



## CONVENE & CONNECT

*Convening is the art of bringing the community (of practice) and relevant stakeholders together to connect members and engage them in meaningful conversations. The diversity of a community and a risk-free and inclusive environment help develop conversations and engage members.*

Start small, create the conducive environment to convene and network people.

Proper community management to ensure diversity of views, prioritize equity for access to opportunities and resource and where everyone feels they belong and can actively participate.

Diversified, equity and inclusiveness environment where there is diverse representation, fairness and everyone feel valued and heard.

### Activities oriented to developing the practice – Knowledge Exchange

#### WHAT

##### **Knowledge Exchange**

A knowledge exchange takes place when someone is moving on from their current position. It aims to recover unique and valuable information from them before they leave.

The knowledge exchange occurs between a knowledge holder and a facilitator. The knowledge holder is the person who is departing. The facilitator is typically a line manager or trusted team member – someone who is close to the leaver and can ensure the questioning is of sufficient depth and relevance. Ideally, the knowledge exchange will also involve the person replacing the knowledge holder or carrying out the tasks they leave behind. They will benefit from any useful tips and knowledge and from asking their own questions.

#### WHY

When staff leave an organisation they take with them the vital knowledge, experience and contacts they have built during their time there. The organisation suffers if this information is not passed on before they leave.

Estimates suggest it takes at least six months before a new recruit contributes effectively to the organisation. Including checks of handover notes through the appraisal process protects organisational memory.

Many Groups will already have some informal process in place to capture the knowledge of leavers. However, the best efficiency gains come from a formalised, structured knowledge exchange process.

## HOW

The Knowledge Exchange methodology consists of five steps:

1. Two days prior to the knowledge exchange, the knowledge holder receives a copy of the knowledge exchange questions. Refer to the sample listed below.
2. The facilitator follows these questions as a guideline, but they are best used as a means to focus on the four key areas of work:
  - General
  - People and people skills
  - Key functional information
  - Lessons learned and 'pattern recognition'
3. Relationship mapping provides an overview of the relationships the knowledge holder has with key contacts in the organisation.
4. The facilitator must then decide the best way to package this knowledge for the organisation. This may include:
  - Drawing up instructional guidelines
  - Mapping business processes
  - Producing a list of useful contact information and relationships
  - Recording as audio or film some of the knowledge holder's information.
5. The facilitator may then choose to upload this information onto the team intranet, or save as a standalone file for future reference.

### Questionnaire:

#### 1 General Information

- 1.1 What do you consider to be the most valuable and/or unique knowledge that you hold in your current role?

Prompts: Do you have any specialisms? Do you hold any valuable knowledge that you would consider hard to replace? Do you hold any knowledge or skills that no one else in your organisation has?

- 1.2 What aspects have made the largest contribution to you learning what you know?

Prompts: On-the-job training and work assignments, previous jobs, educational background, mentors, other people.

#### 2 People and People Skills

- 2.1 Who are the people you interact with most frequently? You may like to use the Relationship Map to illustrate this.

Prompts: Is there anybody for whom you are the main or only point of contact in your team? Have you thought about internally and externally?

- 2.2 Who do you consider are your key contacts, both inside and outside the organisation?

Prompts: Do others on your team know about these? Do you have any useful 'short-cut' contacts who can help you get things done? Do you have a relationship with specific vendors

and contractors? Is there anyone you can go to for expert advice, decisions, or permissions?  
Was anyone particularly helpful/difficult?

### **3 Key Functional Information**

3.1 What are the key factors contributing to the successful carrying out of your job?

3.2 Is there any key documentation that you find particularly useful to your role?

Prompts: Are these readily available to others? Is there anything you feel was missing and would have made your life easier if you had access to?

Think about procedures, manuals, software, reference materials, websites, e-newsletters, and subscriptions.

3.3 Are there any immediate issues specific to your role that in your view need to be urgently resolved?

Prompts: Think about any decisions, threats and opportunities.

3.4 Are there any dormant issues specific to your role that in your view need to be resolved in the longer term?

Prompts: Think about any decisions, threats and opportunities.

### **4 Lessons Learnt and Pattern Recognition**

4.1 In your position, what is generally likely to go wrong, and how do you usually respond to or resolve problems?

Prompts: Do you have any specific skills you use for troubleshooting or diagnosis shortcuts – rapid ways of finding the cause for a fault?

4.2 How have you identified and managed potential risks or problems in the past?

Prompts: Do you have special knowledge for spotting deteriorating performance or imminent problems and failure?

4.3 What mistakes do you think have been made in the past that you think could be avoided in the future?

4.4 Are there any unexploited ideas or potential improvements/innovations that you want to mention? This could apply to the organisation itself, or the whole sector.

4.5 Are there other roles that you perform (officially or unofficially) in the organisation? Also mention anything else generally of which you think we should be aware?