

# How to Hold a Successful Share Fair

**Second Edition**



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Knowledge for Health



**Authors:**

Willow Gerber (Management Sciences for Health,) Jarret Cassaniti, Heather Finn, Anne Kott, and Cassandra Mickish Gross (Johns Hopkins Center for Communication Programs)

**Suggested Citation:**

Gerber W, Cassaniti J, Finn H, Kott A, Mickish Gross C. How to Hold a Successful Share Fair. 2nd ed. Baltimore: Johns Hopkins Center for Communication Programs; Washington, D.C.: Management Sciences for Health; 2016.

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# Acknowledgments

The Knowledge for Health (K4Health) Project produced this publication with support from the U.S. Agency for International Development Bureau for Global Health, Office of Population and Reproductive Health. The Johns Hopkins Center for Communication Programs (CCP) leads the K4Health Project in partnership with FHI 360, IntraHealth International, and Management Sciences for Health (MSH). K4Health uses knowledge management (KM) approaches to help improve family planning and global health services in low- and middle-income countries.

The authors would like to thank those who reviewed this guide: Deanna Kioko (CCP), Tara Sullivan (CCP), and Sara Mazursky (CCP). We also acknowledge Rebecca Shore (CCP) and Amanda Puckett BenDor (IntraHealth International), the authors of the original (first edition) guide, as well as the members of the **Global Health Knowledge Collaborative**, whose past events have informed our work.

Above all, we acknowledge the diverse participants from K4Health's knowledge exchange events and share fairs. Without their expertise, creativity, and dedication, these events would not have been possible.

## About This Guide

Welcome to the second edition of the How to Hold a Successful Share Fair guide.

This guide is for anyone who values the collaborative aspects of knowledge exchange and learning. It will be of particular value for knowledge brokers interested in organizing an event where people have the opportunity to share what they know, strengthen and support each other's knowledge management capacity, and create a forum for learning about and adapting knowledge management strategies and tools.

This second edition builds on the original guide developed in April 2015 and contains new and expanded lessons from a second share fair held in April 2016 in Tanzania titled Peer to Peer Sharing: Tools & Tactics. The 2016 share fair planning team drew these lessons from the reflections and experiences of the more than 100 participants from 14 countries who gathered for the event. Through their generous spirit and high level of personal and professional competencies, each participant contributed to an outstanding knowledge exchange gathering.

This updated guide follows a similar strategic outline as the original guide, which includes a simple and effective approach to organizing a knowledge share fair. The approach will help you:

- Create a plan for before, during, and after the event to achieve your priority objectives.
- Identify the most important components of share fair event planning.
- Prioritize limited financial and human resources.
- Understand what you can control and prepare for during such an event and how best to adapt to unforeseen issues.
- Prepare for monitoring and evaluating key learning and engagement components resulting from the event.

## How to Use This Guide

The authors developed this guide as a reference tool for anyone who works in public health or international development and who wants to bring together a group of people to discuss ideas, address challenges, and share best practices. Users can reference this guide to find what is most relevant for their specific needs.



Attendees of the April 2016 Knowledge for Health Knowledge Management Share Fair held in Arusha, Tanzania, participate in a knowledge cafe led by Michael Mutua from African Population and Health Research Center, Inc. © 2016 Jarret Cassaniti/CCP, Courtesy of Photoshare.

## What is a Share Fair?

A share fair is a participatory event—usually focused on a single topic or field—that promotes learning from participants' experiences to improve their work.<sup>1</sup> Since share fairs are tailored to the specific needs of the participants, there is no right or wrong way to hold share fairs. The overall aim of such events is to provide participants with opportunities to share experiences and learn new skills and techniques related to their work. When appropriately evaluated and documented, share fairs also contribute to the knowledge base of effective knowledge management.

Generally, share fairs differ from typical conferences in the following ways:

- Registration is limited to a distinct audience rather than open to the public.
- The number of participants is usually smaller, and event sessions are more specific.

<sup>1</sup> Share Fair: Better ways to share and learn. Better ways of working." ICT-KM Program of the CGIAR [website]. <http://ictkm.cgiar.org/what-we-do/share-fair/>. Accessed March 3, 2001

- The focus is on experiences and knowledge in people’s heads (tacit knowledge) rather than research results or formal findings.
- The delivery method of presentations is more varied and creative.
- Communication among participants is less formal and focuses on two-way dialogue.
- The agenda is less structured and includes built-in opportunities to network and collaborate with colleagues beyond break times and meals.

## Plan the Event

### Budget

Setting a budget early on can help determine the size and scope of the event. Making the event a priority in the work plan and including the event as its own budget line item will ensure appropriate allocation of staff time and other resources. A larger budget enables more participants and staff to attend and makes it possible for consultants, such as videographers and graphic facilitators, to help plan, facilitate, and document the event. On the other hand, a more limited budget generally necessitates fewer participants, a shorter time frame, and a less expensive venue. Below are examples of events the Knowledge for Health (K4Health) Project helped plan with varying levels of funding:

- Two-day event in East Africa for approximately 50 participants with no formal facilitator or graphic facilitator. Included international travel for four people, regional travel for four to six people, hotel accommodations, breakfast, lunch, and an evening event. **Total cost: US\$20,000.**
- One-day event in Washington, D.C., for approximately 100 participants with a formal facilitator and a graphic facilitator. Included only domestic travel, venue, breakfast, and lunch. **Total cost: US\$25,000.**
- Three-day event in East Africa for approximately 100 participants with a four-member team handling facilitation, documentation, and logistics. Event included international travel for five people traveling from the United States to Tanzania, regional travel for 35 people, hotel accommodations, breakfast, lunch, and an evening event. **Total cost: US\$125,000.**

Keep in mind that the event can cost much less if people do not have to travel far to attend, local venues are inexpensive, or organizations can use their own large meeting room at no cost. For the examples listed above, the highest costs were for the venue, food, and facilitation services.

### Conceptualize and Design the Event

Organizing and hosting a share fair takes significant planning. To begin, set clear goals and objectives. Then draft a concept note to outline the objectives and details for the event. Even if the donor or management team does not mandate such a document, it is helpful for planning and accountability. Gather the team in charge of content and logistics for the event and jointly define the following:

- The audience for the share fair and the estimated number of participants
- Anticipated outcomes and methodologies the team will use for the event (for example, storytelling, knowledge cafés, speed consulting)
- Send the concept note to all sponsors and donors, and ensure their agreement prior to the next step. See **Appendix A** for a concept note template.



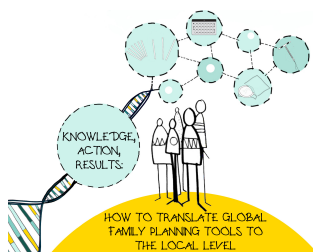
## Identify and Contact Potential Cosponsors/Collaborators

Successful share fairs require collaboration and coordination to meet appropriate goals and objectives. They warrant productive discussions about getting the right people into the room and how best to creatively draw participants' extensive experience and ideas into the planned conversation. Consider inviting another organization or project to cosponsor the event. This can help expand its reach, reduce costs, and add diversity to the presentations. Make sure to identify collaborators early in the process so they can be involved in the planning and feel they have a vested interest in the event. The planning group should consider activities that could help strengthen the capacity of collaborators that can be strategically included in the fair based on their respective needs and goals.

## Select a Theme

Selecting a theme and an accompanying logo gives the share fair an identity. Grounding the presentations and discussions with a particular theme ensures cohesiveness and clear understanding among participants and other stakeholders. A good theme is one that meets the interests, needs, and challenges of the intended audience and resonates with the participants. In addition to being relevant, a good theme should be “catchy” and interesting.

