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Methodologies for collaboration and knowledge sharing

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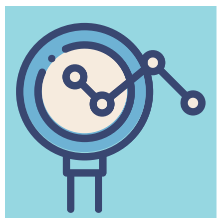
Use these methodologies to catalyze innovation and learning

Are you looking for ways to encourage knowledge-sharing within your organization or gain insights from outside your typical realm? This guide offers practical resources to help you facilitate knowledge-sharing activities with others.

The methodologies and examples presented here are derived from experiences at the Inter-American Development Bank. The IDB utilizes numerous collaboration methodologies to support development projects in Latin America and the Caribbean, as well as to improve its own administrative services. Our experiences with these methodologies have allowed us to validate their practicality in a variety of contexts, recognize good practices, and refine our criteria for when and how to implement them.

Based on those experiences, we've gathered a menu to guide you through choosing, planning and facilitating the methodologies listed below:

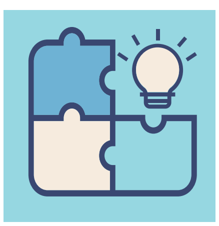
1. Code Expedition: *Crowd-driven identification of digital tools*



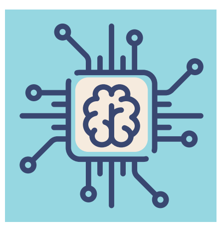
2. Data Expedition: *Teams seek to validate a hypothesis or uncover insights through a data analysis exercise*

3. Hackathon: *Teams create, iterate, or adapt a digital prototype tool in response to a challenge*

4. Ideathon: *Groups generate a wide array of responses to a specific set of questions*



5. Knowledge Exchange: *An interactive workshop where all participants share their expertise*

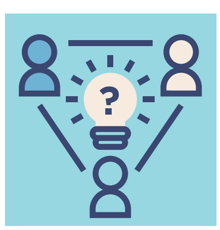


6. Knowledge Mapping: *A process for documenting and curating knowledge on a key topic*

7. Smarter Crowdsourcing: *A series of virtual participatory panel consultations*

8. Sprint to Document: *An activity to jump-start documentation of knowledge*

9. Virtual Globetrotter: *A working group meets virtually at regular intervals to exchange good practices and integrate contributions to the development of a shared deliverable*



10. What would you do?: *An activity to reflect on challenge scenarios and socialize different possible responses*

Each methodology is presented in a practical format as a foundational tool to guide your process. You can build upon them to create your own specific activity, whether you are a challenge owner, a facilitator, or host. We'll give more details about these roles and their responsibilities in each of the methodologies. While there are a number of roles described, it is possible that one individual or group may fulfill multiple roles or share a single role, depending on the size of your team and the scale of the intervention. For instance, the same person may fulfill the role of host, facilitator, and mentor.

Applying the methodologies

The objective and process of each methodology are described in its respective guide, and each guide includes an example of an application. We trust that this toolkit will provide you with the practical tools and inspiration to guide and shape your own knowledge-sharing experiences. We trust that this toolkit will provide you with the practical tools and inspiration to guide and shape your own knowledge-sharing experiences, in your specific context. Of course, the list is neither rigid nor exhaustive -- there are many methodologies for sharing knowledge and plenty of room for modifying, riffing, and making your own.

Identifying the challenge and challenge owner

It is important to note that knowledge-sharing methodologies are most helpful when applied in response **to a specific challenge**, such as addressing a present problem, generating insights to help make a decision, or finding a solution for an existing need. Most of the methodologies in this guide will refer to an actor called the "**challenge owner**." This is the stakeholder responsible for defining the challenge, and who holds the primary interest in identifying and implementing the relevant solutions sparked by the knowledge-sharing process. However, that person is not the only one to benefit from the knowledge-sharing process; this value is often multi-directional.

The most relevant methodology depends on the nature of the challenge that the challenge owner is facing

Some knowledge-sharing methodologies can be applied in many situations, while other methodologies may be more relevant for a particular challenge or to address specific knowledge gaps in an area of interest. The resources at your disposal are also important to consider, as it is important to determine whether the knowledge-sharing methodology will stand alone or as part of a wider process to address the challenge.

For example, While it can happen at any time, at the very early stages of a project you often need to **gather new input, insights, or generate ideas**. To facilitate a wide-open brainstorming, try facilitating an **Ideathon**. To find existing technology solutions to a given challenge, organize a **Code Expedition**. **To gather insights, extract value, or reflect on specific questions using available data,** run a **Data Expedition.**

Diverse perspectives can lead to a more effective project design or to a more focused technical solution. If you need to dig deeper into an area of specialty and harness insights from others with relevant experience, consider **Smarter Crowdsourcing**, or look into a **Knowledge Exchange**. You can engage new collaborators and push the bounds of local technology through a **Hackathon**.

Shared effort from the crowd can contribute directly to a project output. Consider a Virtual Globetrotter to work collaboratively on a shared product with others across geographical boundaries.

It's important that project results are documented, assessed or improved. The What Would You Do? methodology is a great way to promote reflection, while Knowledge Mapping helps centralize and connect existing knowledge around a key topic. Finally, try a Sprint to Document to capture new knowledge or gather dispersed documentation.

What these methodologies have in common: creating through collaboration

The fourth industrial revolution demands us to learn better and faster, and in turn, to facilitate more effective learning with our collaborators. The types of knowledge-sharing methodologies in this guide help foster principles of openness and dynamic practices imperative to our continuously transformative context and harness the power of collaboration essential to creating new knowledge and solutions. These methodologies are substantiated by the following concepts:

Open knowledge and open source principles

The open knowledge and open source movements promote the idea of **knowledge as a public good**, meaning it is **freely available for reuse and adaptation**. Collaborative efforts can be used to improve on the original knowledge, thereby extending its original benefits to a wider audience. Greater awareness of existing open knowledge products can also help to prevent the duplication of efforts and increase overall access to knowledge. Many of the methodologies can be used to open knowledge, improve openness, or help connect people with existing open knowledge.

Agile principles

The principles of Agile include leveraging **multidisciplinary teams** who work intensively in **time-limited sprints** focused on **specific challenges and deliverables**. Face-to-face interactions are encouraged for sharing results and reflecting on how to improve through various iterations. Multiple collaborative methodologies take advantage of these principles to achieve certain objectives during limited time periods.

Systems-thinking principles

Systems thinking encourages us to explore an idea or concept from multiple perspectives while also considering the connections, causalities, and interdependencies in the larger context. It also encourages consideration of the boundaries of the system, including the **scope and scale of an intervention** and a **measurable definition of success.** A well-designed methodology is at once its own system and also an opportunity for connecting across other existing systems.

Human-centered design principles

Human-centered design encourages us to **co-create** with the people who will be most directly impacted by the solution being developed while considering the challenges from their perspective and incorporating their direct feedback through prototyping and testing solutions. When using these methodologies, the solutions generated will be enriched by including diverse participants with unique insights into the challenge during the co-creation process.

Crowdsourcing and Collective Intelligence

The Internet has made it possible for people to leverage **global networks for collaboration.** Crowdsourcing refers to an effort shared among many in contribution to a larger result. Collective intelligence refers to the **shared body of knowledge** that emerges from ongoing,

coordinated efforts of crowd-driven knowledge-sharing on a massive scale. Methodologies which include virtual collaboration and contributions can use these networks to their advantage and also through smaller, geographically dispersed groups.

Why we share knowledge at the IDB

At the IDB, we recognize knowledge as an essential asset for addressing the challenges of development, and are convinced that the power of open knowledge to improve lives is limitless. We also believe that opening and sharing knowledge builds a virtuous learning cycle among people, teams, and organizations.

Sharing knowledge improves our work

Knowledge acquired through experiences provides critical insights for designing more robust and effective projects and processes. When these reflections are acted on, they can lead to improvements which are constructive rather than repetitive. This is especially important for complex projects in international development where efficiency and effectiveness are key for serving the public.

Sharing knowledge connects us

When we share knowledge with others, we encounter diverse perspectives which can challenge our own biases and mutually contribute to our growth. Recognizing and seeking the expertise of others encourages shared buy-in. We can also uncover new insights and solutions from beyond our personal experience and cultivate new partnerships and collaborations. Also, in a time of information saturation, knowing who to talk to can help cut through the noise.

Sharing knowledge creates value

Knowledge is a vital asset to the IDB´s mission as a development bank. Knowledge sharing is a powerful way to advance the capacity of development actors across institutions, sectors, and countries. By sharing knowledge, we hope to not only strengthen our own organization but also contribute to the strengthening of others. We also recognize the potential that our partners´ knowledge holds when it is shared with us.

Now that you understand the underlying concepts of these methodologies, we invite you to use them!

CODE EXPEDITION

Looking for software that responds to a challenge? Code Expeditions are online campaigns to locate and curate open-source software related to a given topic or challenge. Before investing in new software, identify and compare a variety of existing solutions for their potential adaptation and reuse.

Key Benefits

- Obtain a curated selection of open-source software related to a given topic or challenge
- Find additional tools which have the potential to be opened and reused
- Incorporate external perspectives related to software in a particular challenge area
- Identify a larger community of actors interested in using, sharing, and improving software

Participants: Open or Community-specific

Format: Virtual

Duration: 4 - 6 weeks

Prep Time: 2 months

How do you apply this methodology?

1 Frame the scope of intervention:

Identify the challenge: What issue do you anticipate the potential software would address?

Consider the existing tools you know that address this challenge, if any. Are you looking for tools that are similar or something completely different? A mix of both? Use these references to establish some criteria for the tools you seek.

Clarify the objectives and related indicators: What is the definition of success? Establish an indicator that connects with your objective.

Define the profile of the participants: These people will nominate and submit the tools during the expedition, either as the developers of the software or as recommenders. The target group for participation may be wide (open to the public) or specialized (a given community or organization) depending on the challenge.

2 Assign roles and responsibilities:

	Challenge owners	Facilitator(s)	Participants	Mentors
Define the business case, technical eligibility criteria, and success indicators	✓			
Provide technical advice, legal advice, or subject matter guidance for eligibility and evaluation criteria				✓
Sets up a platform or workflow for sharing the call for software and receiving the nominations		✓		
Share the call for software to the crowd or focus communities	✓	✓		
Nominate software and digital tools during the campaign			✓	
Guides participants through the software nomination and review process		✓		
Evaluate the submitted software and tools according to the previously established criteria	✓	✓		✓
Follow up with selected finalists to arrange additional collaboration or activities	✓	✓		

What about legal advice? Consider checking with a lawyer who can provide feedback about the terms and conditions for participation and answer questions about software licenses and intellectual property.

3 Prepare the event:

Two months before

• **Refine your evaluation criteria and the call for nominations:** Establish a set of criteria aligned to your objectives in order to filter and prioritize the nominated tools. What you ask for will be reflected in what you get, therefore, align these criteria with your objectives from the beginning. Determine what criteria make a tool "eligible" for review and what additional criteria make it rank higher among all the eligible tools.

