What threats could harm you?*
 - » *What is your competition doing?*
 - » *What threats do your weaknesses expose you to?*
- » Ask participants to identify the relative importance of SWOT in the context of the knowledge exchange.
- » Consider options for how you will analyze answers and debrief participants:
 - ✓ Create a SWOT chart that shows the results visually.
 - ✓ Involve the participants in consensus building.
 - ✓ Use the final SWOT analysis matrix to identify additional knowledge exchange needs or build a roadmap of next steps.





SAMPLES & CHECKLISTS



1. SAMPLE: PRE-STUDY TOUR SURVEY QUESTIONS FOR KNOWLEDGE SEEKERS

Name of organization:

Contact Person Name: (Surname, First Name, Position in Organization):

Email:

Mailing address:

Location of organization (City, State, Country)

What are the key development priorities of your organization?

Describe the challenges that you and your peers are currently facing in achieving the development priorities?

What, in your perspective, would help to address the challenge(s)?

What are your knowledge and learning goals for this Study Tour?

What would success look like to you at the end of the Study Tour?

What group of stakeholders do you hope to share your new knowledge with? Toward what outcomes?

During the Study Tour, whom would you like to get to know better, and why?

How would you like to continue your engagement with the other Study Tour participants?

From your perspective, what might the knowledge brokers and providers learn from your experience?

Please indicate below the group you belong to:

Policy-makers; Others (please specify):

Senior management;

Mid-management;

Technical specialists;

Academics (faculty and students);

2. SAMPLE: ACTION PLANNING SESSION

DURATION	PROCEDURE	MATERIALS
5 min.	<p>Session introduction.</p> <ul style="list-style-type: none"> ✓ Facilitator explains structure and goal of session and assigns resource persons. 	
30 min.	<p>Large group discussion and brainstorming.</p> <ul style="list-style-type: none"> ✓ Facilitator leads a discussion on what they have learned so far, what they could apply within their own context, and what actions do they foresee taking in the short and medium term. <p><i>Note: Allow time for individual reflection, review of Study Tour journal and other materials and engagement with other participants in the room to cross-pollinate ideas.</i></p>	<ul style="list-style-type: none"> ✓ Flip chart ✓ Markers
45 min.	<p>Action plan development either with intact teams, small groups of different stakeholders, or individually.</p> <p>Facilitator hands out action planning worksheet. The worksheet should include a focus on: action steps, responsibilities, timeline, resources / support / opportunities, potential barriers and risks, and communication plan.</p> <p>Facilitator explains the group structure, which will depend on what makes sense given the participant profile and their working affiliation with each other.</p> <p>Facilitator indicates that resource person is there to offer guidance as needed for their action planning work.</p>	<ul style="list-style-type: none"> ✓ Action planning worksheet
30 min.	<p>Documenting/sharing/feedback in a large group.</p> <ul style="list-style-type: none"> ✓ Participants briefly share their draft action plans with the larger group and invite feedback from their peers and resource persons on one or two specific challenges. 	<ul style="list-style-type: none"> ✓ Flip Charts ✓ Markers
5 min.	<p>Wrap up.</p> <ul style="list-style-type: none"> ✓ Facilitator wraps up the session with a focus on next steps. 	