For example, if the main audience is nurses working with infectious diseases in Peru, the theme may incorporate a new technique or a specific approach relevant to this audience, which would be different from a group of program managers working on HIV/AIDS in India.



## Design a Logo

A logo creates brand recognition for the event. We recommend a logo that communicates the unique theme and goals of the event. Carefully choose a color and design that will complement the share fair and will print well on T-shirts or other items made for the event. If access to or cost of graphic design services are obstacles, consider websites that offer logo designs at low costs (for example, <https://www.crowdspring.com/> and <https://99designs.com/>).

## Identify Dates, Including a Firm Registration Close Date

Select a date very early in the planning process. Consider the ideal length of time for the event. One that is too brief will limit conversations and information-sharing, especially the informal knowledge exchange that occurs during meals or coffee/tea breaks. On the other hand, events that last too long can lose focus and participant engagement toward the end. We recommend a length of two to three days. This gives participants enough time to engage with each other without requiring them to be away from their jobs and families for too long. Always consider how much time is necessary to effectively engage with the audience and to meet your objectives.

For example, if one objective is to enable participants to develop work plans based on what they learn at the share fair, consider setting aside a half or full day for that activity to ensure the schedule is not too packed to be productive. The most recent share fair in Arusha was two and a half days: two days for the actual share fair event and then a half day for select participants who applied to be included in a peer assist exercise as an added practicum opportunity.

When identifying calendar dates for a share fair, consider local holidays—including any national or religious holidays—and participant travel times. If it is an international event, check with local colleagues before setting the date to account for other timing conflicts including competing events, local cultural or sporting events, or USAID Mission reporting requirements (for example, Country Operation Plan submission). Determine whether a security briefing is required, and, if so, who will provide the briefing.

It is very important to **close registration at least two weeks before the event** to allow the planning team to have final participant numbers. You will need these numbers when you communicate with the venue, arrange travel for attendees, and send messages to participants and presenters. Setting a final closing date for registration also prevents many last minute changes to the event plans that could derail the success of the share fair.

## Select a Location and Venue

A suitable geographic location is key to a successful event. Participants should feel safe, be able to find the location easily, and not have to endure arduous travel. It may seem convenient to select a central location close to participants' homes, but it can be more effective to have the event in a neutral or separate location, if possible. Share fairs are most effective when participants can be fully engaged. If participants are too close to their offices, they may be tempted to multitask or go back and forth from the event to their work place.



Attendees at the Knowledge Management for Health Share Fair, held in Arusha, Tanzania. © 2016/K4Health

For example, although many participants from the 2015 and 2016 K4Health East Africa Share Fairs lived in Tanzania, the group chose to hold the events in Arusha to maximize participation and offer a chance for participants to immerse themselves in the learning event. Furthermore, the weather in Arusha was more temperate than Dar es Salaam, and the organizers felt this would maximize attendance for those coming from outside Tanzania. Cost considerations may also dictate where to hold the event; holding share fairs outside of urban centers can be more cost-effective because of lower hotel and in-town transportation costs.

After deciding on a city or town for the event, the next step is to select a venue. It is important to identify a secure, comfortable place with sufficient space for the number of participants, and sufficient amenities and infrastructure. The venue could be a hotel, conference center, partner organization, community center, or other location. Discuss options with partners and fellow organizations. If a venue requires payment (such as a hotel or conference center), it is standard to request bids from three or more vendors for a comparative advantage. A team of one to three individuals should assess the potential locations to make the final decision. The following questions can help initiate this process:

- Does the venue have enough space to accommodate the anticipated number of participants?
- Is there a need for smaller (break out) rooms in addition to the main conference room?
- Is the venue convenient to hotels and other lodging?
- Will the venue be able to cater food and coffee/tea during the event?
- Will the venue be able to provide audiovisual equipment, such as projectors, if needed?
- Does the venue have strong Wi-Fi and staff with digital technology skills if needed?
- Does the venue have a copy center for last minute tasks?
- Can the rooms accommodate simultaneous translation booths if necessary?

Make sure to **reserve the room for the day before the event**. Request that all equipment and supplies are set up in the room on this day so everything can be tested ahead of time. Be sure to introduce the planning team to the venue's operations manager so they know who to go to for help if they encounter problems during the equipment

testing. Better yet, have the operations manager participate in the testing so he/she is immediately available to solve any problems with the audiovisual equipment.



## Create an Action Plan

By now, the event-planning process is well underway. At this point, it is a good idea to create an action plan that all organizers can access to coordinate and organize the logistics, speakers, and other action items needed to properly manage the gathering. Use a spreadsheet or another project management tool to map out the next few months of event planning and share the document via Google Drive, Dropbox, or another cloud-based file-sharing system. See **Appendix B** for a sample action plan.

After creating the action plan, nominate a point person for each activity. Each point person is responsible for updating progress on their activity in the action plan and carrying out related tasks. For example, assign one person to be the point person for the hotel and related logistics before and during the event. Another person may be responsible for creating the agenda and communicating with the participants. Defining these roles early will ensure clear lines of responsibility and accountability throughout the planning process. The RASCI Matrix may be a useful resource ([http://www.valuebasedmanagement.net/methods\\_raci.html](http://www.valuebasedmanagement.net/methods_raci.html)).

Each team member's primary role is their priority. However, share fair events have so many moving parts that all team members must be willing and able to also take on secondary roles once they have fulfilled and/or are confident that their primary tasks are in good shape. For example, the team member whose primary role is finalizing the agenda could also be tasked (in a secondary role) with liaising with hotel staff to make sure breakout rooms are sufficiently set up. It is important that the planning team fully understands what is expected of them in their primary role so that they can then pitch in to help with secondary needs as they arise. When team members are clear and comfortable with their respective primary roles, then they are better able to support secondary roles and other needs as they arise.

Most importantly, regularly check in with your team and ask if everyone has what they need to succeed! Even if you have not been tagged with a secondary role, as a member of a highly collaborative team, you should be willing and able to help with whatever needs to get done to make the event a success. Highly functioning collaborative teams create an atmosphere of trust and cooperation that sets a great example of team leadership and management for event participants.

# Develop the Agenda

## Refine Objectives

After establishing a theme, deciding on the length of the event, and selecting dates and a location, it is time to develop an agenda for the share fair. The goals and objectives identified early in the planning process will inform this next step. All sessions need to fulfill the objectives of the overall event to make it engaging and meaningful.

**Create objectives that relate to the share fair goals.** For example, if a goal is to demonstrate how knowledge management<sup>2</sup> techniques can further Family Planning 2020 (FP2020) goals<sup>3</sup> in a particular region, one objective would be for participants to understand FP2020 goals in that region. These smaller objectives unpack the larger goals and ensure participants understand and can apply them to their work.

<sup>2</sup> Knowledge management is a systematic process of collecting information and connecting people to it so they can act effectively.

<sup>3</sup> Family Planning 2020 is a global initiative with the goal of enabling 120 million additional women and girls to use contraceptives by 2020. [www.familyplanning2020.org](http://www.familyplanning2020.org)

Higher-level ideas should be presented first, followed by more practical sessions focused on implementation. The last one or two items on the agenda should focus on next steps—that is, ways for participants to understand how they can implement these new ideas and skills in their work. This could take the form of resolutions that all participants contribute to and agree upon.

Before adding a new session, be sure it is in line with the event goals and objectives.

## Draft Agenda

Create a matrix for the draft agenda, filling in time slots for coffee/tea breaks, meals, and networking opportunities. As you confirm presentations, fill in the rest of this document. Consider doing this step concurrently with some of the activities mentioned above, such as designing a logo or selecting a location. See **Appendix C** for a sample agenda template.

