Knowledge Management Strategies for Large-Scale Improvement

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The IHI Team

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Session Objectives

- Describe the framework IHI uses for knowledge management in large-scale projects
- Draw lessons and strategies from the IHI experience in large-scale learning events and learning platforms for dispersed participants
- Employ tools and methods for building learning systems and knowledge management platforms

What Are Your Aims?

- Introduce yourself: your name, your home organization and location
- Spend a minute telling each other what brought you to this Learning Lab
What We *REALLY* Want You to Get Out of This….

- Motivation to look at knowledge management in a new way
- An opportunity to address who, where, what, why, when, and how for knowledge management within your project or initiative
- An understanding of not just IHI’s insights and experience, but of the collective experience of all participants
- Practice in getting started in your own knowledge management strategic planning

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**Learning Lab Agenda**

<table>
<thead>
<tr>
<th>Knowledge Management Strategies for Large-Scale Improvement</th>
<th>Time</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1:00 – 1:20PM</td>
<td>Welcome, Introductions, and Ground to Cover</td>
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<tr>
<td></td>
<td>1:20 – 1:45PM</td>
<td>Diving Deep Into Knowledge Management</td>
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<td>1:45 – 2:40PM</td>
<td>Planning for Knowledge Management and Spread</td>
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<td>2:40 – 2:55PM</td>
<td>Break</td>
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<td></td>
<td>2:55 – 3:50PM</td>
<td>Execution of Knowledge Management Strategies in Your Work</td>
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<td>3:50 – 4:20PM</td>
<td>Putting It All Together: Building Your Knowledge Management Plan</td>
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<td>4:20 – 4:30PM</td>
<td>Wrap Up</td>
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Collective Experience

- IHI Triple Aim
- 100,000 Lives Campaign
- 5 Million Lives Campaign
- 100,000 Homes Campaign
- Advancing Excellence Campaign
- Project JOINTS
- Indian Health Service
- Partnership for HIV-Free Survival
- Healthier Hospitals Initiative
- Partnership for Patients
- The Conversation Project
- Surgical Safety Sprint
- IHI Open School
- Scotland Early Years Collaborative
- Joint Learning Network

Oh, and one more thing…

- There are so many great ideas out there!
- However, we won’t have time to cover them all, sadly. (We’ll do our best…)
- But, we want your ideas as well, so chip in!
DIVING DEEP INTO KNOWLEDGE MANAGEMENT

7 fundamentals of design

- Connection before content
- Circles connect
- Learn in small groups, integrate in large groups
- Diverge then converge
- Experts inform our thinking, not provide us with answers
- Connecting new ideas to what a member already knows
- We learn when we talk

Nancy Dixon, Common Knowledge Associates
Knowledge Management

Knowledge is a broad and abstract notion – debated in Western philosophy since classical Greek error

What do you think knowledge is? What makes someone “knowledgeable”?

Knowledge

- Knowledge - The actionable information embodied in the set of work practices, theories-in-action, skills, equipment, processes and heuristics of people

- Knowledge can give us the ability to make effective decisions, and take effective action

*based on definitions by Peter Senge, Mark Demarest
Knowing is a human act

- Knowledge is the residue of thinking
- Knowledge is created in the present moment
- Knowledge belongs to communities
- Knowledge circulates through communities in many ways
- New knowledge is created at the boundaries of old

McDermott, 1998, Knowing is a human act

Two Types of Knowledge

- Explicit knowledge
  - easily can express and record somewhere for easy access
  - e.g. a recipe for cooking, a checklist, a change package, tools for improvement

- Tacit knowledge
  - based on our experience, theories or heuristics (rules of thumb, guidelines, working models, and educated guesses that people use to solve problems)
  - largely exists in our heads, is inherent, instinctive and more difficult to quantify or get down on paper
  - e.g. how to ride a bike, how to support governments on large scale improvement
Knowledge management

Complex multi-faceted concept, multiple definitions and models, and adaptations of language/terminology and purpose

Early-to-mid 1980s – Significant interest/recognition of knowledge as an organizational assets

1990s – Rise of knowledge management as discipline; Evolved from technology “push” to combine push/pull (supply/demand)

1990 - Peter Senge’s The Fifth Discipline – The Learning Organization

...organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together.

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Knowledge management

Newman & Conrad, 1999: Knowledge Management (KM) refers to a multi-disciplined approach to achieving organizational objectives by making the best use of knowledge. KM focuses on processes such as acquiring, creating and sharing knowledge and the cultural and technical foundations that support them.

Duhon, 1998: Knowledge management is a discipline that promotes an integrated approach to identifying, capturing, evaluating, retrieving, and sharing all of an enterprise’s information assets. These assets may include databases, documents, policies, procedures, and previously uncaptured expertise and experience in individual workers.

Dixon, 2002: Knowledge management and sharing is an attempt to leverage this often “buried” knowledge and make better informed decisions individually and as a team that could lead to better solutions, less duplication of effort and create innovation and solutions through collaboration.
Implications for Leveraging Knowledge

- To leverage knowledge, develop communities.
- Focus on knowledge important to both the business and the people.
- Create forums for thinking as well as systems for sharing information.
- Let the community decide what to share and how to share it.
- Create a community support structure.
- Use the community’s terms for organizing knowledge.
- Integrate sharing knowledge into the natural flow of work.
- Treat culture change as a community issue.

McDermott, 1998

Knowledge management: Considerations

**Assigned roles and responsibilities:**
- Convenor AND Participants

**People**
- Storage
- Organization
- Retrieval

**Technology**

**Process**
- Identification
- Capture
- Access
- Sharing
Knowledge Management Model

Knowledge bank

Communities of Practice (sharing sessions)

Learn during

Learn before

Accountable roles

Learn after

Results

Projects

Questions?
Large-scale projects

What do we mean by planning for scale or spread?
- The science of taking a local improvement (intervention, idea, process) and actively disseminating it across an existing system
- There are many possible definitions for “a system” (e.g., a hospital, a group of hospitals, a region, a country)
Planning

Three key questions:

1. What do we want to spread?
2. To whom do we want to spread (and by when)?
3. How are we going to spread?

Core Elements

- **Aim:**
  - What are you trying to accomplish by when?
- **Nature of the Intervention:**
  - What are you asking people to adopt?
- **Nature of the Social System:**
  - How are you accounting for the environment in which you are trying to spread?
- **Motivation:**
  - Why would anyone participate?
- **Foundation:**
  - Who else has adopted the intervention?
- **Network Building:**
  - What is the infrastructure for connection between participants?
**Aim** - What are you trying to accomplish by when?

