Knowledge Transfer Toolkit

AER
Assembly of European Regions

Scirocco Exchange
Capacity-building for integrated care

This toolkit was developed by the Assembly of European Regions in the context of SCIROCCO Exchange project co-founded by the Health Programme of the European Union.

Co-funded by
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Introduction

Knowledge transfer is a key methodology to support policy innovation and capacity-building within different regional systems and sectors. By building on mutually beneficial collaborations among professionals and stakeholders it provides a framework for the exchange of know-how, capitalisation of learnings and tools, and the creation of sustainable networks of experts. Since its inception, the Assembly of European Regions (AER) has provided a space for policy-makers, civil servants and local stakeholders to engage in these types of cooperation facilitating mutual learning and knowledge transfer activities.

As part of the SCIROCCO Exchange project[1], the AER developed and facilitated the implementation of a knowledge transfer programme personalised for nine health and social care authorities with the aim of preparing the local environment for the adoption or scale-up of integrated care.

This toolkit builds on the expertise of the AER and its application in the SCIROCCO Exchange project to offer transferable expertise and tools for the effective design and implementation of knowledge transfer programmes. It is aimed to support regional and local authorities, their local stakeholders and other organisations in developing and implementing knowledge transfer activities that are tailored to their specific needs and objectives.

To this aim, the toolkit provides:

1. https://www.sciroccoexchange.com/

- A process for the co-development of personalised knowledge transfer programmes, accompanying the user through each step in the process.

- A menu of knowledge transfer activities, describing for each activity what it can be used for, what needs and intention that specific activity can address, and offering practical information for their organisation.

- First-hand insights and learnings for the effective organisation of online and hybrid knowledge transfer activities.

- A list of key elements that shall be considered to ensure resilience and success in a knowledge transfer process.

The information and tools provided in the toolkit have been developed and presented as to ensure their applicability and effectiveness across different policy areas and local contexts.

About the Assembly of European Regions

Established in 1985, the Assembly of European Regions (AER) is the largest independent network of regions in wider Europe, gathering over 130 member regions from 30 different countries – from Norway to Turkey and from Georgia to Portugal. The network supports regions to improve their policies and practices on all topics relevant to regional policymaking by providing a space for experience exchange and policy learning.

Throughout the years, the AER has built an expertise in knowledge transfer providing opportunities for both knowledge sharing between regions and for targeted peer-learning. The AER created different methodologies for knowledge transfer - such as the peer review methodology -, as well as original formats of events - such as the AER mutual learning event on topics such as artificial intelligence or the economy 4.0 -. It developed programmes such as the AER Summer Academy as a format for structured exchanges between civil servants, young people and politicians; Centurio, the former civil servants exchange programme; or Eurodissey a youth mobility programme.

Thanks to its large and diverse membership and the wide-spread organisation of knowledge transfer activities, the AER has developed a broad understanding of the type of knowledge transfer activities which create most impact according to the regions' specific objectives and the cultural contexts. This toolkit gathers the expertise of the AER in the field providing regions and stakeholders with tools that can support them in making an informed choice on the most suited knowledge transfer activity according to the needs of stakeholders.

About Scirocco Exchange

SCIROCCO Exchange is a project co-founded by the Health Programme of the European Union and lead by the Digital Health & Care Scotland Division of the Scottish Government in partnership with other eleven organisations working in the design and/or delivery of health and social care services and two European network organisations[2]. The project run from 2019 until 2022 successfully supporting the readiness and capacity of nine health and social care authorities for the adoption and scaling-up of integrated care.

To this aim, SCIROCCO Exchange developed and implemented an evidence-based capacity-building process built upon four core pillars:

- **Initial assessment of the maturity of regions' local context and readiness for the adoption or scaling-up of integrated care**[3]
- **The development of a knowledge management hub**[4] as a repository of capacity-building assets and existing evidence in integrated care.

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2. https://www.sciroccoexchange.com/project-partners
3. The maturity assessment was performed through the SCIROCCO Exchange self-assessment tool available in ten languages https://scirocco-exchange-tool.inf.ed.ac.uk/en_gb/#tool
4. https://scirocco-exchange-tool.inf.ed.ac.uk/en_gb/

- **Co-design and implementation of personalised knowledge transfer programmes**.

- **Co-design of improvement plans** following the implementation of the knowledge transfer and capacity-building activities.

The processes and tools developed within the SCIROCCO Exchange project have been tested to support capacity-building in different areas and across several countries. The SCIROCCO Exchange Maturity Model has adapted to two new areas – Demand Driven Innovation[5] and Digital Neighbourhood[6]. Similarly, the SCIROCCO Exchange Knowledge Transfer Programme provides effective process, tools, and learnings that can be transferable across policy areas and local contexts for the co-development and implementation of personalised knowledge transfer activities that are tailored to the local environment and needs.

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5. https://scirocco-exchange-tool.inf.ed.ac.uk/en_gb/hs-assessments/?astype=2

