Learning & Sharing Guide *Part 2*

Tools and Methods for Learning and Sharing Activities at horizont3000

horizont3000

A PRACTICAL GUIDE FOR HORIZONT3000'S NETWORK AND PARTNER ORGANISATIONS

VERSION 1.0 – 2024

Capturing knowledge at an exchange and learning visit in Senegal

ABOUT THIS DOCUMENT

horizont 3000

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Dreikönigsaktion Hilfswerk der Katholischen Jungschar

kfb Katholische Frauenbewegung

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Acronyms

explained

ADC	Austrian Development Cooperation
AGM	Annual General Advisor Meeting
CoP	Community of Practice
CSO	Civil Society Organisation
h3	horizont3000
KM	Knowledge Management
L&S	Learning & Sharing
MO	Member Organisation (of horizont3000)
NGO	Non-governmental organisation
OD	Organisational Development
PO	Partner Organisation (of horizont3000)
RCO	Regional/ Country office (of horizont3000)
Advisor	Technical Advisor

Introduction to the Guide

Objectives of the guide

The main objectives of the guide are to pool available expertise and tools for practice-based learning & sharing at horizont3000 (h3) and specifically to provide a step-by-step guidance, practical tips and links to templates and resources for all learning & sharing methods and tools regularly promoted and supported within the h3 network.

Target audience

The guide targets all staff at h3 as well as technical advisors who are involved in different roles and different ways with Knowledge Management (KM), Organisational Learning (OL), and specifically learning and sharing activities. Furthermore, it targets partner organisations who are interested in participating, suggesting or organising learning & sharing activities. The guide might also serve as a useful resource for h3 member organisations and their partner organisations and programme staff.

Three guides for systematic learning and sharing

The Learning & Sharing Guide consists of **three volumes**. This present second volume is intended to serve as a practical resource for all those involved in planning, organising, coordinating or offering learning & sharing activities, where they can find all relevant information. Most of the content you will also find as interactive pages at the h3 Knowledge Hub.

The first volume provides some background information on KM, OL, and learning & sharing at h3, as well as definitions and theoretical frameworks for the main terminology linked to and commonly used at h3.

The third volume is about how to start integrating KM and OL into structures and processes of small- and medium-sized CSOs. It provides practical advice on first steps, building a KM strategy and action plans, and using data, information and knowledge, including from organisational self-assessments on gender equality and climate change.

As we continue further developing and learning, we will update the guides. You will find most recent versions of all guides on the h3 Knowledge Hub (please *contact us*, if you need access).

These guides are the result of more than 15 years of experience at h3 in developing and implementing activities with a variety of partners to foster practice-based knowledge sharing and learning. Many colleagues from different offices and departments have participated in advancing KM at h3, along with partners around the world. They all have contributed to the pool of information, tools and methods bundled in these guides.

Contents

1. Facilitation and Organisation of *Learning & Sharing* Activities

1.1 Key facilitation considerations

Providing online or physical spaces for sharing and learning does not guarantee people will contribute or collaborate. **Learning is about discussions and interactions and that needs facilitation.** To the best extent possible, information should be interpreted in relation to the context (geographic, cultural and environmental) to facilitate relatable discussions. Facilitation therefore is necessary and adds/ provides structure, processes and interactive group dynamics.

For certain activities it is necessary and recommended to work with an external facilitator while other learning processes can be facilitated internally. However, the role for facilitation needs to be clear and the organisation needs to provide for the necessary resources for facilitation.

There are numerous methods available for facilitating learning & sharing activities. Facilitation is a skill that needs practice, time, recognition and resources. A facilitator does not have to be an expert on the topic in question. It is sometimes even recommended to dedicate facilitation to a "neutral" person who is not an expert but rather has experience in facilitating discussions, motivating participants to contribute and summarize/ document outcomes. Ultimately, it is important to remember that solutions to problems cannot be imposed or dictated upon, rather, effective solutions are arrived at through free and equitable negotiations among different people.

Five conventional structures guide the way how meetings and learning activities are facilitated: presentations, managed discussions, open discussions, status reports and brainstorm sessions. Liberating Structures add 33 more options to this big five conventional approaches.

horizont3000 can provide for facilitation for certain topics, if the resources are available (advisors, knowhow3000 advisors, thematic focal points, etc.). horizont3000 can further guide partner organisations to find suitable external facilitators if needed.

1.2 Gender and inclusion considerations for L&S activities

While we have opted to present the different aspects of integrating gender and inclusion considerations as a separate chapter, it is key to continuously reflect on the following aspects when organising learning & sharing activities, independently of the focus theme. When conducting learning needs assessments, it is therefore essential to seek the views of men and women in all their diversity and to ask if there are any special needs or requests regarding the participation in L&S activities.

Also, it is essential that when defining the objective of an individual L&S activity, gender sensitivity needs to be already integrated e.g.: At the end of the training, trainees will be able to consider the different needs of women, men, boys and girls in their agricultural activities.

GENDER CONSIDERATIONS IN FACILITATION

Gender issues will continuously come into view – and indeed this should be encouraged – whenever discussing climate and environment, sustainable livelihoods and every other subject. Understanding gender perspectives is the key to interventions that address the specific needs of different groups of women and men, safely and effectively. As gender is a sensitive subject, the following considerations will help to conduct such discussions with sensitivity and responsibility:

- Gender relations are relations of power. Determine if it would be useful to hold women-only and men-only sessions, to ensure that women/ men feel free and safe to voice their views and experiences regarding the subject of discussion.
- Have a mixed team of facilitators (i.e. both women and men facilitators) to enhance participants trust and receptiveness of the message, especially when sensitive issues are being raised
- If need be, request the presence of a local gender resource person to provide insights on culturally specific gender issues, and aid understanding of gender concepts.
- While there is overwhelming evidence of the vulnerability of women especially to the impacts of climate change, men are also affected. Balance the message by highlighting and equally valuing the different situations, experiences, needs and priorities of men and women. Be careful not to associate gender with women's issues alone as this could lead to resistance.
- Demonstrate genuine interest. Create a platform for open and respectful conversations for both men and women, encouraging diverse voices to be heard.
- Include gender-related questions, roles and scenarios in exercises.
- Review facilitation materials (language, examples and illustrations), to ensure they are free of harmful gender stereotypes or sexist language.
- Avoid over-generalized statements in order to paint a picture that is closest to reality, and to avoid perpetuating stereotypes e.g. "women feel…." or women need…." Ponder different viewpoints of the same issue to mitigate against bias.
- Alert participants in advance not to share any information that they do not want others to know, or they do not feel safe sharing. Do not make sharing mandatory.
- As facilitators, continuously explore how you can role model gender sensitivity and equal treatment in your delivery and engagement.

GENDER CONSIDERATIONS IN PLANNING WORKSHOPS, EXPERIENCE CAPITALISATION OR TRAININGS

- Ensure balanced participation of men and women (unless one gender is specifically targeted)
- Consider physical and reputational risks to men and women when identifying meeting locations. Consult and identify safe and neutral locations, for target groups to feel most comfortable.
- Schedule activities in consideration of gender roles/ daily schedules of men and women (to avoid an increased workload especially also for women).
- Make practical arrangements that address gender needs, such as clean and safe spaces for breast feeding mothers, safe access to separate toilet facilities, availability of water and sanitary waste bins etc.
- Consider seating arrangements that are culturally appropriate and comfortable for participants.
- In some places, women may not be able to be out after dark because of safety or social reasons. End meetings in good time to allow for safe movement.