## Add Innovative Techniques



Attendees at the Knowledge Management for Health Share Fair, held in Arusha, Tanzania. © 2016/K4Health

**When** considering how to organize the agenda, think about innovative ways to present content. Participants are more likely to engage with creative presentations than plenary sessions with PowerPoint slides. To encourage creativity and learning, infuse innovative methods into the agenda—for example, storytelling, knowledge cafés, skits, or music. Think about content that is related, but may offer a different perspective. For example, consider inviting experts from another field or sector to share their best practices as they relate to the main theme of the event. See **Appendix D** and **Appendix E** for innovative techniques to adapt. Visit the **Liberating Structures** website ([www.liberatingstructures.com](http://www.liberatingstructures.com)) for more fun and innovative ways to elicit participation and maximize learning.

The tools and approaches used at the 2016 Regional Share Fair are available in a public document repository on the East, Central and Southern Africa Health Community's website: <http://www.ecsahc.org/downloads/#>.

## Leave Space for Connecting

Do not underestimate the importance of free time during such events so participants can become more familiar with each other and build trust for further collaborative knowledge exchange. According to Andre Saita, there is a human-centered knowledge management perspective that considers knowledge largely a **social practice of collective sense-making**. Hence, successful share fairs include opportunities to “cultivate context and facilitate connections that improve practices and sense-making.” (Saito 2007) Having enough break time or crafting ice breakers that allow participants to show a more personal side of themselves helps build familiarity and trust among the group.

Leave space in the agenda for participants to network and gather in a more informal and relaxed setting over meals or coffee/tea, enabling participants to talk and create connections with each other. This can be a jumping-off point for further contact. Frequently, if meeting planners do not schedule enough open break time for participants to mingle with old friends and colleagues who are also present at the event, they will simply take the time by skipping sessions to network, hold side meetings, or socialize.

Ample time to chat with colleagues and meet new people doing similar work is critical to hosting a successful share fair. With proper planning up front, the event should include a combination of professionals with the necessary skills and interest to cultivate a community of collaborative knowledge management supporters.

## Identify and Contact the Presenters

### Make a List, Check It Twice

Reputable and strong presenters are key to a successful share fair. In the action plan, make a list of the top choices and alternates for presenters based on the draft agenda, and include the kind of presentation you would like them to make.

### Establish a Point of Contact for Presenters

Determine the planning team member who will be the point of contact for each presenter. Note that it may be a different person for each presenter. No one person should be overburdened with too many presenters. Be certain to distribute the planning workload fairly and effectively.

### Reach Out to Potential Presenters



Decide on the messages to use when inviting potential presenters to the share fair. A draft email or key talking points for a phone call might be helpful to include in the action plan so the whole team can access the same information. When reaching out to potential presenters, be sure to articulate the share fair objectives, intended audience, dates, and location. Communicate any other specifics early on (for example, the date of the presentation, topic ideas, and the length of the presentation) and be clear about whether the organizers will cover transportation and lodging for presenters.

### Confirm or Move On

Start from the top of the list, and contact potential presenters early. If they are not sure of their availability, suggest a deadline for responding. As the presenters confirm their availability, update the action plan with their illustrative presentation details. If they confirm, encourage them to use innovative techniques in their presentations. If they decline or do not meet the deadline, continue down the list and contact other presenters as soon as possible.

## Plan for Promotion and Dissemination

### Plan for Promotion and Dissemination Early On

At the very beginning of your event planning, think about how you will promote the share fair and disseminate knowledge before, during, and after the event. Consider the goals of your promotion and dissemination efforts. Are you hoping to bring attention to knowledge management champions in your region? Are you trying to share important knowledge management lessons with a larger community of practitioners beyond those attending your event? Are you simply focused on disseminating knowledge to your event participants? By asking these questions and others, you will be more strategic about your promotion efforts and more successful at achieving your knowledge-sharing goals. A promotion and dissemination plan template is included in **Appendix I**.

### Before the Event

Promotion before the share fair should focus on generating excitement, creating community, and disseminating critical information. Be sure to carry out the following activities before the event:

- Announce the event on your website. Promote the share fair on your organization's website, in relevant

communities of practice, and on partner websites. Write a news story or a blog post announcing the share fair, post pictures from previous share fair events, and use other creative communication techniques to build interest and excitement.

- Engage in social media. Use Facebook, Twitter, and other channels to create a sense of community among share fair participants before the event begins, and extend the discussion to individuals who are not attending the event but may have an interest in the share fair. If you use social media, create an **official hashtag** for your event so that participants can easily follow the discussion. If social media plays a large role in your promotion and dissemination plan, consider creating a **social media toolkit** to help organize your outreach. See **Appendix J** for a sample toolkit.
- Reach out to traditional media. You may wish to invite newspaper, TV, and radio journalists to portions of the share fair in order to highlight key themes or inform them about knowledge management. If so, you will need to plan this outreach in advance. You may wish to issue a press release about the share fair and anticipated highlights of the event that features quotes from well-known thought leaders or dignitaries. Alternatively, you may simply wish to invite journalists individually. Make sure you let participants know if journalists will be attending, and consider which portions of the share fair should be for participants only and closed to press or others. Share fairs are most successful when participants can be open and honest about successes and failures. Individuals may feel less comfortable sharing this information with media present.

## During the Event

Promotion during the share fair should focus on **knowledge capture and sharing**. Potential activities include:

- Discuss key themes on social media. Continue the conversation online on Twitter, Facebook, or another social media platform by sharing quotes from presenters and reflections on key themes. Assign someone from your organization to post to Twitter or Facebook during the event to encourage conversation. Distribute a handout with the event's hashtag and a list of the Twitter handles, Facebook pages, or social media accounts of key organizers and attendees. Check with presenters and attendees to gauge their comfort level when it comes to having their words and likeness published on social media.
- Consider adopting an opt-out approach that will allow you to use images from the event on social media and in promotional material. Include language in the registration form to let attendees know that you will be taking pictures of the event and posting them online. Post a notice at the check-in table to remind attendees that they will be photographed. Sample language for this notice is included here: "Smile! We will be taking pictures of this event to be posted online. Follow us, tag us, like yourself! if you'd prefer not to be featured, please let us know at check-in." Remind participants to be respectful of what they share online.
- Takes notes. Assign individuals to take notes during each session of the event. One suggestion is to create a template for notes to easily and consistently document key messages, quotes, and other takeaways. Assign someone to collect all the notes and synthesize this information from the share fair. Don't forget to take photos and/or video and record memorable quotes. Use the notes in blog posts, a share fair report, and other sharing platforms after the event. See sample note-taking sheet in **Appendix G**.
- Recruit share fair participants to write blog posts. In a blog post, an author can share brief snippets of text, quick thoughts or anecdotes, photographs, conversations, interviews, question and answer documents, guidance on a certain topic, or other materials from the share fair. If your organization has a blog, consider recruiting share fair participants to write posts. Throughout the event, ask individuals who are especially engaged if they



Share fair attendees take a selfie together.

would consider writing a blog post on their experience. Keep a record of these individuals and their contact information for follow-up. If there are key attendees you would like to be part of the blog series but are likely to have trouble finding time to write a post, offer to interview them as a way to record their impressions of the event and/or its topic(s). With the interview notes, you can produce a blog post or help them compose a post using the interview notes.

## After the Event

Promotion after the share fair should focus on knowledge synthesis. Potential activities include:

- **Blog series** - Consider running a short blog series after the event to capture opinions and viewpoints about what was shared and discussed. Reach out to the individuals on your list of potential bloggers. If you receive a number of posts, space out their publication timeline. Publish no more than one blog post per week so that your blog readers are not overwhelmed with share fair news. Ask attendees who are planning to publish their thoughts on another blog if you can cross-post their blog post or its link to another online social media website or forum.
- **Post-event report** - After the share fair, prepare a report. Sometimes a donor will require a report, but participants should also receive a post-event report. Include an executive summary and photos from the event, as well as an annex of key documents (for example, the agenda and basic notes from each session). Include the evaluation results in this report.

