

CAPTURE AND SHARE KNOWLEDGE

ACTIVITY GUIDE

OVERVIEW

NOTE

This guide assumes that you have already completed all other steps of the Keystone Design Framework and handed over your completed program design, ToC, budget and workplan to the implementation team.

One great advantage of working in an organization as large as PSI is that we have decades of experience implementing public health programs in dozens of countries. This offers a valuable opportunity to learn from past projects, leverage pre-existing research and adapt proven solutions to make future programs more successful.

However, the PSIs can only benefit from this collective knowledge when teams take the time to record their experiences, share their research and make program outputs conveniently accessible and comprehensible to others.

This activity guide will lead you through a structured process for capturing and sharing knowledge and lessons learned from the program design and implementation process. We will cover how to elicit insights from your team, write an easy-to-follow project recap and package your Keystone outputs and research in a way that will make it easier for colleagues to find and learn from them.

“INFORMATION MARKETS”

The best way to explain the importance of this step is to think of your team as an actor in an *information market*:

- Earlier in the Keystone process, your team was probably a **consumer** of information, searching for any pre-existing research, data, best practices or other information that might help with your program design.
- Now that you’ve reached the end, your team can become a **supplier** of information, to help other PSIs designing similar projects.

Think of yourself as part of an information “value chain”. By taking a few extra steps to organize and refine the information you’ve amassed and put it in a place where knowledge consumers can find it, you can add significant value and help create a robust “market” capable of meeting other PSIs’ knowledge needs.

Taking the extra time to share information can help create visibility and recognition for your work, while providing a valuable resource for colleagues and improving PSI’s ability to serve Sara.



WHEN TO CONDUCT THIS ACTIVITY

The activities outlined in this guide should be carried out for *every* Keystone project.

TIME, RESOURCE AND STAFFING REQUIREMENTS

<p>Who will participate in this activity?</p>	<ul style="list-style-type: none"> • Sponsor • Design Team (required) • Other contributors (if possible) <ul style="list-style-type: none"> ○ Technical Advisors (research, health area) ○ Marketing Advisors ○ Partners
<p>What time and resources are required?</p>	<ul style="list-style-type: none"> • Project Retrospective Meeting/Survey <ul style="list-style-type: none"> ○ Prepare for meeting – 2 hrs ○ Meeting – 60 to 90 minutes ○ Summary – 1 hour • Writing project recap – 2 hours • Cataloging Information Sources / Organizing Attachments – 2 hours • Delivering Package / Uploading to Site – 30 minutes. • Total time: One day (8-9 hours)

INSTRUCTIONS

GOAL

The goal of this activity to capture the lessons learned during the design and implementation of your program and catalog your project outputs, research and other information in a structured way, both for your own benefit and the benefit of other teams working on Keystone projects.

To that end you will:

1. **Conduct a Project Retrospective** meeting and/or survey
2. **Use the Knowledge Capture Tool** to
 - Draft a Project Recap
 - Map your project documentation, information sources and key informants
3. **Create a folder on SharePoint** (or your local hard drive) containing all of your Keystone outputs, research assets and other relevant documentation
4. **Submit your packaged learnings** to the Global Marketing team's Knowledge Manager

Outputs

After completing this activity, you will have:

- A **copy of the Knowledge Capture Tool** containing your major learnings from the process and cataloging your outputs and sources of information
- An organized **folder on SharePoint (or a ZIP file) containing your Keystone process outputs and any other information assets** (research, etc.) you amassed during the project

PROJECT RETROSPECTIVE MEETINGS

When capturing learnings from a project, we want to include the perspectives of the entire project team, if possible. That's why most high-performing organizations include a "project retrospective" step in their project plans, where team members reflect on the successes, failures and lessons learned from the project, in order to inform future projects.

Regardless of whether a project was a celebrated success or fell short of its objectives, the goal of the retrospective is to ask "How can we do this type of project better in the future?"

A retrospective can take many forms, including:

- An **in-person meeting** – A one-hour, in-person meeting can be quite effective if the core team members are collocated in the same office and able to coordinate their schedules
- An **online meeting** – An online meeting might be preferable to an in-person meeting if the team members are distributed.
- An **online survey** – You can conduct a survey in addition to a meeting, or possibly instead of a meeting if team members' schedules prove too difficult to coordinate.