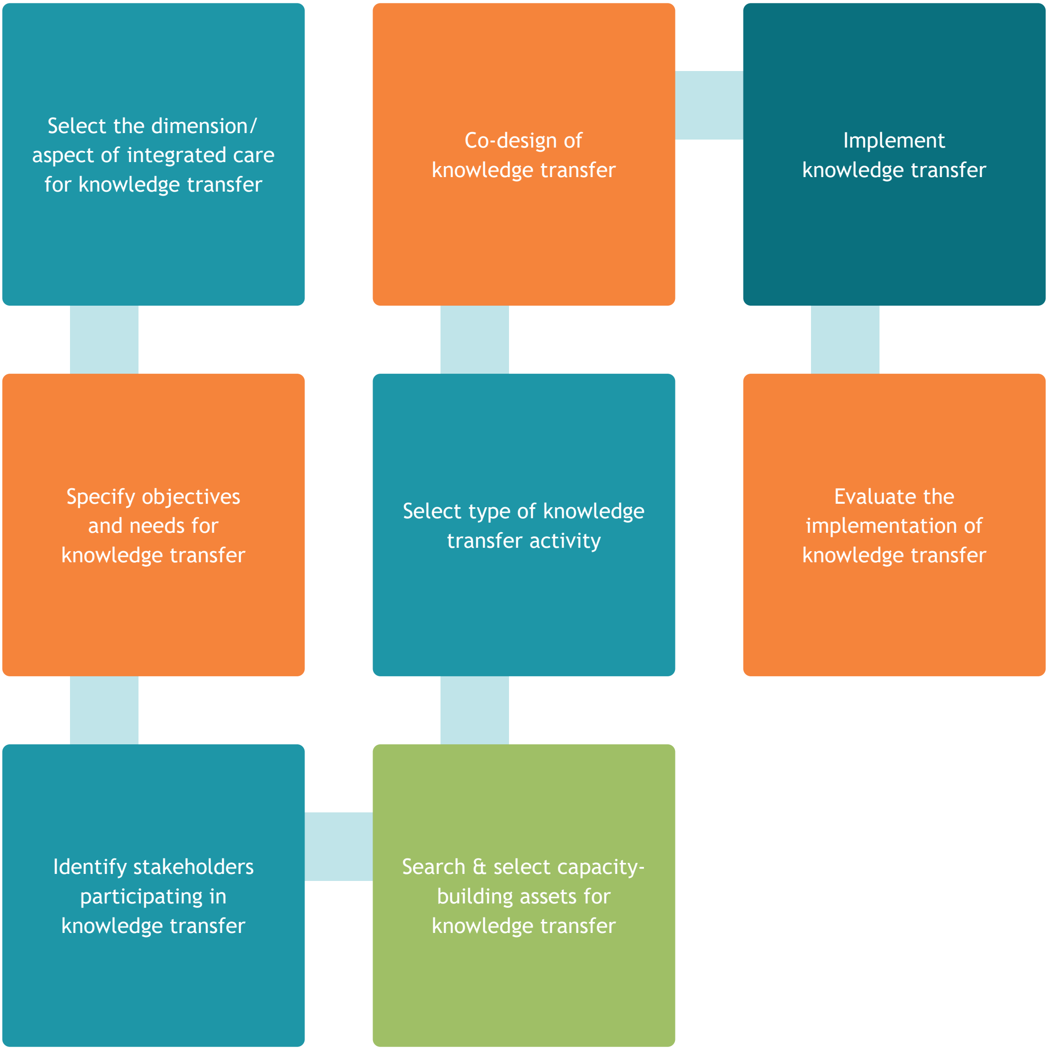
6. https://scirocco-exchange-tool.inf.ed.ac.uk/en_gb/hs-assessments/?astype=3

Knowledge transfer: mind the process!

The Scirocco Exchange project achieved impressive results in terms of knowledge transfer, despite the COVID-19 pandemic and its impact on care systems, reorganisation on priorities, availability of staff and restrictions on meeting and travelling. A clear definition of the Knowledge Transfer process allowed the implementation of the personalised knowledge transfer programmes to be adaptable to changing circumstances.

The process

Knowledge Transfer can be organised in many ways. in Scirocco Exchange, we used an 8-steps process for the development of personalised knowledge transfer programmes:


Select the dimension/ aspect of integrated care for knowledge transfer
Specify objectives and needs for knowledge transfer
Identify stakeholders participating in knowledge transfer
Search & select capacity-building assets for knowledge transfer
Select type of knowledge transfer activity
Co-design of knowledge transfer
Implement knowledge transfer
Evaluate the implementation of knowledge transfer

1

Definition of priorities

The definition of priorities for knowledge transfer is informed by an assessment of the situation. Depending on the topic of your project you may use tools such as a SWOT, an index, a maturity assessment. When the assessment is a collective exercise, with consensus building sessions, as was the case in the SCIROCCO Exchange project, it generates awareness and engagement of stakeholders. Assessments furthermore provide a common language between partners wishing to transfer knowledge.

You may either want to choose to further strengthen areas where you have developed expertise, or improve on areas where you have identified weaknesses.

2

Specification of needs

The specification of needs is crucial for the resilience and adaptability of any knowledge transfer programme. This is best done during calls, rather than by filling in a form. In SCIROCCO Exchange, we facilitated 2X1H calls with each partner. Such discussions require a lot of concentration and are energy intensive, we don't recommend having them for more than 1H30.

Partners identify:

1. the change they want to see happen
2. what is necessary for the change to happen
3. how this can be achieved

4. who needs to make the change happen
5. how to measure the change, defining indicators
6. the expected timeline.

3

Identification of stakeholders

Identifying specific stakeholders for knowledge transfer activities is essential to shape the activities. It is also a way to check that you are at the right level of intervention: if the stakeholders are perfect but not accessible or not available you may need to identify another level of intervention.

4

Identification of the knowledge you want to transfer

Knowledge comes in many shapes: literature, tools, good practices, official documents and strategies to name a few. In the field of integrated care systems, the SCIROCCO Exchange management hub provides a wealth of assets which can be searched according to the level of maturity in each dimension. In other policy areas you may find many resources online, via institutions and EU programmes especially

The choice of knowledge to be transferred can be challenging, we recommend that this step be at least lightly facilitated, even when an online knowledge management hub exists.

5

Select type of knowledge transfer activity

We gathered a selection of knowledge transfer activities and organised them in five categories:

- Expert mission to receiving region
- Events in receiving region with peers/ experts from “outside”
- Capacity-building activities in receiving region or elsewhere if relevant
- Study visit to transferring entity/ region
- Exchange, secondment or placement of staff

In the following pages you will find a description of each of these activities with practical information on how to organise them. To choose an activity, ask yourself first, what the intention is.

6

Co-design

Co-design is your best friend. Don’t think you know better: be curious, ask questions, check with stakeholders that the process reflects their needs and expectations. Include co-design as a step in the process, and an attitude during the implementation.

Co-design may feel slow sometimes or even frustrating when things don’t look like you thought they would. Beyond the fact that it will ensure that activities are tailored to the needs and context of stakeholders, co-design also generates engagement. It creates co-responsibility for outputs. It ensures knowledge is actionable.

7

Implementation

This toolkit provides information on the implementation of different knowledge transfer activities. In 2020-2021 we learned that many of these knowledge transfer activities can also be organised online. Going online however doesn’t mean doing the same but online, this is further explained in the part on online and hybrid knowledge transfer activities.

Evaluation of knowledge transfer

Precise definition of indicators in step 2 “specification of needs” makes it possible to evaluate the knowledge transfer. The evaluation of the outcomes of the knowledge transfer will make it possible to adjust the capacity building process, and inform improvement planning.

What's on the menu?

The actors in the knowledge transfer programme are the transferring region/entity, the receiving region/entity and the knowledge transfer facilitator.

The knowledge transfer activities are organised according to 5 categories:

1. Expert mission to receiving region

External experts and/ or peers from other regions go to the receiving region to analyse the situation according to a specific framework. They provide advice on how to further deploy an integrated care system in the region.

2. Events in receiving region, or in other relevant place, with international peers and experts

Momentum and engagement around the topic of integrated care systems in general or the deployment of integrated care systems & stakes are created via events, which can have very diverse formats.

3. Capacity-building activities in receiving region or elsewhere if relevant

Regions whose stakeholders are willing to improve competences on specific aspects in the dimension chosen for improvement can benefit from different formats of capacity-building activities.