Do No Harm: Continuously identify barriers (cultural, religious, legal) to the participation of both women and men in project events. Consider any adverse impacts or risks to participation, and collectively develop strategies to overcome them.

TIPS AND CONSIDERATIONS FOR MORE INCLUSIVE L&S ACTIVITIES

Refer to the following links to find suggestions and information on making events and meetings more accessible:

- Cornell University, Division of Human Resources - Accessible Meeting & Event Checklist: https://accessibility.cornell.edu/event-planning/accessible-meeting-and-event-checklist/
- Rick Hansen Foundation – Meeting everyone's Needs: Tips for Creating Accessible and Inclusive Meetings: https://www.rickhansen.com/news-stories/blog/meeting-everyones-needs-tips-creating-accessible-and-inclusive-meetings
- United Nations - Disability-Inclusive Communications Guidelines (March 2022): https://www.un.org/sites/un2.un.org/files/un_disability-inclusive_communication_guidelines.pdf

1.3 Environmental and climate change considerations for L&S activities

Events are important opportunities to showcase horizont3000's values. Organising events in an environmentally friendly manner is therefore a good way to demonstrate our commitment to environmental protection and climate action.

The following aspects should be considered when planning learning and sharing events:

Reducing travel-related emissions:

- When feasible, consider online meetings or hybrid meetings instead of physical meetings
- Select a location to reduce the travel distance of all participants
- Public transport (train, bus, minibus) should be preferred over private means of transport (car, motorbike)
- If private transport is organised, this should be planned in the most resource-efficient way (sharing of vehicles, good logistics to avoid unnecessary trips)
- Avoid air travel as much as possible, if needed consider carbon off setting

Selection of a venue:

- Preference of venues which practice environmentally friendly behaviours: Use of natural cooling instead of air conditioning, do not water lawns in water-scarce environments, reduction of waste, recycling, composting of organic waste, etc.
- Venues with environmentally friendly infrastructure: environmentally friendly construction material, not built-in sensitive ecosystems like wetlands, utilisation of solar power for electricity generation instead of diesel generators, solar water heating

Practices during the event:

- Reduce unnecessary printing, e.g., by sharing documents digitally, printing double-sided and reducing colour printing
- If printing is necessary, prefer recycled paper options
- Use natural ventilation instead of air conditioning
- Use of whiteboard instead of flipcharts
- Preferable use of reusable decoration materials (e.g. avoid balloons, confetti etc)
- Give-aways: Choose eco-friendly and practical giveaways, e.g. from recycled materials
- Shop locally to reduce the carbon footprints of purchases and from eco-friendly sources

Catering:

- Preference of locally and seasonally produced, organic and fair-trade ingredients
- Avoid disposable tableware (water bottles, plates, cups, cutlery, etc) and use a reusable linen

- Use of water dispensers and reusable glasses instead of water bottles, which is also economically more viable
- Enhanced variety of healthy vegetarian dishes
- Support the service provider to estimate food consumption accurately in order to reduce food waste (e.g. by asking for preferences in advance)
- If food waste occurs, find sustainable solution to dispose of leftovers (allow packing, giving it out to the needy)

Collaboration:

- If possible, collaborate with vendors and sponsors committed to sustainability
- Seek partnerships with local environmental organisations
- Encourage exhibitors to adopt green practices

Monitoring and Evaluation:

The following action points are recommendations in order to strengthen learning and continuous improvement:

- Establish metrics to measure the event's environmental impact
- Collect feedback from participants on green initiatives
- Use data to improve future events and share successes with stakeholders

Awareness creation and communication with participants and service providers:

Some of the measures may be considered inconveniencing by participants or confusing to service providers who may be unaware of the environmental implications of certain practices. Thus, proactive communication is important to make them understand why we make these decisions. An added benefit of most of these practices is, that in the long run most ecologically sound practices are also economically more viable.

2. *Experience* Capitalisation

OBJECTIVES

to make relevant implicit or "tacit" knowledges shareable by bringing them into a structure and documenting them

REQUIRED RESOURCES

time of internal staff to facilitate and participate in workshops; budget for transport, accommodation and catering for workshops; budget for external facilitation (if required); camera (for pictures and video)

FINANCING OPTIONS

project budget, knowhow3000 budget; overhead budget

To capitalise is to transform the experience into shareable knowledge.

- Pierre de Zutter, Des histoires, des savoirs, des hommes : l'expérience est un capital, FPH, Paris, 1994, p. 36

horizont3000 promotes participatory ways of Experience Capitalisation as learning from experience is enriched if more points of views are integrated. Participatory Experience Capitalisation means that representatives of stakeholders involved in an action/ experience are integrated in the capitalisation process.

The Partner Organisation decides, if desired or necessary in coordination with horizont3000, on the method, how to capitalise the experience and how to finance the process. horizont3000 promotes the following four methods for capitalizing experiences, which require different levels of resources:

- Systematization of experiences
- Questionnaires for Experience Capitalisation
- Storytelling
- Lessons Learned Workshop/ After Action Review

For an overview of the Experience Capitalisation approach in general you can review this practical guidebook by CTA and IFAD.

2.1 Systematization of experiences

For horizont3000, the participatory method of systematization is a central internal learning method that is accepted to substitute an external evaluation under certain circumstances (MEAL Policy). It has its roots in Latin America and has been used within horizont3000 projects for more than 25 years.

Systematising experiences is about working collectively to reconstruct and systematically document all that has happened, to reflect on it and to draw lessons. Experiences thus turn into shareable knowledge, which can be adopted, adapted, and applied by others.

A systematization is done in a participatory way by the same people who implemented the project activities or participated at implementing them. An internal systematization facilitation team is needed to coordinate the entire systematization process. External methodological guidance is recommended if the organisation/ team is undertaking a systematization for the first time. However, if the team or organisation has internal expertise on the method, a systematization process can be facilitated internally.

This short video provides basic information and an overview on the main steps of a systematization. Details on how to use the method can be found in the h3 Systematisation Manual on the h3 Knowledge Hub.

STEP-BY-STEP

The following six main steps are part of a systematization process:

1. **Preparation**: The PO decides on the timeframe, budget and facilitation team for the project. Management participation is highly recommended. The PO also discusses if they need guidance and who can provide it.
   If the systematisation is financed by a horizont3000 project, the horizont3000 support person should be included in these considerations.
2. **Defining the framework and scope**: A systematization process does not capitalize or cover the whole project/ programme. It covers relevant aspects of an experience that has value added for the project and organisation. The facilitation team decides together with the project/ programme team on the main subject and central aspects that will be covered and reflected upon.
3. **Describing the context:** The facilitation team describes the institutional, thematic and geographic context for the experience based on existing information.
   If information about the context is missing, it needs to be collected during the systematisation process by asking suitable questions in workshops or interviews.
4. **Retrieving the history**: To gain a comprehensive understanding of the experience, representatives from involved stakeholder groups are engaged to reconstruct the key events. It is

important to only reconstruct what has happened, who was involved and what the result of it was – no analysis or interpretation should happen yet during this step. Retrieving the history of the experience can be done through document research, workshops and interviews.
The facilitation team then summarises the outcomes to create an overall picture, including the different perspectives. During this step, the facilitation team can already brainstorm on possible final "knowledge products" to communicate and document the findings.