# Invite Participants

## Decide Whom to Invite

The share fair planning is in full swing now, but who will attend? Early in the planning phase, consider the size of the audience, as this will determine the venue. Should it be a small, intimate group or a large event? Or is there a pre-defined list of invitees—for example, is the event for staff from a particular project or initiative? In any case, use the action plan to keep a list of potential participants. Include specific names, if possible, or start with the title or type of participant (for example, Ministry of Health Family Planning Coordinator).

If you have an idea of who should attend based on work function or organization type and you want to open the fair to a broader audience, consider an application process that will allow you to screen potential attendees. This process may expose you to the benefits of new people and networks.

No matter the target audience, it is advisable to invite a country representative who can speak at the opening ceremony. This dignitary should always be the last of the high-level speakers on the first day so that he or she can officially declare the share fair “open.”

## Announce the Date



Send a “save-the-date” email announcement to invitees **three to six months** before the event (or as soon as possible), so they can mark their calendars. Keep the message simple and short—inform recipients of the event and its proposed dates, and invite them to attend. Ensure that all cosponsors agree on the language used in the save-the-date message and include the logo, if there is one, as this will be an opportunity for early brand recognition for the share fair. However, be careful not to send high-resolution photos or images, as recipients with low Internet bandwidth may not be able to open them. It is very important to include a closing date for registering.

## Send Formal Invitations

At least one month before the event, send formal invitations to the share fair. **Be sure to include the logo.** These invitations should include more details about the event than the save-the-date announcement. For example, mention any featured speakers or planned activities. Request a response by the registration closing date. To send invitations and collect responses, you may want to use one of the following free online services:

- **Eventbrite:** An event and ticketing site that helps planners set up, promote, and manage every detail of an event.
- **My Event Guru:** A web-based event platform that enables individuals and organizations to sell tickets and process payments for their events, promote events using social media, and obtain access to other comprehensive event planning tools.
- **Facebook:** Promote your event on the popular social network by creating a public or private event using Facebook Pages.

## Track Responses

Carefully track the number of participants who will attend. If the maximum number of participants is approaching the number you determined early on, consider emailing invitees to let them know that registration is filling up. Likewise, if not many invitees have responded, consider sending a follow-up message. Once you reach the ideal number of participants, and the registration closing date is still days away, send a reminder out to the full group noting that only a few spaces remain for the event. Formally close the registration by the selected date by sending an email out to the group and by updating the landing page if you have set up a website for the event.

# Design an Evaluation

Early in the planning phase, decide whether evaluating the share fair is a priority for the team. An evaluation may include a pre- and post-event survey as well as additional methods of collecting feedback and information from participants and presenters before, during, and/or after the share fair. An evaluation allows the organizers to better understand participant experiences, gather feedback to improve the current and future events, and understand how participants use and share what they learned after the event. It may also be a requirement set by the donor.



### Develop an Evaluation Plan

Event organizers may have a variety of objectives for gathering feedback, so it is important to determine the information needs early and to think about how the information will be used. Develop an evaluation plan that identifies research questions; these questions clarify what the organizers want to learn from the evaluation process and may include the following:

- What knowledge do participants already have about the share fair topic?
- What topics and types of sessions are most interesting to participants?
- To what extent did the share fair achieve its identified objectives?
- What topics or skills presented at the share fair were the most valuable to participants?
- How did participants use what they learned during the share fair in their work?
- How did participants share what they learned during the share fair with their colleagues who did not attend the event?



It is helpful to continue to refine the research questions in alignment with the objectives and intended outcomes of the event and the content and objectives of the sessions. Regularly check to see that the sessions are designed to accomplish your event objectives and that research questions are designed to measure the outcomes the agenda is designed to produce.

After identifying the research questions, consider how to collect the information needed to answer these questions. It may be helpful to think about data collection activities before, during, and after the event.

## Before: Create a Pre-evaluation Survey

In the weeks leading up to the event, having background information about participants can help shape the presentations and other share fair activities. Create a pre-evaluation survey to ask basic questions of participants—for example, their background, previous knowledge about the share fair topic, and what they hope to learn during the event. See a sample pre-evaluation in **Appendix H**. This demographic information and baseline knowledge might be collected as part of the registration process.

Using tools such as SurveyMonkey or Google Forms, create a simple survey that will make it easy to collect pre-evaluation information and analyze the results. Conduct this pre-evaluation survey two to three weeks before the event, if possible.

## Share Results

Share results of the pre-evaluation survey with all event presenters and other organizers so they can tailor their sessions to the participants' responses. If time allows, consider sending a pre-event email with general details about participants (for example, 30 share fair participants are nurses, and 20 are community health workers).

## During: Interactive Methods to Gather Participant Feedback in Real-Time

During the event, check in with participants and gather feedback. High-tech options such as online-based audience response systems can be new and engaging for participants; low-tech options such as an expectation wall or paper surveys can help ensure everyone can participate and may help avoid digital technology difficulties. Consider participants' digital literacy, the reliability of Wi-Fi, and the need for real-time results when choosing the method or combination of methods that is most appropriate.

### High-Tech Option

An audience response system such as Poll Everywhere (<https://www.polleverywhere.com>) or Kahoot! (<https://getkahoot.com/>), allows participants to respond to a question through a web-enabled device (such as a cell phone, iPad, or laptop computer.) Organizers can choose to display the results of the question in real time to highlight immediate feedback. This method is helpful to gather quick feedback about specific sessions or preferences without requiring data entry or analysis and can be fun and engaging for the audience. Presenters can use the data to make custom changes to presentations, choosing to spend less time on a topic that most attendees are not interested in or more time on a topic respondents do not know much about. Share fair organizers may choose not to display results as they come in in order to limit the influence of the first responses on others' responses. They may also choose not to display results if the question is of a sensitive nature.

While this method can address **recall bias** that can occur when evaluations are conducted at the end of a multi-day event, it does rely heavily on Wi-Fi connectivity. This can be a significant challenge in some venues, such as hotels, which often have limited bandwidth. Another challenge is the requirement that each participant have their own web-enabled device to participate. Organizers should come prepared with a few "loaner" devices to share, and have staff available to provide assistance to participants to help them use the application.

## Low-Tech Option

An expectation wall is another way to conduct an evaluation in real time. This option requires a large wall space, VIPP Cards or large sticky notes, and markers. To facilitate an expectation wall exercise, designate one side of the wall for “Expectations Set” and the other side for “Expectations Met.” Then ask participants to write their expectations for the share fair on the card or note (one expectation per card or note). Ask participants to place their card or notes on the Expectation Set part of the wall. Over the course of the meeting, remind and provide designated time for participants to revisit the wall and consider whether their expectations have been met; if so, they should move their sticky note to the “Expectations Met” side of the wall. The wall provides a barometer throughout the meeting to see how well expectations are being addressed.



Participants contribute to the expectations wall at the beginning of the East Africa Knowledge Management Share Fair in Arusha, Tanzania. c 2016 Cassandra Mickish Gross/K4Health

At the end of the meeting, it may be helpful to facilitate a conversation about the expectations, grouping them by theme, and asking the audience to talk about why their expectations were or were not met. This may also be an opportunity to refer participants to resources for additional information to address any unmet expectations. In a large meeting, it may be helpful to provide sticky notes in a variety of shapes and colors to help participants find their expectations on a crowded wall. Bring tape to secure sticky notes, especially in humid climates and venues with large fans or air conditioning units. Taking photos of the wall throughout the event is a great way to illustrate the process after the event.