4. Study visit to transferring entity/region

Peers from the receiving region visit a transferring region to better understand a good practice in context and analyse elements needed for its transfer.

5. Exchange, secondment or placement of staff

Stakeholders from the receiving region visit and work in a transferring region for a specified duration in order to understand a good practice in context, learn how to implement it in a day-to-day context and ensure sustainable transfer.

The following table provides an overview of the knowledge transfer activities described in this toolkit, with indications on when to use them and the type of approach that characterises them (top-down, participative, co-creative).

Examples

1.1	AER peer review methodology
1.2	S3 Platform Peer Reviews
1.3	TAIEX PEER 2 PEER Expert Missions
2.1	Conferences, thematic seminars
2.2	Breakfast briefings, late night lounge meetings, etc
2.3	TEDx talks and PechaKucha
2.4	High level meetings with politicians or civil servants
2.5	World Cafe and variants
2.6	OST, unconferences
2.7	AER mutual learning event on current and transversal topic
2.8	Awareness raising campaigns
3.1	Webinars
3.2	Training Seminar
3.3	Action Learning Set
4.1	SCIROCCO Exchange methodology for study visits
5.1	Secondment programs
5.2	EU calls & programs

PURPOSE (WHEN TO USE?)																TYPE OF APPROACH		
Raise Awareness	Increase visibility, legitimacy, recognition	Bring Message across more efficiently	Build momentum	Engage stakeholders	Connect stakeholders	Bring new knowledge	Receive external expert advice (system level	Receive feedback in context (individual level)	Create collective intelligence	Identify set of actions for implementation	Accelerate development & implementation of actions (system level)	Learn how to implement actions in context (individual level)	soft/ indirect capacity building (system level)	Capacity building (system level)	Develop skills (individual level)	Top Down	Participative	Co-creative
		x	x	x		x	x		x	x							x	
		x	x	x		x	x		x	x							x	
		x	x	x		x	x		x	x							x	
x	x		x	x	x	x				x			x			x		
x	x		x	x	x	x				x			x			x		
x	x		x	x	x	x				x			x			x		
x	x		x	x	x	x				x			x			x		
x	x		x	x	x	x			x	x			x					x
x	x		x	x	x	x			x	x			x					x
x	x		x	x	x	x			x	x			x				x	
x	x		x	x	x	x				x			x			x		
						x			x	x				x	x	x		
					x	x			x	x				x	x	x		
				x	x	x			x	x	x	x		x	x			x
			x	x	x	x			x	x	x		x					x
						x		x		x		x			x		x	
						x		x		x		x			x		x	

Pick, choose, reinvent!

For each of the five categories of knowledge transfer activities, we selected some examples to illustrate how activities can be shaped.

1.

EXPERT MISSION TO RECEIVING REGION

Experts or peers from other regions go to the receiving region to analyse the situation according to a specific framework. They provide advice on how to further deploy an integrated care system in the region. Expert missions offer an external perspective and additional inputs. Their presence and interest in turn create further interest and engagement in the receiving region.

When to use this type of format?

- You have identified a problem and would like to get advice from external experts
- You need to engage stakeholders and bring messages across in a more efficient way (No one is a prophet in their own land)

Examples of expert missions

- AER peer review methodology
- S3 platform peer reviews
- TAIEX-EIR expert missions

1.1. The AER peer review methodology

The regional peer review methodology was developed by the AER in 2006 in the field of economic development to help regions harness the potential of the network and benefit from a friendly audit by peers. This versatile methodology has been used and evolved into a very effective tool through different EU projects and can be adapted to any topic.

Examples of application so far include:

- Innovation-based job creation, in the SmartEurope INTERREG IVC[7] project.
- Financing renewables, in the Regions4GreenGrowth INTERREG IVC[8] project
- Youth employment policies
- Sustainable tourism

The specificity of this methodology, which is detailed in the SmartEurope toolkit[9], is that, compared to other peer reviews, it is a relatively long event, which includes field visits, and interviews with a variety of stakeholders. It is a powerful yet work intensive event, both in the preparation and the implementation.

7. Website: https://smart-europe.eu/

8. Website: https://ec.europa.eu/regional_policy/en/projects/bulgaria/regions4greengrowth-helps-regions-to-invest-in-green-energy-schemes

9. Toolkit: https://smart-europe.eu/toolkit

Practicalities:

Steps for the implementation of such a peer review in the context of a project include:

- Adaptation of the peer review checklist.
- Formulation by the receiving region of their specific question.
- Preparation of the programme of the peer review by the receiving region
- Recruitment of peer review team
- Background information, assessment, specific question and programme of peer review are sent to peer review team.
- Peer review takes place: peers visit a number of relevant places, carry out interviews with stakeholders based on the checklist.
- Peers produce a SWOT analysis, which will be presented on the last day to stakeholders and decision-makers.
- Peers provide a series of recommendations and relevant good practices
- After the peer review, the host region identifies actions for follow-up on recommendations.

Preparation:

Recruitment of peers (time may vary according to distance and specificities) + minimum 6 weeks

Duration:

5 days (trip + meetings and visits). In principle, experts should arrive on Monday midday and depart at midday on Friday of the Peer Review week.

Peers:

8-12 highly experienced peers from different regions and professional backgrounds. Peers are selected based on the needs and focus of the receiving region.

Below is an example of the programme of a peer review in the SmartEurope project:

Annex 7: Example Peer Review week programme

The following is an example programme for the organisation of a Peer Review.

	Monday	Tuesday	Wednesday	Thursday	Friday
Morning	Travel	Kick-off meeting with political and Managerial leadership/Seminar	Group Meeting/ Interviews	Group Meeting/ Interviews	Preliminary Results Presentation with the media
		Press briefing		Field visit	
		Lunch			Travel
Afternoon		Field visit + Interviews on site	Field visit + Interviews on site		
	Peer Review Team meeting: Info and organisation	Daily feedback / conclusions	Discussion on drafting the report	Peer Review Team meeting: Presentation and organisation	
Evening	Free time				
	Dinner / Social events				

1.2. The S3 Platform peer reviews

The Smart Specialisation (S3) Platform was established by the European Commission in 2011 to help European regions to define their research and innovation strategies based on the principle of smart specialisation. This type of peer review, which is described in the S3 Knowledge Repository is condensed and doesn't include field visits. Peers base their analysis on the material provided in the presentations and preparation material.[10]

Practicalities:

Steps for the implementation of such a peer review include:

- Adaptation of the peer review material.
- Formulation by the receiving region of their specific question.
- Decision on whether it should be an individual peer review or a combined event where several regions will both be reviewers and be reviewed (as is generally the case with the RIS3 peer reviews).
- Recruitment of peer review team by facilitator
- Preparation: Outcomes of maturity assessment are sent to peers.