- Time and number
- Heart of the work
- Aligns with larger goals, but still has edge

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**Knowledge Management Planning**

- Back of the envelope calculation
- Images to tell your story
Aim - Ideas to Try

Getting Started:
- Set a “what by when” goal
- Have team create back of the envelope calculations; discuss similarities and differences
- Use thumbs up, neutral, or down to come to number agreement
- Ask yourself: How is the heart of this work reflected in the aim?

Accelerating Good Work:
- Re-evaluate your aim. Will you reach it? If not, do not be afraid to extend the time. How will you change your work to reach the aim?
- Identify three or four stories that support your overall aim and bring a face to the work
- Set milestones along the way; what’s the trajectory of the work? Where do you expect to be at interim periods?

Nature of the Intervention - What are you asking people to adopt?

- Selecting individual interventions
  - Once you think an intervention is simple enough, simplify again
- Selecting a group of interventions
  - Look at the portfolio of interventions
- Degree of belief
Knowledge Management Planning

- Selection criteria
- Sequencing and sense making
- Find and create tools for all types of adopters
- Identify most useful resources

Nature of Intervention - Ideas to Try

**Getting Started:**
- If you can’t count the steps on one hand, go back to the drawing board
- Put asterisks by the most low resource places to start, but remind people they will have to do all the work eventually
- Develop intervention criteria to narrow the list
- Watch or visit a high performer to understand how they really do their work

**Accelerating Good Work:**
- Supplemental materials for specific types of organizations
- Develop a gap assessment or tool to help people know where to start
- Simplify again. Most likely everything has gotten more complex over the course of time.
Nature of the Social System - How are you accounting for the environment?

Letter Text:
“Requesting hard copy of Conversation Starter Kit Please mail to:...”

Knowledge Management Planning
- Find examples – site visits, town halls, scanning
- Make tools flexible
- Identify what makes different systems special
- Additional relationships to consider?
- Research on group dynamics?
Nature of Social System - Ideas to Try

Getting Started:
- Base recruitment strategies off what you know about the environment
- Build on success from other leaders or projects

Accelerating Good Work:
- Evaluate what has changed in the environment. How have you adjusted your work to account for the changes?
- Allow organizations to tailor content to specific needs. Create templates that organizations can alter.

Motivation - Why would anyone participate?
- Start with yourselves
- Align with local priorities and push the envelope
- How does this solve someone else’s problem?
- Develop a plan to engage a diverse group
**Knowledge Management Planning**

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Stop?</th>
<th>Let?</th>
<th>Help?</th>
<th>What Matters to Them</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academia (early adopters)</td>
<td></td>
<td>X</td>
<td></td>
<td>Educating the next generation of health care professionals to provide outstanding patient care in a changing environment</td>
</tr>
<tr>
<td>Academia (late adopters)</td>
<td>X</td>
<td></td>
<td></td>
<td>Educating the next generation of health care professionals with a deep understanding of science and sharing what they have learned during their tenure</td>
</tr>
<tr>
<td>Medical Student Associations</td>
<td></td>
<td>X</td>
<td></td>
<td>Networking with like minded students and providing value to members; being on the cutting edge</td>
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<tr>
<td>Nursing Student Associations</td>
<td></td>
<td>X</td>
<td></td>
<td>Networking with like minded students and providing value to members</td>
</tr>
<tr>
<td>Pharmacy Student Associations</td>
<td></td>
<td>X</td>
<td></td>
<td>Networking with like minded students and providing value to members</td>
</tr>
<tr>
<td>Boards</td>
<td>X</td>
<td></td>
<td></td>
<td>Ensuring boarded members will be good practitioners</td>
</tr>
</tbody>
</table>

**Motivation – Ideas to Try**

**Getting Started:**
- Identify what has impressed you
- Canvas potential participants
- Find or use milestones and red letter days
- Complete a stakeholder analysis

**Accelerating Good Work:**
- Update and celebrate – data, cases, successes
- Keep up your own motivation
- Identify participant milestones and key dates
- Move a stop partner to a let partner, move a let partner to a help partner
Foundation - Who else has adopted the intervention?

- Include letters of support
- Kick off calls with high ranking leaders
- Tell the story of the change
- Find examples that look like intended adopters
Knowledge Management Planning

- Who already has success?
- Finding bright spots
- Who at your organization should make the ask?
- Find examples from many settings
- Create affinity groups
- Sequence change – envelope version ok

Foundation – Ideas to Try

**Getting Started:**
- Build publicity around early adopters
- Identify well-liked peers (individuals and facilities)

**Accelerating Good Work:**
- Develop an alignment grid
- Identify new groups to engage
- Update publicity to include new stories and examples
Network Building - What is the infrastructure for connection between participants?

IHI and Campaign Leadership
NODES (approx. 75)
*Each Node Chairs 1 Network
Mentor Hospitals
FACILITIES (2000-plus)
*30 to 60 Facilities per Network

Knowledge Management Planning

- Highlight others
- Create a low-tech means for participants to ask and answer questions of each other
- Tend to the network – more than one relationship in a region
- Value of celebration and recognition (economy)
  - Cultivate affection
Value of Recognition

“Not sure if you had anything to do with this recognition, but you have no idea how much it has impacted our hospital. It has given us the jolt of energy around quality that we needed. We have focused all week on celebrating and refocusing around quality. Thanks for all you do. You really make the fight worthwhile!”

-Hospital Quality Manager

Network Building – Ideas to Try

**Getting Started:**
- Think about where you want to be at the end of the work; imagine an infrastructure to accomplish it
- Who would be the first two people you’d want to include and with what frequency and format would you like to connect?
- Create a node or faculty structure

**Accelerating Good Work:**
- Test new ways of connecting network members
- Identify additional contacts
- Identify opportunities for recognition and celebration
Planning – Key Points

- **Content**
  - Constantly simplified
  - Appropriate mechanisms

- **People**
  - Participants and other key players part of constant redesign
  - Everyone welcome where they are

- **Aim** – know your goals and limitations on participants
  - Time
  - Technology
  - Measurement

- **Methods**
  - Coming next!