5. **Critical Analysis**: Based on the history of the experience, the main turning points and critical elements of success or failure are discussed, analysed and recommendations explored. The facilitation team summarizes the outcomes of the critical analysis.
   - **Sharing of Lessons Learnt / Recommendations**: An internal process documentation and a summary of the findings is part of each systematisation. Additionally, creative knowledge products can be developed to communicate main findings and recommendations. Depending on the target audience, the knowledge products can be "At-a-Glance" documents, stories videos, radio programmes or leaflets. Findings can be shared internally only, if the content is confidential. If not, the systematization report should be shared with horizont3000 RCO and with other interested organisations.

ROLES & RESPONSIBILITIES

PO: coordination of whole systematization process; providing time and resources for the internal facilitation team; co-financing within projects/ programmes; contracting external facilitator if needed.

horizont3000: financial support for implementing systematization processes, e.g. via knowhow3000 programme intervention or other project resources; methodological backstopping during the preparation and implementation phase; support to find external facilitators if needed.

RESOURCES

- Systematisation Manual (English and Spanish)
- Example systematization documents

! **Don't forget to integrate gender and inclusion as well as environmental and climate change considerations! See chapters 1.2 and 1.3.**

2.2 Structured questionnaires for Experience Capitalisation

Since 2015, horizont3000 offers questionnaires to capitalize experiences. These questionnaires provide guidance to capitalize implicit and explicit knowledge and make it shareable. Whether experiences are capitalized to present them at sharing events or learning meetings or an organisation wants to internally reflect and learn from a positive or negative experience, these questionnaires can provide a valuable structure.

STEP-BY-STEP

1. Project team meeting to decide on an experience and to set up the capitalisation process

- Go through the questionnaire and the required information/ data
- decide, which experience would be interesting to be capitalized where you have access to information and data
- Decide, who coordinates this Experience Capitalisation within your team, who fills in this questionnaire and communicate with horizont3000 on this Experience Capitalisation
- Decided on the formats to collect data and information and discuss the experience with representatives of the stakeholders and beneficiaries involved
- Set up a timeframe for the capitalisation

2. Interviews or focus group discussions/ meetings with representatives of beneficiaries and stakeholders (if relevant)

- Use key informant interviews or focus group discussions on the ground with relevant representatives to get a comprehensive picture of the experience
- Discuss the findings within your project team

3. Completion of questionnaire

- Fill in all required fields of the questionnaire
- Keep in mind that this is not a report - think about what would be interesting for other organisations to learn from your experience and leave out redundant information
- Cross-check the quality internally within your organisation

4. Send questionnaire and annexes to the horizont3000 contact person if you want to share your experience

5. "At-a-Glance" summaries (optional)

- The user-friendly "At-a-Glance" summaries are a way of making knowledge palatable to people, motivating them to engage with it.
- Unless requested otherwise, horizont3000 creates a clear and compact summary (“At-a-Glance") of the key findings from your completed questionnaire.

- horizont3000 sends the summary to the PO for approval, with added follow-up questions in case of unclarity or missing information.
- horizont3000 uploads the summary together with the questionnaire on the horizont3000 website. From there it can be downloaded as a single-page PDF and printed out if required.

TIPS

Do you have interesting stories to tell about your experience? You can use the Storytelling method (Chapter 2.3.) to give structure to your personal experience so that it becomes emotionally relatable and accessible for a broader audience.

ROLES & RESPONSIBILITIES

PO: coordination and implementation of experience capitalisation process; finance visits of key informants (if relevant).

horizont3000: provision of templates for questionnaires and methodological backstopping (if needed); provide funding through knowhow3000 or other project budgets (depending on availability), elaboration of “"At-a-Glance" summaries.

RESOURCES

- Questionnaire Template: « learning from good practice” and “learning from failure”
- Example questionnaires

! **Don’t forget to integrate gender and inclusion as well as environmental and climate change considerations! See chapters 1.2 and 1.3.**

2.3 Storytelling

Since 2020 horizont3000 systematically uses and encourages storytelling to create impact stories and to capitalise on experiences of projects and programmes. Stories are personal and based on a protagonist which means that an experience is linked to and told by one individual person.

WHY STORYTELLING?

Each of our experiences develops in a particular context. Yet through storytelling the particular can become universal: More so than a list of facts or dry project descriptions, the story of a personal experience can become relatable and relevant to people in different contexts.

Even if the knowledge they transmit is not useful to everyone, stories have the power to create understanding of the bigger picture, to illustrate complex issues in a simple way, and to build emotional connections across different positionalities. Stories help us to think outside the box, outside of our own bubble and to get a sense of what is going on in real life.

TIPS

Check out our comprehensive Storytelling Guide for more information on storytelling, as well as for tips and tricks about video production, photography, and interviewing.

MAIN CHARACTERISTIC OF A STORY

- **Clarity**: be clear and consistent – if you confuse, you lose
- **Detail:** don't just give a general overview of a project – focus on your experience with a concrete aspect of a project and go into detail
- **Context**: as in life, context is an inseparable part of stories and should be clearly and vividly presented with the intended audience in mind
- **Creativity**: stories should not feel like reports – be creative and captivating by using a narrative style that keeps people interested
- **Emotions:** stories live from joy, rage, disgust, fear, sadness, surprise etc. – speak to the audience's emotions
- **Message**: answer "so what?" by being clear on why you are telling this particular story

STORIES OF CHANGE

Stories of Change are part of visibility measures. They focus on the impact a project activity had on a specific protagonist and the she or he had in it.

- **Purpose:** Raise visibility for project activities and their impact by letting protagonists share their personal experiences.
- **Audience:** member organisations, funders, ADA, interested public, organisations who want to get a feeling how other organisations are working, h3 staff, ...
- **Protagonist:** Protagonists can be beneficiaries, project staff, or cooperation partners actively involved in the project.
- **Approach:** Follow a narrative structure to highlight the transformative impact of the project on individuals and communities. Use our storytelling canvas for this purpose!

STORYTELLING CANVAS

horizont3000 provides a Storytelling Canvas that helps you to construct the story. In it, you can note down key elements of the story that should be clear before writing or recording.

- objective
- message
- intended audience(s)
- protagonist
- mentor/supporter
- problem/challenge
- solution

Remember: These elements are NOT the actual story, they are just the framework – you need to fill it with flesh, emotions, processes, activities, colours!