10. https://s3platform.jrc.ec.europa.eu/documents/20182/114903/JRC85133_S3P_Peer_Review_Methodology.pdf/df0f0be7-5613-459f-990b-407a60bbe510

- Peer review workshop is implemented.
- After the peer review, the host region identifies actions for follow-up on recommendations.

An S3 peer-review workshop generally runs over two half-days and a maximum of two full days. They feature a number of plenary and parallel sessions.

Preparation:

Recruitment of peers (time may vary according to distance and specificities) +minimum 6 weeks.

Duration:

Generally, 1 day, sometimes 2 half days.

Peers:

S3 peer review workshops accommodate 50 to 70 participants fitting in one of the 7 categories of participants listed in the S3 peer review methodology. A SCIROCCO Exchange peer review workshop would rather include 5 categories of actors (maybe only 4). Categories of participants are listed below:

1. Participants from receiving regions under peer review. Ideally 3-5 representatives from the region are invited to represent their region at the workshop. In the case of the S3 peer reviews, 3-5 regions underwent peer-review.

2. Critical friends. All peers at the workshop have the role of a critical friend. The region being reviewed in one session acts as a critical friend in the next session. They act as peers and share their different knowledge and experience. Critical friends are at the heart of each peer review session.

3. Critical buddies. Prior to peer review workshops, the S3 Platform team approaches a sub-group of carefully selected peers ('critical buddies'). This group of peers are asked to provide additional and structured feedback to regions under review.

4. Invited experts. During the plenary part of the peer review workshop, invited experts generally contribute by delivering presentations on relevant topics. These experts also attend peer-review sessions and offer their expert advice, recommendations and comments. During the peer review sessions, experts act as peers alongside everyone else. They are also asked to share their expert advice and general reflection in the workshop closing session.

5. Representatives of the European Commission DGs and services. These participants deliver presentations focusing on the latest updates. During the peer-review sessions, representatives of the European Commission contribute to the discussions in the capacity of 'critical friends'.

The below figure provides an overview of a typical programme of a S3 peer review workshop:

1.3. TAIEX PEER 2 PEER expert mission

TAIEX[11] is the Technical Assistance and Information Exchange instrument of the European Commission. It was created in 1996 and provides support to beneficiaries in areas as diverse as security, agriculture, the use of structural funds or environmental policies. A methodology which was also relevant to consider in the context of the SCIROCCO Exchange, project was the one used for TAIEX-EIR[12], the tool which supports authorities in charge of environmental policies.

In TAIEX-EIR Expert missions, experts from an EU Member State environmental authority visit an environmental authority in other Member States that have requested peer advice and exchange of experience on a specific topic. These visits can be carried out both at national level and at regional level.

The TAIEX-EIR type of expert missions are rather light in terms of preparation as only one peer organisation is invited to provide an external perspective and expertise. They generally combine field visits and presentations. They are an opportunity to invite a greater number of stakeholders on the spot to increase engagement.

Practicalities:

Steps for the implementation of such an expert mission include:

11. https://ec.europa.eu/neighbourhood-enlargement/tenders/taiex_en

12. https://ec.europa.eu/environment/eir/p2p/index_en.htm

- Formulation by the receiving region of their specific question.
- Identification of relevant peer organisation
- Preparation of the programme of the expert mission by receiving region
- Background information (maturity assessment), specific question and programme of expert mission are sent to experts.
- Expert mission takes place: Experts visit the receiving region, and presentations are made by relevant stakeholders in the receiving region as well as by experts. On-site visits can be included.
- Experts provide a series of recommendations.

Preparation:

Identification of relevant peer organisation (time may vary according to distance and specificities) +minimum 6 weeks.

Duration:

2 to 5 days.

Experts:

1 or 2 experts from a peer organisation.

2.

EVENT IN RECEIVING REGION or in other relevant place, with international peers and experts

Momentum and engagement around the topic of integrated care systems in general and/or the deployment of integrated care systems and stakes are created via events, which can have very diverse formats. They are usually organised in the receiving region, although it may in some cases be relevant to organise an event in a place which has symbolic significance related to the topic addressed, among these: Places of power, historical places, places of expertise, and places where needs are particularly pressing.

When to use this type of format?

- You want to raise awareness, increase visibility, legitimacy, recognition of the importance of a topic.
- You want to increase engagement, interest, and ownership.
- You want to enable stakeholders of an ecosystem to meet in a safe space, engage with each other and create collective intelligence.

You want to build momentum

- You want to bring new knowledge and perspectives to a place.
- You want to inspire, with the aim to bring about change.
- You want to provide soft capacity building (easier to implement if there is no formal request despite the need for capacity building).

Examples of events

- Conferences, Thematic seminars;

- Breakfast briefings, late night lounge meetings, etc;
- TED talks and Pecha Kucha presentations;
- High-level meetings with politicians or civil servants;
- World Café and variants;
- AER mutual learning event on current and transversal topic;
- Open Space Technology, unconferences;
- Awareness raising campaigns.

2.1. Conferences, Thematic seminars

Conferences and thematic seminars are gatherings of a large number of delegates to discuss a particular topic. These events, which have a rather formal format, serve to:

- Create momentum and raise awareness on a topic, in cases where the issue addressed is not yet very familiar for stakeholders in the receiving region;
- Share technical knowledge and findings on a specific topic with a community of experts.

Formal events are all the more efficient to create momentum and consolidate legitimacy of a new topic when they are supported by institutions - such as hospitals, universities, local regional and national governments, international institutions - as well as stakeholders recognised for their legitimacy, as patients' organisations, carers' organisations, etc. While the format of conferences and seminars can vary, they often include the following elements:

- **Keynote speakers:** Eminent personalities in the field whose presence is meant to attract more people to attend the conference, as well as to inspire participants and initiate collective thinking.
- **Panel discussion:** A group of people gathered to discuss a topic in front of an audience. Panels usually include a moderator who guides the discussion and sometimes elicits audience questions, with the goal of being informative and entertaining. This is also an opportunity to confront diverging views or varying experiences.

- **Presentations of case studies and examples:** Presentations are generally most useful when the format - number of slides, type of information, type of illustrations, timing - is very strict. Presentations can for instance use a TED-X format or Pecha Kucha format to be more entertaining (see description below).

Additionally, other elements described in this document can be included in the programme of a conference. In particular: on-site visits, workshops, high level meetings, etc.

Practicalities:

Steps for the organisation of a conference typically include:

- Definition of purpose of the conference by the receiving region (who should benefit from which knowledge and how will the conference help to achieve this?).

- Definition of target audience.

- Identification of knowledge assets to be transferred

- Co-definition of the concept, format, content of conference by receiving region and facilitator of knowledge transfer

- Organisation of logistics by the receiving region.