3. SAMPLE: AFTER-ACTION REVIEW ACTIVITY

DURATION	PROCEDURE	MATERIALS
5 min.	<p>Session introduction. Facilitator explains the goal of the session and that the session is organized to address the following four questions:</p> <ol style="list-style-type: none"> 1. <i>What was expected to happen?</i> 2. <i>What actually happened?</i> 3. <i>What went well and why?</i> 4. <i>What can be improved and how?</i> 	
10 min.	<p>Review: What was expected to happen? Facilitator asks participants to review the prepared summary describing the following:</p> <ul style="list-style-type: none"> » Purpose and objectives of Study Tour, » Knowledge provider, » Knowledge recipients, » Initial timeline and agenda, » Intended outcomes and outputs, » Expected operational barriers. 	<ul style="list-style-type: none"> ✓ Summary (describing initial plan for Study Tour)
20 min.	<p>Discussion: What actually happened? Facilitator engages participants in discussion and documents what actually happened. Facilitator modifies the initial Study Tour agenda as participants share what took place during the Study Tour. <i>Note: It is important that all participants contribute and confirm the modified agenda.</i></p>	<ul style="list-style-type: none"> ✓ Projector ✓ Computer ✓ File: Initial agenda
30 min.	<p>Discussion: What went well and why? Facilitator explains that this discussion is to help identify successful strategies to ensure that good practices are built into future work and repeated. To start the discussion, the facilitator can ask, "What went well and why?" <i>Note: Depending on the participants, this part of the session could include a smaller group discussion before sharing with all.</i></p>	<ul style="list-style-type: none"> ✓ Markers ✓ Flipchart
30 min.	<p>Reflection & Sharing: What can be improved and how? Facilitator asks participants to complete the Reflection Worksheet to generate answers to the question, what can be improved and how? Facilitator asks participants to share one or two key points and notes the suggestions on the flipchart until the group has exhausted all points.</p>	<ul style="list-style-type: none"> ✓ Reflection Worksheet ✓ Markers ✓ Flipchart
5 min.	<p>Wrap up. Facilitator collects the worksheets/notes. Facilitator will draft the summary from the session and email summary to participants for further refinement. <i>Note: This process can be used for an after action review only with the core design and implementation team members.</i></p>	

4. SAMPLE: BRAINSTORMING ACTIVITY TO PLAN THE STUDY TOUR

DURATION	PROCEDURE	MATERIALS
5 min.	<p>Session introduction.</p> <p>Facilitator/leader explains goals of the brainstorming session:</p> <ul style="list-style-type: none"> » Generate an inventory of sites to visit during the Study Tour and appropriate contacts for these sites, and » Identify a list of relevant topics to address. <p><i>Note: The open brainstorming session has certain ground rules; the facilitator/leader will remind participants.</i></p> <ul style="list-style-type: none"> » No idea is a bad idea. » No immediate discussion, simply state the idea. » Round-robin format with the option to pass. 	
10 min.	<p>Idea generation.</p> <p>Facilitator/leader asks participants to take a few minutes to write down their ideas in order to speed up the sharing process. Facilitator/leader provides participants with a stack of Post-it pads for them to write down one idea per note.</p>	<ul style="list-style-type: none"> ✓ Post-it notes ✓ Pens
10 min.	<p>Idea sharing.</p> <p>Participants share one idea and stick their Post-it note in the appropriate location on the flipchart.</p>	<ul style="list-style-type: none"> ✓ Flipchart (organized per session goals)
20 min.	<p>Building on the original ideas.</p> <p>When all ideas are accounted for, the facilitator leads a discussion building on the original ideas.</p>	<ul style="list-style-type: none"> ✓ Flip Charts ✓ Markers
15 min.	<p>Wrap up.</p> <p>Facilitator categorizes, prioritizes and/or summarizes the list of ideas for further refinement or action</p>	

5. SAMPLE: AGENDA FOR A WORKSHOP

(which laid the ground work for a Study Tour)