BENEFITS OF A RETROSPECTIVE

A retrospective meeting or survey can help you:

- Identify ways to improve processes and increase overall efficiency
- Provide team members with a safe, supportive forum to discuss issues and obstacles and recognize accomplishments
- Share information with others and grow your knowledge
- Build empathy and expand your own point of view by hearing how others view situations and solve problems
- Build team cohesion and boost morale
- Turn perceived failures into opportunities for improvement and learning experiences
- Provide case studies that other teams look to for guidance during the design process and share with donors when bidding on RFPs and seeking funding for new initiatives

COMMON CHALLENGES FOR CONDUCTING RETROSPECTIVES

Despite the benefits, there are various common reasons why teams might skip the retrospective:

Challenge	Suggestion
Team members might be busy with new projects and consider participating in a retrospective for a past project as a low priority	If scheduling an in-person meeting proves difficult, consider a web conference or, at minimum, a survey.
Participants might forget the details of the project over time	Hold the retrospective as soon as possible after the project is complete, or while the project is winding down (around the time of the handover to the implementation team)
If the project was not entirely successful, team members might be reluctant to revisit a difficult experience	Frame the retrospective as an opportunity to learn and indicate that it is a forum where team members can discuss challenges and suggest improvements for the benefit of all PSlers working on similar projects
Additional meetings, whatever their purpose, can seem like an imposition	Keep the mood as light as possible. If meeting in person, perhaps cater lunch or snacks with coffee/tea
No one takes ownership for organizing the retrospective and moving it forward	Assign the team lead or another member to make the necessary preparations and move the process forward

SURVEYS

You might want to use a survey in addition to or instead of a Project Retrospective Meeting if:

- **You want to surface topics for discussion in advance, to free up time during the meeting** – Ask team members what worked well or could have worked better, then skip the brainstorming step in the meeting, using the survey responses as points for discussion.
- **Scheduling a quorum of participants for a meeting proves too difficult** but you still want to get everyone's input in a timely manner.
- **You suspect people might not be comfortable discussing certain aspects of the project as a group.** While, ideally, a meeting would allow participants to discuss any challenges openly in a safe, non-judgmental space, a survey can provide an additional layer of anonymity and safety.

See the end of this guide for a list of sample survey questions. We recommend using a free polling tool like **Survey Gizmo** to capture team members' input.

LEADING A RETROSPECTIVE MEETING

When organizing the retrospective, we recommend taking the following steps:

BEFORE THE MEETING

1. **Set a date**
2. **Draft an Agenda**

The simplest agenda for a retrospective meeting is to draft a list of “What Worked Well” and a list of “What Could Have Worked Better” and list the major accomplishments and challenges.

- If you decide to circulate a survey, you can use it as an opportunity to invite the team’s input in surfacing issues.
 - Alternately, you can hold off on drafting this list and invite the team to list items during a quick initial brainstorming session.
3. **Prepare a list of discussion prompts** – While the conversation should be open, people might be hesitant to speak at first or uncertain about what they should say. Having some prompting questions written in advance can help get the discussion started. For instance:
 - Did we attain the best results possible? Would the donor, our partners and target audience/consumers agree?
 - Did we meet our deadlines / milestones consistently?
 - What did we learn that we didn’t know when the project began? Did we innovate new solutions or make any incremental improvements to processes?
 - What challenges and complications arose? Could they have been foreseen? Did we respond to them as effectively as we could?
 - Did we achieve our performance targets? If yes, what activities contributed most to our success? If not, why?
 - Did we overspend our resources/budget? If so, why?
 - If you could do this project over again, knowing what you know now, is there anything you would approach it differently?

