Research Center for Leadership in Action
NYU Wagner

PRACTICE NOTE

December 2008

Rapid Peer-to-Peer Resource Exchange (Speed-Dating):
Getting the Most from Peers in Less than 90 Minutes

In this Practice Note…

In designing a day-and-a-half learning session, the Research Center for Leadership in Action team wanted to capitalize on the fact that each participating organization had developed important knowledge and best practices that could benefit other organizations. We wanted to intentionally and individually match participants who wanted to learn more about certain practices with participants who have experience or resources in that practice.

This Practice Note shares lessons about facilitating rapid peer-to-peer knowledge resource exchange (speed-dating) when you have a tremendous amount of knowledge and demand for that knowledge in a room and limited time in which to share it.

Speed-dating is most effective in facilitating introductory knowledge resource exchange and networking rather than in-depth understanding of certain practices due to the nature of its brevity. Insights presented here are relevant for event organizers and planners that have peer-learning as a primary objective. This methodology should be integrated with other event components to reinforce the connections that might result from the peer-to-peer resource knowledge exchange.

The Experience …

In August 2008, the Research Center for Leadership in Action (RCLA) and our partner, the Center For Applied Research (CFAR), hosted a learning session for 15 grantee organizations of the Edna McConnell Clark Foundation. The objective of the learning session was to help these organizations more intentionally integrate talent and leadership development activities with their organizational objectives and strategies.

The day-and-a-half learning session was designed to give the participating organizations the opportunity to learn from some best practices in the nonprofit field, and to learn from each other at the peer-to-peer level.

To address the multiple ways of learning, we brought in outside speakers to give presentations, engaged participants in interactive and participatory exercises, split participants into small groups to have deeper dialogue around emergent themes, and facilitated rapid peer-to-peer resource exchange (speed-dating).

The speed-dating component of the session resonated with attendees, and they were enthusiastic about participating. Here we share the process and key learnings from designing and executing the speed-dating methodology.

RCLA Practice Notes offer practical guidance about sound leadership practices by drawing on leaders' experiences using various techniques, tools, and approaches in dealing with critical social issues. More information is available at www.wagner.nyu.edu/leadership

Speed-Dating at a Glance

Speed-dating was originally created as a formalized means of matchmaking that allows a large number of people to meet each other in a brief amount of time. The corporate sector have used speed-dating as a way to connect businesses for possible future partnerships. RCLA Senior Fellow Heather Weston saw the potential of transforming this experience from the mainstream networking experience into a practice that would facilitate an efficient and targeted exchange of knowledge resources in a very short period of time.

RCLA examined the mainstream speed-dating formula that is used socially and in the mainstream professional setting and added components to create an experience that would be richer and more useful in content for the participants. Here is how the two formulas compare:

Mainstream Formula for Speed-Dating	RCLA Formula for Speed-Dating
Individuals interested in meeting other individuals + Pre-set period of time + Space = Possible social connection	Individuals looking to gain knowledge around certain topics and willing to share knowledge around the same topics + Obtaining and mapping "Give and Get" + Intentional matchmaking + Pre-set period of time + Space = Peer-to-peer resource exchange and networking

How it works in brief

Mainstream speed-dating organizers are intentional about putting people with similar interests in one room and less intentional in matching individuals with each other based on specific interests. The uniqueness of RCLA's approach lies within the intentionality of matching individual participants with a specific knowledge with individuals who seek to learn more about that knowledge. The overall speed-dating concept was suitable for RCLA to create a resource exchange among more than 40 participants, but we needed to be better matchmakers so that participants leave with multiple knowledge resources at the end of 90-minutes. The RCLA team brainstormed what we could do to add to the participants' experience and came up with the following key steps:

The key steps

- Setting the Tone of "Give and Get"
- Matchmaking Intentionally
- Creating Dance Cards
- Facilitating Rapid Knowledge Resource Exchange

Although this methodology is based on a rapid exchange of resources and ideas, it requires a significant time investment in detailed planning and advance preparation to work effectively.