• **Map the nomination workflow:** Consider how you will manage the review of the nominations submitted by participants. Incorporate multiple levels of evaluation to help streamline the nomination process for the user while also addressing your most critical "eligibility" questions for an initial filter. A more detailed technical review of the eligible tools can take place during a later-stage review process.

• **Decide on the prizes:** What kind of incentives will you offer participants? Sometimes the incentive of promoting their work or exploring collaboration is more valuable than something purely material.

One month before

• **Develop a campaign strategy:** Sharing the call for nominations with the right audience is essential. Based on the technology you are looking for, map the relevant actors and groups to target your outreach strategy. This can be complemented with a network analysis. Consider the most effective channels to reach these audiences. Include those in your organization that can help you reach the intended networks.

• **Build your platform** for receiving nominations. Make sure the evaluation criteria established has been clearly communicated. Also include a way of keeping track of how nominators are directed to the nomination process (social media, email, direct invitation) as this is helpful insight for fine-tuning future campaigns.

One week to one day before

• **Last check:** Take a moment to make sure everything is online and working, including important links and any forms being used to receive submissions.

• **Announce the launch:** Make a splash to announce the launch of the code expedition, with social media, blogposts, and other methods noted while developing your campaign strategy.

4 Start the Code Expeditition!

Week 1	
Launch and promote the Code Expedition	• Launch day! Let people know the Code Expedition has officially begun! • Following the launch, spreading the word and maintaining momentum are essential. Continue promoting engagement and encouraging your target audience to share their tools.
Preliminarily review nominations	• Review the first nominations as they are received. Are the forms coming back with the information you need? Make any needed minor adjustments.
Week 2	
Monitor nominations and promote engagement	• Continue promoting engagement and encouraging your target audience to share their tools. • As the campaign end date approaches, assess whether you will end on time or extend the campaign end date.
Week 3	
Finish strong to reach your objectives	• Send reminders about the campaign end date with clear steps about how to participate before then. • Concentrate on 1-1 follow-ups with key actors whose input has been identified as most valuable. • Close the nomination form at the announced time.
Evaluate the submissions	• Using the evaluation criteria established at the beginning, gather your panel of evaluators to filter the submissions and identify the finalists. A "tiered" approach can help eliminate submissions which have not met the criteria considered to be the minimum threshold of eligibility.

Tips for facilitation

- **Qualified evaluators:** When it´s time to evaluate the tools, be sure you have evaluators capable of identifying the technical elements of the evaluation criteria.

- **Recognize adaptability:** Be open to relevant solutions which were originally developed to address challenges from other sectors. For example, if you are looking for tools related to tax administration, a tool developed to assess informal housing might be adaptable.

- **Open Source resources and guides:** Sometimes a great tool submitted will not be fully documented or meeting the standards of open source. Sharing resources such as documentation templates supports participants who wish to proactively address this.

What to do after the event

- **Evaluate the event** with the participants. Thank them for their participation and reflect on any comments they may share in an evaluation survey. How can you integrate their feedback in your next code expedition?

- **Measure your results** with the definition of success established at the beginning.

- **Share the findings:** Did any new insights emerge or was any software identified that could be shared with a wider audience? Consider publishing a blogpost. Want to dive deeper into the best tools? Host a follow-up workshop with those who will benefit most.

- **Follow up on the findings:** Check in again with the challenge owners. Did the insights from the code expedition lead to any changes in business practices or how software is used?

Code Expedition in Action: Tools for Subnational Tax Administration

The Municipal Management team at the IDB applied the Code Expedition methodology to identify existing software solutions in response to a request from four countries on how to improve various aspects of subnational tax administration such as updating land registries and publishing municipal tax information.

The methodology was applied during the execution phase of a project. The team had already decided during the ideation phase that a software solution was the direction they wished to pursue in responding to the challenge of improving subnational tax administration.

Rather than creating a software from scratch, the team decided to gather information about existing software to inform the design of a new solution. They designed a project that incorporated the Code Expedition methodology as the means to identify software which could potentially be opened or reused.

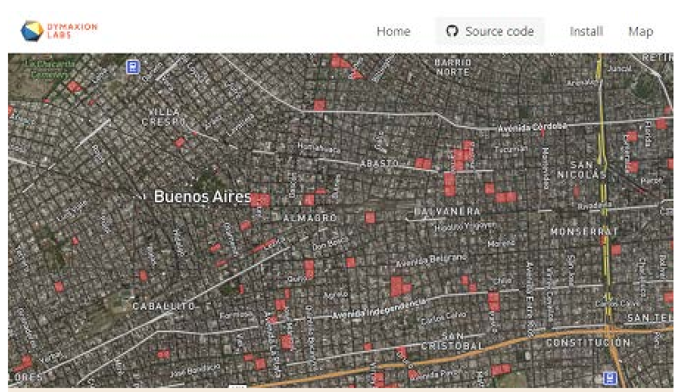
The Code Expedition produced the following:

- Identification of three software solutions related to the challenges defined.

- Presentations of the software by its developers to the IDB and interested countries to discuss the opportunity for reuse.

- Contact with actors engaged with software development related to subnational tax administration and additional related communities.

Read more about this example on the blog.



Screenshot from AP-LatAm, an application developed by Dymaxion Labs and identified during the Code Expedition.

Additional Resources

- The IDB has written **several blog posts** about its experience with code expeditions, which can provide additional insight.

DATA EXPEDITION

Ready to turn your data upside-down? Data Expeditions are an opportunity for teams to explore data in response to a challenge. The challenge owners can gain new insights from datasets alongside collaborators interested in practicing data analytics.

Key Benefits

- Create data visualizations and extract insights from a dataset(s)
- Generate new questions for further exploration of the data
- Test creative and experimental approaches for data analysis
- Strengthen data storytelling techniques
- Identify new talent in data analysis

Participants: Specialized, Invitation

Format: Workshop

Duration: 1 - 2 days

Prep Time: 3+ Months

How do you apply this methodology?

1 Frame the scope of intervention:

Consider available data which has been overlooked. Could it be used to investigate a relevant challenge? Could it be seen from a new perspective or combined with a new insight?

Further define the challenge with data. You may have to ask, does the data you have suffice to respond to your challenge? Determine if all the data you need to analyze is open-source or if special permission will be required to work with it. If they are not available, think of additional proxy data. Sensitive data should be protected and anonymized.

Clarify the objectives and related indicators. What is the definition of success? Establish an indicator that connects with your objective.

Define participant profiles. They may include a variety of profiles including data scientists, designers, and project managers – anyone who has something to contribute to collaboratively exploring the data.

2 Assign roles and responsibilities:

	Challenge owners	Lead facilitator(s)	Hosts	Participants	Mentors
Provide or obtain the data with the required permissions	✓				
Identify the business case and present the challenge question to participants	✓				
Organize the process and preparation of the Data Expedition	✓	✓			
Provide location and logistic support for the event			✓		
Analyzes data in response to the challenge question				✓	
Offers technical advice or subject matter guidance to participants in relation to the data and business case	✓	✓			✓
Presents the findings of their data analysis				✓	
Form the jury panel which evaluates final participants' presentations	✓				✓

3 Prepare for the event:

Three months before

- **Wrangle the data:** Get concrete about the data you have available. Start making an inventory including links, data owners, descriptions of the data, and the permissions required for use.

- **Reach out:** Get in touch with potential hosts, participants and mentors to get a sense of interest in collaboration.

Two months before

- **Refine the challenge statement:** Make concrete connection between your challenge question and the available data. Be realistic about what can be accomplished technically given the limited time and the data available.

- **Establish Data Dictionary:** Using the data available, define a list of variables relevant to the challenge and note how they are labeled in each data set (for example, the variable "time" might be in days or months). More abstract concepts being measured will require more explicit definitions.

- **Engage with participants:** Register participants and establish a webpage or other strategy for sharing information, data and tools. The registration of teams is optional.

One month before

- **Hold a bootcamp to release the data:** Have a kick-off session with participants to introduce the challenge, explain the data, and ensure everyone has access to it. This can be virtual or in-person.

- **Get signed permission:** If a signed waiver or non-disclosure agreement (NDA) is required for participants to work with specialized data, obtain that before giving access.

- **Resolve the logistics:** Establish where the data expedition will take place. Make sure that the location is suitable for people to work with computers for an extended amount of time (multiple electrical outlets, internet access, group tables and chairs).

One week to one day before

- **Last check:** Take a look before the day of the event to make sure everything is ready!

- **Remind participants:** Make sure your engagement is strongest right before the event starts so people are motivated and ready. Include reminders for what to bring, such as laptops and chargers, how to arrive to the location, and what kind of meals will be available if any.

4 Start the Data Expedition!

Day 1 (half day)	
Check-In	• Participants, facilitators, and challenge owners arrive and verify their contact information. Participants join their teams.
Welcome and Group Ice-breaker	• Organizers say a few words to get everyone motivated for the work ahead and thank the hosts and contributors. • Energize the group with an ice-breaker activity.
Challenge Recap	• The challenge owners present the context of the challenge and clarify the objectives the data analysis is meant to address.
First Work Session	• Teams work intensively to develop their hypothesis and start their analysis. Facilitators and mentors circulate to answer questions. • Check-in: During the first working session, teams go through a brief check-in with the challenge owners to share their hypothesis and intended approach. This is an opportunity to guide participants toward the analysis that will provide the most value.
Day 1 reflection, questions, and wrap-up	• Close the day with an opportunity to hear questions and comments from the group. Provide a preview of the next day´s session.
Refreshments	• Networking with drinks and snacks.

Day 2 (full day)	
Welcome and Coffee	• Start the day by highlighting achievements from the previous day and sharing any announcements.
Second Work Session (3 hours)	• Teams continue working to complete their analysis.
Meal Break	• Specify whether food and drinks will be provided or if it's an opportunity to go out and get lunch. • This time can also be used as an opportunity for an educational presentation or fair, to showcase a tool or skill which can benefit all participants. • An opportunity to showcase a tool or skill which can benefit all participants. This can be an extension of the meal time to help people re-engage.
Mid-Day Check In (Presentation Criteria)	• Transition participants from working on their analysis to working on the final presentation. • Share the time limits for the final presentations and the criteria the jury will use.
Presentation Work Session (1-2 hours)	• Time for participants to prepare their data visualizations, pitch presentations and rehearse
Final Presentations and Jury evaluations	• Teams present to the jury and audience of participants. Facilitators give cues to presenters to respect time limits. • The jury selects the grand prize winners and decide to recognize any additional "best-in category" winners.
Certificates and awards	• Recognize everyone´s participation. Having an updated list of registered participants is helpful for drafting personalized certificates. • Announce prize-winners. • Take a group photo!
Closing	• Facilitators invite participants, mentors, and challenge owners to share reflections on the experience • Have fun and celebrate a job well done with drinks and snacks!

Tips for facilitation

• **Team spirit:** Make sure everyone is oriented with their team before the event starts. Encourage a welcoming and inclusive atmosphere. New teams can be formed when needed, if more or less people arrive than expected.

• **Online mentorship:** Is there a mentor who wants to help but can't be present at the event? Consider making a virtual phone booth with a video conference to facilitate virtual office hours with the participants.