Arrival: Thursday			
Day One: Friday			
8:00 - 9:00	BREAKFAST.		
9:00 - 10:00	Protocol.		
10:00 - 11:00	Plenary Session: Community Building and Peer-to-Peer Basics.		
11:00 - 12:00	Networking Session: Getting to Know Each Other, Social Mapping.		
12:00 - 13:00	Negotiating rules (including mobile phones). Peer-to-peer dynamic/Speed dating. World Cafe. Key questions.		
13:00 - 14:15	LUNCH.		
14:30 - 15:00	Transportation to field visit site. Arrival and registration. (Tea and snacks at registration table)		
15:00 - 18:00	Track 1 field visit.	Track 2 field visit.	Track 3 field visit.
18:00 - 18:30	Transportation back to hotel.		
18:30 - 20:30	Cocktails and light appetizers.		
20:30 - onward	DINNER AND SOCIAL ACTIVITY.		
Day Two: Saturday			
8:00 - 9:00	BREAKFAST.		
9:00 - 11:00	Plenary Session debrief and a panel discussion with Experts.		
11:00 - 13:00	Track 1: Exchange most significant story. Problem solving. Key take-aways. Lessons learned.	Track 2: Exchange most significant story. Problem solving. Key take-aways. Lessons learned.	Track 3: Exchange most significant story. Problem solving. Key take-aways. Lessons learned.
13:00 - 14:15	LUNCH		
14:15 - 15:15	Harvesting: Where to Go, How to Get Organized, how to learn from additional good practices of their peers.		
15:15 - 16:30	Fishbowl Plenary: Setting the Vision, Principles, and Practices for the Community and follow up Study Tours related to different tracks/ themes.		
16:30 - 17:15	Evaluation and Wrap-Up.		
17:15 - 17:45	CLOSING CEREMONY.		
17:45 - onward	Light refreshments and conversations.		

6. SAMPLE: FIELD VISIT AGENDA

(adapted from the Global Environment Facility-led Knowledge Day)

DURATION	PROCEDURE
45 min.	<p>Before departing for field visit:</p> <p>The field visit coordinator leads a pre-field visit debriefing session where the agenda and learning objectives are reviewed with the participants and the following materials are distributed:</p> <ul style="list-style-type: none"> » Project summary. » Learning station roadmap. Learning stations are set up at each project site where project stakeholders display and discuss a completed project (or a project well into implementation), highlighting lessons and good practices. » Knowledge passport. This is a customized field visit template that all participants need to complete and get stamped at each learning station so that they can enter in an attractive raffle at the end of the field visit. <p>Coordinator assigns people to learning groups and also assigns a group lead.</p> <p>Coordinator explains his/her role in documenting the visit with photos and encourages the group to take photos/videos and share them after the visit and suggests the group can prepare a post-field visit documentary for broader dissemination.</p>
TBC	<p>Depart in buses based on pre-assigned learning groups along with assigned group leaders.</p>
75 min.	<p>During the field visit</p> <p>Participants receive a plenary debriefing on the project from the field visit host and then divide into their learning groups and begin their tour of the project, moving from learning station to learning station. They spend about 15 minutes at each learning station. The activities at each learning station can include: listening to project presentations, participating in hands-on demonstration, touring the site, talking with project beneficiaries, and engaging in discussion with different stakeholders. They continue to record their notes and reflections in their passports.</p>
45 min.	<p>End of the field visit</p> <p>The participants come together for a plenary debriefing session, share their key takeaways from the learning stations, participate in the passport raffle for a fun activity, fill out the exit survey, and the field visit concludes with a luncheon.</p>
TBC	<p>Luncheon get together and departure for hotels/workshop/conference venue for follow-up activities as needed.</p>

7. SAMPLE: PARTICIPANT TEMPLATE FOR FIELD VISIT

QUESTIONS	YOUR ANSWERS
<i>What did I expect from this visit?</i>	
<i>What struck me most? Why?</i>	
<i>What are the questions that came up from the visit?</i>	
<i>What do I consider to have been the success factors of the initiative we observed?</i>	
<i>What ideas can contribute to improve or enhance the initiative we observed?</i>	
<i>What obstacles and challenges came up in the process of developing this initiative?</i>	
<i>What new challenges are there today and how are they being addressed?</i>	
<i>What aspects of this experience would be replicable in my city/country?</i>	
<i>What aspect/part would or would not be? Why?</i>	
<i>How I can put what I learned into practice in my city/country?</i>	
<i>What lessons can I take from this experience?</i>	

8. SAMPLE: PARTICIPANT SURVEY

This survey is conducted at the end of the Study Tour.