Setting the Tone of "Give and Get"

The idea of "give and get" is the foundation of peer-to-peer resource exchange. It explicitly asks participants to name, around one particular theme or topic, what expertise and systems they have developed that could be useful to their peers (give) and what they would like to learn from their peers (get). The session organizer must convey that in a peer-to-peer setting, participants must be equally willing to share and learn from others.

At least one month in advance of the actual speed-dating session, the session organizer must set the tone of "give and get" with participants and collect their "give and get" wish lists based on one specific theme or topic. The scope of the topics should be specific enough to give participants clear parameters around what knowledge resources they should offer and set expectations for what resources they will receive. The topics should also be broad enough to allow participants to bring relevant innovative ideas to the table. Examples of speed-dating topics can be leadership development strategies for internal staff; best practices for succession planning; and creative and cost-efficient ways to engage emerging leaders in skills development. It is critical that the session organizer is clear about giving instructions on naming the "gives and gets" around a theme or topic in order to control for the "give and get" data that is ultimately submitted to the session organizer. In collecting the "give and get," it is important to ask participants to be very intentional about what they want to get. The "getter" is the person who will drive the resource exchange conversation toward what is most useful for him or her. The clearer the "getter" is in asking focused questions, the more valuable the pairing is likely to be.

Each participant should also bring with them one- to two-page takeaways for their "gives." Since the nature of this exercise is very fast, the aim is for participants to leave with an introductory level of knowledge that sets the ground work for them to follow up after the session is over. Having short handouts from "givers" helps facilitate this follow up.

The more "give and get" options you receive from every participant, the more flexibility you will have in matchmaking later on in the process, so don't shy away from asking participants to give you as many "gives" and "gets" as possible. The list should be organized as such:

	Give	Get
Participant 1: Name	1)	1)
	2)	2)
	3)	3)
Participant 2: Name	1)	1)
	2)	2)
	3)	3)
Participant 3: Name	1)	1)
	2)	2)
	3)	3)
Participant 4: Name	1)	1)
	2)	2)
	3)	3)

Organizing the list of "give and get" next to the participants' names allows you to see the big picture of all of the resources participants can provide and the resources they want. This list will help you map out the matchmaking in the next step.

Matchmaking Intentionally

After you collect the full "give and get" list from the participants, it's time to get into the most time-consuming portion of the planning process. Ideally, one session organizer is very familiar with the full "give and get" list and can easily match one participant with another. If you have more than one session organizer doing the matchmaking portion, it is critical that the session organizers work from the same document and make very clear which matches have already been made and which still need more work to avoid duplicate matching, which could be a problem when the rapid resource exchange is executed in person.

First, the session organizer must take a look at the full list and decide, given the total number of participants, how many rounds of rapid resource exchange the content allows and how long each session should be. The more participants you have typically means the more resources you have in the room, which allows for four or more rounds of rapid resource exchange. Although not preferable, it is okay for each participant to give and get the same thing more than once, as long as it is with different participants. See the "Keep in Mind" section below for suggested optimal number of sessions.

After the session organizer decides how many rounds of rapid resource exchange will take place in one session, it is time to fill out the matchmaking grid:

	Round 1	Round 2	Round 3	Round 4
Participant 1 Name: Jenny Jones	Give: Creating an Effective Performance Management System Table #: 1	Get: Table #:	Give: Table #:	Get: Table #:
Participant 2 Name	Get: Table #:	Give: Table #:	Get: Table #:	Give: Table #:
Participant 3 Name	Give: Table #:	Get: Table #:	Give: Table #:	Get: Table #:
Participant 4 Name: Steven Lee	Get: How to measure performance effectively? Table #: 1	Give: Table #:	Get: Table #:	Give: Table #:

It is critical for the session organizer to remember that for every round of resource exchange, half of the participants *must* be giving resources and the other half of the participants *must* be getting, or receiving, resources. It is also important to determine how many people per table the space can accommodate. If each table can only seat six people, it means only three pairs of resource exchange can happen at each table for each round.