Both the high-tech and low-tech approaches are participatory options that attendees may appreciate as deviations from the more formal presentations that are so common at meetings and conferences.

## After: Follow up with Participants to Learn More

Gathering feedback after the event can include asking participants to complete a paper or online survey immediately following the event, or waiting weeks or months after to event to how participants are implementing what they learned their work.

A paper survey distributed to participants at the end of the event, rather than through an online survey days or weeks after, will increase the response rate and will aid participants’ recall of the event. This is another opportunity to ask participants if their expectations were met and, if not, to ask why. It is also a place to collect information about fair logistics and findings participants intend to share with their colleagues after the event. If some participants have left, follow up by email with an online version of the survey. The results of the post-event evaluation can be used to judge the success of the event, contribute to the event report, and share with donors. For an example of a post-evaluation survey, see **Appendix H**.

If the organizers have time and resources, additional communication with participants three to six months after the event can provide valuable information about how participants used and shared the information and skills they learned during the share fair. It may also be valuable to ask questions from the pre-event survey to assess whether knowledge and attitudes and practices have changed compared to before the event. As you design the survey instruments and poll questions before, during, and after the event, continue to ensure that the questions are aligned with the original research questions. Try to keep instruments clear and concise to reduce the time burden on participants.

## Analysis and Reporting

Analyze the results of your evaluation to address the research questions. Synthesize the findings in a report, flyer, or infographic, and consider sharing with participants, presenters, and other implementers. It may be valuable for organizers to review the findings of the report and discuss recommendations for future events.

# Organize Logistics

## Stay Organized

By now, the venue for the hotel should be identified and confirmed. When possible, have a local contact confirm in person with the venue staff, and be sure to ask and receive a written confirmation from the venue with specific details regarding services and reserved spaces. Use the action plan to update all of the logistics for the event.

## Arrange Travel



If the event requires participants to travel to another country, check on visa requirements and whether donor concurrence is required. Look into visas and concurrence early so that these processes do not delay the event. Depending on the country, securing visas can take anywhere from a day at the embassy to weeks or months. Make it clear who is responsible for securing visas. If travel is being provided for select participants, whenever possible, allow them to book their own travel arrangements and propose reimbursement up to the maximum budget and/or State Department lodging amount in your budget. This way, participant travelers can arrange the accommodations that best suits their needs, and the planning team will spend less time on logistics.

## Organize Venue Specifics

Before arriving at the venue, make a list of all materials needed and who is responsible for bringing them to the event. Also note what can be purchased onsite versus what needs to be brought from the office or another location. Whenever possible, try to buy materials in the country where the event is being held. Such purchases can help support the local economy and significantly defray shipping costs.

## Hire an IT Firm for Wi-Fi

Regardless of what a venue manager or venue staff promises, purchase a Wi-Fi package from a local IT firm. Be honest with the provider, and inform them of how many people will be attending and using their devices during the event. Make sure you receive a network ID and password that is available only to your group.

## Consider Other Travel Issues

Arrange airport transfers for presenters to the hotel or venue. Be sure that participants are aware of airport transfer options and any costs associated with these. Many hotels provide free or reduced airport pick up for guests staying at their hotels. Pooling travelers into shared vans or cars can be a significant cost savings.

## Reimbursements and Per Diems

Reimbursements and per diem disbursements may be required depending on standard protocols, donor approval, and, of course, an adequate budget. Any communications concerning funds must be clear, including what qualifies for reimbursement; documentation required for a reimbursement; the method of reimbursement, including the currency; and when participants can expect payment. If reimbursements cannot be made during the share fair, be sure each participant is clear on the process.

## Arrange Shipping

If materials need to be shipped, look into shipping procedures and customs early in the planning process. Items can take anywhere from weeks to months to get through customs. Bringing extra luggage can be a cost-effective alternative to shipping.

## Set Up the Venue

The day before the event, try to meet with the conference coordinators to get the rooms set up to your specifications. Ask who will be the venue contact during your event and program their mobile number into your phone.

As a share fair organizer, it is necessary to arrive at least a day or two before the event, especially if you have not visited the location before. Decide whether the venue staff is willing and able to supply a laptop or desktop computer for each conference room. In addition:

- Load any presentations the day before the event onto the available computer(s), and confirm that the files open properly.
- Check that the sound system works with both the microphones and the computer in case presentations have audio embedded.
- Check that the Wi-Fi connection is properly set up and working well.
- Confirm that the projectors display properly.
- Review all meal menus and break times with the venue food service staff.
- Review transportation arrangements to and from the local airports if applicable.

# Coordinate Presentations



## Assist With Presentation Development

After identifying the presenters, be sure to support them as they develop their presentations. Some may want significant assistance, while others will develop their sessions on their own and only require feedback on the draft. Ask whether the presenters want to include any materials in participant folders or have materials available on tables at the event. Consider assigning each presenter a point person on the organizing team whom they can contact with questions. Be sure to update this information in the action plan.

## Create a Document Repository

At least one week before the event, request that the presenters send their final presentations to their point person. If possible, upload the final presentations to a page on your website or to an online storage site like Dropbox. This creates a central location from which presenters and participants can access presentations and other important materials. At minimum, be sure to save all presentations to a USB key or flash drive in case the presenters need a backup version during the event.

## Review All Materials

Review the slide decks, handouts, and any other materials. These should be final, but allow time for a final review and copy editing to ensure the highest quality content is ready to share at the event.

# Pack Your Bags



## Plan What to Bring

Planning what to bring to a share fair event is important. What kind of event materials will you need (for example, participant notebooks, flip chart paper)? Will you take any promotional materials, such as relevant brochures or briefs? Often, small giveaways (buttons, pens, and coffee mugs) are good to have on hand. Consider who will take all of these to the event, and pack them carefully. As noted in the Organize Venue Specifics section, if this event will be held in a location with a country office or partner office, it is generally preferable to produce these items in-country. Doing so supports the local economy and avoids the cost and inconvenience of extra baggage.

## Print Early to Avoid High Cost

Printing is often very expensive in conference halls or hotel venues, so print what you need beforehand or identify a local printer to help before you arrive. Also, plan to print more copies than the anticipated number of participants. It is better to have extra materials on hand than not enough.

## Have an Unlocked Cellular Phone on Hand

Providing a local telephone number is incredibly useful. Share this number with the participants as soon as possible. Consider establishing a WhatsApp or other text service group that planners and organizers can use to communicate.

# After the Share Fair

## Review Actions

It is important to reflect on the event and the post-evaluation results and to discuss what worked and what could have gone better. An after-action review can help identify how to correct deficiencies, sustain strengths, and focus on improved performance. This is especially important in preparing for future share fairs. More information about planning and carrying out an after-action review can be found in the U.S. Agency for International Development (USAID) **technical guidance document for after-action reviews**.<sup>4</sup>

## Follow Up With Participants

Be sure to follow up with participants to share presentations, notes, and the final report from the event. Set up a virtual space or email group with all of the participants. Ensuring communication after the share fair will foster momentum following the event. If possible, initiate this **contact within two weeks** after share fair. If you carried out a formal monitoring and evaluation activity of the event, follow up in six months to see how much knowledge and information the participants have retained, how they have cascaded what they learned at the event to their colleagues, or how they have implemented some of the knowledge management practices they learned about at the share fair.

## Send Thank You Notes!

Do not forget to thank your presenters, participants, and organizing team very soon after the share fair. **Follow up within a week** by email or with a handwritten note thanking them for their time and contributions to the knowledge-sharing at the event.

<sup>4</sup> After-action review: Technical guidance." Washington, DC: USAID; 2006. [http://pdf.usaid.gov/pdf\\_docs/pnadf360.pdf](http://pdf.usaid.gov/pdf_docs/pnadf360.pdf). Accessed March 18, 2015.