Feedback on Study Tour

Questions:

- » *How would you rate the overall quality of the Study Tour?*
(Range: Very low to Very high)

- » *How would you rate the overall usefulness of the Study Tour?*
(Range: Very low to Very high)

- » *How would you rate the overall relevance of the Study Tour to your work?*
(Range: Very low to Very high)

- » *To what degree did the Study Tour achieve the intended objectives?*
(Range: Very low to Very high)

- » *How would you rate the facilitators? (excellent, very good, good, fair)*

- » *How would you rate the knowledge providers?*
(excellent, very good, good, fair)

- » *Was the knowledge gained useful?*
 - Yes (Please explain)
 - No (Please explain)

- » *How will you apply the knowledge gained from the Study Tour in your organization?*

- » *Were the resources provided to you during the Study Tour adequate?*
 - Yes
 - No (Please explain)

- » *Was the time allocated to different sessions/field visits adequate?*
 - Yes
 - No (Please indicate how timing could be improved. Which sessions needed more time.)

Note: Include a question here on logistics. This question should be broken down to include more specific aspects of logistics you are looking to get feedback on (for example: accommodations, meeting rooms, transportation, translation services, meals, free time).

- » *What worked best during the Study Tour?*

- » *What would you recommend to improve the Study Tour?*

- » *What are the key messages you are taking away from the Study Tour?*

9. SAMPLE: STUDY TOUR AGENDA

(Adapted from the MEDELLIN LAB/Study Tour focusing on Medellín as an Inclusive, Safe and Resilient City)

TIME	DAY 1 ACTIVITIES
9:00 - 10:00	Activity: "Introduction and meeting the participants".
10:00 - 12:00	Tour of the city, traveling by Medellín Metro.
12:00 - 13:00	At hotel.
13:00 - 14:30	Luncheon.
14:30 - 17:00	Activity: "Café Mundial" (Global Café).
17:00 - 18:00	Context Setting, Agenda, and Outcomes for Medellín Lab Week, including presentations.
18:00 - 19:00	Welcome remarks and cocktail party (hosted by Medellín's Resilience Office). A moment with members of the press.

TIME	DAY 2 ACTIVITIES
8:00 - 9:00	Plenary: Feedback and reflections from Day 1.
9:45 - 11:40	Tour of sports facilities led by INDER.
11:40 - 13:40	Tour of Outdoor Electric Escalators and Integrated Urban Project.
13:40 - 14:00	Transportation to San Javier Library Park.
14:00 - 15:00	Luncheon.
15:00 - 16:00	Presentation by Mayor of Medellín.
16:00 - 17:00	Signing of Agreements between local authorities and international agencies and donors.

TIME	DAY 3 ACTIVITIES
8:00 - 9:00	Plenary: Feedback and reflections from Day 2.
9:00 - 9:40	Transportation to Centro Cultural de Moravia.
9:40 - 12:00	Participants divide into 3 subgroups and alternate visiting the 3 field visit sites to accommodate space-related constraints at each site. At Centro Cultural de Moravia, the director explains the historical and cultural value of the neighborhood and the role played by the center in creating protection and inclusion. At the Buen Comienzo Kindergarten, group learns about the protection strategy for 0 to 5 year-olds. At the Moravia Hill site, the group is greeted by a community leader who explains the environmental, urban, and social transformation of the sector.
12:00 - 13:30	Luncheon (picnic at the Botanical Garden).
13:30 - 14:00	Transportation for the afternoon tour.
14:00 - 17:30	Two groups alternate visiting the two sites: CEPAR followed by Casa de la Memoria Museum.