The idea behind the intentional matchmaking is to allow each participant to be connected with a different participant for each round of resource exchange. This gives the participants the opportunity to "give and get" equally and also to network with as many peers as the session allows.

As the session organizer(s) fills out the matchmaking grid one round at a time, remember that two participants' spaces on the grid are being filled at the same time—a participant as the 'giver' and a participant as the 'getter'—and their table numbers must be the same.

As the session organizer moves from round to round, use the "give and get" master list to keep track of which knowledge resources have been matched and those that remain.

Double-check the matches. The most important thing the session organizer can do next to making the actual matches is to work with a colleague to double-check that the matches make sense, have the same table numbers, and no one is "double-booked." Give the final matches to a colleague and ask him/her to go from round to round, making sure that each "give" has a "get" and that they are assigned to meet at the same table. This will take time, so be considerate of your colleague's schedule and give her/him ample time to do the very detail-oriented work this task requires.

Creating Dance Cards

The last step before the actual session is to create very clear "dance cards" for the participants so they know where to go for each round and what their role is during each round. The dance cards take the information in the matchmaking grid and extract the information on a participant-by-participant, round-by-round basis. Ideally, here's what the dance cards should look like:

Rapid Resource Exchange Participant 1: Jenny Jones

Round 1: You are the **giver**, please tell Steven Lee about *creating an effective performance management system* at Table 1

Round 2: You are the **getter**, please ask ...

Round 3: You are the **giver**, please tell...

Round 4: You are the **getter**, please ask ...

Rapid Resource Exchange Participant 4: Steven Lee

Round 1: You are the **getter**, please ask Jenny Jones about *how to create an effective performance management system* at Table 1

Round 2: You are the **giver**, please tell...

Round 3: You are the **getter**, please ask ...

Round 4: You are the **giver**, please tell...

The dance cards should be sufficient for guiding the participants where they need to go, but as the session organizer, it is important to have the master matchmaking list at hand to help shepherd the process along for participants that might need extra guidance.

Facilitating a Rapid Peer-to-Peer Knowledge Resource Exchange Session

The final component to successfully executing a rapid peer-to-peer resource exchange session is to give the participants very clear instructions on how to participate in the session with their dance cards in hand. As the session organizer, here are some key points to share with the participants before the start of the session:

1) The philosophy and purpose of "give and get": Peer-to-peer learning is based on the recognition that each participant has resources they want and resources they can offer; each round of matchmaking facilitates sharing on topics participants have identified as areas where they would like to take on the role of learning or sharing
2) The total number of rounds in the session and the duration of each session;
3) A quick run-through of a sample dance card to give participants the opportunity to orient themselves to the process;
4) The location of the table numbers (these should be fairly large and visible to help participants identify where they need to be for each round);
5) The sound of a whistle or bell indicates the end of a round and participants should move on to the next round listed on their dance cards;
6) Participants are encouraged to exchange contact information for follow-up questions to allow the resource exchange to go further and deeper beyond the session; and
7) Let the speed-dating begin!

Keep in Mind

- **Prepare & Plan:** The success of the rapid peer-to-peer resource exchange session lies in the detailed planning and extensive preparation prior to the actual session. Start the process at least one month in advance of the actual session to allow for enough time to obtain the "give and get" list from the participants, to make the most appropriate matches, to double-check the work, and to make the dance cards.

- **Optimal Number of Sessions:** The more participants you have, the more content you have for rounds of resource exchange. Below are some suggested guidelines for how many rounds and the duration of each round for a session:

Total Number of Participants	Minimum Number of "Give and Get"	Number of Rounds*	Duration of Rounds
10 – 15	4 "gives" and 4 "gets"	3	15 – 18 minutes
15 – 20	4 "gives" and 4 "gets"	3	15 – 18 minutes
20 – 30	6 "gives" and 6 "gets"	4	12 – 15 minutes
30 – 40	6 "gives" and 6 "gets"	4	12 – 15 minutes
40 – 50 (max)	8 "gives" and 8 "gets"	5	10 – 12 minutes

*The more rounds the session organizer commits to, the more time is needed for matchmaking.