DURING THE MEETING

1. **Set expectations and establish the tone (5 min.)** – Taking time up front to establish the expectations for the meeting is critical, otherwise participants may unintentionally take the discussion off track. Point out that:



- Every team member should have a chance to give their point of view and raise any issues that concerned them – show professional courtesy and respect each other’s points of view.
 - For every issue raised, the team should propose a solution. The goal is to discuss any difficulties constructively and learn from them, not simply complain about them.
 - Do not blame individuals (including yourself) for problems. This is a “no judgments zone”, and your conversation should be about reflecting on what happened and identifying what you and others in PSI can do as a *team* to improve performance in the future.
2. **Briefly review the facts/metrics (5 min.)** – Remind the team of certain basic facts – the health need the program was meant to solve, the interventions decided upon and the major activities defined for achieving that end (with a brief synopsis of the Theory of Change logic behind them). While metrics might not yet be available, it can be useful to share them and compare them to the established KPI targets.
 3. **Outline the agenda (10 min.)** – Either present the list of “What worked well” and “What could have worked better” points identified in the pre-meeting survey, or hold a brief brainstorming session, inviting each participant to add points to either list. Make it clear that this is about getting a list – do *not* debate or discuss the points at this time.
 4. **Choose a moderator (5 min.)**– Have the group nominate/elect a member of the team *other than the leader* to act as “moderator”.

While the leader’s job will be to drive the discussion forward and find answers to the question “*How can we do this type of project better in the future?*”, the moderator’s job will be to ensure that all of the major points from the agenda are covered and ground rules (focus on solutions, no assigning blame) are respected.

5. **Start the discussion (30-60 min.)**
 - Keep the discussion light, positive and fun. The goal is to quickly surface insights and lessons learned that might not be obvious from reading the research and project output documents. This is *not* a time to try to reinterpret the research or replay old debates.
 - Refrain from finger-pointing or assigning blame: keep the focus on the team and use “we” rather than “I / you” whenever possible. If people do not respect this rule, reiterate the need to maintain a safe, non-judgmental space in order to have constructive discussions about difficult issues.
 - Ensure that everyone is given adequate time to speak.
 - If discussions start running long or veering off-topic, the moderator should bring them to a conclusion by asking “*What is the next step to resolve this issue? What actions should we recommend other teams take in the future?*”

- If the team comes up with a long list of things that worked well and/or could be improved, it may be helpful to prioritize the list at the end to select top 3-4 items that seem to be the most important / had the most effect.
- Take notes, summarizing the major points raised in the discussion and capturing any particularly valuable quotes/insights word for word.

DISCUSSING “WHAT’S NOT WORKING”

The most difficult thing about retrospectives, is dealing honestly and openly with difficulties. On one hand, discussing failures and challenges honestly can be a valuable learning experience. On the other, discussions of problems can rapidly degenerate into unhelpful cycles of blame and denial.

Here are some general tips for discussing difficulties constructively:

- **Separate “failure” from “fault”** – It can be difficult to suppress the human tendency to assign blame, so make it clear that this discussion will not dwell on finding fault, but focus on how the organization, collectively, can avoid problems in the future.

NOTE

None of this is to say that individuals should not be held accountable for performance. Rather, we are saying that questions of individual performance fall outside the scope of the retrospective discussion.

- **Ask if the problem was foreseeable or simply the inevitable result of engaging with complex situations.** If it was foreseeable, what signs were missed, where could you have done better at working through the logical consequences of your actions or where could you have coordinated/executed more effectively as a team? If the latter, what did you learn about this type of problem that could help other teams in the future?
- **Ask if the assumptions made during planning and the parameters of any prototyping / projections / testing were realistic.** There is a natural human tendency to plan, design and test assuming “optimal” conditions. Did the plans and design process account for the possibility of suboptimal conditions?
- **Don’t discourage experimentation (as long as you learn).** If your team developed a new intervention for a problem for which no proven, viable solution existed, then even an unsuccessful attempt should be celebrated. At the same time, there is a need to identify causes of problems, call out incorrect assumptions or faulty logic and make a determination about whether the intervention merits further development or should be abandoned in favor of other solutions.



- **Focus on solutions.** Again, make it clear that the goal is to find a solution going forward, not to complain or retroactively assign blame.
6. **Wrap Up (5 min.)**
- After all points have been addressed or time is up, summarize the major findings of the meeting
 - Thank everyone for their participation and let them know that a recap will be sent with action items.

AFTER THE MEETING

1. **Circulate a “thank you” email and summary of action items** – Thank everyone for their time and input, and list the actionable takeaways that emerged from the meeting.
2. **Use the Knowledge Management Tool to package your learnings** - Now that you have captured the team’s insight, it is time to document and organize your learnings and project outputs in a format that will be useful to other teams.