9. SAMPLE: STUDY TOUR AGENDA

(Adapted from the MEDELLIN LAB/Study Tour focusing on Medellín as an Inclusive, Safe and Resilient City)

TIME	DAY 4 ACTIVITIES
8:00 - 9:00	Feedback and reflections from Day 3.
9:00 - 9:30	Transportation to the Secretary of Security.
9:30 - 12:00	Panel discussion: Participants include representatives of the Secretary of Security, academia, and an international agency. A guided tour on the integrated emergency system where the group learns about strategies such as 123 Mujer.
12:00 - 13:00	Transportation to San Cristobal (Medellin Rural Área).
13:00 - 14:00	Luncheon with the community.
14:00 - 14:30	Transportation for the afternoon tour.
15:00 - 17:15	Participants divide into 4 small groups to facilitate their visit to different locations. The participants directly experience the empowerment of the community and engage in discussions with other organizations.

TIME	DAY 5 ACTIVITIES
9:00 - 12:00	Activity: "Open Space" to prepare action plans and next steps.
12:00 - 13:00	Evaluation/Feedback and closing protocols.

10. KNOWLEDGE SEEKER'S CHECKLIST: TO PREPARE FOR THE STUDY TOUR

Preparing for the Study Tour

- Send in your Pre-Study Tour Survey.
If you have not received any kind of survey, try to reach out to the knowledge broker to request a survey. The information you provide will help inform the design of the Study Tour.
- Review the Study Tour Agenda.
- Write a list of things you would like to learn during the Study Tour.
- Collect information on the places you will be visiting.

Managing logistics

- Verify passport and visa requirements.
- Communicate any food allergies, health concerns, or religious requirements that organizers should be aware of.
- Let organizers know about any challenges you may have with the language or customs of the places you are visiting.
- Pack appropriate clothing and supplies (e.g., bug spray) for the places you are visiting on the Study Tour.

Making the most of the Study Tour

- Find opportunities to engage with other participants, facilitators, and knowledge providers as much as possible
- Keep a journal about what you learn, experience, and observe and what you can apply in your own context.
- Ask questions and share your reflections and experiences.
- Take pictures and videos. Also use networking and communication tools to share your experience with a wider group of peers and stakeholders who can benefit from your learning.