• **Keep teams focused:** Check in with teams periodically to make sure everyone is on track or if they have questions or roadblocks. Help circulate the mentors between each group so that everyone benefits from a mix of insights.

• **Clarify presentation criteria:** Before teams start working on their final presentations, clarify how their presentations will be judged. For example, presenting a clear response to the challenge may be more important than polished graphics. Be honest with participants about what you value.

What to do after the event

• **Evaluate the event** with the participants. Reflect on any comments they may share in an evaluation survey. How can you integrate their feedback in your next data expedition?

• **Measure your results** with the definition of success established at the beginning.

• **Share the findings:** Did interesting insights or data analysis techniques surface that could be shared with a wider audience? Consider publishing a blogpost. Want to dive deeper into the winning analysis? Host a follow-up workshop with a wider audience who may be interested in learning from the tested approach..

• **Follow up on the findings:** Check in again with the challenge owners. Did the insights from the data expedition lead to any changes in business practices or how data is used?

Data Expedition in Action: Understanding Collaboration at the IDB

Marte Martín, one of the Data Expedition participants from IE, presents his team´s results and learnings: "Data analysis and exploration is not a linear process, data often has its complexities. We understood that it was important to establish a method of action in advance and to create a shared common sense within the team."

Multiple teams within the IDB including the human resources department, the knowledge management division, and the Vice Presidency of Countries collaborated with the Instituto Empresa's Big Data Club in Madrid to explore the topic of collaboration during project development at the IDB. The IDB was curious about which areas within the organization collaborate and whether the data about project teams during the project preparation phase would serve to illustrate their collaboration.

The human resources department were the data owners and offered their business expertise to the participants addressing the challenge. The knowledge management division provided the methodological process and the facilitators. Instituto Empresa's Big Data Club hosted the event, while members of their graduate programs participated to analyze the data from different angles. Additional mentors shared tips on big data analysis techniques.

An important challenge of this data expedition was to define "collaboration" in a way that it could be measured through the data. The IDB hosted a virtual introductory session a month before the event to explain the challenge to the participants and introduce the dataset. This was also an opportunity to explain how teams would work during the data expedition and how their findings would be evaluated.

During the event, teams used the data to create visual representations of how project teams collaborate across organizational units at the IDB. Additional insights and nuances regarding the definition of collaboration emerged through this process, including a differentiation between "active" and "passive" collaboration.

Additional Resources

- See a **video recap** of this Data Expedition.
- The IDB has written several blog posts about its experience with data expeditions, which can provide additional facilitation tips and guidance, constantly updated on the blog **Abierto al Público**.

HACKATHON

Are you looking for prototypes of digital applications? In a hackathon, participants work together intensively over the course of two (or more) days in a marathon-style workshop to build prototypes of digital tools or applications in response to a challenge. The winners may be paired with a local incubator or accelerator to continue developing their solution.

Key Benefits

- Generate prototypes for digital tools or applications
- Accelerate possible new solutions to local challenges
- Build stronger links among diverse actors in a given community
- Promote the improvement or reuse of open-source tools and open data

Participants: Open or Specialized, Invitation

Format: Workshop

Duration: 2-3 days

Prep Time: 3+ Months

How do you apply this methodology?

1 Frame the scope of the intervention:

Identify a challenge where a new technological intervention could be part of the solution and get the challenge owners on board.

Consider the existing data and tools available to support the investigation of the challenge. They should be open source. If not, work with the provider to secure the proper permission for use. Create a toolkit or a repository to centralize and share these items.

Clarify the objectives and related indicators. What is the definition of success? Establish an indicator that connects with your objective.

Consider participants: These can include programmers, designers, project managers, and everyday citizens – anyone who has something to contribute to collaboratively prototyping the solutions.

Ally with a local incubator or accelerator: They can provide mentors to support teams working on their prototypes and provide specialized, ongoing support for the top-performing team(s) following the hackathon.

2 Assign roles and responsibilities

Assign roles and responsibilities	Challenge owners	Lead facilitator(s)	Hosts	Participants	Mentors
Defines and presents the challenge question to participants	✓				
Obtains and provides data (with permission) relevant to the challenge	✓				
Leads the preparation and execution of the hackathon		✓			
Provide location and logistic support for the event			✓		
Play the role of MC or announcer during the hackathon		✓			✓
Build a prototype in response to the challenge question				✓	
Offer technical advice or subject matter guidance to participants in relation to the data and challenge	✓	✓			✓
Present the prototype				✓	
Form the jury panel which evaluates final participants' presentations	✓	✓	✓		✓
Accompany the development or accelerate the winning projects					✓

3 Prepare for the event:

Three months before

- **Reach out:** Get in touch with the communities you hope to involve, including participants and mentors to explore their interest in collaboration.
- **Refine the challenge statement:** Define precisely the challenge to be addressed and be realistic about what can be accomplished technically during the limited time.

Two months before

- **Engage with the public:** Start a communications strategy to publicize the event, register participants and keep people engaged in the preparation time until the event. Launch a webpage or other strategy for sharing information, data and tools in advance.

One month before

- **Prepare a toolkit:** Gather the relevant tools and data in one place for participants to access them.
- **Hold a Bootcamp**: Have a kick-off event with participants to introduce the challenge, explain the data or tools, and ensure everyone has access to them. This can be virtual or in-person.
- **Form teams**: Encourage people to form multidisciplinary teams before the event.
- **Resolve the logistics:** Establish where the event will take place, making sure that the location is a suitable place for people to work with computers for an extended amount of time (multiple electrical outlets, internet access, group tables and chairs).

One week to one day before

- **Last check:** Verify the day before to make sure everything is ready for the event!
- **Send a reminder to participants:** Include a list of what to bring, such as laptops and chargers, how to arrive to the location, and what kind of meals will be available if any.

4 Start the Hackathon!

Day 1 (half day)	
Check-In	• Participants, mentors, and challenge owners arrive, check in with their teams and verify their contact information. • Take the opportunity to match people with teams if they have not been formed already.
Opening Ceremony and Group Icebreaker	• The lead facilitator or MC welcomes everyone to the hackathon and introduces organizers, hosts and contributors. • The MC goes over the agenda of the event. • Participants get acquainted through an ice-breaker activity.
Challenge Recap	• The challenge owners emphasize the context of the challenge and the objectives the protypes should address. • Remind participants about the toolkit and other resources at their disposal.
First Work Session (1-2 hours)	• Teams work intensively to investigate the challenge and plan a proposal for their prototypes. • Facilitators, challenge owners, and mentors circulate to answer questions.
Working Meal Break	• Specify whether food and drinks will be provided or if it's an opportunity to go out for lunch.
Second Work Session (2+ hours)	• Teams continue working to develop their prototypes.

Day 1 reflection, questions, and wrap-up	• Bring the day to a close with an opportunity for teams to share updates, questions and reflections with the group. • Facilitators goes over the agenda for the next day´s session.'
Refreshments	• Time when everyone can share a drink or snacks while networking
	Day 2 (full day)
Welcome and Coffee	• The MC or lead facilitator starts the day by highlighting milestones and sharing any announcements with the participants.
Second Work Session (3 hours)	• Teams work to complete their prototypes with the support of the challenge owners and mentors
Working Meal Break	• Specify whether food and drinks will be provided or if it's an opportunity to go out and get lunch.
Educational Presentation or Fair	• An opportunity to showcase a tool or skill which can benefit all participants. • The accelerator may also present here on the viability, scalability, and sustainability of projects.
Mid-Day Check In (Presentation Criteria)	• Invite participants to finish working on their prototypes and start working on their pitch presentations. • Share the criteria that the jury will use and the time-limitations for presenting.
Presentation Work Session (1-2 hours)	• Time for participants to prepare and rehearse their pitch presentations.
Final Presentations and Jury evaluations	• Teams present to the jury and audience of participants. Facilitators give cues to presenters to respect time limits. • Jury determines grand prize winners and decide to recognize any additional "best-in category" winners.
Closing Remarks	• Before announcing the winners, facilitators invite participants, mentors, and challenge owners to share their reflections on the experience.
Certificates and Awards	• Recognize everyone´s participation. Having an updated list of registered participants is helpful for drafting personalized certificates. • Announce prize-winners.
Refreshments	• Take a group photo and pictures with the prize winners! • Have fun and celebrate a job well done!

Tips for facilitation

• **Get pumped up!** Bring your full, positive energy to the participants, from the preliminary communications up until the last minute of the event. The high-intensity format benefits from everyone being motivated.

• **Team Spirit:** Make sure everyone is oriented with their team before the event starts. Encourage a welcoming and inclusive atmosphere and form new teams when needed.

• **Read the room:** Avoid interrupting teams that are concentrated during working sessions and be responsive to those who are looking for assistance. Mentors should circulate between teams so that everyone benefits from a mix of insights.

• **Clarify presentation criteria:** Before teams start working on their final presentations, clarify how their presentations will be judged. For example, presenting a clear response to the challenge may be more important than polished graphics. Be honest with participants about what you value.

What to do after the event

• **Evaluate the event** with the participants. Thank them for their participation and reflect on any comments they may share in an evaluation survey. How can you integrate their feedback in your next hackathon?

• **Measure your results** with the definition of success established at the beginning.

• **Share results:** Let the community know what teams accomplished. This could be communicated through a blogpost or video.

• **Support ongoing outcomes:** Align the top team(s) with a local incubator or accelerator who can provide the specialized resources and mentorship for continued development and scaling of the product. Other projects may also receive follow-up and support thanks to their exposure from the event.

Hackathon in action: Bicitón hackathon in Montevideo

Organizers from the City Hall of Montevideo and the IDB present the challenge to the Bicitón participants in December 2017. Photo courtesy of Agustín Fernandez Gabard.

Various departments from the City Hall of Montevideo partnered with the IDB to carry out the “Bicitón” (Bikeathon) hackathon. The Bicitón was a collective workspace which used technology and open data over the course of two days to generate proposals to encourage the use of bicycles in Montevideo as an integrated method of transportation.

The challenge included finding an effective route of bicycle paths to allow people to move safely and efficiently while supporting wider efforts to make the city more accessible. Participants responded to the challenge using a combination of technology and open data, to create products that would increase knowledge about bicycle mobility in Montevideo. Acceleration was the grand prize to continue working on the project and implement a pilot in the city.

In order to prepare for this hackathon, the facilitators generated alliances with the local ecosystems related to data, cycling and entrepreneurship. A bootcamp was organized to share the challenge with the participants and to organize the teams.

The hackathon was an initiative within the framework of the IDB Cities Lab.

Additional Resources

- The IDB has written **several blog posts** about its experience with hackathons, which provide additional facilitation tips and guidance.

- If there is a lack of data or tools to work with before your hackathon, consider running a **Code Expedition** prior to the event.

- Hackathons have inspired many spin-off methodologies with the “thon” suffix, an allusion to the word “marathon,” for its intensive format. **Ideathons** are one example.

IDEATHON

Looking for a way to brainstorm with a big group? Ideathons bring together participants in order to generate ideas in a time-limited setting. The challenge owners benefit from a broad range of diverse ideas in response to a specific question.