Preparation:

Large conferences require 6 months preparation, smaller seminars may require only 4 months, depending on the type of speakers expected and the number of delegates.

Duration:

1 to 2 days.

Participants:

+/- 100-300 for a conference; 50-100 for a seminar.

2.2. Breakfast briefings, late night lounge meetings etc

Breakfast briefings take place before 10:00 AM and do not last more than 2 hours. The idea is to enable people to attend an event without having too much impact on the normal organisation of their workday. Similarly, late night lounge meetings, Lunch briefings or News & Booze events are a less formal and recreational format. This encourages people, who already have packed agendas and many invitations, to attend yet another meeting without creating a heavy burden on their daily logistics, while also being entertaining.

These events are rather affordable – offering breakfast and using a room for 2 hours generally implies low costs, while in a so-called brown-bag meeting, participants even bring their own lunches, and the same goes for the News & Booze[13] format which states in their practical information "BYOB" (Bring Your Own Bottle!).

Breakfast briefings, brown bag lunches, news and booze and other similar events are generally used to inform. While the format is informal and aimed to encourage qualitative networking, they are a top-down activity: The topic is decided in advance and the information flow is mainly unidirectional.

13. News and Booze is a free meet up for NGO communicators and non-profits in Brussels co-hosted by Joanna Sullivan, MD of Conscience Consulting, Gareth Harding, MD of Clear Europe and Julia Ravenscroft, Communications Manager at Eurodad.

The main advantages of these events are the following:

- They are scheduled more or less outside working hours or with minimal impact on a workday, and this makes it easier to decide to attend in the first place.
- Their concentrated format makes them affordable for participants in terms of time spent.
- The informal, often slightly hipster format, makes the event more attractive.
- The different energy that comes with a less formal context increases the quality of networking and learning.
- These smaller events are relatively easy and quick to organise.
- Costs are very limited.

Practicalities:

Steps for the organisation of a Breakfast briefing or variation thereof, typically include:

- Definition of purpose of the informal event by the receiving region.
- Identification of knowledge assets to be transferred
- Receiving region develops an Exchange Breakfast briefing with help of colleagues in the consortium
- Organisation of logistics by receiving region.

Preparation:

2-4 months for the preparation, depending on the type of speakers expected, number of delegates and whether the ecosystem is used to get invitations for events (and attend) or not.

Duration:

Half a day.

Participants:

20-60 to depending on venue, logistics and capacity to engage stakeholders.

2.3. Strictly framed and inspiring presentations: TEDx talks and PechaKucha

TEDx talks and PechaKucha presentations are a strictly framed format for sharing knowledge. It is possible to either organise an event (conference, briefing, workshop…) with one or more presentations which follow the TEDx or PechaKucha format, or to organise an event with only TEDx-style or PechaKucha-style presentations.

Talks and presentations can either ignite an event and inspire, or numb audiences into a soporific stupor. The delivery of a presentation is what often makes all the difference.

Strictly framed formats, therefore, provide a framework which allows speakers to focus on their story and the message they want to convey.

A TEDx Talk is a showcase for speakers presenting great, well-formed ideas in under 18 minutes. The TEDx organizer guide[14] details what makes a great well-formed idea:

- Something that's new and surprising; an idea or invention that the audience has never heard about.
- A great basic idea (that the audience has maybe already heard) with a compelling new argument behind it that challenges beliefs and perspectives.

14. https://www.ted.com/participate/organize-a-local-tedx-event/tedx-organizer-guide/speakers-program/what-is-a-tedx-talk

PechaKucha is a storytelling format where a presenter shows 20 slides for 20 seconds of commentary each (6’40” in total). Slides change automatically.

PechaKucha was created by Astrid Klein and Mark Dytham of Tokyo's Klein-Dytham Architecture (KDa) in 2003, the objective was to "talk less, show more".

NB:

TEDx and PechaKucha are trademarks. Information about licence agreements can be found on the TEDx[15] and PechaKucha[16] websites.

Practicalities:

These formats require more work from the speaker, which is why the briefing needs to be done carefully. Often this also requires more courage, and hence it is essential to provide speakers with elements which show them they will perform well.

Preparation:

It is advised to brief speakers at least 3-4 weeks in advance on the type of presentation they will have to provide. For a Pecha Kucha

15. https://www.ted.com/participate/organize-a-local-tedx-event/apply-for-a-tedx-license/tedx-license-agreement

16. https://www.pechakucha.com/hostevent

presentation, it's best to provide speakers with a template with automatic transitions. Always check presentations, content and transitions before the event.

Duration:

TEDx-like talks or PechaKucha presentations can fit in any type of event. The duration of the presentation itself is limited: Under 18 minutes for a TEDx-like talk and 6:40 minutes for a PechaKucha presentation.

Participants:

Any number.

2.4. High-level meetings with politicians or civil servants

High-level meetings with politicians or civil servants can be organised in the receiving region or any other relevant place (Brussels, Strasbourg, Luxembourg, capital cities…), depending on the actual purpose of the meeting.

High-level meetings between decision makers from the receiving region on the one hand, and EU Commissioners, Members of the European Parliament, Representatives of international organisations, etc. on the other hand, are a way to both engage decision makers further, and increase the visibility of the work of the receiving region.

In terms of knowledge transfer, these meetings are a way to access relevant information from the right source and channel it directly to decision makers be it upstream (towards international decision makers) or downstream (towards regional decision makers).

High-level meetings also provide momentum and good communication material, opportunities for pictures, press releases, and articles. They are an opportunity to build reputation and increase legitimacy: Legitimacy depends not only on the quality of the development or the implementation, but also on who acknowledges the work, and who is seen together with actors. Legitimacy in turn is essential to ensure that messages are actually being heard.

Practicalities:

Steps for the organisation of a High-level meetings with politicians or civil servants include:

- Definition of purpose of the High-level meetings with politicians or civil servants by the receiving region (who do you want to know you and recognise you? Who do you want to be seen with? What do you want to say? What do you want to know?).
- Identification of knowledge assets to be transferred
- Organisation of logistics by receiving region, potentially with support of facilitator

Preparation:

This is highly variable, depending on the level of the meeting with institutions and international organisations and the flexibility of high-level representatives from the receiving region. It is reasonable to prepare such meetings 6-8 months in advance.

Duration:

1-2 hours

Participants:

2-15 depending on format

2.5. World Café and variants

World Café discussions are based on the principles and format developed by the World café global movement[17]. They are a structured conversational process for knowledge sharing among people who are divided in groups of 4 to 5 participants. Groups discuss a topic at several tables, with individuals switching tables periodically.