- **Create shared story and image**

Plan for Potential Challenges

- **Context**
  - Different geographies, time zones and cultures

- **People**
  - Partner roles and responsibilities
  - Participant understanding of their role
  - Identifying the right connectors

- **Process**
  - Internal and external factors delaying speed of sharing

- **Technology**
  - Internet access, phone access, limited repository

- **Demonstrating continuous value, motivators**
  - Less active participation then desired across virtual platforms
Questions?

Table Time: Planning

- Application
  - What resonates? Which strategies, concepts, ideas appeal? Which don’t feel like a good fit?
  - List key considerations for your own planning
    - Who to involve, when
    - What process can you design (steps/activities)
    - What mechanisms can you employ or test out
    - What dosage – touchpoints should be considered
“Amateurs talk about strategy; professionals talk about logistics.”
-Old Military Axiom

Let’s Take A Break!

Join us again in 15 minutes
And We’re Back!

ON EXECUTION
Methods: Four Themes

- Synchronous Methods (Face to Face)
- Asynchronous Methods (Virtual)
- Engaging Patients and Communities
- Harvesting

A framework for planning

<table>
<thead>
<tr>
<th>TACIT</th>
<th>PUSH</th>
<th>EXPLICIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>TELL</td>
<td>PUBLISH</td>
<td>TELL</td>
</tr>
<tr>
<td>ASK</td>
<td>SEARCH</td>
<td>ASK</td>
</tr>
<tr>
<td>PULL</td>
<td></td>
<td>PULL</td>
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</tbody>
</table>
Knowledge Sharing Framework

TACIT

TELL
• All-country Webex calls
• One-on-one TA calls
• Video clips
  Facebook, twitter

ASK
• Communities of practice (M&E)
• Teleconferences
• Site visits
• Regional meetings
• All Country meetings

PUSH
PUBLISH
Weekly list serv blast
• PHFS monthly newsletters
• Evaluation
• Country reports / monthly updates

SEARCH
• PHFS Drop box
• Links to existing QI/NACS web sites

PULL

EXPLICIT

Ways to Exchange/Facilitate learning

<table>
<thead>
<tr>
<th>Monthly</th>
<th>Cross country virtual:</th>
<th>Cross country In-person:</th>
<th>In country In-person:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Teleconference/Webinars</td>
<td>• Shared learning meetings (regional, all country)</td>
<td>• Technical Partner Site Visits/learning exchange</td>
</tr>
<tr>
<td></td>
<td>• All-country calls - updates/themed discussions</td>
<td></td>
<td>• Monthly PHFS Steering Committee Meetings</td>
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<tr>
<td></td>
<td>• M&amp;E calls - special interest community discussion</td>
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<tr>
<td></td>
<td>Correspondence</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• Country updates report</td>
<td></td>
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<td></td>
<td>• Newsletters</td>
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<tr>
<td>Ongoing</td>
<td>Correspondence</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>• PHFS ListServ blasts</td>
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<td></td>
<td>• Emails</td>
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<td></td>
<td>Social Media</td>
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<tr>
<td></td>
<td>• Facebook, twitter</td>
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<td></td>
<td>• Dropbox document sharing</td>
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Methods: Four Themes

- **Synchronous Methods (Face to Face)**
  - Face to Face Learning Sessions
  - Site Visits
- **Asynchronous Methods (Virtual)**
- **Engaging Patients and Communities**
- **Harvesting**

KM-Focused Learning Sessions

- Keep the energy up from beginning to end.
- Give improvement teams a chance to share in every session.
- Keep the “home team” in sight.
- Understand the audience for each session, including their learning styles.
- Put the patient, family, and purpose at the center.
- Maximize storyboard sessions.
- Capture the learning, not just share it.
Learning Sessions – Ideas to Try

On Keeping the Energy Up
- Use exercise breaks and ice breakers to break up the content. Sometimes even discussion becomes monotonous so remember discussion isn’t the only way to make the LS dynamic.
- Include a “surprise” for your participants.
- Play energizing music during down times like before and after the LS, transitions, and breaks.
- Encourage teams to create ways to celebrate and differentiate their team, like t-shirts, hats, or signs.
  “We’ve upped our numbers; up yours!”

On Giving Improvement Teams a Chance To Share in Every Session
- Choose and coach teams ahead of time to present in each breakout on their work.
- For large Learning Sessions, include a facilitator at each table to ensure all voices are heard.
- Start table conversations with a sharing prompt: One Sentence Round Robin.
- Pair faculty with improvement teams during plenary/corporate sessions to play out real examples.
- Incorporate a “Swedish Moment” to allow a few minutes for teams to talk amongst themselves. In international cases, a chance to speak in their native language.

Learning Sessions – Ideas to Try

On Keeping the Home Team In Sight
- Create a “For the Home Team” worksheet to note 2-3 points from each session that participants can take back their home teams.
- Debrief during end-of-day Action Planning session with your team what and how you will communicate the learning.
- Create a Twitter hashtag for the initiative or Learning Session so that others at home can hear highlights.
- Use a media team to video tape portions of the event.

On Putting the Patient, Family, and Purpose at the Center
- Include a patient or family member on each improvement team attending the meeting.
- Include a patient story in every session, in person to share their story, or by video.
- Create a persona for the patient and include the persona in the conversation. “But how would this help Esther?”
Learning Sessions – Ideas to Try

**On Maximizing Storyboard Sessions**
- Think strategically where to play your storyboards.
- Give participants a few guiding questions or prompts to guide their learning.
- Reserve a morning block before the LS begins for private faculty rounds either private or with teams.
- Take photos of the storyboards to record the learning.
- Ask teams to include a photo of their home teams.

**On capturing the learning, not just sharing it.**
- Use facilitation techniques like World Café, Open Space and keypad polling and text polling to capture teams’ ideas.
- Use Graphic Facilitation to show emerging learning.
- Using carbon copy worksheets to capture plans.
- PDSAs and other action plans.

Data, Cuddles, and a Song...