Key Benefits

- Generate and document a large number of ideas with a group
- Identify new inputs for a project or process
- Foster a greater sense of involvement in a project
- Encourage imagination and detect new prospective solutions

Participants: Open or specialized

Format: Workshop

Duration: 2-4 hours

Prep Time: 1-2 Months

How do you apply this methodology?

1 Define the scope of and the intervention:

Match your objective and indicator(s) for success: For example, if your objective is to include more diverse perspectives in a project, try correlating the success of the Ideathon with the participation of different groups. To encourage more creative responses, set the number of ideas generated as a success indicator.

Turn the challenge into a clear question: Briefly describe the challenge faced and where new ideas are needed, to formulate valuable questions. Use open-ended questions (not a question which can be responded with ´yes´ or ´no´) to encourage a range of creative ideas in response.

Define participants profile: Think about whose perspectives the challenge owner would like to include through the ideation process

2 Assign roles and responsibilities

	Challenge owners	Lead Facilitator	Co-facilitators	Participants
Define objective, challenge question(s) and criteria for success	✓			
Organize event logistics	✓	✓		
Invite participants and co-facilitators	✓	✓		
Train co-facilitators and communicates with participants before the event		✓		
Set up materials for the event		✓	✓	
Lead the idea generation process during the Ideathon				✓
Contribute ideas in response to challenge question	✓	✓	✓	
Answer participants´ questions about the challenge	✓	✓		
Analyze responses gathered	✓			
Incorporate new ideas into project	✓			

Who are the co-facilitators? Working with co-facilitators can be especially helpful when there will be a large group of participants (50 or more). Anyone who becomes trained in the methodology and learns about the challenge in advance can serve as a co-facilitator. The IDB has partnered with local universities to train young professionals to facilitate the ideation process at group tables during large events.

3 Prepare for the event:

Two months before

- **Refine the challenge question(s) and context:** Make sure the questions are clearly communicated to generate the kind of responses sought from participants. Test the questions with a potential participant to validate that it is understood.

- **Keep participants and co-facilitators informed:** Start a communications plan to invite and keep people engaged until the event.

One month before

- **Train co-facilitators:** Hold an orientation session or bootcamp to present the challenge questions and the Ideathon methodology to the co-facilitators.

- **Confirm participants:** Collect a list of participants with contact information such as email address and obtain permission to contact them after the event.

- **Organize event logistics:** Confirm where the event will take place. You´ll need a space where participants can gather comfortably to share and document their answers.

- **Gather supplies:** Make sure you will have enough paper, posters, markers and post-it notes. If you decide to collect ideas digitally, make sure the technology is not a barrier.

One week to one day before

- **Facilitator rehearsal:** The lead facilitator and co-facilitators practice the Ideathon process and clarify any final doubts with the challenge owner.

- **Remind participants** as the event gets closer. Inform them about what to bring and how to arrive.

- **Last check:** Make sure the space is ready for the event! Are there enough chairs? Do you need a microphone or projector? Do you have the question sheets, pens, paper, and other materials?

One week to one day before

- Check in with co-facilitators: Make sure everyone is ready to start the event and has the materials they need.

4 Start the Ideathon! (2 hours)

Check-In	**10 minutes**	• Check-in all participants. Verify name and contact information for follow-up communications.
Welcome and Group Ice-breaker	**10 minutes**	• Arrange participants in groups lead by co-facilitators. After welcomes and thank-yous, groups can be introduced through an ice-breaker activity.
Challenge Recap	**10 minutes**	• The challenge owners present the intention for the Ideathon, the challenge question(s) and how the ideas generated in response will be used.
Work Session: Question 1	**30 minutes**	• Participants discuss the first question with their groups and write down their ideas. Facilitators clarify doubts, encourage creative responses, document synthesized ideas, and help make the event positive and inclusive.
Work Session: Question 2	**30 minutes**	• Guide groups to transition to the next question, if there are multiple. Repeat the process of the first work session.
Sharing and reflection	**10 minutes**	• After the work sessions, invite groups to share reflections and comments about the process.
Closing	**20 minutes**	• Thank everyone for their participation and contribution. • Celebrate! Consider taking a group photo and allowing time to network or share refreshments.

Tips for facilitation

- **All responses welcome**: Ideathons are inclusive and positive spaces where participants can unleash their creativity. Remind participants there are no "right answers" or "correct responses".

- **Take notes:** It can be helpful for co-facilitators to take notes as participants discuss their ideas. This will help synthesize the input and provide a back-up record. Ideas can be visual as well, including hand-drawn charts or simple illustrations.

- **Collect all response materials:** Once the working sessions have ended, make sure that all papers or digital forms used to capture ideas have been collected for review. Don't let participants carry them away!

What to do after the event

- **Evaluate the event:** Ask participants for feedback about the process. How can you integrate this feedback in your next Ideathon?

- **Review the ideas** with the challenge owner. The responses will likely require further curation and research before becoming actionable. Be on the lookout for unique ideas, areas of overlap or consensus, and especially the ideas that are most relevant for further development.

- **Measure your results** using the definition of success established at the beginning.

- **Share the results:** Share an update with the participants with a snapshot of the results and a brief mention about what you´ll do next with the results. If a final product is derived later from the Ideathon results, let the participants know!

Ideathon in Action: IDB Consultations with Civil Society in Latin America and the Caribbean

From 2016-2017, the IDB Office of Vice Presidency of Countries (VPC) worked to update the institutional framework guiding its relationship with civil society groups. They decided it was very important to incorporate the perspective of civil society members in this process.

To this end, the IDB hosted two Ideathons in 2017 during the regional Civil Society Forums; one in Kingston, Jamaica and another in Santa Cruz de la Sierra, Bolivia. In Jamaica, more than 50 members of civil society groups responded to questions seeking new criteria for guiding collaboration at the organizational level. The group was divided into five tables of 10 participants with two co-facilitators from the University of West Indies, Mona, who encouraged inclusive participation while also keeping the discussions on topic and on time. Similarly, in Bolivia, 40 students guided nearly 100 participants from civil society organizations across Latin America to respond to questions about ways to strengthen collaboration with Civil Society at different levels. A third question was added relating to how open technology can play a role in strengthening collaboration with Civil Society.

The answers generated from these Ideathons were considered in the revision of the institutional framework, along with insights from other consultation activities with civil society. The IDB team used this input to detect and validate a number of thematic areas to include in the new framework, especially in relation to how changes in technology affect the ways that civil society can connect with institutional partners. See **the new strategy** on its page at the IDB.

Students from the Private University of Santa Cruz de la Sierra (UPSC) Bolivia co-facilitated the ideathon which took place at the IDB Group's Civil Society Forum in December 2017. Photo courtesy of Milka Costas Sitic.

Additional Resources

- The IDB writes about its experience with Ideathons along with additional facilitation tips **in the blog Abierto al Público**.

- If you need a methodology that can provide more specific, practical ideas on a specialized topic or where more in-depth information is necessary to pursue viable solutions, consider the **Smarter Crowdsourcing** methodology as an alternative.

KNOWLEDGE EXCHANGE

Do you want to compare practices among a peer group for addressing a common challenge? Knowledge Exchanges are interactive workshops used to strengthen a project by learning from related cases and gathering feedback to improve existing solutions. All teams or delegations share the stage with an opportunity to showcase their proposals, experiences or feedback in order to facilitate multidirectional sharing of expertise.

Key Benefits

- Improve an action plan, operational framework, or project proposal.
- Identify and compare approaches or criteria for addressing a shared challenge.
- Generate a working group or an expanded network to support ongoing project development.
- Strengthen cooperation and collaboration among actors with similar functions across institutions or countries.

Participants: Specialized | **Format:** Workshop | **Duration:** 1-2 Days | **Prep Time:** 2+ Months

How do you apply this methodology?

1 Define the scope of the intervention:

Identify the opportunity to trade insights: What kind of insights or know-how does your team need that others are looking for as well? What knowledge does your team have which another team could benefit from?

Define learning objectives and indicators of success: The objectives should be co-defined with the participants while also meeting the needs of the challenge owner. The indicators of success are tied to the development of working plans which support the integration of the learnings in the participating teams' work.

Define the profile of the participants or teams: Who does the challenge owner want to learn from the workshop? Consider whose work can benefit from learning from others with similar functions and work at comparative technical levels. Typically, the participants should be those who may encounter similar situations to the ones being discussed in the workshop and therefore will benefit from shared exploration of potential solutions. They can also be mixed or cross-cut for sharing across different perspectives (i.e. by role, by country, by team). Participants in a Knowledge Exchange usually have a dual role of presenting their experiences as well as participating and asking questions.

2 Assign roles and responsibilities

Assign roles and responsibilities	Challenge owner	Facilitation team	Hosts	Presenters / Participants	Guest Experts
Identify the challenge or topic	✓				
Define the profile and technical level of the participating teams and locate them across institutions	✓	✓			
Carry out a closer investigation of the challenge		✓		✓	✓
Confirm participants; identify potential location and logistics for workshop	✓	✓	✓		
Develop the format and agenda of the workshop	✓	✓	✓		
Coach the participants with the presentation of their insights		✓			
Investigates, develops and rehearses the materials for the presentation and/or discussion tables		✓		✓	✓
Leads the workshop and moderates table discussions		✓			
Leads additional site visits and cultural activities			✓		
Make team presentations and integrate learnings into a proposed working plan(s)	✓			✓	
Provide feedback to others' proposed working plan(s)	✓	✓		✓	✓
Integrates new insights into working practices and work plans	✓		✓	✓	
Follow up and continue engagement with participants as a working group	✓		✓	✓	

3 Prepare for the event:

Two months before

- **Clearly define the challenge:** It is important to go beyond a general question in this methodology. Describe the complex facets within the challenge and which teams are working to address them, across institutions, functional roles, or countries.

- **Validate the scope of the challenge:** Create a survey to validate the scope of the challenge question with potential participants and include any additional facets they consider worth integrating.

- **One-on-one consultations:** The facilitation team builds a relationship with the challenge owners and other key participants to understand the challenge in detail and gather additional insights which can help facilitate valuable learning during the workshop.

One month before

- **Register participants:** Collect a list of participants with contact information and obtain permission to contact them after the event. This is essential for sharing the results of the event. This is also a good opportunity to offer them to opt-in to other campaigns and knowledge products.

- **Coordinate the logistics:** Once you have an estimate of the number of participants, establish where the event will take place, making sure that the location is a suitable place for people to meet in groups comfortably to write and share their ideas.

- **Design the agenda and the activities:** Decide how the teams will best exchange their insights. Consider panel presentations, work sessions, roundtables, world café, site visits and cultural activities.

- **Refine presentation materials:** The facilitation team works with participants to refine the presentation of their insights according to the format for the workshop, such as presentations, posters, etc.

One week to one day before

- **Remind participants:** Include reminders for what to bring and how to arrive to the location.

- **Last check:** Make sure your space is ready for the event! Are there enough chairs and tables? Do you need a microphone or projector? Confirm with the facilitation team that they have the materials they need.