THE KNOWLEDGE CAPTURE TOOL

We have provided a Knowledge Capture tool, as part of the Keystone Project Summary document, to help you quickly and effectively document your team's learnings. The tool provides a standard format for creating:

- A **project recap** that summarizes what the project accomplished, in plain language that any outside reader can readily understand.
- A list of **challenges and complications** that the team encountered, actions taken to address them and recommendations for other teams facing similar problems
- A list of **key learnings and insights** – anything significant that the team learned in the course of the project that they did not know before
- A **mapping of work outputs, information sources and key informants** to help other teams quickly find information that might be useful in future projects

PROJECT RECAP

The project recap provides a short, narrative summary of what your project accomplished. Imagine that you are writing for a non-technical staff member at a donor organization or a new hire into PSI. Keep the language straightforward and avoid jargon and acronyms that may be confusing. If necessary, include a brief glossary of terms used.

The project recap should consist of one main bullet point and several supporting bullets, with each point consisting of a single **SPARC statement**.

SPARC STATEMENTS

The acronym "SPARC" stands for:

- **Situation/Problem** – What situation or problem was the team facing?
- **Action** – Who took what action to address the situation? (it doesn't matter whether the action was right or wrong, simply state what happened... or didn't happen)
- **Result** – What happened – effective or not - after action was taken (or a decision was made not to act). If the situation changed for reasons unrelated to the action taken, that is also worth knowing.
- **Contributing Factors** – Why the action produced the result, calling out any particular circumstances or preconditions that might not apply in future situations.

Example

Here are some examples of SPARC statements.

Type	Situation/ Problem	Action	Result	Contributing Factors
Generic	I was spending too much money buying expensive coffee from the café every morning before work.	I purchased an inexpensive coffee maker and some high-quality coffee from an online retailer.	I now spend less on coffee, without any appreciable reduction in quality.	I already shopped for groceries online, so the transition was easy for me.
PSI- Related	We found that, due to road closures in the rainy season, retailers in a remote region of the country often faced stockouts of key products.	We were able to broker micro-loans to help retailers buy extra stock in advance of the rainy season.	No one reported any stockouts during this year's rainy season.	We had an existing partnership with a microfinance institution that had mechanisms to distribute cash already in place.
Keystone- Specific	Upon completing our market functions analysis, the team discovered that young students were not able to obtain Contraceptive X. When profiling the target consumer, we found the issue was that the only outlets allowed to distribute Contraceptive X closed before the end of school.	We convinced a few strategically located clinics to extend their hours, and launched a communications campaign to promote the extended hours to local students.	According to the clinics, uptake of Contraceptive X among local students increased, which was confirmed by our surveys of customers.	We already had a strong relationship with many of the clinics from an unrelated program and were able to leverage that relationship.

MAIN STATEMENT AND SUPPORTING STATEMENTS

Your recap should include one, comprehensive statement about how your intervention addressed the overall situation/problem around the health need, followed by supporting statements about specific aspects of the problem that you addressed through specific actions.

Example

Type	Generic	Keystone-Specific
Main Statement	<p>I was spending too much money buying expensive coffee from the café every morning before work, so I purchased an inexpensive coffee maker and some high-quality coffee from an inexpensive online retailer.</p> <p>As a result, I now spend less on coffee, without any appreciable reduction in quality.</p>	<p>Upon completing our market functions analysis, the team discovered that young students were not able to obtain Contraceptive X. When profiling the target consumer, we found the issue was that the only outlets allowed to distribute Contraceptive X closed before the end of school.</p> <p>We convinced strategically located clinics with whom we had existing partnerships to extend their hours, and launched a communications campaign to promote the extended hours to local students.</p> <p>According to the clinics, uptake of Contraceptive X among local students increased, which was confirmed by our surveys of customers.</p>
Supporting Statements	<p>At first when researching brands of coffee, I was overwhelmed by the number of choices on the market and had no idea where to begin.</p> <p>So, I found what seemed to be a reputable website that reviewed coffee brands and compared their “top 5” lists for the past three years and noted brands that consistently ranked at the top.</p> <p>As a result, I was able to narrow my evaluation of the market to just four well-rated brands.</p>	<p>When profiling the market and target consumer segment, we discovered some issues with quality of use arising from popular misconceptions about Contraceptive X.</p> <p>In light of that, we made sure to include some general education about Contraceptive X and its use in our communications campaign.</p> <p>Our post-survey of customers suggested that quality of use increased after the campaign.</p>



CHALLENGES AND COMPLICATIONS

While there might be a desire to focus on our successes and highlight our accomplishments, in order for PSI to learn as an organization it is necessary to review instances where we did not get the hoped-for results or where unanticipated complications arose that put our program at risk.