- Watch the following [short video](#) from the Scotland Early Collaborative Learning Session 3.
  - Note ideas and tips throughout the video. What do you pick up?
Site Visits – Ideas to Try

- Decide your objective from the outset: exploratory, evaluative, celebratory
- Give clear input to the hosting team on who, what, where, when in your expectations
- Meet with an array of roles (leaders, middle-managers, front-line admin and health care staff)
- Use a pre-planned feedback form

Encourage teams to visit each other
- Invite other teams to join the site visit as observers
- Combine a site visit with a Learning Session
- Whatever you do, do not sit in a windowless conference room the entire time!
Adding to Our Collective Learning

For Discussion:
- From your work, what would you add?
- What are some of the challenges have you faced?
- Any “Oh man, if I knew then what I know now, I would have…” stories?

Methods: Four Themes

- **Synchronous Methods (Face to Face)**
- **Asynchronous Methods (Virtual)**
  - Calls and Virtual Meetings
  - Virtual Methods to Move Ideas Quickly
  - Virtual Learning Sessions
  - Virtual Site Visits
  - Communities of Practice and Affinity Groups
  - Keeping Exemplars Engaged
- **Engaging Patients and Communities**
- **Harvesting**
KM-Focused Calls and Virtual Meetings

- Create more than just two-way communication
- Focus on content of interest to all
- Ensure the right people are on the call (right speakers, right participants)
- Value the participants time - announce call schedule and topic themes ahead of time
- Turn the call over quickly to presenters and teams
- Be as interactive as possible (“the 10 minute rule”)
- Deploy your resources well (technical host, content host, 1-2 chat facilitators)
- Create affinity among teams and with you
- Make the calls work for you – communication tool
- People need time to think. Get comfortable with silence.
- Always, always, always RECORD (notes, Webex recording, etc.)

Calls and Virtual Meetings – Ideas to Try

On Picking Content for All / Valuing Participants Time
- Choose a particular intervention or challenge with faculty advisors.
- Send out call calendar with dial-in information and topics at the outset.
- Make it easy for people to join: Send emails with embedded links to “add to outlook calendar”; Send 2-3 reminders (“8 times, 8 ways”)

On Making the Call Interactive / Gathering Learning from Participants
- Tap teams to formally or informally present for every call. Teams feel good that you appreciate their work to ask.
- Choose rotating teams to facilitate discussions/tee up questions.
- Set the explicit expectation for participation.
- Use ice breakers to announce/chat in (e.g., the weather in each teams’ time; something “shout worthy”)
- Always include photos of speakers (faculty or teams)
- Ask teams to sign in with their site/organization after their name
- Introduce yourself! Your background, outside interests.
- Use the “Every 10 Minute Rule” – Every 10 minutes stop for a discussion question, to take questions from the chat, to administer a poll.
- For ongoing calls: flip the content and discussion/questions. Introduce content on the second half of a call and take the questions and discussion during the first half of the next call to allow time for content to sink in.
Virtual Methods to Move Ideas Quickly

- Listservs and Newsletters – allow quick push of information (but need editors and monitors)
- Extranet – internal project sites for teams to post documents, resources, measures, reports
- Facebook – creates affinity and can also push information out
- Videos to tell stories
- Twitter – News of PDSA’s, successes, resources and tools out to masses in real-time

Spreading Ideas Quickly – Ideas to Try

**Listservs and Newsletters**
- Always include one or more resources (articles, tools, helpful websites)
- Feature a team with each newsletter installment
- Whenever a message goes out regarding your project, especially to a listserve, include the project name at the front of the Subject Line “TAIC: Reminder for Next Measurement Leads Workgroup Call This Wednesday”
- Think about your audience first.
- Personal replies should be directed to specific individuals rather than to the entire list.

**Videos and Other Social Media**
- Develop a regular iPhone video submission with a theme each month – about progress, a leadership interview, a tour of a clinic, etc. Feature the videos on an upcoming calls.
- Invest in a media team to capture stories.
- Incorporate a video-confessional/diary room at Learning Sessions
- Create a Twitter hashtag for your initiative and promote it’s use at face-to-face events and during Action Periods. Scroll real-time tweets at meetings or on calls.
- Include a Twitter Coach at events to help participants set up a Twitter account.
- Set a Twitter “impressions” goal
Scotland EYC LS2: The Twitter Challenge

- **Tuesday, 9:30am:** 50 new Twitter followers and 250,000 Twitter impressions by the end of LS2 (Wednesday, at 3:30pm)
- Challenge met by 1:30pm Tuesday.
- NEW CHALLENGE:
  - 1,000,000 Twitter impressions by the end of LS2.

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Scotland EYC LS2: The Twitter Challenge

- #bestplacetogrowup reaches #2 on worldwide Twitter trending list…

- Above:
  - #arresteddevelopment
  - #syria
  - #memorialdayweekend
KM-Focused Virtual Learning Sessions

- Everything regarding calls/virtual meetings, plus...
- Emphasize attendance at and participation in the virtual session is just as important as the face to face events.
- Set expectations: “You will be ‘attending’ the session usually from your own facility, with the tendency to be distracted by “emergencies”; questions, refill needs, etc. from your own office.”
- When there are multiple breakout sessions going on simultaneously, tell teams to create a plan for the location of the computer and screen and connection for each of those sessions.
- “Attention is the currency of leadership” – set the expectation early that leadership need to be at Leadership breakout sessions as well as plenaries.
- Emphasize the value of a virtual LS: Additional staff can attend, teams can pull data and run PDSA’s in real time, etc.

Virtual Learning Sessions – Ideas to Try

- **Institute the 50 Mile Rule with teams**: Each team let everyone at the facility know that “You should not interrupt me for anything that you would not try to reach me for if I were 50 miles away.” Their co-workers can be made aware of the teams’ scheduled times for breaks and lunch and get any questions that need to be addressed quickly to them at those times.

- **Encourage teams to invite additional staff** who otherwise could not attend to participate in the sessions, as well as Board members and community representatives.

- **On the draft LS agenda, include spaces for teams to include the location of each session** for their participating staff, as well as a space for their time zone.

- Each sites’ Program Manager/lead should **print worksheets** for their team ahead of time.