PHOTOS AND VIDEO

Our guide Storytelling with Videos and Photos provides tips and tricks for producing videos and photos. Here are the basic points:

- It is important that the story is accompanied by high-quality photos that show the protagonist in action.
- The production of a short story-video (~5 minutes) is highly recommended but not mandatory. If you are creating a Story of Change, having a completed Storytelling Canvas before the video shoot is recommended. This can be used as an outline for the script or storyboard, as the video should follow the same narrative arc as your written story
- If necessary, we can hire professionals (photographer(s), video makers) via horizont3000.
- Here are three examples of Stories of Change videos:
    - Environmental Citizenship (Columbia)
    - Exchange Visit (Senegal)
    - Borrow-a-Advisor (Kenya)

STEP-BY-STEP AND ROLES & RESPONSIBILITIES

You can follow this general sequence for creating a Story of Change:

1. identify possible protagonist(s) and stories and clarify plans with those involved (can also be done via advisors or programme coordinators, for example)
2. support the protagonist(s) in filling out the Storytelling Canvas
3. discuss and coordinate the Canvas, time frame and concrete budget with the Knowledge Management Department in Vienna
4. use the *Stories of Change template* to write the story based on the narrative arc and within the specified word limit
5. take photos and produce a video, if possible
6. get feedback from protagonist(s) and the Knowledge Management Department
7. collect any possible additional material (i.e. manuals produced in the scope of the project)
8. send all material to the Knowledge Management Department for uploading on the h3-website

PUBLISHING

- All stories (including videos and photos) will made available on a designated page on the h3 website. There, stories can be search by region and/or topic.
- All stories will include illustrations based on the photos and/or video you send us. There is also the possibility to upload the protagonist's own illustrations.
- All videos will also be uploaded to h3's YouTube and social media channels, from where you can share it easily through your own channels.

OTHER STORY TYPES

There are different story types. Depending on your intentions and interest you can choose one style over the other. In the context of horizont3000 two story types can be particularly useful: Stories of Change and Learning Stories. The boundaries are fluid and stories can have mixtures of characteristics.

Learning Stories, for example, focus less on the visibility of impacts and more on personal learnings. Their main purpose is to give an insight into what it actually means to use a specific tool or method for actors themselves. These stories do not have to follow a narrative arc: actors take an active, creative, and enjoyable part in capturing and transmitting their experience through telling their stories in their own way.

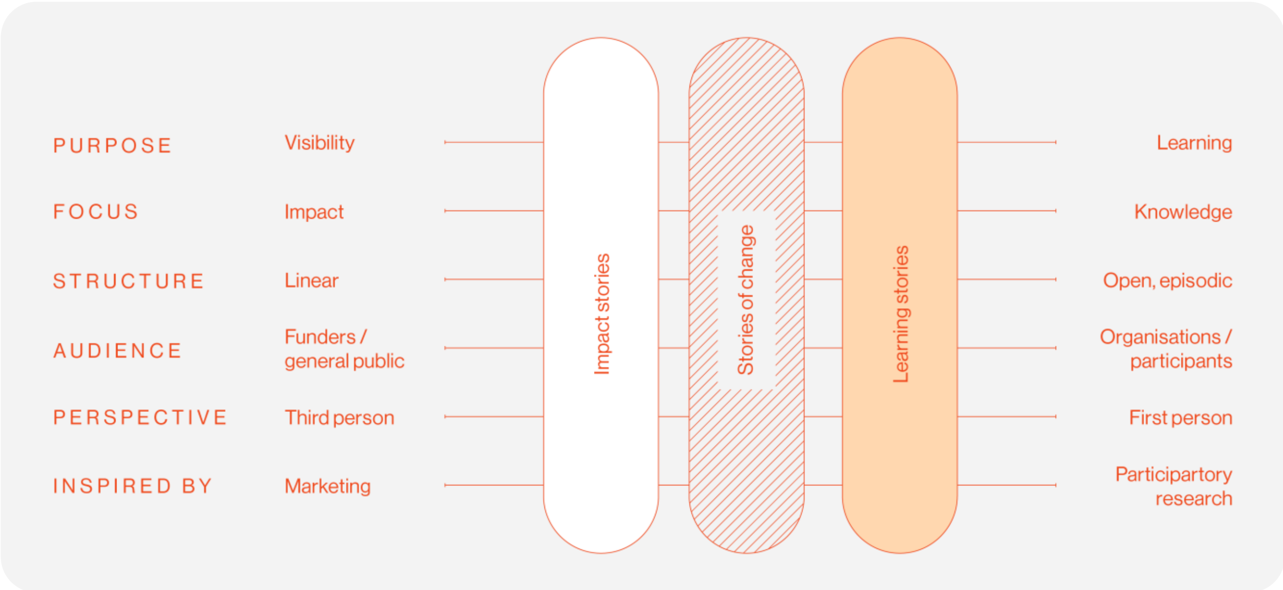

Figure 8: Types of stories and their characteristics

RESOURCES

- Storytelling Guide (incl. Storytelling Canva)
- Example stories
- Corporate design

! **Don't forget to integrate gender and inclusion as well as environmental and climate change considerations! See chapters 1.2 and 1.3.**

2.4. Lessons learnt workshop/ After action review

horizont3000 supports the use of Experience Capitalisation workshops integrated into the regular monitoring of a project. These workshop formats enable direct learning from successes and failures and the use of findings immediately for the (project) work. It enables course corrections during the process based on what has been learned, optimises teamwork and building a collective, action-oriented knowledge base.

Different set-ups and structures exist for lessons learnt workshops, however, horizont3000 promotes the following simple After Action Review workshop.

STEP-BY-STEP

After Action Review (AAR)

1. **Preparation**

Immediately after a critical activity or event, all those persons that were involved in organising and/or implementing the activity hold a meeting. Their memories are still fresh and what they have learned can then be implemented immediately, even the next day.

One person should prepare and facilitate the AAR workshop. It is possible to do an AAR physically and virtually.

2. **Reflection: 4 key questions**

- What should have happened?

  The facilitator should start by breaking down the activity that will be reviewed into main steps. The discussion starts with the first question "What should have happened?"

- What really happened?

  The participants have to collect the facts, not opinions (!), about what really happened. The point here is to find learning points or problems, not culprits.

- Why were there deviations?

  The plan is compared with what actually happened. The successes and shortcomings are thus identified and discussed

- What can we learn from it?

  Learnings are discussed and measures are derived to repeat the successes and reduce the deficits. These measures should be defined in such a way that they can be implemented as immediately as possible.

3. **Documentation**

The facilitator documents key aspects of what was planned and what actually happened, as well as the measures derived. The lessons learned are documented and integrated into the regular monitoring and communicated internally with the team and with funding organisations.

Don’t forget to integrate gender and inclusion as well as environmental and climate change considerations! See chapters 1.2 and 1.3.

3. Knowledge *Sharing*

OBJECTIVES

share and transfer relevant implicit and explicit knowledge(s) by bringing people together in a structured manner or by making knowledge products and documents accessible

REQUIRED RESOURCES

time of internal staff to facilitate and participate in workshops; budget for transport, accommodation and catering for workshops; budget for external facilitation (if required); camera (for pictures and video)

FINANCING OPTIONS

project budget, knowhow3000 budget; overhead budget

Knowledge sharing at horizon3000 is done through various tools, activities and methods that aim at fostering structured and systematic sharing of experiences, implicit knowledge(s) and explicit knowledge documents or products amongst people and organisations with similar thematic backgrounds.

Depending on the learning needs and objectives, horizont3000 or the respective partner organisation(s) decide which sharing format is suitable.