4 Start the Knowledge Exchange! (1.5-day format)

Day 1 – Diagnosis and exploration of the challenge	
Check-In (10 minutes)	• Participants, facilitators, and challenge owners arrive and check in. Everyone verifies their name and contact information.
Welcome and Review Agenda (30 minutes)	• Organizers say a few words to get everyone motivated for the work ahead. • The facilitation team will present the agenda for the day.
Opening presentation: Shared Challenge Theme and Context (15 minutes)	• Participants will start this session in mixed groups, representing a diversity of projects and countries at each table, but sharing a similar functional role. • The challenge owners introduce the shared theme of the challenge and the context to the plenary.
Coffee Break (15 minutes)	• Give participants a little time to meet each other during the break.
Working session 1: Diagnosis and exploration of the shared challenge (30-45 minutes)	• Participants are arranged in groups by similar function. The participants and guest experts discuss their reactions to the opening presentation and share their experiences related to the challenge, with the objective to improve their common understanding of the challenge and build their empathy with the challenge owner. • The facilitation team will assign a moderator to accompany each table and coach deeper exploration of the challenge and possible avenues to move forward. Ideally, this will be the same person who accompanied the participants in the prior consultations about the challenge.

Working session 2: Develop responses and action plans (30-45 minutes)	• Arrange participants in tables by a shared trait – whether city, country, department or institution - so they can compare common aspects of the challenge. • Guest experts can provide additional insights in each working table.
Lunch and midday activities (1 hour)	• Lunchtime can provide an opportunity for networking. Incorporate special activities such as a world café to further exchange different experiences and insights.
Special presentation (30 minutes)	• A guest expert may give an afternoon presentation on a special topic which complements a cross-cutting issue, such as communications or project management.
Site visit / Cultural Activity 2-3 hours	• Take advantage of the location to organize a hands-on activity or tour, in support of the exploration of the challenge. This may include a site visit to a local office which is working to resolve elements of the shared challenge, or a visit to an urban area or project site where a program is taking place.
Reception	• Encourage further opportunities to build rapport among participants by sharing a meal or appetizers to close the first day.
Day 2 – Action Plan Development Opening and Recap	
Opening and Recap (15 minutes)	• Challenge owners and hosts start the day welcoming everyone and reviewing yesterday's milestones. • Facilitators present the agenda of the day.
Working Session 3 (1.5 hours)	• For the final working session, participants return to their teams of origin or main project team to draft their working plans / action plans. • Facilitators guide participants in each table to share with their teams what they have learned from the previous working sessions and the presentations over the past day. • Teams synthesize their reflections and develop a working plan or action plan for their situation, with proposed new approaches and solutions.
Coffee break (15 minutes)	
Review session or training activity (1 hour)	• Guest experts may provide specialized review of the drafts at each table or offer a presentation to the whole group with tips and advice that can help everyone focus on where to strengthen their action plans.
Working Session 4 (1 hour)	• Teams incorporate the feedback into their draft working plans and prepare the final presentations to share their plans with the whole group. • The facilitators should provide guidelines for the final presentations such as time limits and expected format.
Presentation of Working Plans (1 hour)	• Each team will present their working plan. • Leave some time for each team to receive comments and feedback from the other teams on their presentation.
Closing (15 min)	• Challenge owners recap the day and share their reflections and take-aways. • Hosts, facilitators, and participants may share additional reflections and next steps with the group. • Discuss how the group may keep in contact moving forward

Tips for facilitation

- **Emphasize multi-directional learning:** To make the most of the Exchange, think about the challenge from different angles and the different insights a diverse group can provide.

- **Connect activities with main objectives:** Build the agenda to directly strengthen the creation of the working plans. Each activity should support clear learning objectives that will be reflected in the final deliverable.

- **Choose the host strategically:** This may be for logistical convenience or because of a specific opportunity at the location which can enrich the experience. For example, a model agency or institution worth visiting, or a local cutting-edge project to see. Be sure to coordinate the logistics for the event in cooperation with the hosts, including venue preparations, special presentations or field visits.

- **Each participant must have a role:** When selecting participants, choose carefully based on their specific functions and how they will relate with their peer colleagues across project teams and institutions. This will help facilitate the group learning and avoid leaving anyone excluded or without something relevant to share.

- **Define criteria for final working plans:** Each working plan should include specific deliverables with assigned tasks and timelines to encourage the successful completion of activities.

What to do after the event

- **Evaluate the event** with the participants. How can you integrate this feedback in your next Knowledge Exchange?

- **Measure your results** using the definition of success established at the beginning.

- **Immediate follow-up:** Share a thank you message and written recap with the participants after the Knowledge exchange as well as information about next steps.

- **Check in in 6 months:** Keep in contact with the participants over time. As teams progress on their working plans from the Knowledge Exchange, share their achievements with the rest of the group!

Knowledge Exchange in action: Strengthening Public Investment Projects in El Salvador

El Salvador was interested in developing a more strategic, efficient and transparent management of public investment projects. Therefore, in 2015 the IDB supported the Ministry of Public Works (MOP) in the preparation of a knowledge exchange to learn about financing and managing pre-investment studies.

The objective of the Knowledge Exchange was to analyze the role and discuss the attributes of effective and efficient management of pre-investment in the preparation and design of infrastructure projects. Key actors from El Salvador, Panamá, Ecuador, Peru, Colombia and Korea, as well as other international agencies, gathered in a workshop to exchange ideas about how to strengthen existing processes and public investment systems. The participants from Korea and Global Infrastructure Basel provided expert insights and good practices on sustainable infrastructure management. The exchange focused on experiences related to institutions, regulations and pre-investment processes, emphasizing: 1) criteria for prioritizing public investment projects, and 2) the management and financing of pre-investment studies.

The questions to guide the discussions focused on the criteria to prioritize investment projects, the technical and political levels involved in the prioritization process, and how pre-investment studies are managed. Finally, the pre-investment process was analyzed closely from the initial study phase until the final contracting phase.

As a result of the Knowledge Exchange, an action plan was developed by El Salvador and supported by the IDB, including the development of a technical cooperation project to support the improvement of the National Public Investment Systems (NPIS). As well, a knowledge-sharing program with Korea, additional cooperation with Colombia, and a new working group under the Ministry of Public Works in El Salvador were established to continue improvng the planning and execution of infrastructure projects.

Additional Resources

- The IDB has written several **blog posts** about its experience with knowledge exchanges, which can provide additional facilitation tips and guidance.

- To see more resources from the Knowledge Exchange on preinvestment, visit the **IDB Library Guide**.

KNOWLEDGE MAPPING

Have you identified a topic of great interest everyone seems to be working on, but no one has a complete picture? This methodology guides teams and organizations through a curation process to capture, systematize and centralize knowledge of a cross-cutting issue by documenting the efforts taking place in different areas and sharing them on a common platform.

Key Benefits

- Collect experiences related to a common theme in a standardized format.
- Identify commonalities across experiences from different organizational units/divisions, such as shared challenges, enablers and recommendations.
- Break silos of information and generate a shared typology on related topics.
- Identify actors and activities involved in a cross-cutting theme.

Participants: Specialized

Format: Asynchronous

Duration: Ongoing

Prep Time: 1-3 months depending on number of cases included

How do you apply this methodology?

1 Frame the scope of the intervention:

Identify the challenge: Is your client thinking, "Nobody knows what we or others are doing in terms of [key topic]?"

Align with organizational needs: for sustainability of the knowledge mapping, make sure the topic is connected to wider institutional interests, priorities, and initiatives. Discuss the appropriate scope of the topic (such as, applications within the organization rather than any global application).

Establish a measure of success: These could include a positive response rate from subject matter experts, views of the webpage, or a benchmark number of activities and actors (internal and external) to map and document.

2 Assign roles and responsibilities

	Client	Team Leader	Knowledge documenters	Subject matter experts	IT Team
Identify a cross-cutting topic area to be mapped	✓				
Responsible for the overall product development and communication with the client		✓			
Carry out desk research and interviews			✓		
Provide conceptual basis, insights and background documents about the topic being mapped				✓	
Builds the virtual repository and interface for sharing the captured knowledge; provides ongoing system support					✓
Continue championing the Knowledge Mapping by supporting ongoing curation and new documentation	✓	✓	✓	✓	

3 Prepare for the repository:

Three months before

- **Desk Review:** Once a certain topic area has been identified as your challenge, work with the project documenters to conduct some initial background research to build fluency with the topic.

- **Establish a common language:** Work with the client to define the concepts to be used and the typology or thematic classification that will serve as the basis for organizing the initiatives. If pertinent, a dictionary is constructed with terminology of the subject.

- **Reach out:** Identify different subject matter experts and specialists within your organization to let them know about the project and ask for their consent to participate.

Two months before

- **Build a script or template** for the interviews to ensure you capture the essential information to be included in the repository.

- **Schedule interviews:** Of the subject matter experts who agree to participate, schedule a time for an in-depth conversation to capture their experience.

- **Prepare specs for website development:** Coordinate with the technology team or vendor to develop the user-interface to share the knowledge with others. Make sure your design is scalable, so that new content can be added easily and discarded as well.

One month before

- **Carry out interviews** with subject matter experts. Refine the information captured for clarity.

- **Build knowledge database** with captured information. This will be used to populate the user-facing website.

- **Follow up on website development** so that information captured can be used to populate the site.

4

Build the repository	Notes
Final content review	• Go over the final version of the content with the subject matter experts who have contributed it.
Populate Website	• Upload all content into the website. Incorporate attractive elements such as maps and filters. • Conduct user testing to ensure the site works properly.
Launch and promotion	• Once you are ready to go live, take advantage of an event (or many events) to share the repository and how it works. • Find other opportunities to promote the resource throughout the organization.
Ongoing maintenance	• As new experiences or relevant cases are identified, document them and add them to the repository.

Tips for facilitation

- **Look out for new developments:** Pay attention to clues from colleagues that indicate new information or connections to the topic they were not aware of previously.

- **Prepare an interview template and log:** Streamline and standardize the questions you ask while interviewing. Set up a structured log of all interviews to keep track of progress and adding additional interviewees. It may be helpful to send follow up emails requesting additional background info or related documents if needed.

- **Align the interview template with the information display:** Sketch out how you will package the final information on the website. Ask yourself whether your template has been structured to capture information and operational lessons about a topic versus more theoretical knowledge. Make sure your approach is consistent with your client's and end-users' needs.

- **Organize the information in spreadsheets:** Fill out templates by activity and assign classifiers and tags to each activity, so they can be filtered and searched. For example, tag by country as well as topic.

- **Design with your users in mind:** Invest in designing a good display of the information gathered on your website. Validate that it is attractive and user-friendly.

What to do after the launch

- **Monitor the analytics of the platform:** Take a look at who is accessing the information, how often, which content is getting interaction, in order to understand the demand for the product and how it could be improved.

- **Identify champions** who will continue to promote the platform to users while also keeping an eye out for new information to be added. This is important for sustaining the long-term relevance of the platform and to support ongoing dissemination.

- **Administer your content.** The repository is a living tool, so it will maintain relevance only if new content is curated ongoingly; obsolete content should be removed as well. Stay coordinated with your client and champions.