- **Be Aware of the Participants' Physical Needs:** Rapid resource exchange requires the participants to move from place to place in a brief amount of time. Before planning the session, make sure that the participants do not have any physical restrictions that would hinder their ability to engage in the session. If so, the session organizer can intentionally keep the participant in one area and let the other participants go to him/her. Or, consider another type of resource exchange facilitation methodology.

- **Hold the Session in a Comfortable Space:** Due to the active nature of this methodology, it is important that the session is held in a space that allows participants to move freely and easily. Make sure the chairs are out of the way and that there are no bags or other personal belongings on the floor that can trip the participants before beginning the session. As stated above, make sure the table numbers are large and easily identifiable for the participants to locate where they need to be for each round. If possible, try to keep each table to a maximum of 3 pairs, or 6 people, to allow the conversations to happen at a normal talking volume Also, don't forget to leave two to three minutes for the participants to wrap up and move to their next station in between rounds.

- **Find the Right Sound-Making Device:** At the end of each round, the session organizer will need a sound-making device to indicate to the participants that it is time to move on. Some sound-making devices might be too loud for the participants and some might be too low-pitched – as the session organizer, it is important to try to anticipate how the participants will respond to the sound-making device. Some suggestions are:

    - Whistle
    - Call bell
    - Small xylophone
    - A silent option: Flicker the lights

More about Our Partners

The Edna McConnell Clark Foundation currently focuses on advancing opportunities for low-income youth (ages 9-24) in the United States. The Foundation believes that significant and long-term investments in nonprofit organizations – with proven outcomes and growth potential – is one of the most efficient and effective ways to meet the urgent and unmet needs of low-income young people. More information at: www.emcf.org

The Center For Applied Research (CFAR) is a management consulting firm specializing in strategy and organizational development. More information at: www.cfar.com

Relevant RCLA Resources

Practice Note: Using World Café in Complex Conversations - October 2008
This Practice Note draws on RCLA's experience using World Café in a Race and Leadership symposium to examine the central roles social identity, particularly race and ethnicity, can play in the work of social change organizations. Facilitators can use this method to enable a variety of rich, in-depth discussions, letting coherent themes emerge without imposing their own interpretations.
http://www.wagner.nyu.edu/leadership/reports/files/PracticeNoteWorldCafe1008.pdf

Practice Note: Designing Peer-to-Peer Learning Exchanges - April 2008
Peer-to-peer exchanges enable leaders to learn from each others' practice. Peers often share a deep understanding of each others' common challenges, experiences, and practices, and have developed valuable expertise. This Practice Note discusses some actions that can facilitate opportunities to deepen peer-to-peer learning and address the challenge of applying new learning "back home" in participants' own organizations.
http://www.wagner.nyu.edu/leadership/practice_notes/RCLA%20Practice%20Note_Peer-to-Peer.pdf

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The Research Center for Leadership in Action (RCLA) at New York University's Robert F. Wagner Graduate School of Public Service supports leadership that listens to many voices and serves as a resource for making systems and organizations effective, transparent, inclusive and fair. RCLA supports change agents tackling critical public challenges through rigorous, practice-grounded research and reflective processes that strengthen the theory and practice of leadership.

As part of this work, RCLA crafts and runs customized, experiential leadership programs that both expand individuals' skills and strengthen the organizations in which they work. RCLA develops structured convenings where leaders explore the complexity of the challenges they face and together advance their efforts to make change possible. As an academic center, RCLA conducts rigorous social science research, employing a variety of innovative and participatory methodologies to the issues of contemporary leadership.