3.1. Sharing Events

Sharing events are understood as local or regional events, where a significant number of diverse participants come together for one or more days to share knowledges, experiences, good practices and learning from failures on a given topic. Participants are selected horizont3000 partner organisations, advisors, member organisations and their partners, research agencies, other NGOs, other development actors/ donors, ministries, etc.

We call this explicitly **sharing** event rather than conferences as our aim is to provide a learning environment and methodological set-up that allows for participants to interact and share their very practical experience rather than having a small number of experts giving speeches.

A sharing event needs proper preparation, facilitation and follow-up to guarantee success for participants and horizont3000. We have developed various guides to help planning and implementing successful sharing events.

RESOURCES

- Quick Guide for Events and Training
- Planning Guide for Events and Training
- Facilitation Guide for Events and Training
- Template: ToRs for learning & sharing activities
- Template: Event itinerary
- Template: Action plan for learning
- Template: Evaluation questionnaire
- Template: Final report
- Template: Application for funds

! **Don't forget to integrate gender and inclusion as well as environmental and climate change considerations! See chapters 1.2 and 1.3.**

3.2 Exchange of Experience meetings

An 'exchange-our-experiences' (EoE) is a framework for a one-off meeting. People gather, either in person or virtually, to exchange ideas and experiences on a specific topic. It is useful when the learning needs and scope of exchange are not yet clear. As such, an EoE is different from a sharing event in size and from a Community of Practice in purpose.

An EoE needs a **facilitator** and should have a clear objective and agenda. It can be coordinated and facilitated by a person from horizont3000, such as an advisor, subject-matter focal point, sector coordinator, programme coordinator or knowhow3000 coordinator. The facilitation can also be assigned to an external person.

Any **proposals** for EoEs should be coordinated with the knowhow3000 coordinator within the respective regional/ country office or head office. The main outcomes should be **documented**.

RESOURCES

- Template: ToRs for learning & sharing activities
- Template: Action plan for learning
- Template: Final report
- Template: Application for funds

! **Don't forget to integrate gender and inclusion as well as environmental and climate change considerations! See chapters 1.2 and 1.3.**

3.3. Exchange and learning visits

Exchange and learning visits is a learning & sharing format that horizont3000 offers to its partner organisations, where one (or more) Partner Organisation visits another organisation (within the horizont3000 network or beyond) and its projects to learn from their practice and methods applied. Practitioners visit practitioners and exchange ideas through on-site visits, learning directly how things are done. This format is recommended for organisations wishing to deepen their knowledge and understanding of a **particular** area or methodology.

Partner organisations meet other organisations in the course of Communities of Practice, sharing events or other meetings. If another organisation offers specific experience or methods for a given learning need, an exchange or learning visit can be proposed. In case, the PO does not know which organisation to visit, the PO can request support from the knowhow3000 coordinator or thematic focal point of sector coordinator to provide guidance.

STEP-BY-STEP

There are two ways to implement learning visits: Individual and joint learning visits.

Individual learning visits

1. **Preparation**

   The horizont3000 regional/ country office (RCO) plans a budget for learning visits and sends out a call for proposals for learning visits. Partner Organisations (PO) with a specific knowledge need (identified in the course of a self-assessment) for learning from another organisation apply by filling out and submitting two application forms (contact your RCO for respective templates):
   - technical application
   - cost calculation

Submissions have to be sent to the knowhow3000 coordinator in the RCO. If approved, horizont3000 sets up a short contract for this activity.

In case that the PO does not know which organisation provides the required know-how, the PO can request support from horizont3000.

2. Prefinancing

The partner organisation itself is prefinancing the activity and is responsible for organising the visit. If necessary, the knowhow3000 coordinator in the RCO can support.

3. Documentation

After the learning visits has been completed, the partner organisation that solicited the learning visit submits following documents to the knowhow3000 coordinator in the RCO:

- short report
- action plan for learning
- list of expenses including original receipts
- list of participants

The documentation process can be steered by one volunteering partner organisation, a knowhow3000 advisor, or a subject-matter focal point.

4. Reimbursement

horizont3000 reimburses all costs applicable to the PO according to the contract, cost calculation and application.
If extra funds were needed that had not been calculated and agreed upon, the PO itself would need to cover these extra expenses from its own budget.

Joint learning visits

Two or more organisations can visit one or more other organisations through a joint learning visit.

The interest for a joint learning visit can arise within Communities of Practice or as a follow-up on a sharing event or exchange-of-experience (EoE). The knowhow3000 coordinators or subject-matter focal points (gender, climate) also have an overview on learning needs and can propose/ plan a joint learning visit.

The 4 steps are the same as for an individual learning visit (see above).

RESOURCES

- Template: Application for funds (content and cost calculation)
- Template: ToRs for learning & sharing activities
- Template: Action plan for learning
- Template: Final report for learning & sharing activities

! **Don't forget to integrate gender and inclusion as well as environmental and climate change considerations! See chapters 1.2 and 1.3.**

3.4 Borrow-an-Advisor (BA) assignments

A "Borrow-an-Advisor" (BA) assignment is a horizont3000 specific sharing format where the expertise and experiences of individual advisors is accessible to multiple project teams and organisations.

h3 advisors are typically assigned to individual partner organisations with a specific logframe for each assignment. However, with Borrow-an-Advisor, other project teams or partner organisations of horizont3000 and its member organisations can request Advisors for additional short-term consultancy(es).

STEP-BY-STEP

1. **Application:**

   The need for a BA assignment has to be expressed by the partner organisation. Either the organisation already knows the advisor they would like to invite for a BA assignment, or they describe their specific needs to the responsible persons for the advisory programme in the country or region. The advisor search on the horizont3000 website can also help to find out if there is an advisor in the region with the competences and know-how that are needed.

   The application form can be filled out by the partner organisation (with support of an advisor) and/or the horizont3000 member organisation and their partner organisation. It has to be sent to the responsible persons for the Advisory programme as well as knowhow3000 programme in the Regional/Country Office (RCO).

2. **Regulations**

   There are a few regulations to keep in mind before starting to plan the assignment in detail.

- **Financing:** The BA assignment is financed by the Advisory programme. Keep in mind that advisors – as their contract states – can use 20% of their working time for horizont3000 tasks. In some cases, where costs are incurred by the recipient partner organisation, they may be covered by knowhow3000. If a project is co-financed by a member organisation, they might also cover the costs.
- **Transportation:** Tickets should be bought only after all arrangements and approvals are available.
- **Max. Duration:** The BA assignment can last up to three weeks as the maximum time spent in the host organisation. However, there may be additional follow-up visits. Some assignments may need to be planned over a longer period with several shorter visits. In total, the assignment should not exceed 15 working days (excluding follow-up).

3. Planning the BA assignment

- **Coordination:**
    - Once the persons in charge of the Advisory Programme and knowhow3000 in the Regional/Country Office (RCO) receives a BA application form, they discuss its purpose and usefulness with the respective people in charge (Regional Director etc.). It should be discussed whether a BA assignment is the right tool to apply for the respective purpose compared to learning visits, sharing events, trainings etc. They should agree on content, time, advisor sent, and budget.
    - After assessment, the approval or decline by the RCO should be communicated in the scope of three weeks after submitting the application form.
    - The persons responsible for the Advisory programme and knowhow3000 provide the final authorization for the BA assignment. In case of disagreement, the Regional or Country Direct takes the final decision.