- **Continue promotion** by connecting the knowledge platform with different audiences and needs. It could be connected to a course or written about through blog posts and articles.

Knowledge Mapping in action: Behavioral Economics at the IDB

Over the last few years, several projects at the IDB across different sectors have incorporated components using techniques from Behavioral Economics (BE) in order to strengthen their impact. The idea behind the application of BE is to help people make better decisions, overcome inertia, and think beyond the exact moment in which they find themselves.

With this motivation, the IDB Knowledge and Learning Sector collaborated with the Research department to document and share experiences related to the use of behavioral economics in IDB projects. For this, the team interviewed a number of specialists who lead, or have led, behavioral economics initiatives in different disciplines: water and sanitation, fiscal policy, public savings policies, health and nutrition, among other areas; and asked them what they have done, what have they learned while working with this science, as well as their recommendations for those who wish to apply behavioral economics to development projects. This revealed that when applying behavioral economics in a development project, different factors must be considered when designing the intervention, and in some cases, the success or failure of the initiative may depend on them.

In addition to being displayed on the custom knowledge repository, the repository and gathered cases were highlighted during a behavioral economics training for IDB specialists, and also showcased in other sites such as the **Behavioral Evidence Hub**.

Additional Resources

- The IDB has written **several blog posts** about extracting lessons learned, which can offer additional tips and guidance.

- Some examples of the knowledge mapped related to Behavioral Economics are **available on the blog**.

SMARTER CROWDSOURCING

¿Are you looking for insights from specialists beyond your area of expertise? Use this methodology to research a complex challenge from different perspectives and identify a range of possible solutions. Through online meetings, challenge owners can access practical expertise without the added costs of an in-person conference while guest experts share their know-how.

Key Benefits

- Gather specialized insights from dispersed subject matter experts and practitioners.
- Deepen understanding of intersecting challenges within a problem area.
- Broaden awareness of possible solutions to a given challenge and build on past experiences.
- Establish "just in time" multidisciplinary communities of practice.

Participants: Specialized | **Format:** Virtual | **Duration:** 90-minute sessions over 4-12 weeks | **Prep Time:** 4-8 weeks

How do you apply this methodology?

1 Define the scope of the intervention:

Identify the need for additional expertise: Are you working to respond to a complex challenge, where the path forward goes beyond your area of expertise and local networks?

Assess the roadblocks which comprise the challenge: Take a closer look at your challenge and parse out the specific unknowns or areas where new information will provide the most support. This will help you identify the different kinds of experts to include in your Smarter Crowdsourcing activity.

Determine your objective(s) and indicator(s) of success: Consider the different facets of information needed in order to move your team toward its next step in addressing the challenge. Is it a legal aspect? A digital infrastructure question? Structure your process toward obtaining that type of expertise.

Connect to the crowd: Reach out within your networks for recommendations to new connections who can possibly address the identified challenge areas. At the same time, look to the Internet, academic journals, and online professional networks to identify possible experts.

2 Assign roles and responsibilities

Assign roles and responsibilities	Challenge owners	Facilitation team	Guest Experts
Responsible for organizing the group and securing any resources needed to carry the results forward.	✓		
Work on initial definition of the challenge	✓	✓	
Identify and invite guest experts to participate	✓	✓	
Organizes online conference agendas and connection logistics		✓	
Contribute written briefs of the insights or experiences to be shared in response to the challenge			✓
Participate in the online conferences	✓	✓	✓
Reflect on the insights shared during the online conference to assess and prioritize most viable solutions and next steps	✓	✓	
Continue collaboration to accompany implementation of prioritized solutions	✓		✓

Simultaneous interpreters: To make participation in virtual meetings more inclusive, consider adding support for different languages, depending on the needs of the group. Interpreters can connect into the online session and provide alternate languages via another channel.

3 Prepare for the online sessions:

One month before

• **Identify the list of topics and key questions** to be addressed in the online sessions. Create a short description of the challenge, the context, and the key questions related to each topic to share with experts in advance.

• **Outline the session series plan:** The challenge owners and facilitation team create a calendar to define the sequence and dates of the online sessions, the corresponding topics, and invite experts accordingly.

• **Identify and invite experts:** Reach out to the experts with details about the objective of the activity, the session date, and the expected level of contribution. Keep track of confirmed participants in a spreadsheet and ask for a brief biography to share.

One week before

• **Specify the agenda:** The facilitation team prepares a detailed outline of the upcoming online session so participants know what to expect, as well as the time allotted for interventions.

• **Confirm the time and date for call connection:** By this time a specific date and time should be confirmed with participants. Along with the agenda, share a link to the online meeting space and instructions for connection with a calendar invitation.

• **Interpretation Rehearsal:** If you are working with an interpreter during the online meeting, coordinate a rehearsal period to practice managing the different language channels.

One day before

• **Send a final reminder:** along with any informative materials prepared by participants relating to the agenda and the biographies of the confirmed challenge owners and guest experts.

An hour before

• **Get set up online:** Make sure the session is opened so everyone can get connected to start the online meeting.

• **Sound check:** Encourage participants to connect a few minutes early to check audio.

4 Start the Smarter Crowdsourcing online session! (90 minutes)

Check-In (5 minutes)	• Participants and facilitators connect to the session and test audio.
Welcome (5 minutes)	• Once enough participants are connected, do a round of introductions. The facilitators present the agenda for the session.
Project Recap (10 minutes)	• The challenge owners will present on the context of the challenge and the objectives of the session as well as the intention for possible use of the ideas being discussed. If relevant, they may also mention previous sessions on related topics.
Questions by experts to challenge owners (5-10 minutes)	• After hearing the context of the problem area, experts are given the opportunity to ask clarifying questions to the challenge owners, which they respond to in turn.
First question to experts (5 minutes)	• One of the challenge owners will open discussion by presenting the first question to the group of experts.
Discussion (15 minutes)	• Guest experts will respond by providing short spoken presentations about their experiences related to the question. • The facilitation team will help moderate the discussion by encouraging succinct responses that stay on topic and keep track of time before moving to the next question. • Challenge owners and other members of the facilitation team will take notes on the responses given.

Next question to experts (5 minutes)	• Another one of the challenge owners will open discussion by presenting the next question to the group of experts.
Discussion (15 minutes)	• The discussion process repeats, until the remaining questions are addressed within the time limits allowed.
Close and Next Steps (5 minutes)	• Thank everyone for their participation and contribution. • Clarify next steps and intended time until next meeting. • Invite everyone for a group picture before signing off!

Tips for facilitation

- **Choose a virtual meeting platform:** There are many options which allow multiple people to connect at once by internet or telephone, while also sharing video. Check with your organization or the group to determine which platform is most convenient and accessible.
- **Group size:** Limit the total number of speaking participants to 30 or less to balance opportunities for sharing and participation.
- **Share talking time:** Guide participants to make interventions that are brief and on topic. This will help keep people engaged over the course of the session and provide everyone with more opportunities to speak.
- **Technical support:** Have someone on hand during the online meeting time who is savvy with technology and audio connection, who can help troubleshoot any issues which might arise.
- **This methodology is suited to be a series:** Take note of any open-ended questions from each session and determine if they should be incorporated into the agenda in another session.

What to do after the event

- **Evaluate the event with the participants.** Thank them for their participation and reflect on any comments they may share in an evaluation survey. Review how you can integrate this feedback in your next Smarter Crowdsourcing session.
- **Synthesize and summarize the ideas** with the challenge owner. Prioritize the ideas that are most relevant for further exploration or possible implementation.
- **Measure your results** using the definition of success established at the beginning.
- **Keep the dialog going:** Thank guest experts for their contributions and briefly mention what will be done next with the results. If a final product is derived later from the insights gathered during the Smarter Crowdsourcing series, remember to let the participants know!

Smarter Crowdsourcing in Action: Zika SmarterCrowdsourcing

Participants from the IDB and the ministries of health in Argentina, Colombia, Panama and the city of Rio de Janeiro met online with global public health experts. NYU GovLab designed the methodology and moderated the session.

The Zika virus was a major epidemic that particularly affected Latin America and the Caribbean. In October 2016, 147,000 cases were confirmed and almost 500,000 more awaited verification. Rapid change in knowledge about the virus posed a major challenge for public authorities to identify appropriate measures to contain the outbreaks. Traditional measures to control these epidemics needed to be combined with innovative technological solutions, requiring greater collaboration between different sectors.

In this context, in April 2016, the Inter-American Development Bank collaborated with the Governance Lab (GovLab) at New York University's Tandon School of Engineering. The GovLab had designed and applied the SmarterCrowdsourcing methodology in 2015 to support the City Hall of Quito, Ecuador to prepare a response plan for the possible eruption of the Cotopaxi volcano. GovLab proposed to apply the same methodology to identify new solutions for combatting Zika. Combining the IDB's network of specialists and contact with governments in Latin America, and GovLab's worldwide network of innovators, academics and researchers, this project aimed to connect existing strategies used in different public health emergency contexts with the specific challenges identified by governments and providing a catalogue of solutions that could be pursued at different levels.

Across four months and six online conferences, IDB and GovLab convened over 100 international experts from 68 institutions in the private and academic sector, 57 officials from the governments of Argentina, Colombia, Panama and the City of Rio de Janeiro (Brazil) and IDB specialists across 11 divisions to identify and discuss the solutions that would be included in the catalogue. After six months of intensive collaboration, GovLab delivered a catalogue of 20 solutions containing descriptions and approximate costs of implementation. Governments expressed their interest in implementing or further researching some of these solutions, and used the contacts established through the Smarter Crowdsourcing activity to continue consultation with the related experts.

Additional Resources

- See the results of two Smarter Crowdsourcing activities lead by the NYU GovLab with the IDB: **Zika SmarterCrowdsourcing** and **Smarter Crowdsourcing Anti-Corruption**.
- The GovLab also provides **more information** about their creation and tips for the **use of this methodology**.
- If you are looking for another methodology which leverages virtual collaboration for working together with a group on specific deliverables, consider the **Virtual Globetrotter** methodology as an alternative.

SPRINT TO DOCUMENT

Looking for time to write? Capturing experiences in writing is an essential part of the individual and team learning process, as well as a catalyst for ongoing knowledge-sharing and dissemination. This methodology gets teams to sit down and write together to transform outlines into rough drafts in contribution to a larger work, whether chapters for a book or a collection of case studies, while encouraging a fun and collaborative drafting process.

Key Benefits

- Generate a collaborative and motivating space to produce an outline or draft document from various contributors
- Design a template to facilitate further documentation
- Accelerate the completion of a larger documentation project
- Document team experiences to support further knowledge-sharing on a topic

Participants: Specialized, Selective

Format: Workshop

Duration: 90-minute sessions

Prep Time: 1-2 weeks

How do you apply this methodology?

1 Define the product that you are trying to complete:

Specify what kind of documentation or written work is needed: think of the total product as well as its parts. Do you need paragraphs, chapters, or case studies?

Identify who should write what: Consider the relevant subject matter experts for the experiences or topics you seek to document. The ideal contributor should be someone with experience in the subject or information to be captured through the Sprint to Document activity. Coordinate with each participant before the sprint to clarify what topic or experience they will be documenting and how it fits within the larger effort or product.