The World café methodology is detailed in the World café Hosting Tool Kit[18]. It is a method for creating a constructive dialogue around questions that matter for real work. Cafés in different contexts have been adapted and named in many ways to meet specific goals, for example Creative Cafés, Strategy Cafés, Leadership Cafés, Smart Cafés[19], Knowledge Cafés[20], or Community Cafés. They are a bottom-up approach and as such the outcomes can be surprising.

They are particularly powerful to:

- Bring stakeholders from an ecosystem together;
- Bring new knowledge to a place and facilitate cross pollination;
- Identify patterns;
- Grow collective knowledge.

17. http://www.theworldcafe.com/
18. http://www.theworldcafe.com/tools-store/hosting-tool-kit/
19. https://smart-europe.eu/sites/default/files/2.1.%20SMART%20EUROPE%20Cafe%CC%81.pdf
20. https://conversational-leadership.net/knowledge-cafe-process/

World Cafés generally include the following steps:

- Groups of 4-5 people are seated at small tables or in conversation clusters;
- Progressive rounds of conversation are organised, approximately 20 minutes each;
- Questions addressed genuinely matter to the work or the community;
- After at least three rounds of conversation, a period of sharing discoveries and insights in a whole group conversation is initiated.

Practicalities:

Steps for the organisation of a World café include:

- Definition of purpose of the World café by the receiving region (what do you want to change or improve? Who should be part of the conversation? What topics or questions will be most pertinent? What sorts of harvest (output) will be more useful?).
- Identification of knowledge assets to be transferred
- Receiving region and facilitator develop World café
- Organisation of logistics by receiving region.

Preparation:

2-4 months for the preparation, depending on the type of speakers expected, number of delegates and whether the ecosystem is used to get invitations for events (and attend) or not.

Duration:

Half a day.

Participants:

Any number starting from 12-15 people to depending on venue, logistics and capacities for facilitation.

2.6. Open Space Technology, unconferences

Open Space Technology (OST)[21] is a method for organising and running a meeting or multi-day conference, where participants have been invited in order to focus on a specific, important task or purpose. It was developed by Harrison Owen, an Episcopal priest and Civil Rights activist, in the 1980s, based on his experience of how coffee breaks and other unorganised encounters were the most productive parts of formal meetings.

In contrast with pre-planned conferences where who speaks at which time is scheduled often months in advance, and therefore subject to many changes, OST sources participants once they are physically present at the live event venue. In this sense OST is participant-driven and less organiser-convener-driven. **Pre-planning remains essential however.**

In Open Space meetings, events and organisations, participants create and manage their own agenda of parallel working sessions around a central theme of strategic importance, such as: What is the strategy, group, organisation or community that all stakeholders can support and work together to create[22]?

OST operates on four principles and one law:

1. Whoever comes are the right people. This reinforces that the wisdom to achieve solutions is present in the room and the group is not to worry about who is not present or to panic about who is.

21. https://en.wikipedia.org/wiki/Open_Space_Technology

22. https://openspaceworld.org/wp2/what-is/

2. Whatever happens is the only thing that could have. This keeps the attention on the best possible effort in the present, not worrying about “what we should have done”.

3. Whenever it starts is the right time. This reminds people that creativity cannot be controlled.

4. When it’s over, it's over. This encourages people to continue their discussion as long as there is energy for it. Some sessions will finish well within the anticipated time. Others will run longer than the allotted time.

- *The Law of Mobility*, also known as The Law of Two Feet, indicates that people can enter or leave an open space session as they choose. If the session you are in is not meeting your needs for either contributing or learning, go to another one.

Unconferences often use variations on OST. The term "unconference" has been applied, or self-applied, to a wide range of gatherings which try to avoid hierarchical aspects of a conventional conference, such as sponsored presentations and top-down organisation. An "unconference" is particularly useful when participants have a high level of expertise or knowledge in the field the conference convenes to discuss.

As with classical conferences, the event itself can include a variety of components, such as world cafés, PechaKucha presentations, workshops etc

The unconference/ OST methodology can also be used for parts of a classical conference, a workshop for instance.

Practicalities:

Steps for the organisation of an OST or unconference include:

- Definition of purpose of OST or unconference by the receiving region (what do you want to change or improve? Who should be part of the conversation? What topics or questions will be most pertinent? Who are the stakeholders you want to get to talk to each other?).
- Identification of knowledge assets to be transferred Development of concept of event
- Organisation of logistics by the receiving region.

Preparation:

2-4 months for the preparation, depending on the type of stakeholders expected, number of delegates and whether the ecosystem is used to get invitations for events (and attend) or not.

Duration:

From half a day (or less if it’s only an unconference-style workshop).

Participants:

Between approximately 30 for a workshop and 100-200 for an unconference depending on venue, logistics and capacities for facilitation.

2.7. AER mutual learning event on current & transversal topic

The format of the AER mutual learning events is at the crossroads of several of the above described formats. This yearly event, which was launched in 2016 on “E-health: let’s find a common language” brings together stakeholders who don’t necessarily speak to each other much, in order to share their stories and start understanding each other’s perspectives.

The topic always refers to a societal challenge and the organisation of the event allows for very diverse stakeholders to share how this societal challenge is impacting or expected to impact their work. The purpose of the event is to raise awareness on this societal challenge, engage stakeholders, identify fields for action and generate collective intelligence.

Each participant is a contributor. While there are a few presentations on funding opportunities and trends in the EU framework, the discussion groups are the heart of the event. These discussion groups bring together 3-5 experts from academia, business, policymaking and civil society, a moderator and the people who have registered to the event, who are experts in their own fields too. As is the case in Open Space Technology events, the outcomes are not predefined and do not lead to the drafting of political positions: whatever happens is what should have happened. The script of these discussions is however very specific, and details questions to address minute by minute. Similarly, roles are predefined for the moderator, the pitchers, the contributors and rapporteurs.

One such mutual learning event gathers 4 to 5 discussion groups, each addressing different perspectives.

Preparation:

6 months

Duration:

½ day to 1 day

Peers:

The AER mutual learning events create a framework where everybody is a contributor. Categories of participants are listed below:

- **Identified contributor:** for each discussion group, 3-5 experts from academia, business, policymaking and civil society are invited. They are recognised in their field and have a significant role (this included for instance CEOs, politicians, a University Vice rector, journalists…)
- **Pitcher:** One of the 3-5 contributors will pitch the topic of the group so participants can decide which group they would like to join. The idea is to say in 3-4mn without slides why, based on the contributor's experience, the topic addressed in their group is the most important topic of the day
- **Moderator:** Each group has a moderator who is also an expert in the field. The moderator is the warrant of the flow and rhythm of the discussion. They have a set of questions to be asked within a certain time and are there to frame the discussion. They ensure the process is being followed, the rapporteur is designated, and all contributors are involved and interact. Moderators keep time.