For this reason, the “**Project Knowledge Capture Tool**” included in the Keystone Project Summary document, contains a section to record challenges and complications encountered, as part of the recap.

When describing challenges and complications, you can add a “suggestions” section to your SPARC statement describing what you might have done differently:

- **Situation/Problem** – A summary of the complicating event/factor/circumstances
- **Action** – The action that we took (or failed to take or could not take) in response
- **Result** – The consequences of the complication
- **Contributing Factors** – Summary of any outside factors or conditions that contributed to the result
- **Suggestions**
 - **Alternate Action** – Something the team could have done differently in response to (or to prevent) the situation/problem, if any
 - **Expected Alternate Result**– The hoped-for result of the suggested action
 - **Alternate Conditions/Assumptions** – Highlight any assumptions being made about or potential complications arising from this alternate approach



Example

Type	Generic	Keystone-Specific
<p>Complication / Challenge</p>	<p>(SP) Initially, I kept my bags of coffee on top of my refrigerator.</p> <p>At one point, the bag was knocked over and coffee grounds spilled all over my refrigerator and floor.</p> <p>(A) I wiped up the grounds, then placed the bag inside a glass jar on my countertop.</p> <p>(R) Having to wipe up the grounds was irritating and made me late for work, but since placing the bag in the jar there has not been another incident.</p> <p>(C) It's a good thing I happened to have a glass jar available.</p> <p>(A2) Another solution might be to purchase whole coffee beans rather than pre-ground coffee, (A2) as then any spills would be easier to clean up. (C2) This would have the added benefit of the coffee tasting slightly better. However, it would require the purchase of a coffee grinder and add time to the process each day.</p>	<p>(SP) For some students, the extended hours did not solve the problem as they were expected to be home shortly after school and the process of obtaining the product took too long.</p> <p>(A) Because this issue did not surface until our post-surveys we were unable to take action at the time and (R) as a result many students were under-served.</p> <p>(C) This particularly disadvantaged students whose caretakers took an active interest in their whereabouts and demanded the student be home by a certain time – which is ordinarily a positive thing.</p> <p>(A2) We could take steps to streamline the process at the clinic, such as allowing a request to be made over the phone and limiting the in-office interaction to pickup. (R2) That would allow students to minimize time spent at the clinic.</p> <p>(C2) However, there are certain time-consuming administrative steps that the clinic cannot, legally, omit.</p>

KEY LEARNINGS

The “Key Learnings” section of the Knowledge Capture tool provides space to record:

- **Discoveries** – Anything notable that your team learned about the health need, target audience/consumer, market, intervention or process that you did not know before (especially things that might not be immediately evident from your other project documentation).
- **Innovations** – New solutions or incremental improvements to processes or products that you would advise other teams to consider.

Keep the descriptions brief (short bullet points, one idea per bullet) and use end notes to refer readers to more detailed documentation and supporting research.

Example

Type	Generic	Keystone-Specific
Discoveries	<ul style="list-style-type: none"> • The brand of coffee that my local café serves is available for purchase online • The brand of coffee that my local café serves was not among the best-rated brands on the review website • I thought I preferred dark roast coffees, but through this process discovered that I actually prefer light roast 	<ul style="list-style-type: none"> • We thought that young people had an active aversion to Contraceptive X, but awareness (Promotion) and availability (Place) turned out to be bigger issues. Once we corrected for those factors, our target consumer segment was just as open to Contraceptive X as other solutions. • For quality of use, knowledge gaps among providers were just as significant as knowledge gaps among users.
Innovations	<ul style="list-style-type: none"> • At one point I switched from a drip coffee maker to a French press, which resulted in better tasting coffee. I still used the drip coffee maker to heat water, as it was faster than a stovetop kettle. 	<ul style="list-style-type: none"> • We created an illustrated instruction sheet that could be stapled to the packaging of Contraceptive X, which improved quality of use.