Determine your objective and indicator of success: Consider the appropriate dimension of work to be completed by one person in a limited time. With 30 minutes to write, it´s realistic that each person will only develop an outline or a couple of pages, if they have their ideas clear.

2 Assign roles and responsibilities:

	Challenge owners	Lead Facilitator	Participants / Contributors
Define the product and identify the contributors	✓		
Create a template to guide the contributors' work during the sprint	✓	✓	
Organize workshop logistics and prepare agenda for the sprint		✓	
Gather background materials to bring to the sprint			✓
Lead the sprint and moderate time limits		✓	
Fill out the template! Write during the sprint!			✓
Provide feedback on the template			✓
Collect and edit the draft materials	✓	✓	
Schedule follow-up sprints	✓	✓	
Finish transforming the results of the sprints and package into a final product	✓		

3 Prepare the event:

One to two weeks before

• **Refine your template:** Get concrete about the information participants will be expected to provide during the sprint. Create an outline structure or list of guidelines in a document template. Share the template with a colleague to validate that it is understandable and easy to use.

• **Match writers with their topic:** Get in touch with the writers you hope to involve and confirm their participation. Make sure participants have a clearly assigned topic, according to the needs of the project. Keep track of confirmed participants and their assigned topics in a spreadsheet.

• **Prework:** Encourage participating writers to do preliminary research or gather reference materials so the most important information is fresh in mind.

• **Resolve the logistics:** Once you have an estimate of the number of participants, establish where the event will take place, making sure that the location is a suitable place for people to concentrate quietly and keep their devices charged for the duration of the sprint. Consider offering snacks!

One day before

• **Remind participants:** Make sure participants are ready for the activity – share the location of the event and a reminder to bring laptop, headphones, and any prework or reference materials. Include a copy of the template and reminders about each writer's assigned topic. Also, emphasize punctuality – it´s a timed event and every minute counts!

• **Create a guiding presentation:** It is helpful to use slides to project the template and the countdown clock during the sprints. The runaway time helps keep everyone on track during the sprint.

An hour before

• **Get set up:** Make sure the space is ready so that everyone will be prepared to start the event.

4 Sprint to document! Session (90 minutes)

Check-In (5 minutes)	• Participants arrive and settle in. Facilitators help make sure everyone has a copy of the template open on their laptop.
Welcome and Introductions (10 minutes)	• Facilitators thank participants for coming, present the objective of the Sprint to Document activity, intended final product and the agenda for the session. • Participants introduce themselves and share what they will be documenting.
Work Session: Sprint to Document! (30 minutes)	• Start the clock! This uninterrupted period should be for writing only. Minimize distractions and interruptions. • You might offer a bonus minute or two, but then, time is up!
Debrief and transition: (10 minutes)	• Give everyone a stretch break, then open for feedback. How did it go? What went well? What could be improved? • Help participants match in pairs before starting the review.
Review Session 1: (15 minutes)	• Working in pairs, have one participant share what they wrote down with their partner. Their partner will ask questions and offer feedback about additional information which would be valuable to capture. • The participant should add notes to their document to include this additional information, or link to a resource where it can be found.
Review Session 2: (15 minutes)	• Then, switch roles in each pair. Now the participants who were offering feedback should share their work with a partner for review and notetaking.
Close (5 minutes)	• Thank everyone for their participation and contribution. • Make sure everyone knows where to send their draft file, whether by email or a shared folder. • Invite everyone for a group picture. Celebrate, network and share a drink or snacks if available.

Tips for facilitation

- **Template, worksheet, or editorial guide:** Make the most of the limited time by providing participants with an outline or guiding questions to focus their writing on the most essential information needed. Keep it digital – this will make it easier to edit and disseminate results.

- **Personalized files:** While everyone may be using the same template, it may be worth the extra step of saving a copy for each participant and sharing that file. If you share the template from the cloud, make sure it is "read-only" and can be downloaded as a copy to avoid someone adding their work directly to the master file and having it over-written by someone else.

- **Ideas first:** Emphasize with participants the value of capturing key ideas over polished prose during the limited time. Spelling and grammar can be corrected later during additional sessions.

- **Project a countdown clock:** The pressure will help participants focus on the essentials. Agree to some additional ground rules in your group before starting the clock, such as asking questions quietly and minimizing interruptions until the time runs out.

- **Collect the work:** Don't let a participant leave the room until they have sent a link or a copy of their work back to you!

What to do after the event

- **Evaluate the event with the participants.** Thank them for their participation and reflect on any comments they may share in an evaluation survey. Ask about the clarity of the template and any other dimension of the event where you would like specific feedback. Integrate this feedback in your next Sprint to Document activity.

- **Review and revise** the materials produced during the activity. As project owners, make sure these inputs keep moving forward toward your final product. Consider enlisting the original participants for help with this process.

- **Schedule follow-up sessions:** This is an iterative process. The key is to accompany contributors through each round of improving and completing the final product.

- **Share results:** Once the final product is produced from the Sprint to Document results, remember to let the participants know. Acknowledge and celebrate their contributions in the final product!

Sprint to Document in action: Documenting applications of knowledge-sharing methodologies

Various Knowledge Management practitioners at the IDB had significant experience applying the different methodologies found throughout this guide. However, these experiences had not been documented in a consistent or centralized way to facilitate sharing information and learnings about these experiences with others. The Sprint to Document activity was one of the first steps in the process of gathering as a team and establishing a common framework for documenting the methodologies used. The idea was to create a modular system to align previous documentation in a similar structure and facilitate the contribution of additional documentation in the future by using the same template.

Eight participants worked through a 90-minute session with an emphasis on the Case Study portion of the template. Each participant had been previously identified as the expert on a specific methodology. During the Sprint, they used the time to describe how that methodology had been applied in the context of a specific challenge. During the review phase of the Sprint to Document activity, different participants who had not previously worked together on the same methodologies were able to learn from each other and trade insights while also validating the clarity of their descriptions. This session also provided an excellent opportunity to gather feedback for improving the template used to continue documenting additional methodologies while also offering a foundation for the first edition of this book.

Additional Resources

- A blank copy of the template used to document the methodologies found in this guide is available as an annex.

VIRTUAL GLOBETROTTER

Tired of expensive conferences where working groups make little progress? With this methodology, you can create a series of online sessions to connect faraway colleagues and align efforts toward a shared purpose.

Key Benefits

- Foster an engaged and productive working group before and after in-person events
- Advance work and build rapport in order to obtain greater added value from conferences and events
- Maintain momentum after a productive conference or event
- Create shared deliverables such as a project plan or manual of good practices with cases submitted by dispersed participants

Participants: Open or Community-specific

Format: Virtual

Duration: 90-minute sessions monthly or quarterly

Prep Time: 1 month

How do you apply this methodology?

1 Define the scope of the intervention:

Match your objective and indicator(s) of success: for example, if the objective is to create a guide of good practices, an indicator of success could be the number of cases contributed by each participant. When planning the online meeting series and shared deliverables, be sure to align with the working group's purpose.

Establish a timeframe: How long will the group work together? How often will it meet? What is a reasonable timeframe for achieving the target objective?

2 Assign roles and responsibilities

	Group manager(s)	Online Facilitator(s)	Participants
Organizes the working group; secures necessary resources for virtual meetings and the shared product or project	✓		
Define the objective of the virtual globetrotter series, the product, the project timeline, and rotating commitments	✓		✓
Prepares agenda for online meetings and sends reminders		✓	
Prepares interventions or assigned presentations			✓
Creates online sessions and facilitates connection logistics		✓	
Presents insights during online meetings and contributes deliverables related to the working group's objectives			✓
Collects and reviews deliverables and finalizes shared project	✓		

Shared roles and commitments: Some groups have a clearly established manager or chairperson, while others are more self-organized. The groups may be cross-institutional and international as well. Consider if rotating the responsibilities of group managers and online facilitators among participants is an option for your group.

Simultaneous interpreters: To make participation in virtual meetings more inclusive, consider adding support for different languages, depending on the needs of the group. Interpreters can connect into the online session and provide alternate languages via another channel.

3 Prepare the sessions:

One month before

- **Outline the group plan:** Circulate a draft to define the objective for establishing a Virtual Globetrotter series and the proposed timeline for working together, including an outline of the sessions with expected milestones toward the final result.
- **Get to know your group:** Ask participants to create a short biography including their motives for participating in the group. Share the compiled list with everyone before the first Assign roles and deliverables: Share information about specific tasks and expected contributions to the final deliverable. Assign roles before the first meeting.
- **Schedule the first meeting:** Mark the first meeting on the calendar with the participants.

Two weeks to one week before

- **Specify the agenda:** Share the agenda for the first (or next) session so that participants know the topics for discussion and the time for interventions in advance. Coordinate presentations on deliverables or special topics with presenters.
- **Circulate reminders:** Keep participants engaged with a quick reminder email about benchmarks or draft deliverables to share during the online session. Share a calendar invitation with instructions for the online meeting connection.
- **Interpretation Rehearsal:** If you plan on working with an interpreter or translator during the online meeting, coordinate a rehearsal period to test the connection.

One day before

- **Final Reminder:** Send a final reminder along with the agenda. Encourage participants to connect a few minutes early to check audio.

An hour before

- **Open the online meeting:** Start the session early so everyone can get connected in time to test their connection.
- **Sound check:** As participants get connected, test each other's audio and microphone.

4 Start the Online Session! (90 minutes)

Check-In (5 minutes)	• Participants and facilitators connect to the session and test audio.
Welcome (10 minutes)	• Once enough participants are connected, do a round of introductions. • The facilitators go over the agenda for the session.
Project Recap (10 minutes)	• The group managers present the objectives of the working group as well as the intention for the deliverables.
Topic Presentation 1 (10 minutes)	• The first presenter shares their insight on a special topic related to their deliverable for the working group's project.
Questions and Discussion (10 minutes)	• The rest of the participants will be invited to ask questions or share reflections related to the first presentation.
Topic Presentation 2 (10 minutes)	• Another participant will present on a special topic related to the objective or their deliverable for the working group.
Questions and Discussion (10 minutes)	• Participants will be invited to ask questions or share reflections related to the second presentation.
Additional topics or discussion (20 minutes)	• Use this time for another brief presentation or a plenary discussion session.
Close and Next Steps (5 minutes)	• Thank everyone for their participation and contribution. • Clarify next steps and estimated time until the next session.

Tips for facilitation

• **Choose a virtual meeting platform:** There are many options which allow multiple people to connect at once by internet or telephone, while also sharing video. Check with your organization or the group to determine which platform is most convenient and accessible.

• **Group size:** Limit the total number of participants to around 30 or less to balance opportunities for participation.

• **Share talking time:** Guide participants to make interventions that are brief and on topic. This will help keep people engaged over the course of the session and provide everyone with more opportunities to speak.

• **Technical support:** Not comfortable with technology? Ask a colleague who is savvy with technology to help troubleshoot any issues which might arise during the online connection.