- **Rapporteur:** A rapporteur is designated, this rapporteur will collect the following points during the discussion, which will be shared in the plenary session after the coffee break:

    - some examples of changes brought about by the societal challenge
    - proposals of the group
    - questions which may not have answers yet but need to be taken into account (to share with the whole audience)

- **Contributor:** Every participant is a contributor. The discussion groups are designed in a way which allows all participants to contribute in a meaningful way to the conversation and think together with experts about these societal challenges which can only be addressed via collective intelligence.

2.8. Public awareness campaign

Raising public awareness of a topic or issue is a process which seeks to inform a community's attitudes, behaviours and beliefs in order to influence these for the achievement of a defined purpose or goal[23]: for example, developing integrated care systems.

Awareness raising activities are an effective way to channel a message and reach a wider audience. Depending on the purpose, the context and the available resources, they can consist of diverse activities.

Examples of public awareness raising activities

- Press releases, articles, briefings
- Reports, studies, scientific publications
- Contributions to educational material
- Conferences, meetings, workshops (see above 2.1-2.7)
- Media campaigns: radio, television, video, film, the internet, social media, mobile phones, newspapers, newsletters, leaflets, poster campaigns and the arts. A variety of visual tools such as stickers, logos, t-shirts, armbands, bracelets and banners also may be used[24]

23. https://unesdoc.unesco.org/ark:/48223/pf0000147637
24. https://sdgaccountability.org/working-with-informal-processes/raising-awareness-through-public-outreach-campaigns/#easy-footnote-bottom-4-1051

Practicalities:

Steps for the organisation of a SCIROCCO Exchange Public awareness campaign would typically include:

- Definition of purpose of the SCIROCCO Exchange Public awareness campaign by the receiving region: what do you want to change or improve? Who should be part of the conversation? What topics or questions will be most pertinent? Who are the stakeholders you want to get to talk to each other?
- Identification of knowledge assets to be transferred via the SCIROCCO Exchange Knowledge Management Hub
- AER supports receiving region to develop SCIROCCO Exchange Public awareness campaign with help of SCIROCCO Exchange Knowledge Management Hub
- Organisation of logistics by receiving region
- SCIROCCO Exchange Public awareness campaign is organised

Preparation:

4-6 months (tbc)

Duration:

a few weeks to a few months

3.

CAPACITY-BUILDING ACTIVITIES IN RECEIVING REGION or elsewhere if relevant

Capacity building actions can take different formats and can happen online, in the receiving region or in an easily accessible location, such as for instance the national capital city or Brussels.

Depending on the context and specific needs, receiving regions will chose to organise in person capacity building activities or online activities.

When to use this type of format?

- A need for capacity building has been expressed
- Stakeholders are ready to participate in a capacity building activity
- The receiving entity has a problem and needs to increase capabilities in order to specify it and address it

Examples of capacity-building activities

- Webinars
- Training Seminars
- Action Learning Sets

3.1. Webinars

In the context of the pandemic the whole concept of “webinars” was revisited, and re-invented. While a lot of events happened in Zoom, it would not be accurate to call them all “webinars” as they were prepared in different ways, contents were curated according to the actual intention and stakeholders and the technical aspects were also adapted to the needs of stakeholders. In particular translation, which had almost disappeared from a lot of international events given its cost but also its impact on interaction and formats, became all the more relevant during the pandemic and the need to provide value to health and care stakeholders.

Practicalities:

Steps for the organisation of a webinar include:

- Definition of purpose of the SCIROCCO Exchange webinar by the receiving region: what do you want to change or improve? Who should be part of the conversation? What topics or questions will be most pertinent? Who are the stakeholders you want to get to talk to each other?
- Identification of knowledge assets to be transferred
- Development of concept of the webinar
- Prepare the outline and agenda of the webinar
- When necessary organise interpretation

- Organise briefing call for speakers/ dry run
- Run and record the webinar

Preparation:

1-3 months (tbc)

Duration:

1-2 hours. The total duration of webinars has generally increased since 2020 to allow for more discussions and interactions.

3.2. Training Seminars

Training Seminars generally last between 2-5 days and provide employees and members of professional organisations with an opportunity to learn new business and industry practices.

Practicalities:

Steps for the organisation of a training seminar include:

- Definition of purpose of the training seminar by the receiving region: which are the capabilities you want to develop? Who is your target audience? Who should be involved?
- Identification of knowledge assets to be transferred
- Development of training seminar
- Organisation of logistics by receiving region

Preparation:

4 months

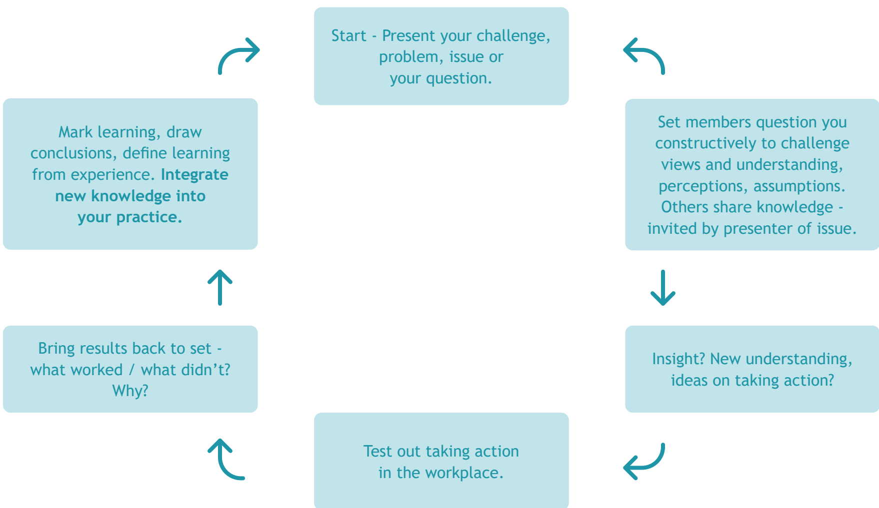
Duration:

2-5 days

3.3. Action Learning Sets

Action learning is a structured mechanism[25] for working in small groups to address complicated issues. Action Learning Sets are made up of between six and eight people who meet together regularly over a reasonable time period. A “presenter” presents the issue at stake and the group collectively works on problems faced in ongoing practice. The group will then help the 'presenter' work on that problem through supportive but challenging questioning: encouraging a deeper understanding of the issues involved, a reflective reassessment of the 'problem', and an exploration of ways forward.

The figure below, from the ODI think tank toolkit, explains the process:



25. https://www.odi.org/publications/5230-colloboration-mechanisms-action-learning-sets
Also: http://www.fao.org/elearning/course/FK/en/pdf/trainerresources/PG_ALSets.pdf

4.