# Appendix A: Concept Note Template

## **Background:**

Include background information on the topic and the reasons you are holding a share fair.

## **Goals:**

State the overall goal for the event. This can be general—for example, to connect implementers in this field to share information and learn about best practices.

## **Specific Objectives:**

The objectives are much more specific and detailed than the goals. For example, an objective of the K4Health East Africa Share Fair was “to demonstrate how the use of knowledge management can enhance family planning program activities, contribute to improved family planning outcomes, and further FP2020 goals in the region.”

## **Audience:**

How many people should attend, and what background should they have (for example, policy makers, program managers, journalists)?

## **Share Fair Principles:**

Examples of general share fair principles include the following:

- Focus on learning
- Value participatory approaches
- Incorporate collaborative knowledge management tools and methods (for example, graphic facilitation, knowledge cafés, peer-assist, open space)

## **Potential Topics:**

It is helpful to identify potential topics before you reach out to presenters. These topics should help meet the share fair objectives. For example, why do family planning donors value knowledge management within family planning programming? Or what are family planning knowledge-sharing gaps within East Africa, and how can knowledge management help?

## **Conveners:**

- Primary
- Collaborating organizations

## **Venue:**

- Where will the event be?

## **Date:**

What are the dates?

## **Outputs:**

What do you hope to achieve by the end of the event? These outputs may be tangible (for example, a post-event report) or intangible (for example, increased support around a particular topic).

## **Point of Contact:**

This is the main point of contact for high-level funders and partners (or whomever reviews the concept note). Keep in mind that this person may differ from the point of contact for presenters, participants, and other logistics.

# Appendix B: Action Plan Template

An action plan is key to staying organized during share fair planning. With so many moving parts, planning can become overwhelming without a central place to keep track of what has been done and what is left to do. One option for creating this action plan is a Google Drive spreadsheet.

You can find a sample action plan at <http://goo.gl/y78pyo>. The spreadsheet includes tabs for organizing materials, participants, and travel. If you are interested in using the spreadsheet, select File > Make a Copy. This will enable you to edit and change the spreadsheet as you see fit. To download the spreadsheet, select File > Download As > Microsoft Excel if you prefer to work offline. It is helpful to make the action plan available online so multiple people can access it and keep it up to date.

To access this document visit: <http://goo.gl/y78pyo>.

The screenshot shows a Google Spreadsheet titled "Share Fair Sample Action Plan". The spreadsheet has a menu bar (File, Edit, View, Insert, Format, Data, Tools, Add-ons, Help) and a toolbar with a "View only" dropdown. The spreadsheet is organized into columns labeled A through L. Column A contains task descriptions, column B is labeled "Responsible person", and columns C through L are labeled with dates: 2-Jan, 9-Jan, 16-Jan, 23-Jan, 30-Jan, 6-Feb, 13-Feb, 20-Feb, 27-Feb, and 6-M. The tasks are grouped into sections: Concept Note, Save the Date, Branding, Venue, Agenda, Travel Logistics, and Presentations. Each task is listed in a row, and the spreadsheet is designed to track the completion of these tasks over time.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Tasks	Responsible person	2-Jan	9-Jan	16-Jan	23-Jan	30-Jan	6-Feb	13-Feb	20-Feb	27-Feb	6-M
2	<b>Concept Note</b>											
3	Select a date											
4	Draft Concept Note											
5	Share with Partners and get feedback											
6	Finalize Concept Note with Feedback											
7	Send to Donor for Review											
8	Finalize Concept Note											
9	<b>Save the Date</b>											
10	Draft Save the Date											
11	Share with Partners and get feedback											
12	Finalize text and design email/eCard											
13	Develop list of participants to invite											
14	Send out Save the date											
15	<b>Branding</b>											
16	Select a theme											
17	Design a Logo											
18	<b>Venue</b>											
19	Create selection criteria for venue											
20	Get 3 quotes from venues											
21	Create selection memo for venue											
22	Reserve room block for about 30% of guests											
23	Pay downpayment											
24	Reserve breakout rooms											
25	Check on Meals (Breakfast, Lunch and Tea)											
26	Reserve space for before or after events											
27	Secure multimedia for presentations (projectors, TV, etc.)											
28	<b>Agenda</b>											
29	Draft agenda shell											
30	Share draft agenda with planning group											
31	Finalize agenda											
32	Print final agendas											
33	<b>Travel Logistics</b>											
34	USAID Concurrence Washington											
35	USAID Concurrence Mission											
36	Visa Letter (USAID or country sponsor)											
37	Order Visas											
38	Book flights (staff)											
39	Book flights (other presenter/participants)											
40	Reserve Hotel Rooms											
41	Arrange ground transport to venue/hotel											
42	<b>Presentations</b>											
43	Develop list of presenters											
44	Work with presenters to decide on KM techniques for presentations											
45	Review and edit presentations											
46	Collect final presentations in multiple formats											
47	<b>Invitations</b>											
48	Develop a list of participants to invite (keep in mind objectives)											
49	Create invite through event website											
50	Draft formal invitations											

# Appendix C: Agenda Template

INSERT LOGO

INSERT NAME OF EVENT/THEME

INSERT DAY NUMBER – INSERT DATE

08:00 – 09:00		<b>Registration</b>		
09:00 – 09:30	<b>Opening Sessions</b>	<ul style="list-style-type: none"> <li>INSERT NAMES OF SPEAKERS AND THEIR AFFILIATION</li> </ul>		INSERT LOCATION
09:30 – 10:30	<b>Plenary</b>	<ul style="list-style-type: none"> <li>INSERT NAME OF SPEAKER/THEME OF PLENARY</li> </ul>		INSERT LOCATION
10:30 – 11:00	<b>Coffee/Tea</b>			
11:00 – 12:00	<b>Breakout Sessions</b>	<p>OVERALL SESSION NAME/THEME</p> <p><i>Description of session theme. Please choose one session to attend.</i></p>	<ul style="list-style-type: none"> <li>NAME OF SESSION</li> <li>NAME OF SESSION</li> <li>NAME OF SESSION</li> </ul>	<ul style="list-style-type: none"> <li>Breakout Room #1</li> <li>Breakout Room #2</li> <li>Breakout Room #3</li> </ul>
12:00 – 13:00	<b>Lunch</b>			INSERT LOCATION
13:00 – 13:15	<b>INSERT SESSION NAME</b>			INSERT LOCATION
13:15 – 14:30	<b>Breakout Sessions</b>	<p>OVERALL SESSION NAME/THEME</p> <p><i>Description of session theme. Please choose one session to attend.</i></p>	<ul style="list-style-type: none"> <li>NAME OF SESSION</li> <li>NAME OF SESSION</li> <li>NAME OF SESSION</li> </ul>	<ul style="list-style-type: none"> <li>Breakout Room #1</li> <li>Breakout Room #2</li> <li>Breakout Room #3</li> </ul>
14:30 – 15:00	<b>Coffee/Tea</b>			
15:00 – 16:30	<b>Knowledge Café/ Breakout Session</b>	<p>INSERT SESSION NAME</p> <p><i>Insert session description. Participants will rotate through all sessions.</i></p>	<ul style="list-style-type: none"> <li><b>NAME OF SESSION</b></li> <li><b>NAME OF SESSION</b></li> <li><b>NAME OF SESSION</b></li> </ul>	<ul style="list-style-type: none"> <li>Breakout Room #1</li> <li>Breakout Room #2</li> <li>Breakout Room #3</li> </ul>
16:30 – 17:00	<p><b>Closing Remarks for Day/Event</b></p> <p>Description</p> <p>Option for Next Day Preview</p>			INSERT LOCATION
17:00 – 19:00	<p><b>Social Event</b></p> <p>Event Description</p>			INSERT LOCATION



# Appendix D: Visual Storytelling Activity

This visual storytelling activity is an example of an innovative technique to use during your share fair to encourage creativity, sharing, and learning.