- **Include photos of teams** on storyboards along with a “headline” - use as scrolling slides before, after, and during breaks.
Virtual Site Visits: Ideas to Try

- All the site visit ideas, plus...
- Good pre-work - Give questions to team ahead of time to prepare
- Include photos: team, facility layout, process flows
- Make virtual site visit presentations available on extranet for other teams

Source: Lave & Wenger, 1991

Communities of Practice

- A group of people who share a craft and/or a profession.
  - The group can evolve naturally because of the members' common interest in a particular domain or area, or it can be created specifically with the goal of gaining knowledge related to their field.
  - It is in the process of sharing information and experiences with the group that the members learn from each other, and have an opportunity to develop themselves personally and professionally.

Source: Lave & Wenger, 1991
Key Considerations for CoP’s

1. Consider the participants (practitioners, team program leads, measurement leads, senior leaders)
2. Dedicated role(s) - to nurture learning, know the projects well and ID opportunities
3. Understand limitations of participants (time, technology, etc)
4. Understand preconceived notions and initial learning needs
5. Continuously assess participant learning needs across execution
6. Establishing a common learning framework around the topic

Key Considerations for CoP’s

7. Don’t underestimate power of facilitation
   - Good facilitation accelerates learning
   - Participant-driven creates ownership, using their preferred approach
   - Flexibility – emphasize learning as opposed to completing an agenda
   - Mix of techniques
   - Field visits grounds learning
8. Test out various tactics for virtual learning, including video recorded interviews or Q&A
9. Don’t shy away from pre-work
CoP Execution challenges

- Co-design failure
- Initial lack of clarity on community of practice concept and design
  - Initial concerns that the CoP might encroach on the design and delivery of individual projects
- People
  - Commitment to roles and responsibilities
- Process
  - Overly ambitious meeting agendas
- Technology
  - Internet access, phone access resulting to momentum lulls

Keeping Exemplars Engaged

Key Considerations:
- Be Celebratory!
- Focus on “earning it” – 100k Homes Campaign “2.5% Club”
- Allow their work to mentor laggards
Keeping Exemplars Engaged

- **Node Robustometer**
  - How to approach the data
  - Taking advantage of in person events
  - Node curriculum
    - Improvement Science
    - Execution Framework
    - Breakthrough Series

- **Mentor Hospitals**
  - Became our faculty
  - Celebrated success

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IHI 100k and 5 Million Lives Campaigns

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IHI 100k and 5 Million Lives Campaigns
Adding to Our Collective Learning

- For Discussion:
  - From your work, what would you add?
  - What are some of the challenges have you faced?
  - Any “Oh man, if I knew then what I know now, I would have…” stories?
Methods: Four Themes

- **Synchronous Methods (Face to Face)**
- **Asynchronous Methods (Virtual)**
- **Engaging Patients and Communities**
- **Harvesting**

Engaging Patients, Families and Communities in Gathering Knowledge

- Understand that no matter your work, you have an accountability to the people you serve. They are watching!
- In order to engage patients, families, and communities, you need to:
  - Help them become adept at communicating the urgency and the need for change and the potential for solutions.
  - Create readily available venues for people to engage in co-decision making
  - Help people understand how their efforts are influence the shared community goal(s) over time
  - Understand and access imbedded power structures within the community that might be marginalizing patients, families, and communities’ voices.
  - Develop relationships with leaders in community change that can help cultivate participation and leadership among their peers
Engaging Patients, Families and Communities – Ideas to Try

On Building Understanding and Leadership
- Engage residents in a process-mapping effort to identify breakdowns in current processes and ideal state process scenarios.
- Identify a “so that” chain to describe strategy and how it links systemic change to positive impacts in people’s lives.
- Cultivate coaching skills within community residents to help one another overcome motivational, strategic, and informational challenges that might otherwise hinder action.
- Discuss and assess with residents the constraints to empowering diversity and traditionally marginalized voices in the community (e.g., racial/ethnic/income disparities), and design a strategy for engaging these voices in your work.
- Develop simple metrics that are easy for the community to understand and rally around. (E.g., measures on HbA1c levels communicated as “hearts saved”) Engage residents in the development of such metrics.
- Identify “movers and shakers” in the community and how they engage other stakeholders.
- Use visual recording and graphic facilitation to help residents see their impact on shared community goal(s).

Engaging Patients, Families and Communities – Ideas to Try

On Creating Venues for People to Engage in Decision Making
- Provide venues for residents to engage in One on One Meetings to share concerns, level of interest and commitment for an issue, as well as the resources each person has to offer.
- Engage local community organizers in a canvassing effort to understand residents’ top concerns within their community and potential solutions.
- Invite community resident champion(s) to participate in local leadership council. Solicit suggestions from community residents on who to invite to participate.
- Plan a series of facilitated community resident listening sessions/forums to engage in decision-making and intervention design. Focus the forum on a set of guiding principles that will foster diverse and engaged participation, including: shared power and responsibility, inclusivity and compassion, thoughtful deliberation, public trust, and freedom of expression.
- Form “action learning groups” of community residents that meet over a period of time to learn and test interventions together, using repeating cycles of reflection and action.
- Use online methods to gain input into solutions, such as webinar capabilities to engage residents in meetings that cannot attend in person, online discussion forums, resource repository for tools and videos.
The 21st Century Town Meeting…

- Watch the following short video from the AmericaSpeaks Town Hall Meeting concept.
  - Note ideas and tips throughout the video. What do you pick up?

Adding to Our Collective Learning

- For Discussion:
  - From your work, what would you add?
  - What are some of the challenges have you faced?
  - Any “Oh man, if I knew then what I know now, I would have…” stories?
Methods: Four Themes

- Synchronous Methods (Face to Face)
- Asynchronous Methods (Virtual)
- Engaging Patients and Communities
- Harvesting

The “Harvesting” Gestalt

- It is everyone’s job to:
  - Know what is happening
  - Work with others to improve what is happening
  - Make it easier for the next person to do their work well
Thinking Strategically About the Harvest

- Planning – What’s it for? Who’s it for? When is it needed?
- Harvest can be tangible or intangible.
  - Tangible: documents, plans, pictures, etc.
  - Intangible: trust, relationships, shared clarity, etc.
- There is both a planned harvest (for issues known must address) and an emergent harvest (for what can’t predict in advance).
- Harvests can be done by and/or for individuals or the collective.