- **Research:** The respective advisor does research: Have there been similar assignments or experiences already? Get in touch with the KM team and make use of learnings from good practice and from failure.
- **Responsibilities & Follow-up:**
    - The partner organisation makes sure that there are designated persons from their organisation, who will be in charge of the experience and knowledge exchange with the incoming advisor.
    - The organisations also have a follow-up plan ready: How will the experiences and knowledge shared be implemented after the BA assignment?

- Make sure that documentation is secured during the implementation, such as participants list, photos, etc..

4. **Reporting and Refund**

- **Reporting:**
  - Advisor Report: This form has to be filled out by the advisor who carried out the BA assignment and submitted to the responsible persons for the knowhow3000 and the Advisory programme in the Regional/Country Office.
  - PO Report: This form has to be filled out by the partner organisation that requested the BA assignment and submitted to the responsible persons for the knowhow3000 and the Advisory programme in the Regional/Country Office.

- Refund Form: Please submit your refund form to the person in charge of the Advisory programme in the Regional/Country Office.

- **Resources:** The Partner Organisation fills out the Action Plan for Learning and sends the form to the persons in charge of knowhow3000 and the Advisory programme in the Regional/Country Office.

RESOURCES

- Template BA application form
- Template BA report by partner organisation
- Template BA report by advisor
- Template Action Plan for Learning
- Template BA refund form

! **Don't forget to integrate gender and inclusion as well as environmental and climate change considerations! See chapters 1.2 and 1.3.**

3.5 Knowlympics

Since 2015, horizont3000 organises the KNOWLYMPICS: a yearly knowledge sharing game that offers an opportunity to call for experiences outside of the programme/ project cycle – and to win prizes! It is a flexible format that motivates partner organisations from horizont3000 and partners of our member organisations to share their capitalised experiences on annually changing topics.

STEP-BY-STEP

1. Call for experiences

- KM Team at Vienna office decides on the thematic focus, timeframe, budget and coordinating person.
- Information and invitation to participate is sent out by selected person from KM Team Vienna to all programme coordinators, RCO directors and advisors and member organisations. Additionally, a knowhow3000 special newsletter on KNOWLYMPICS is sent out.
- Programme coordinators, Advisors and RCO directors share the KNOWLYMPICS invitation with all POs in the region/ country, particularly encouraging POs with potentially relevant experiences to participate.

2. Submissions

- Current project partners (either advisory or financing project) of horizont3000 **or** our member organisations identify an experience that they think is also relevant for other organisations. The experience must refer to a specific practice, method, strategy or approach the organisation has applied in its projects and programmes.
- If the experience is not yet capitalized and documented, the organisation can use the horizont3000 Questionnaires for Experience Capitalisation to capitalise and document the experience. Instructions are included in the questionnaire. Advisors can assist in filling out the questionnaire, but the project team should be involved.
- Organisations send the capitalised experience (final version of the questionnaire or other experience document) together with relevant annexes (photos, videos, etc.) to the respective contact person for KNOWLYMPICS.

GOOD TO KNOW

If you already have capitalised your experience, e.g., through storytelling or systematisations, you do not have to fill out a questionnaire but can submit your existing material instead.

3. Review and selection of winners

- The submissions are reviewed by the relevant KM Team members in coordination with the RCOs and corresponding focal point persons. Open questions are referred back to the organisations.

- KM team prepares “At-a-Glance” summaries of the questionnaires in cooperation with Sector Coordinators, Programme Coordinators, and Advisors (refer to chapter 2.2). Organisation are contacted to give their final approval. If the PO agrees, the summary is uploaded to the horizont3000 website, and the link is forwarded to the author/contact person of the questionnaire.
- To determine the winning submissions, they are assessed by the KM Team according to specific qualifying criteria. The specific modalities are communicated within the Knowlympics call.

4. Prize ceremony

- The winning organisations are informed per mail. If they accept, they must specify what they will use the prize money for.
- If possible, the KM Team organises a prize ceremony online event where the winning organisations are invited to present and discuss their experiences. A knowhow3000 newsletter is send out to inform and invite all members.

3.6 Communities of Practice

Communities of Practice (CoPs) are formed by people who want to engage in a process of collective learning in a specific domain through structured and regular exchange.

KEY ELEMENTS AND STRENGHTS OF COMMUNITIES OF PRACTICE

To understand how Communities of Practice act as containers for collective learning, it is helpful to know three basic structural elements of a CoP (domain, community and practice). They fit together like a jigsaw where each piece is distinct, yet only functions as a necessary part of the whole:

When aligned, a community of practice significantly enhances members' achievements. The domain unifies members and stakeholders, community fosters relationships and collective learning, and practice applies learning to real challenges. This leads to three key focus areas for nurturing communities of practice:

1. Domain: Define the community's focus and its source of dynamism. Ensure domain recognition by external stakeholders.

2. Community: Determine who should participate, their roles, leadership, and methods to encourage meaningful contributions. Address missing or silenced voices.

3. Practice: Facilitate open discussions on real practice experiences, promoting learning that drives practical improvements and collective action. Showcase the community's value both internally and externally.

Figure 9: Key elements of CoPs (adapted from Wenger-Trayner, B. et al. 2023, Communities of practice within and across organisations: a guidebook)

When aligned, a CoP can profit from following key **potential strengths** of CoPs for organisations but also individuals:

- CoPs enable practitioners to take **collective responsibility** for the learning they need. horizont3000 aims to contribute to the evolvement and anchoring of local, **sustainable learning environments** where knowledge and innovative ideas can evolve. Sooner or later the members should facilitate and drive the CoP themselves, without intervention of horizont3000.

- CoP members gain **added value by exchanging** with colleagues outside their team, accessing timely assistance beyond their personal network, gathering tips and ideas, and staying informed about developments in other work groups. In the long run, members can enhance their knowhow, professional identity, and reputation. They can build a joint voice for engaging with stakeholders, grow their network, and cultivate leadership skills.

- The **work of partner organisations is enhanced** by staff and advisors who engage in CoPs. They can draw from best practices, recurring mistakes and networking to improve the quality, performance and impact of their organisations.

TIPS

At horizont3000 we follow the main CoP principles of Wenger-Trayner et al. (2023). In their guidebook, you can find a detailed comparison of characteristics of a CoP to similar structures.
For example, member engagement in communities of practice varies. An overview of possible groups and responsibilities within a CoP is described in the handbook.

STEP-BY-STEP

The following step-by-step guidance provides a rather ideal and prescriptive scenario, which might now always be followed through in detail but should guide further developments of CoP within the h3 environment.

1. Preparation, testing, coalescing

Get in touch with the respective regional or country office or thematic focal points or sector coordinators in the horizont3000 team to find out, if your topic is of strategic interest for others within and outside of horizont3000.

Determine if there are any existing communities that fill your need. Don't replicate. If there is an existing community, see if you can work/ collaborate with them. Remember: A CoP doesn't usually appear suddenly. It emerges from existing practice, during sharing events or other events.

When you have outlined your CoP topic, plan an Exchange of Experience meeting (see chapter 3.2) with other interested practitioners (advisors, representatives of partner organisations) and discuss the idea to set up a CoP. The aim is to identify the CoP's value proposition and find leaders who are willing to take over the facilitation.