This activity is a creative representation of a breakout session. Instead of the standard method of reporting back, this method enables participants to draw and illustrate themes learned in the specific session to share with the larger group.

## Instructions:

- Identify one or two people to be illustrators and one or two people to be reporters.
- Allow the group 15 minutes to complete the drawing portion of the activity.
- The illustrators draw what the group decides best depicts the session themes, stories covered in the session.
- The group can decide on any images or numbers, but they cannot use words that would give away the title of the session.
- Illustrators are free to make rough sketches before the final drawing but must keep track of time.
- After the time is up, all session groups return to the plenary room for a gallery walk and reporting.
- Groups give the illustrations to the facilitators, who place them on the wall.
- Groups walk around the room and think about which illustration represents which breakout session.
- Each group votes on which illustration represents which breakout session.
- The group that has the highest number of correct votes wins a prize.
- Each group selects a reporter to explain their illustration as a means of reporting to the larger group (no more than 5 minutes).

## Hints:

- Be creative.
- The drawing does not have to be literal.
- Pictures can represent one main theme or a story. Everyone in the session should participate.
- There are no wrong answers!

# Appendix E: Knowledge Management Flash Cards

## Steps in an AAR

1. Invite the right people and appoint a facilitator.  
Create the right climate
2. Ask, "What was supposed to happen?" Revisit the objectives and deliverables of the project.
3. Ask, "What actually happened? What went well? Why? What could have gone better?" Share learning advice for the future.
4. Ensure that everyone feels fully heard before leaving the meeting.
5. Record and share important lessons learned.

SDC – Knowledge Management Toolkit  
More information: [www.daretoshare.ch](http://www.daretoshare.ch)

## Knowledge/World Café - How to go about it?

1. Seat four or five people at small tables or in conversation clusters.
2. Set up progressive (usually three) rounds of conversation for about 20 - 30 minutes.
3. Discuss questions or issues that genuinely matter to the community.
4. Encourage participants to write and draw key ideas on their tablecloths or on pads of paper.
5. Upon completing the initial round, ask one person to remain at the table as the "host" while the rest of the group move to other tables.
6. Ask table hosts to briefly share the main ideas of the previous conversations at the start of each round.
7. After several rounds, initiate a plenary discussion and strive for common answers, patterns and possibilities for action.

SDC – Knowledge Management Toolkit  
More information: [www.daretoshare.ch](http://www.daretoshare.ch)

## Peer Assist

1. The host team clarifies the purpose and invites an experienced team. Allow time for socializing and create a positive climate.
2. Host team explains its project, needs and expected outcome.
3. The visiting team further explores the situation and gives feedback on what they learned.
4. The visiting team identifies options to solve the problem. The host team listens carefully.
5. The visiting team presents the final feedback and conclusion.
6. The host team commits to actions and to keeping the visiting team updated.
7. Together, they identify lessons learned.

SDC – Knowledge Management Toolkit  
More information: [www.daretoshare.ch](http://www.daretoshare.ch)

## Storytelling

How to go about it as a storyteller?

1. Be clear about the key message of your story.
2. Build your story on an own experience. Note keywords.  
What is the lesson learned?
3. Tell your story. Build an atmosphere of curiosity. Use a dramatic voice. Observe your listeners.
4. If indicated, relate your story to the topic discussed.

How to go about it as a listener / interviewer?

1. Warm up. Show your interest.
2. Listen closely. Be receptive and comprehending.
3. Hear the story out. Ask questions only at the end.

SDC – Knowledge Management Toolkit  
More information: [www.daretoshare.ch](http://www.daretoshare.ch)

## Community of Practice

- Ensure that key stakeholders are members -- balance giving and taking.
- Strive for the most practical and tangible outputs/outcomes; disseminate widely.
- Carefully select how to "be connected"-- balance face-to-face with other means.
- Combine informality with a basic set of rules for communication and collaboration.
- Ensure ownership within - look well after the roles of owner, manager, expert and facilitator.
- Adjust to changes in the environment.

SDC – Knowledge Management Toolkit  
More information: [www.daretoshare.ch](http://www.daretoshare.ch)

## Lightning Talks - How to go about it?

- Organize lightning talks like "speed dates." The idea is that participants can experience many different ideas in a short amount of time.
- Advance preparation is key to a successful outcome. Have presenters work with a coach/facilitator to prepare for the talk.
- Ask each presenter to do a dry run of their presentation to ensure that all goes as expected.
- Give presenters a checklist that addresses what they are expected to do during the session to stay on track, and what to expect after they are done.
- Sequence the lightning talks so the audience can make sense of the issues being presented. Consider the overall message of the talks.

Art of Knowledge Exchange - The World Bank  
More information: <http://wbi.worldbank.org/wbi/>

## Share Fair Principles

- Focuses on learning.
- Values participatory approaches.
- Incorporate collaborative knowledge tools and methods (for example graphic facilitation, knowledge cafes, peer-assist, open space, etc.)

The Knowledge for Health Project  
More information on KM: <https://www.k4health.org/toolkits/km>

## Rules of Visualization

- Write legibly! Check font size, density, contrast. Use block lettering, check for distance between letters and words.
- Use colors restrictively! Use white or light colored chart paper and pastel colored pin-board cards. Use black markers for general text and colors for decoration.
- Let posters speak for themselves! Put a meaningful title on top or in the centre. Structure your poster to guide the eye. Be aware of the proverb: "If the eye is not attracted, the feet will pass by."
- Use a simple language. Avoid abbreviations.
- Install technical means before the meeting! Check if they are running properly. Verify the legibility of the visualization.

SDC – Knowledge Management Toolkit  
More information: [www.daretoshare.ch](http://www.daretoshare.ch)

## After Action Review

An after action review (AAR) is a discussion of a project or an activity. It enables the individuals involved to explore what happened, why it happened, what went well, what needs improvement, and what lessons can be learned from the experience. The spirit of an AAR is one of openness and learning -- it is not about problem fixing or allocating blame. Lessons learned may be tacitly shared on the spot by the individuals involved or explicitly documented and shared with a wider audience.

## Knowledge/World Café

In a Knowledge/World Café, small groups seated around tables discuss different themes in several rounds. The format is flexible and adapts to foster collaborative dialogue.

- Clarify the purpose! Why are you bringing people together?
- Create a hospitable space, from the invitation to the physical set-up.
- Explore questions that matter to the participants! Explore a single question, or several questions in progressive steps.
- Encourage everyone's contribution, from actively contributing ideas and perspectives to active listening.
- Connect diverse perspectives by moving to different tables.
- Listen for insights and share discoveries. After several rounds be sure to meet as a larger group.

## Peer Assist

Peer Assist is the most economic way of designing a project and avoiding errors and mistakes based on others' experience and knowledge. A team starting up a new project or task (the hosts) call on another team having acquired experience rather than having to reinvent the wheel. It is worth using Peer Assist when: a team is facing a challenge, where the knowledge and experience of others will really help, and when the potential benefits outweigh the costs of travel.

## Storytelling

Storytelling is used in organizations as a communication tool to share knowledge with inspiration. The language used is authentic (focused on experiences rather than facts). Most people find the narrative form interesting and attractive. While storytelling has of course existed for thousands of years as a means of exchanging information and generating understanding, it is quite new as a deliberate tool for sharing knowledge within organizations. However, it is growing very rapidly, to the extent that it is becoming a favored technique among an increasing number of organizations and individuals.