END NOTES

The purpose of the project recap is to provide a quick, easy-to-follow, high-level overview that will help others determine whether your project outputs and research might be relevant to their own project. As such, we don't want to weigh down the recap with excessive technical detail.

However, given the nature of PSI's work, we will often have a professional and ethical obligation to include supporting evidence. For this reason, we recommend adding end notes to the recap, which in turn can reference your attached project documentation and information sources.

Ideally, the recap should be referencing points already made and substantiated in your Keystone outputs. References to any other sources should be included, and ideally those sources would be included in the project documentation.

MAPPING INFORMATION

The Knowledge Capture Tool includes a section to “map” or catalog your project documentation, information sources and key informants.

PROJECT DOCUMENTATION



Gather together your **Keystone Project Summary** document, **Keystone Project Presentation template** with **Theory of Change**, **Logframe**, **Work Plan**, **Budget** and **any additional output documents for individual activities**. Take a moment to confirm that they are all neatly formatted and easy for others to read.

INFORMATION SOURCES



Complete the **“Information Sources”** sections in the Keystone Project Summary document.

- List the major sources of information / research data
- Include a short description
- For each source, indicate:
 - How each source was applied and what decisions it informed (the explanation can be as short as sentence)
 - Whether it was primary/new or secondary/pre-existing
 - Whether it was produced internally or commissioned/purchased
 - The applicable standards of evidence / level of rigor
 - Estimated cost to purchase / budget to produce
 - The filename, folder name or web link (with any necessary login credentials) to access the information
- Ensure that the outputs of any new **primary research** are organized, formatted and well explained/annotated, such that they will be comprehensible to other PSIsers who, while they might work within your same health area or on the same types of programs, might not be as familiar with specifics of your program.
- If information/data is obtained from a source with a limited time subscription, download/export it if at all possible.
- It is also possible that information on the web might not always be available, so downloading or printing web articles for archival purposes is often a good idea.



Example

Source	Description	File/ Link / Reference
e.g. Malaria Indicator Survey	Demographic Stats	https://dhsprogram.com/What-We-Do/Survey-Types/MIS.cfm
X	X	x

KEY INFORMANTS

The Knowledge Capture Tool, included in the **Keystone Project Presentation template**, has a section to list individuals, teams and/or outside organizations who contributed expertise to the project, in case other PSI teams need to seek their input for future projects, or if the Knowledge Management team decides to follow up to more formally elicit and capture that person's expertise.

Example

Name	Title / Position	Team / organization	Contribution	Contact
Ryan Thomas	Barista	Corner Café, Washington DC	Provided a detailed comparison of coffee brands and explanation of characteristics used to describe coffee varieties	name@organization.org
X	X	X	X	X



PACKAGING THE INFORMATION

In all likelihood, the SharePoint folder or folder on your hard drive where project documentation was stored probably contains multiple draft versions of documents with inconsistent naming conventions, etc.

To help others navigate your documentation, take the following steps:

1. Create a “Knowledge Sharing” folder, with subfolders for each project
2. Copy the “final” version of your Project Summary Template (including your Knowledge Capture Tool) into the folder for this project.
3. Create the following subfolders for your other files:
 - **Keystone Project Documentation**
 - **Diagnose** – Copy your Diagnose phase outputs into this folder
 - **Decide** – Copy your Decide phase outputs into this folder
 - **Design** – Copy your Design phase outputs into this folder
 - **Deliver** – Copy your Deliver phase outputs including your budget and workplan to this folder
 - **Theory of Change**
 - **Attachments**
 - Copy any additional files cited in your list of sources to this folder. This would include research and other sources referenced in your Keystone Project Documentation files.
 - Create subfolders to keep items organized but try not to go more than 1 level (e.g., avoid subfolders within subfolders) to ensure documents don’t get overlooked. Users can refer to the Knowledge Capture Tool to help them locate key documents.



CONCLUSION

Our collective experience and knowledge is one of PSI's most valuable assets. When you share information in a format that other teams can easily find and reuse, it can avoid costly duplication of effort and free up more budget for program work.

While it may be tempting to view it as an afterthought, taking time to capture, package and share your learnings, information sources and work products others can have a very real and direct benefit your colleagues and, ultimately, to Sara.



Complete the Knowledge Capture section of the **Keystone Project Summary document**, then return to the **Keystone Manual** to conclude the process.