Harvesting in Three Aspects

- Gather. Collect insights, information, and ideas.
- Synthesize. Notice patterns, make meaning, and prioritize.
- Communicate. Share what happened with those not there, remind those who were there, contribute to next steps, keep conversation or harvest going post-event.
Levels of Harvesting

- **Personal level harvest:**
  - How can we enhance our personal learning, using time for reflection, journaling, etc?
- **“Ground level” harvest:**
  - After each meeting or process how can we harvest what happened?
  - How can we create a collective memory and make collective meaning right now?
- **Community level harvest:**
  - What is useful for us as a community to remember or what do we need to share / feed-back and to whom and how is it best done?
- **Meta-level harvest:**
  - What is useful for our longer term learning and what would be useful to share with others, similar networks etc. – How widely could this harvest serve? Cyberspace may be the limit?

Asking the right questions...

- **Harvesting from the past:**
  - You may look back and ask: What did we learn? What made sense? Where are we now in the journey? What are the next steps?
- **Harvesting in the present:**
  - What are we sensing? What are we noticing now? What patterns are emerging? etc.
- **Harvesting for the future:**
  - You may also look forward: look for the issues or questions that you know will feed the next inquiry and feed those back into the system.
- **Harvesting for emergence:**
  - “What question, if answered, would shift us to the next level?
Listening for the answers…

- Dedicated listener:
  - One person is assigned to listen just for one thing. You can have multiple listeners, each listening for different themes. Consider a “keynote listener”.

- Team of synthesizers:
  - “Theme Team” (America Speaks) or “Theme Catchers” (Amanda Fenton, AoH).
  - Group of individuals chosen for ability to quickly synthesize information and identify key themes, can be used to feed back into discussions (e.g., via polling, additional questions, etc.).

- Reporter:
  - Hire a professional journalist, journalism student, or have someone act as a journalist -- listening, observing, interviewing people during event and then tell its “story”.

- Collective Story Harvest:
  - Process for individual storytelling + intentional listeners + group harvest

  *The intentional listener needs to set aside old habits of listening and take “self” out, in order to listen for commonalities, listen “to the center”.*

100,000 Lives Campaign Bus Tour
Fall Harvest

- 70 staff visited a hospital in all 50 states in 2 weeks
- Worked with Nodes and Mentors to identify unique hospitals (not all usual suspects)
- Mix of large/small, urban/rural, pediatric, academic...
- Collected impressive results, tips and tricks, tools, and possible mentor contacts

National Action Day

- On June 20, 2007, over 35,000 participants joined a **virtual** meeting for Campaign participants to focus their attention on getting results faster and more reliably.
Putting it all together

- Final thoughts and questions
- Applying to your work

Planning template

<table>
<thead>
<tr>
<th>Action Planning for Large-Scale Learning</th>
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<tbody>
<tr>
<td>What are you planning / what is the purpose:</td>
</tr>
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<table>
<thead>
<tr>
<th>People</th>
<th>When (consider planning, execution &amp; scale-up)</th>
<th>How will you involve/engage</th>
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<thead>
<tr>
<th>Process for knowledge sharing (identify, capture, access and share)</th>
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<tr>
<td>Steps</td>
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<table>
<thead>
<tr>
<th>Technology</th>
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<tbody>
<tr>
<td>Ways to store/organize knowledge</td>
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<td>----------------------------------</td>
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<table>
<thead>
<tr>
<th>Home team</th>
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<tr>
<td>Who are key people to take this plan back to and involve immediately</td>
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<td>-------------------------------------------------</td>
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<th>Other Considerations:</th>
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Last thoughts

Resources
- Additional articles on KM
- K4Health KM tools

Contact Information:
- Kate DeBartolo – kdebartolo@ihi.org
- Ninon Lewis – nlewis@ihi.org
- Patty Webster – pwebster@ihi.org

ADDITIONAL CASE EXAMPLES
Example 1: Joint Learning Network

A joint learning network across 10 countries,

- Knowledge sharing approach:
  - Direct support to specific JLN countries asking for quality support
  - Building knowledge around quality improvement relevant to JLN countries

Example 2: Partnership for HIV-Free Survival

A multi-country learning collaborative which is part of the global effort towards eMTCT.

It focuses on postnatal MTCT with the following objectives and uses a QI approach to boost existing country eMTCT programs:

- Achieve universal breast feeding and improve nutrition of mother-child pairs
- Ensure that all breast-fed infants exposed to HIV are protected through ARVs
Which countries are members of the Partnership?

- Six countries selected and additional countries welcome
- Project co-design partners:
  - USAID
  - WHO
  - IHI
- Supporting existing eMTCT and nutrition plans

Country coverage and participation:

Prototypes in all with plans for spread across all countries

- **Kenya**: 4 Districts, 17 facilities
- **Lesotho**: 3 Districts, 44 facilities
- **Mozambique**: 4 Districts, 8 facilities
- **South Africa**: 4 Districts, 33 facilities
- **Tanzania**: 3 Districts, 33 facilities
- **Uganda**: 6 Districts, 22 facilities
PHFS: Planning for Spread

0-9 months: Phase 1
- pre-scale up learning

9-24 months: Phase 2
- rapid scale up phase

(Phase 3) scale up across PHFS countries and

Common Aim: Reduce transmission and improve nutrition coverage

Breastfeeding: 35%-40%

Postpartum Early Late

MTCT

15%

15%

Maternal -infant nutrition

>95%

22%
Example 3: MNH Referral Community of Practice

A 2-year multi-country shared learning initiative of the Gates Foundation to share learning and experiences across three Gates-funded projects supporting global efforts to reduce maternal and neonatal mortality.

Each project, as an arm of existing work, has a dedicated focus on improving faulty referral processes contributing to adverse maternal and newborn health outcomes.

Objective of all three projects is to:
- Support Country MoHs to achieve MDGs 4 & 5 by 2015

Who are the participants?