• **Complete the deliverables as intended:** Be sure to keep the group focused on the development of the shared deliverables until their completion **and avoid the temptation to deviate.**

What to do after the event

• **Evaluate the session with the participants.** Ask for feedback about their experience. Consider how you can incorporate this feedback into your next online session.

• **Continue the series:** This methodology works best over the course of multiple sessions. Take note of any open questions from the first session and incorporate them into the next agenda.

• **Stay in touch:** At the end of the series, share with participants an overview of the results and a brief explanation of next steps. Once the final product is derived from the results at the end of the series, remember to share it with everyone!

Virtual Globetrotter in Action: URBELAC III

From 2016 to 2018, delegations from nine Latin American and European metropolitan and medium-sized cities participated in the third edition of URBELAC, an exchange founded in 2010 between the IDB and the European Commission to encourage transatlantic relationships and trading of good practices related to urban development.

URBELAC participants were interested in getting acquainted with the group before the in-person kick-off event to allow more time for in-depth discussions during the conference. Thus, the group agreed to use this Virtual Globetrotter methodology.

During the first online meeting, the participants presented their city's area of focus or challenge related to urban development. The others responded to share about their own experience dealing with a similar issue or to express their support. During additional online sessions, the cities provided updates on their projects, while also contributing to produce a shared manual titled "**Intelligent Management of Public Spaces**." Each city contributed case studies to the creation of this final product. The online meetings provided an opportunity to check on the progress of the manual, in addition to further sharing good practices and trading lessons learned with one another.

By the end of the third URBELAC edition, the cities had solidified bilateral relationships which allowed them to continue collaboration beyond the scope of URBELAC itself. URBELAC continues and still incorporates the use of Virtual Globetrotter sessions between the conferences to further enrich exchange between cities.

Illustration courtesy of the City Hall of Murcia, Spain. The cities participating in URBELAC III included Buenos Aires, Argentina; Campo Grande, Brazil; Guadalajara, Mexico, and Montevideo, Uruguay from Latin America and the West Athens metropolitan region, Greece; Bordeaux, France; Milan, Italy; Murcia, Spain; and Viseu, Portugal from the EU. Two additional cities from the previous edition – Cuenca, Ecuador and Edinburgh, Scotland – also joined to continue their URBELAC experience.

Additional Resources

• To read more about the URBELAC project, **visit the website**.

• If you are looking for another methodology which leverages virtual collaboration for generating new ideas and problem-solving with a group, consider the Smarter Crowdsourcing methodology as an alternative.

WHAT WOULD YOU DO?

Are you facing a roadblock in your project? This methodology creates an opportunity for teams facing a challenge to generate dialog and exchange ideas about possible responses. It provides a safe setting to express concerns about a project and hear feedback from others who can share their related experiences and learnings while exploring alternative paths forward.

Key Benefits

- Generate scenarios of possible paths forward and new perspectives on how to address a project challenge.
- Capture experiential knowledge from participants which otherwise remains tacit.
- Increase understanding of recurring situations and challenges related to a project or practice.
- Foster collaboration, trust and support among teams and stakeholders.

Participants: Specialized, Selective

Format: Workshop with webinar connection

Duration: 4-6 hours

Prep Time: 1+ month

How do you apply this methodology?

1 Frame the scope of the intervention:

•**Identify the challenge and the related cases:** The selection of the case is important. Make sure that there is a relevant connection between the selected cases and the issues that you wish your audience to confront during the discussion. Consider if you will need just one workshop or a series in order to address the different aspects of the challenge and reach the intended audience.

Establish a measure of success: Define learning objectives for the workshop which can be self-assessed by the participants and also meet the needs of the challenge owner.

Identify the target audience: Who does the challenge owner want to learn from the workshop? Consider whose work can benefit from learning and reflecting about the challenge. Typically, the participants should be those who may encounter similar situations to the ones analyzed during the workshop and therefore will benefit from the discussion as a teaching tool.

2 Assign roles and responsibilities:

	Challenge owner	Lead Facilitator	Mentors	Presenters / Storytellers	Participants / Audience
Identify the challenge or problem topic	✓				
Select one or two related cases with comparative value for the workshop discussion	✓	✓			
Review existing documentation in order to reconstruct the narrative		✓			
Interview protagonists involved in the cases to reconstruct the storyline and validate the details		✓			
Coach the storytellers who will present the cases		✓	✓		
Preparation of two-pager and storytelling script				✓	
Review the two-pager prior to the workshop					✓
Present the storytelling of the case for discussion with the participants				✓	
Develop proposals of different scenarios in response to the cases presented during the workshop					✓
Present scenarios to the storyteller and participate in discussion with questions and reflections					✓
Present the conclusion of the case and associated learnings				✓	
Close the session with key reflections about the challenge, upcoming opportunities to address the challenge, and next steps	✓				

3 Prepare the workshop:

One month before

- **Define the challenge** or problem topic for discussion in the workshop. Select one or two related case studies with relevance to the challenge.
- **Review existing documentation:** Create a general overview of what happened, identify key actors, and identify additional questions to research about the case(s).
- **Identify possible storyteller(s)** who will present the case(s) during the workshop.
- **Investigate the story:** Reach out to protagonists involved in the cases to reconstruct the storyline and validate the details through an in-depth interview.

Two weeks before

- **Preparation of two-pager:** Create a brief outline to provide the context of the challenge to give the background to workshop participants.
- **Coaching of storytellers:** Prepare a script and work on the narrative technique in order to create an engaging presentation.
- **Logistics of the workshop:** Reserve an appropriate space for the event. Make sure you have tables for groups to work and also flipcharts, pens, etc.

One week before

- **Distribute materials in advance:** Share the proposed agenda and two-pagers with participants in advance (without the case conclusion). Participants review the shared materials prior to the workshop.
- **Arrange working groups:** Think about your setup and how you will arrange the participants in groups. Assign groups considering their mix of skills or similarities.

One day before

- **Rehearse storytelling presentations:** Practice with the time limits and make sure the storytellers don´t give away the conclusion of the story!
- **Send a reminder to participants:** Confirm the attendance and make sure you have enough members in each group for the activity.

4 Start the workshop (Sample agenda 3 hours)

Opening (5 minutes)	• Make sure the setup is ready with tables and flipcharts. Participants arrive and sit in their groups. Facilitator will help direct people to where they need to go. • Challenge owner presents an introduction with the purpose and objectives of the workshop, as well as a brief explanation of the topic.
Storytelling (15 minutes)	• Storytellers will narrate the case up until the climax of the challenge. Without revealing the conclusion, the narrator will pause the story to ask participants “What would you do?”
Group Discussion (20 minutes)	• Participants work in their groups to analyze the challenge and generate a possible response to the situation presented. • Participants capture their recommendation on the flip chart in order to share the main ideas with the entire group at the end.
Group Presentations (5 minutes per group)	• Each group selects a spokesperson to present the ideas to the plenary. • The spokesperson presents their proposed response to the challenge, using the flipchart notes. • After each presentation, there is room for a few questions from the audience.
Reveal the Conclusion – Feedback **Storyteller presentation (7-10 minutes)** **Questions (10 minutes)**	• Next, the storyteller presents to the audience the real case conclusion (if available). • The storyteller should also provide reflections about the experience, as well as summarize two or three main lessons derived from the case. • Finally, there is time for questions and discussion with the participants and the storyteller about the learnings about what happened at the end of the story.
Present additional cases	• If the workshop is analyzing more than one related case, repeat the activities of Storytelling, Group Discussion, Group Presentations, and Conclusion Reveal for the next cases.
Closing	• Collect the flipcharts to be used as inputs for the memoire of the workshop.

Tips for facilitation

- **Case selection and curation:** If you decide to present more than one case during the workshop, the cases should be arranged to complement different facets of a topic.
- **Empathy with the storyteller:** Choose a storyteller based on rapport with the participants. This could be a peer or colleague, most importantly, someone whose experience will be relatable to them.
- **Develop a script for the storyteller:** It is a great way to make sure that the storyteller provides all the necessary details in an engaging narrative within the required time limit. Make sure the narrative builds to a cliff-hanger to build suspense before the question "What would you do?". Also, don't give away the conclusion until after the group discussions.
- **Rehearse, rehearse, rehearse!** There must be an element of style and drama in the story presentation. The more prepared the storyteller is, the better the delivery will be and the more engaged the participants will be to respond. Measure the times for each storyteller while rehearsing to keep the presentation brief and precise.
- **Start the camera:** After all the effort invested in telling a great story, capture the moment by recording the storytelling on video. Depending on your resources, you can hire a professional or just use a volunteer with a smartphone if available.

What to do after the event

- **Evaluate the workshop:** Ask participants for feedback about the activity. How can you integrate this feedback in your next workshop?
- **Measure your results** using the definition of success established at the beginning.
- **Share a recap with participants:** Prepare a recap of the workshop to be shared with the participants as a reference material, including the two-pagers, storytelling, and the notes from the flipcharts with the different proposals presented.
- **Compile learning materials:** If you have many workshops, you could consider developing a repository of case studies, presentations, and videos from the workshop.

What Would You Do? in action: Environmental and Social Safeguards

The department of Environmental and Social Safeguards (ESG) at the IDB sought to strengthen the dialogue and relationship of trust with teams from the operational sectors which finance and supervise the Bank's development projects. Due to the nature of the safeguards' work to ensure compliance of social and environmental policies in projects, there can be friction with sectors that lead project design.

A classic option to address this challenge could have been to generate meetings to talk about the difficulties encountered in the joint work between ESG and the Sectors, however, this situation was considered ideal for applying the "What would you do?" methodology.

In this context, the methodology was applied over a series of seven workshops corresponding to each of the sectors with whom ESG regularly interacts, such as transportation, water and sanitation, housing and urban development, etc. The workshops used real cases of projects that were recently approved by the Bank which faced typical challenges in environmental and social safeguards during their preparation phase. These examples would be used to identify the opportunities for improved collaboration between the sectors and ESG specialists. The key benefits of the series included:

- Greater knowledge on environmental and social safeguard policies for the sector specialists.
- Achieved genuine knowledge exchange on the main recurrent challenges regarding compliance with environmental and social safeguards during the project cycle.
- Increased relationship of trust and support between ESG and Sectors teams, to achieve compliance with the IDB's environmental and social policies.

Additionally, two additional products were generated: (i) a first draft of a monitoring plan between each of the sectors involved and ESG; (ii) a repository of the cases of studies, presentations and videos of the workshops held.

Additional Resources

- For more information about this methodology and how it has been applied by the IDB, **see this technical note**.
- To read more lessons learned from the use of this methodology, **read this blog post**.

Key Benefits

Participants:	Format:	Duration:	Preparation time:
Open	Virtual	1-4 hours	1-4 hours

How is this methodology applied?

1 Define the scope of the intervention:

2 Assign roles and responsibilities:

	Challenge owners	Facilitation team	Participants / Other collaborators

3 Plan the event or activity:

Two months before

One month before

One day before

4 The day is here! Provide an example agenda

Tips for facilitation

What to do after the event

Methodology in action - Example story

Additional resources

Share this methodology with the IDB!