STUDY VISIT TO TRANSFERRING REGION

The Scirocco methodology for study visits allows partners to compare and identify specific areas for action. It also ensures the Scirocco Exchange maturity assessment tool is being used as much as possible, which in turn increases the tool's literacy among stakeholders and makes it easier for them to go back to the tool at a later stage.

When to use this type of format?

- The receiving region/ institution has already developed "soft capacity building activities"
- A face to face meeting between peers will accelerate the development and implementation of actions for the deployment of integrated care in the receiving institution/region
- A process for the deployment of integrated care has started and stakeholders need additional knowledge and information in context.

The Scirocco methodology for study visits can be organised in 3 phases:

- **Phase 1:** Preparation
- **Phase 2:** Implementation
- **Phase 3:** Capturing the learning

Phase 1: Preparation

For the learning to be tailor-made and useful, the preparation phase is crucial. This phase starts with the assessment, which is used to

1. Understand the situation in the receiving region
2. Have comparable data between regions
3. Identify regions which demonstrate strengths relevant for the receiving region
4. Learn about the transferring region

Phase 2: Implementation

This phase involves contacting the transferring region, engaging stakeholders to be involved, organising a preparation webinar to ensure the learning will be tailor-made and address needs, and starting to put stakeholders in touch with their peers in the other region.

Phase 3: Capturing the learning

For the learning to be actionable, the phase after the study visit is crucial. It involves gathering stakeholders to

1. Hear about the learning
2. Agree on specific measures to transfer
3. Develop an Action Plan

5.

STUDY VISIT TO TRANSFERRING REGION

Based on the results of the Scirocco Exchange Maturity Assessment either directly after having completed the maturity assessment or after having implemented a number of Knowledge Transfer Activities a receiving region can decide that they would like to send one or more stakeholders for a limited period of time to a transferring region.

Exchanges and secondments or placements are interesting because learning improves when there is feedback, reflection and immersion in real tasks.

The prerequisites for such a knowledge transfer activity are the following:

- The sending institution has identified an institution it wants to import knowledge and practices from by investing in human resources
- The sending institution has developed a relationship of trust with a target institution
- There is funding available for such an initiative

When to use this type of format?

- You want the stakeholder(s) to understand a good practice in context
- You want the stakeholder to learn how to implement the good practice in a day to day context to ensure sustainable transfer.
- You want the stakeholder to receive feedback, reflection and immersion in real tasks

Examples for this type of formats:

- Secondment programs
- Potentially EU calls & programs

Going online

In 2020-2021 we learned that most activities can happen online too, even activities we thought had absolutely to happen in person, such as consensus building meetings, world cafés or Open Source Technology meetings or team coaching.

Going online generally requires more preparatory work as presentations will have to be more concise, to the point, useful. It requires being very clear on the intention and the real reason why people gather.

The attention span online is much shorter than in person, and is not compensated by a coffee break which will stimulate senses (taste of food, smell of coffee, different sounds), allow participants to move their body and generate some form of randomness in the interactions.

Simplify the agenda: less items on the agenda, clear objectives, focused discussions, not too many tools for interaction.

Coffee breaks are important, online too! Rather 20 to 30mn break for longer meetings. Avoid the 10mn break which will be squeezed if the agenda gets too crowded.

Interaction: tools which were once fancy became boring, such as polls for instance. While some online tools can help visualise and, depending on the IT literacy of users generate co-creation. In general, we advise to keep it as simple as possible, close to the lived experience of participants. The chat can be a very effective tool for interaction both formal and informal. *People long to feel connected, how can that be built in the icebreaker, the facilitation, the questions asked to speakers, the possibility for participants to contribute and share?*

Any hybrid?

Organising a hybrid event is the equivalent of organising 3 events: the on-site, the online, and the coming together of the 2. In hybrid contexts, there is a need to

- **develop 2 parallel experiences:** online and the on-site events have different constraints, tools and best ways to foster knowledge exchange.
- **invent the coming together of these 2 parallel events:** how do the online and the on-site meet? How do participants of these 2 parallel events feel part of a shared experience, interact between each other and engage fully both online and on-site?
- **Define what the added value of travelling on site** is, in a context where content is available online and interaction on site is often transformed by the hybridization of the event and sanitary restrictions.

Study visits for on-site participants, or meetings with stakeholders, are a way to provide genuine value for people travelling.

Moderation needs to reflect the circumstances of participants: having an online and onsite moderator helps to build-in empathy in the structure of the event and ensure all participants feel included.

Resilience & success

In a world, where the one certainty is the prevalence of uncertainty, designing a knowledge transfer programme in a way that it will still be valid when circumstances change, is essential for success.

The Scirocco Exchange project showed that the following elements were key to ensure the resilience of a knowledge transfer programme:

- **Specification of needs:** clear objectives, purpose, measurable indicators, and specific stakeholders need to be identified. Because this was clear in SCIROCCO Exchange, it was possible to redesign activities in a meaningful way.
- **Tailor-made activities, with clear intention:** adapted to the culture, the audience, as well as to financial, time and human resources.
- **Clear value to stakeholders:** seems obvious but in reality oftentimes stakeholders are not asked what would help them.
- **Regular and continuous reassessment** of the validity and added value of the knowledge transfer approach.
- **Well-structured preparatory work** for any knowledge transfer activity, especially when they are online.
- **Empathic coordination:** In Scirocco Exchange, the role of the Lead Partner was central. Effective coordination and management require attention, care, listening and excellent organisation.

- **The creation of a community:** trust is key in learning. Solid connections between partners prior to the outbreak of the crisis kept the collaboration smooth.

- **Small steps!** They are a secret recipe for success. A step can be as small as preparing an A4 with bullet points on what questions a region wants to ask to another region.

- **Explore new opportunities:** moving activities online made it possible to involve local and international experts as well as practitioners who would otherwise not have travelled. Online events also brought back interpretation, which had gone out of fashion in international events. Interpretation in online events is easier and cheaper, than in in-person events. This makes it possible to get peers to exchange, despite the language barrier.

- **Peer learning:** targeted exchanges, as well as questions and answers on both strategic and technical aspects between peers, allow for more granularity in the identification of transferability elements. Peer learning generates a degree of familiarity which is beneficial to learning: experts feel recognised for their competences, they exchange with peers who understand their challenges and speak the same technical language.

- **Explore ways to generate randomness and create informal connections.** These moments are known to be very productive for knowledge exchange and innovation. In online settings these could be tested through icebreakers for instance or the facilitation of meditative, creative or physical activities.

Assembly of European Regions
Rue d'Arlon 63,
1040 Brussels
www.aer.eu
info@aer.eu
@europeanregions

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