Main questions:

- What is the strategic value?
- Who cares? Is it a topic for advisors only or a broad domain? Who else is out there? In what ways are their issues similar?
- Who is the responsible person at horizont3000 to exchange on the idea of a CoP?
- Do we share enough to benefit from forming a community? Or is it rather a one-off exchange that is needed?
- What would a CoP mean to us, to our organisations and to horizont3000?
- How do we get to know each other and what we each do or are good at?
- What can we each gain and contribute?
- Are there low-hanging fruits?
- Can we produce something useful?

2. Establishing & Launching

Clearly articulate your CoP Charta, a concise single-page document created and owned by the CoP.

Define key members and decide if it should be a horizont3000 internal CoP or also open to non-horizont3000 staff. If latter is the case, do not only focus on horizont3000 and member organisations, also look beyond for expertise and interested people (research, private sector, academia, experts, etc.). Try to find out what knowledge and learnings CoP members need to improve their **practice**!

Send your Charta to the responsible knowhow3000 coordinator (in your respective region as well as the KM Team Leader at the Vienna office). As soon as the CoP is established, we will set up a page for it in the Knowledge Hub and upload the founding documents there.

To officially constitute the CoP, organise a **CoP Kick-Off** or **Launching Event** (virtually or physically) and invite members and sponsors. Make sure that at least one sponsor participates and shares some opening words and support for your CoP. Use this kick-off event to present your CoP Charta and to brainstorm on key topics and approaches for learning within your CoP as well as the necessary resources. If you need budget from knowhow3000 for your activities, please contact your local knowhow3000 coordinator for guidance.

Main questions:

- What exactly is our domain? What do we include or exclude?
- What activities produce the most learning value?
- What type of learning formats do we need?
- Are physical meetings possible/ necessary? Are virtual meetings enough?
- Do you need online collaboration? If yes, which technical solutions meet your needs?
- Do we need financial support for our CoP activities? If yes, how much and who can cover the costs?

- Who could sponsor your CoP? Find one or more sponsors (managing director, sector coordinators, regional/ country director).
- Who takes which responsibility? Are there community leaders for a specific topic? Are there core group members? What does it mean to be a “member”?

3. Committed Learning & Evolvement

Work together to identify and plan CoP activities for your CoP. Activities could be CoP exchange meetings (virtual or physical), collective trainings on certain topics/methods, compile & share most relevant literature/ approaches for your topic, etc. Always discuss how these activities can be financed. Make sure that one topic related horizont3000 staff from the RCOs is a member of your CoP and informed.

Implement and facilitate CoP activities. Remember that within a CoP, members should take on responsibilities for different learning activities by becoming community leaders – the core group is responsible for everything. Facilitation in communities of practice is complex and evolves. Initially led by community leaders, it gradually involves other members. At times, external facilitators or horizont3000 colleagues may be engaged.

Take time to reflect while sharing & learning: what is working (do more of that!), what is not working (stop that!).

Once a year, report main CoP outcomes and recommendations to the knowhow3000 coordinator in your country or regional office as well as the KM Team at the Vienna office. Use the CoP reporting template.

Longevity involves continuous rejuvenation and renewal, including new members, topics, and challenges, and the development of a repository of stories, practices, and documents. Mentors or welcome wagons can support new members to become active members. It also necessitates a positive relationship with organisational stakeholders who see the community as custodians of their domain.

Main questions:

- Who else cares about our domain?
- What will it take to grow into a sustainable community? How can we welcome and integrate new members?
- What will constitute success? How will we know we are creating value?
- How do we establish our legitimacy as stewards of the domain?
- What is our relationship with organisational stakeholders? What responsibilities are we ready to take on?
- How do we sustain ongoing learning loops about our practice and our community?
- What new issues are arising? Where are gaps in our performance?
- What external sources of innovation, research, or benchmark should we tap?

4. Dissolution or closure

A CoP should end when it's no longer useful. It might disperse, merge, or become an informal network. Alternatively, if its role remains crucial, it could evolve into a formal department. Regardless, it leaves a legacy in the form of relationships, artifacts, and member identities.

If your CoP is coming to an end, clarify the next steps with your country or regional office as well as the KM Team at the Vienna office.

Main questions:

- Is the community in a temporary slump or has it outlived its usefulness?
- Should it take a new form?
- What is our legacy? What was the value added/learning impact on horizont3000 partner organisations?

ROLES & RESPONSIBILITIES

horizont3000: The KM team offers support to CoPs through exchange sessions of CoP facilitators and further develops together with facilitators the support environment at horizont3000. Furthermore, the KM team cares for visibility of CoPs via the CoP dashboard on the h3 Knowledge Hub (see chapter 3.7).

RESOURCES

- Template: CoP Charter
- Template: CoP annual reporting
- External: Detailed CoP guidebook on CoP by Wenger et.al, 2023

Don't forget to integrate gender and inclusion as well as environmental and climate change considerations! See chapters 1.2 and 1.3.

3.7. h3 Knowledge Hub & Website

KNOWLEDGE HUB

The purpose of the horizont3000 Knowledge Hub is to serve as an infrastructure for know-how transfer, advancing the usability and outreach of knowledge products and services. The idea is that users can quickly find experiences, methodological and theoretical knowledge, and tools that can be adapted or serve as inspiration for their own projects.

Main areas

- **Library**: making relevant knowledge products, such as presentations and guides, created in the scope of horizont3000 projects available and accessible for our community – above all for advisors, Partner Organisations as well as Programme and Sector Coordinators
- **Topic pages**: supporting colleagues with the planning and implementation of our knowledge management methods and activities by providing guides, templates, and examples
- **CoP areas**: providing community spaces for the activities of Communities of Practice.

Access and upload

The Knowledge Hub is built within the Microsoft SharePoint structure. This means:

- Users with a horizont3000 email account have already access to it.
- User with external email addresses can request access (if not already invited). Once approved they can then login with their normal email address by entering a code that has been sent to that address.

- If users have relevant files they want to share and upload to the Knowledge Hub, they can either
  - send the files to the platform administrator who will upload them
  - upload the files themselves in a corresponding location within the library and tag them accordingly.
- The administrator will receive a notification and may move the files to a more suitable location and add tags, so that other users can find them more easily.

Use-cases

- **Advisor facilitating a workshop**

An advisor is supporting her Partner Organisation in facilitating a workshop on climate and environment. She remembers that on the K-Hub there is an “Organisational Toolbox”. There she finds guides and many tips and tricks for the facilitation of workshops, in person as well as online. She wonders if there have already been similar workshops within the h3 network. A quick search of the library reveals that there were indeed many. Filtering via the tags “Climate Action” and “Training Material” she can narrow down her search. Scrolling through the files she finds inspiration for workshop procedures, programmes, and some interesting presentations, which she could adapt.

A training with a topic very similar to their own and even held in the same country catches her attention. After seeing one of the presentations, she decides to contact that speaker and ask if she would like to present something similar at their workshop.