- Last 10 Kilometers, Ethiopia
  115 Woredas, 15.1 mil, ~20% total pop

- Projects Five Alive!, Ghana
  2 Regions, 6 Districts, 74 facilities
  >1100 communities, ~180,000 <5s,
  39,000 expected preg, 900,000 tho,
  ~4 % total pop

- Society for Family Health, Nigeria
  2 States, 6 million, ~4 % of total pop

IHI’s role:
- To design/implement a concept and strategy to maximize learning
- Overall facilitation/coordination
Specific Referral Project Aims

- **L1OK** - Demonstrate innovative processes and solutions that improve effective care seeking and response for critical maternal and newborn health conditions
- **PFA1** - Improve access to maternal and newborn health services and outcomes in rural Ghana by using a QI approach to improve referral processes
- **SFH** - To scale-up effective and efficient approaches to improve maternal and newborn health practices in the home, as well as facilitate enhanced facility-based Maternal Neonatal and Child Health (MNCH) services in North East Nigeria

Every person gets to the right place....at the right time....in optimal condition....and receives the care needed

Aims of CoP

- To accelerate learning and improvement across the three projects with referral of mothers and children.

- To disseminate new learning from the projects among the partners and into the external global health community.
PHFS: Learn before

Borrow It Forward/ Peer Assist

- Internal learning sessions to discuss learning agenda for PHFS, what has happened in past engagements
- New team learns from past teams (phone, in person)
- Gather pitfalls, lessons, tactics for learning

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### PHFS Logic Framework (Project Timeline: July 2012 – June 2014)

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<td>PEPFAR Funding</td>
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<td>USAID/WHR/PHS Steering Committee (SC)</td>
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<td>WHO 2010 Infant Feeding Guidelines</td>
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<td>WHO Guidelines development for B-protocol</td>
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<td>USAID NACS platform</td>
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<td>MEASURE implementation strategy</td>
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<td>Ministry in-country MTCT, Q1, and nutrition plans</td>
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<td>Country level MOH and teams</td>
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<td>In-country MOH expertise</td>
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<td>UHCHEALTH/NIQAL MOH expertise</td>
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<td>PANTALIP NACS expertise</td>
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<td>80 MOH and collaborative implementation expertise</td>
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<td>8 MOH and collaborative implementation expertise</td>
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<td>2 visual learning platform(s) (LP)</td>
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<td>Initial driver diagram</td>
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<td>PHSP management support</td>
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<tr>
<td>1) Cross-Country Learning Platform (LP) (HH)</td>
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<tr>
<td>Convolve country learning sessions in the following:</td>
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<td>1) All MOH</td>
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<tr>
<td>- country and Southern and Eastern Africa regional learning sessions (LS)</td>
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<td>reduced to 1%</td>
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<tr>
<td>Monitor in-country activity through SC visits and virtual communication</td>
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<td>Postnatal NACIS coverage of mother-infant pairs increased by 90%, over two years</td>
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<td>Harvad qualitative learning from each in-country learning session and SG visits</td>
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<td>Engage teams in cross-country virtual learning platforms through push-pull functions</td>
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<td>2) In-country Activities</td>
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<td>Local MOHs run BLS in 10 sub-districts</td>
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<td>URCIHP provide MOH and data systems training to facilities and DMTs</td>
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<tr>
<td>URCIHP support sub-districts to develop system for collecting UDM and sharing data</td>
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<td>PANTALIP provide NACS implementation support</td>
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<td>Local MOHs, communities, facilities co-design plan to improve MOH access and retention via community engagement</td>
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<td>MoH Steering Committee oversees DMTs</td>
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<td>DMTs develop district implementation plans</td>
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<td>1) Cross-Country Learning Platform (LP) (HH)</td>
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<td>1) All MOH</td>
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<td>2) In-country activities</td>
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<td>complete and track small</td>
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<tr>
<td>2. MOH receive NACS</td>
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<td>2. MOH receive NACS</td>
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<td>3. HIV status of MOH</td>
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<td>3. HIV status of MOH</td>
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<tr>
<td>4. MOH receive optimal NACS coverage</td>
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<td>4. MOH receive optimal NACS coverage</td>
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<tr>
<td>Facility and district staff work with community to increase access and retention</td>
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<td>95% of MOH enrolled in PMTCT are retained in care</td>
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- Timely, accurate, complete data systems
- District leaders use MOH for program performance
- DMTs have actionable scale-up plan to spread PHFS in district

---

90% reduction in HIV transmission through breastfeeding over two years (MTCT rate of 15% reduced to 1%)

AND

Proportional improvement in child survival
**PHFS Planned Activities**

**Cross-Country Learning Platform**
- Convene country teams through all-country and Southern and Eastern Africa regional learning sessions (LS)
- Monitor in-country activity through SC visits and virtual communication
- Harvest qualitative learning from each in-country learning session and SC visits
- Engage teams in cross-country virtual learning platforms through push/pull functions
- Develop core measure set for all steps in postnatal PMTCT/NACS pathway
- SC and country reps develop change package

**PHFS Planned Outputs**
- Three all-country and four regional LSs; six teams sharing best practices
- Four SC visits to each country
- Learning from SC visits and regional LS shared through virtual LP
- All country teams engage w/LP
- Vetted measure set
- Change package and measures for all four steps of postnatal PMTCT/NACS pathway
PHFS Network building

In Country Activities:
- Local NGOs run BTS in demo sub-districts
- URC/HQ provide QI and data systems training to facilities and DMTs
- URC/HQ support sub-districts to develop system for collecting data and earning
- FANTA/LIFT provide NACS implementation support
- Local NGOs, communities, facilities co-design plan to improve M-I access and retention via community engagement
- MoH Steering Committee oversees DMTs
- DMTs develop district district implementation plans (DIP) that include PHFS scale-up

Network building:
Multi-Country Learning Collaboratives

Learning PDSA cycles
Learning session 1
Learning PDSA cycles
Learning session 2
Learning PDSA cycles
Learning session 3

Intensive learning support to key contacts and partners

18-24 months
**Network building:**
Country level Learning Collaboratives

- **Learning session 1**
  - PDSA cycles
- **Learning session 2**
  - PDSA cycles
- **Learning session 3**
  - Intensive QI support to facilities and managers