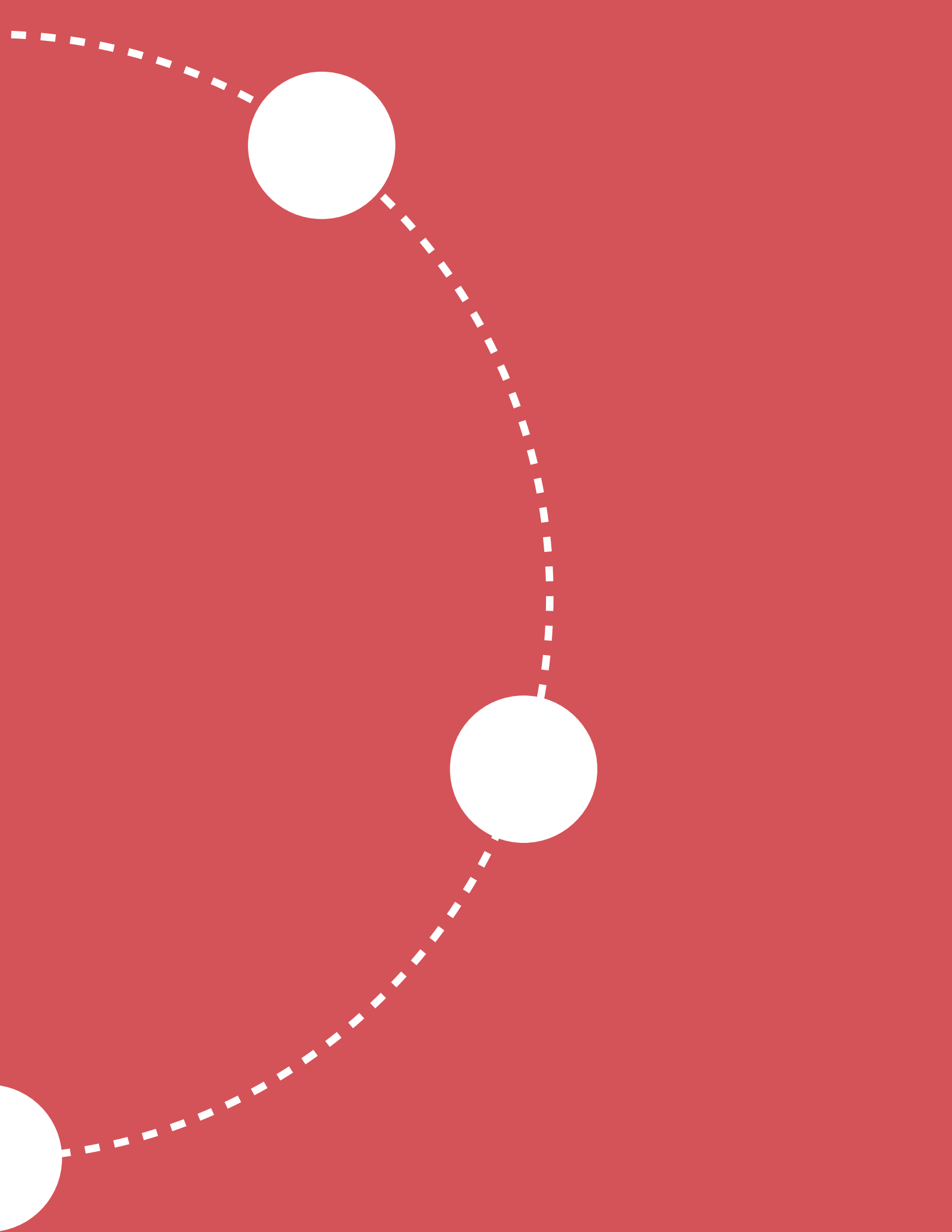
Putting your experience to work

- Prepare an action plan with specific milestones and make note of things you plan to do differently after the Study Tour.
- Share what you learned with your peers and other key stakeholders through appropriate knowledge-sharing platforms.
- Acknowledge the work of organizers and knowledge providers and establish ongoing relationships to build on the Study Tour experience.

11. KNOWLEDGE PROVIDERS CHECKLIST: TO PREPARE FOR THE STUDY TOUR

Study Tour preparation

- Review the Pre-Study Tour Survey of knowledge seekers. This is your critical resource to understand the knowledge-seeker profiles, their knowledge and learning needs, and the challenges they need to address.
- Prepare the Study Tour Agenda working closely with the knowledge broker to support the targeted knowledge and learning outcomes.
- Clearly identify the relevant knowledge and experience that you would like to share with the knowledge seekers.
- Have a plan to share the knowledge in an engaging format. If the knowledge you want to share is still not fully captured, plan to document it in an appropriate format (presentations, posters, videos) well ahead of time. Also, prepare your presenters/resource experts who will be participating from your side.
- Identify any questions you may have for, or about, the knowledge seekers and communicate those to the knowledge broker or Study Tour coordinator.
- Identify ways to link your knowledge to the contexts of the knowledge seekers.
- Identify what you might be able to learn from the knowledge-seeking participants.
- Share both the successes and failures of your experience.
- Plan to involve visiting participants in conversation rather than just one-way lecture.
- Use graphics, images, or other media to help explain and illustrate what was done and what was achieved.
- When appropriate, give knowledge seekers the opportunities to “learn by doing”.
- Manage logistics.
- Verify the number of participating knowledge seekers.
- Ensure that there is enough space in the meeting room.
- Ask the knowledge broker about any translating services that will be needed during the event.
- Prepare any handouts or supporting documents that you may want to provide to the knowledge seekers.
- Plan for extra time during the sessions to allow for any delays related to travel and other logistics.
- Discuss backup plans with the knowledge broker.
- When appropriate, share your contact information with knowledge seekers so they continue to ask questions or share information in the future.



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THE ART OF DESIGNING AND IMPLEMENTING STUDY TOURS

A Guide Based on
The Art of Knowledge Exchange Methodology

Shobha Kumar & Ryan Watkins