○ **Partner organising an Exchange and Learning Visit**

A partner is in contact with another organisation who is working on the same issues and wants to know if a "Learning Visit" would be worthwhile. On the K-Hub she navigates to "Learning Visit" and can read through the experiences other partners already had.
Deciding this is what they are looking for, she reads through the step-by-step guide and learns about the requirements. She then downloads the application template and gets in contact with the responsible h3 colleague. After the application is accepted, she comes back to the K-Hub and downloads required files like report templates or action plans.
After the visit, she shares the learnings and uploads all relevant material from the visit to the corresponding folder. She might be interested to capitalise the visit's learnings further, so she visits the "Experience Capitalisation" or "Storytelling" page on the K-Hub to learn more.

HORIZONT3000 WEBSITE

The horizont3000 website offers a publicly accessible overview of all projects and programmes as well as news and updates. These sections can be particularly useful:

- **Partner Experiences:** Although all partner experiences are also stored within the Knowledge Hub, on the h3 website they are presented and designed as a more accessible webpage, including photos, videos, and easy filter possibilities.
- **Projects**: Here, all h3 projects can be filtered and seen in a map or list view.
- **Learn & Share**: This webpage features a breve overview of all our Learning & Sharing tools and activities. As it does not require a login, it can easy be shared with everyone. The webpage also contains our beautifully designed stories (formerly known as "Stream of Knowledge").
- **Blog**: Alongside our social media channels, news articles written by h3 staff, advisors, and partners are published on this site. Using the tag "learn&share" you can filter all articles about our Knowledge Management programme.
- **Newsletter**: our monthly knowhow3000-newsletter disseminates news articles together with interesting material from the Knowledge Hub and events tips. You can find past newsletter in the archive on the h3 website.

RESOURCE

- Online guide for the efficient use of the Knowledge Hub and its library
- Online presentation/launch of the Knowledge Hub

4. *Trainings* and Skills Development

OBJECTIVES

provide (external) expertise from subject-matter experts in a structured way for a broad number of representatives of partner organisations and advisors

REQUIRED RESOURCES

time for needs assessment, elaboration of ToR, call for proposals, selection process, logistics and follow-up

FINANCING OPTIONS

project budget, knowhow3000 budget; overhead

4.1 Trainings

Certain fields of expertise require a ‘traditional’ training set-up: one or more experts – either from outside or within the horizont3000 community – are hired to provide information, methods and concepts in a structured way.

STEP-BY-STEP

1. **Topic and ToR**
   - Decide on the topic scope, budget and training set-up (virtual, face to face, number of participants, location, etc.). Ideally those aspects are defined well in advance (during annual planning or at least 4-6 months in advance).
   - Elaborate ToR for the training using the ToR/ invitaton template. Have clear expectations, ideally linked to learning needs communicated by POs or emerging through POs self-assessments or during CoP sessions.

2. **Trainers**
   - Send out calls for proposals and ToRs to trainers/ experts (e.g. email-lists, expert groups, reliefWeb, etc.) and collect offers according to financial and procurement requirements.
   - Evaluate the offers received and select a trainer. Document the decision based on clear evaluation criteria (e.g. technical/ methodological offer, financial offer, expertise, references). Set up a contract with the selected trainer(s) according to financial and procurement requirements.
3. **Preparations**
   - Develop a detailed agenda and programme with the trainer(s). Send out invitations to POs using the ToR/ invitaton template.
   - Book the training venue and organise transport, catering and accommodation for participants.
4. **During the training**
   - Document the training implementation and take pictures (including flipcharts). You can divide tasks across the team. Collect the list of daily participants, signed by participants.
   - At the end of the training provide a feedback/ evaluation survey and ask the participants to prepare Action Plans for Learning.
5. **After the training**
   - Share a training report with all participants as well as the knowhow3000 coordinator, including presentations and other material linked to the training.
   - Upload all relevant material to the Knowledge Hub or send it to the platform coordinator.

RESOURCE

- Quick Guide for Events and Training
- Planning Guide for Events and Training
- Facilitation Guide for Events and Training

! **Don't forget to integrate gender and inclusion as well as environmental and climate change considerations! See chapters 1.2 and 1.3.**

4.2 Coaching

Experience shows that a 'traditional' one-off training may not always deliver the expected change at the **organisational level**. Traditional training can provide inspiration and new insights to a limited number of participants. However, once the participants return to their organisation or project team, questions may arise regarding their understanding and application of the learnings.

In order to support the **application of learnings** into the organisational structures, coaching by an external expert can be offered in combination with trainings or as an activity on its own. Coaching builds on a clear organisational learning framework as it is always focused on a clear **learning objective**.

STEP-BY-STEP

1. **Topic and ToR**
   Whether the coaching is combined with a traditional training or offered and organised separately, it is important to set a budget and establish clear ToR for it. Please get in touch with the knowhow3000 coordinator (and if applicable, corresponding subject-matter focal point) of your region/ country to discuss the details.
   Coaching is typically limited to a certain number of sessions. We advise that organisations only apply for coaching if they present a clear learning objective to horizont3000 and the coach, based on the needs assessment for learning on specific topics.

2. **Coaches**
   Coaching offers should be collected and selected based on clear criteria. Coaches/ trainers should include information on coaching in their offers. For example, five coaching sessions, each lasting 1.5 hours, are offered to training participants after they have completed the training.

3. **Documentation**
   The coach is obliged to present a short documentation of the coaching sessions covering date, name and contact details of participants, topics covered, an action plan for learnings and recommendations for further learning & sharing activities regarding the given topic.

RESOURCES

- Template: ToRs for learning & sharing activities
- Template: Event itinerary
- Template: Action plan for learning
- Template: Evaluation questionnaire
- Template: Final report
- Template: Application for funds

Don’t forget to integrate gender and inclusion as well as environmental and climate change considerations! See chapters 1.2 and 1.3.

Literature and References

Wenger-Trayner, B. et al. 2023: Communities of practice within and across organisations: a guidebook, Social Learning Lab

Wenger-Trayner, B. et al. 2023: Introduction to communities of practice, a brief overview of the concept and its uses. https://www.wenger-trayner.com/introduction-to-communities-of-practice/

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FURTHER REFERENCES

Find more information about learning & sharing on horizont3000's Knowledge Hub.

For practical tools for facilitation and groupwork, visit https://www.liberatingstructures.com/.

For an overview of the Experience Capitalisation approach in general you can review this practical guidebook by CTA and IFAD.

Resources

OVERVIEW AND LINKS TO TEMPLATES AND RESOURCES

Guide booklets

- **Quick Guide for Events and Training**
- **Planning Guide for Events and Training**
- **Facilitation Guide for Events and Training**
- **Storytelling Guide + Storytelling Canvas**
- **Systematisation Manual + animated video**

Templates

- Template: ToR and/or invitation for learning & sharing activities
- Template: Event itinerary
- Template: Action plan for learning
- Template: Evaluation questionnaire
- Template: Final report for learning & sharing activities
- Template: Application for funds (content and cost calculation)
- Template: Borrow-an-Advisor application form
- Template: Borrow-an-Advisor report by advisor
- Template: Borrow-an-Advisor report by partner organisation
- Template: Borrow-an-Advisor refund form
- Template: Experience Capitalisation Questionnaires

Examples

- "At-a-Glance" documents
- Stories of Change
- Systematisations