18-24 months

---

**PHFS Planned Timeline**

- **Phase 0**
  - In-country Visits Set 1
  - In-country Visits Set 2
- **Phase 1**
  - 2012
    - National and District/Sub-District Preparation
  - 2013
    - In-Country Launch and Implementation in Prototype Sub-Districts
- **Phase 2**
  - Project Timeline
    - Multi-country Learning Platform Session A LAUNCH
    - Multi-country Learning Session 1
    - Multi-country Learning Platform Session B
    - Multi-country Learning Session 2
    - Multi-country Learning Platform Session C
    - Multi-country Learning Session 3
    - Multi-country Learning Platform Session D
- **Phase 3**
  - 2014
  - District Scale-Up
  - Country Scale-Up
PHFS Defined Learning Focus: Four critical steps for mother-infant care

- Retain all mother-infant pairs in care
- Ensure mother-infant pairs receive nutritional advice, counseling and support
- Know the HIV status of every mother and infant
- Ensure optimal ARV coverage for mother and infant

PHFS: Execution strategies for learning

- In-country Learning - how to reach aims on the ground
  - Working with small # of sites
  - Making changes to current system (interventions)
  - Measuring and documenting what works, what doesn’t

- Cross-country Learning - how to accelerate reaching aims
  - Sharing best practices, tools, pitfalls and barriers
  - Sharing evidence (data) of which changes work, which do not
  - Creating a universal package of changes to spread

- Scaling up across countries
PHFS: Country-identified ways to exchange/facilitate learning

<table>
<thead>
<tr>
<th></th>
<th>Cross country virtual:</th>
<th>Cross country In-person:</th>
<th>In country In-person:</th>
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</thead>
<tbody>
<tr>
<td><strong>Monthly</strong></td>
<td>Teleconference/Webinars&lt;br&gt;  • All-country calls - updates/themed discussions  &lt;br&gt; • M&amp;E calls - special interest community discussion</td>
<td>Shared learning meetings (regional, all country)</td>
<td>• Technical Partner Site Visits/learning exchange  &lt;br&gt; • Monthly PHFS Steering Committee Meetings</td>
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<tr>
<td></td>
<td>Correspondence&lt;br&gt;  • Country updates report  &lt;br&gt; • Newsletters</td>
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<tr>
<td><strong>Ongoing</strong></td>
<td>Correspondence&lt;br&gt;  • PHFS ListServ blasts  &lt;br&gt; • Emails</td>
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<td></td>
<td>Social Media&lt;br&gt;  • Facebook, twitter  &lt;br&gt; • Dropbox document sharing</td>
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A framework for planning

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 TACIT
  TELL
  ASK
PUSH
  PUBLISH
  SEARCH
EXPLICIT
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PHFS: Knowledge Sharing Framework

TACIT

<table>
<thead>
<tr>
<th>TELL</th>
<th>ASK</th>
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<tbody>
<tr>
<td>• All-country Webex calls</td>
<td>• Communities of practice (M&amp;E)</td>
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<tr>
<td>• One-on-one TA calls</td>
<td>• Teleconferences</td>
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<tr>
<td>• Video clips</td>
<td>• Site visits</td>
</tr>
<tr>
<td>• Facebook, Twitter</td>
<td>• Regional meetings</td>
</tr>
<tr>
<td></td>
<td>• All Country meetings</td>
</tr>
</tbody>
</table>

PUSH

<table>
<thead>
<tr>
<th>Weekly list serv blast</th>
</tr>
</thead>
<tbody>
<tr>
<td>• PHFS monthly newsletters</td>
</tr>
<tr>
<td>• Evaluation</td>
</tr>
<tr>
<td>• Country reports / monthly updates</td>
</tr>
</tbody>
</table>

PULL

SEARCH

<table>
<thead>
<tr>
<th>PHFS Drop box</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Links to existing QI/NACS web sites</td>
</tr>
</tbody>
</table>

EXPLICIT

PHFS Execution challenges

- **Context**
  - Different geographies, time zones and cultures
- **People**
  - Partner roles and responsibilities
  - Participant understanding of their role
  - Identifying the right connectors
- **Process**
  - Internal and external factors delaying speed of sharing
- **Technology**
  - Internet access, phone access, limited repository
- **Demonstrating continuous value, motivators**
  - Less active participation then desired across virtual platforms
PHFS: Key considerations

1. Build relationships, trust and focus on play
   - In-person introductions & understanding how sharing can accelerate current MoH plans
2. Continuous stakeholder engagement, review & assessment of learning needs
   - Hold regular coordination meetings with all stakeholder/supporting partners – what new learning is emerging,
   - Map out joint learning aim and work plan to support participation/learning
3. Identify champions and highlight strengths of all
4. Ensure continuous rhythm/dosage of cross sharing
   - Follow-up all meetings with immediate touches
   - Map out calendar of weekly list serv blasts, monthly call
   - Keep participants informed of schedule for learning opportunities
   - Key point people (internal and external go-tos) identified to spread word
5. Demonstrate value
   - Of their own ideas - Highlight their own successes, examples, pictures, stories

CoP knowledge sharing

Mechanisms:
- 3 Face-to-face meetings
  Site-visits
- Monthly webinar calls
- List serv

People: project leads & key staff
CoP Execution

Timeline of activities

March 2012
May 2012
Nov 2012
Jan 2013
April 2013
May 2012
July 2013
Oct 2013

Concept and strategy for CoP drafted
1st CoP face-to-face meeting, Addis Ababa, Ethiopia
Project Leads’ meeting, during Gates Convener in Accra, Ghana

Creation of dedicated facilitator role – to nurture and enhance knowledge sharing across projects
1st CoP webinar – keeping community volunteers motivated, learning from Malawi
2nd CoP face-to-face meeting, Addis Ababa, Ethiopia
2nd CoP webinar – how learning has been applied

“Action period” activities
• One-on-one connections with individual project leads/teams
• List serv discussion, material sharing (dropbox), article reviews/summaries digest

Face-to-face learning tactics used

• Co-designing agendas
• Themed meetings to tie learning to specific learning area
• Tagging teams to lead facilitation of preferred sessions
• Innovative report-outs – from the community perspective
  • Report out from the eyes of a mother, community leader or reporter from local paper – what it means to them
• Peer assists for problem solving
• World café’s for cross sharing and building on ideas
• Team pause and plans
• Site visit debriefs – learning and teaching moments
• Talk, talk, talk
Virtual learning tactics

Aside from the usual...
- Webinar pre-recorded slide sharing
- Video recorded interviews/Q&A