## Community of Practice (CoP)

Six essential aspects of a successful CoP:

1. Strong community: Includes active members with lively interest. Member pool is often fluctuating.
2. Clear, well-defined domain: Focuses on a specific thematic orientation, relevant and meaningful for all members.
3. Linked to practice: The CoP is based on and linked to individual practice of its members.
4. Personal motivation: Members give priority to the CoP.
5. Mandate: Organizations are interested in concrete outcomes and support members with time and resources.
6. Informal structure: The CoP goes beyond organizational structures and links up units within and/or between the organizations.

## Lightning Talks

Lightning Talks are a series of short presentations on the same or diverse topics by different speakers lasting a few each as part of a single session.

They may occur virtually or face-to-face, as a moderated activity with each talk lasting five minutes, and/ or with experienced practitioners.

Use this technique to:

- Raise awareness about one or more topics in a short amount of time.
- Report on a project or group results and good practices.
- Enhance individual or group capacity to prepare succinct reports or presentations.
- Offer new perspectives.

## Share Fair

A Knowledge Fair or Share Fair is an effective technique for catalyzing sharing experiences and expertise it uses face-to-face participatory techniques to engage a group in conversation around implementation methods that have been effective in participants' work. The event highlights local application of knowledge, and the conversation involves the collaboration of many individuals, not just a select few. The knowledge shared in this setting is later synthesized and shared widely, thus supporting continuous improvement and learning.

## Visualization

Visualization is a technique to make presentations and discussions more efficient and effective. The spoken word is supported by a visual representation (text, pictures, graphics, objects, etc.). Current means are beamer or transparencies for presentations, and charts or cards for recording discussions.

This technique:

- Improves focus on the point under discussion.
- Makes the content easier to remember.
- Forces the speaker to prepare in advance and to use precise and concrete arguments.
- Reduces emotional implications in a heated discussion.
- Serves as documentation by recording statements, ideas, results, and to-do lists.

# **Appendix F: Final Event Report Template**

[Put logos of funders at the top]

**EVENT NAME**

**EVENT LOGO**

**(Make this text large. It is the focus of the cover page.)**

# Appendix G: Note-Taking Sheet Template

Date of session: \_\_\_\_\_

Session name: \_\_\_\_\_

Time of session: \_\_\_\_\_

Name of presenter(s): \_\_\_\_\_

Presenter's organizational affiliation: \_\_\_\_\_

Name of note taker: \_\_\_\_\_

Main topics or themes presented (3 to 5 words or phrases): \_\_\_\_\_

Challenges presented and ways to address them:

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What were the most interesting questions and discussions related to the presentation? Was there anything that surprised you?

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Quotes, takeaways, or next steps:

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# Appendix H: Example Pre-evaluation and Post-evaluation Surveys

## Pre-evaluation Survey: East Africa Share Fair

### 1. Background information:

Name: \_\_\_\_\_

Country where you work: \_\_\_\_\_

Job title: \_\_\_\_\_

Organization: \_\_\_\_\_

Gender: \_\_\_\_\_

### 2. What category best describes your organization? (select one)

- Medical/health organization
- Clinic/hospital/other service organization
- NGO/PVO (local and international)
- Government/ministry
- Private sector (for profit)
- Faith-based organization
- USAID/donor

- United Nations Agency
- Library
- University
- Research organization
- Civil society
- Health training institution
- Other. Please specify \_\_\_\_\_

**3. What is your main job function? (select one)**

- Policy maker
- Program manager
- Technical advisor
- Administrative staff
- Service provider/clinician
- Journalist
- Researcher/evaluator
- Teacher/trainer
- Librarian/information officer
- Student
- Other. Please specify \_\_\_\_\_

**4. What is your main reason for attending the share fair? (select all that apply)**

- To learn more about family planning in the East Africa Region
- To learn more about knowledge management
- Networking
- To share family planning strategies with my colleagues
- To present at a session
- Other. Please specify \_\_\_\_\_

**5. Do you have a background in knowledge management?**

- Yes                       No

**6. How would you rate your comfort level with knowledge management?**

- Expert
- Proficient
- Novice

**7. What do you hope to learn during the share fair?**

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**Post-evaluation Survey**

**1. Background information:**

Name: \_\_\_\_\_



Country where you work: \_\_\_\_\_

Job title: \_\_\_\_\_

Organization: \_\_\_\_\_

Gender: \_\_\_\_\_

**2. What category best describes your organization? (select one)**

- Medical/health organization
- Clinic/hospital/other service organization
- NGO/PVO (local and international)
- Government/ministry
- Private sector (for profit)
- Faith-based organization
- USAID/donor
- United Nations Agency
- Library
- University
- Research organization
- Civil society
- Health training institution
- Other. Please specify \_\_\_\_\_

**3. What is your main job function? (select one)**

- Policy maker
- Program manager
- Technical advisor
- Administrative staff
- Service provider/clinician
- Journalist
- Researcher/evaluator
- Teacher/trainer
- Librarian/information officer
- Student
- Other. Please specify \_\_\_\_\_

**4. What did you expect to learn during this share fair?**

**5. Were these expectations met?**

- Yes                       No

**6. Did you attend the Global Health Knowledge Collaborative event on Wednesday, September 10th?**

- Yes                       No

**7. Do you plan to continue or initiate involvement in these communities of practice after the share fair?**

Yes

No

**8. How would you rank the quality of the following? (place an X in the corresponding rank)**

	Excellent	Good	Fair	Poor
a. Venue and facilities				
b. Presenters				
c. Plenary sessions				
d. Breakout sessions				
e. Networking opportunities				

**9. AFTER the share fair, rate your knowledge management expertise:**

Greatly improved    Slightly improved    About the same

**10. What session did you enjoy the most, and why?**

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**11. On which topics would you have liked more information?**

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**12. On which topics would you have liked to devote less time?**

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**13. If you could describe this event in a few words, what would you say?**

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**14. Would you recommend an event like this to your colleagues?**

- Yes                       No

**15. Did you learn something at this event that you will use in your work?**

- Yes                       No

If yes, what? \_\_\_\_\_  
\_\_\_\_\_

**16. Did you learn something at this event that you will share with your colleagues?**

- Yes                       No

If yes, what? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Would you participate in an event like this again?**

- Yes                       No

**15. Other comments:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Appendix I. Promotion and Dissemination Plan Template

A promotion and dissemination plan should generally be organized in the following order:

- **Overview** - Briefly summarize the purpose of the plan.

Example: This plan details activities to promote a regional share fair and disseminate its findings and lessons learned.

- **Objectives** - Describe what you hope to achieve with your promotion and dissemination activities.

Example: Through our promotion and dissemination activities, we hope to: 1) create awareness (before the event) and generate enthusiasm (before, during and after the event) about the share fair; 2) document event highlights, and share lessons learned with both participants and interested individuals/organizations unable to attend in person; and 3) demonstrate the importance of knowledge management techniques in global health and development work

- **Audience(s)** - Describe your target audience(s).

Example: Our primary audience is share fair participants and other individuals/organizations working in the East Africa region on global health and development programs. We also hope to engage donors, global NGOs working in East Africa on global health and development, journalists, and knowledge management professionals working outside of global health and development.

- **Communication Channels** - Indicate which channels of communication you will use to reach your target audiences. These may include social media, personal emails, email distribution lists, media outreach, and word of mouth.

- **Activities** - Divide this section into activities *before*, *during* and *after* the event. If possible, assign a timeline to each phase.

- **Content & Materials to Develop** - Include a list of content and materials that need to be developed to support your promotion and dissemination efforts. This may include a press release, social media toolkit, website announcement, social media handout, and blog posts.

- **Roles and Responsibilities** - Be clear about roles and responsibilities, particularly if multiple organizations are working together to promote and disseminate event knowledge. Assign tasks to individuals or organizations, depending on who is involved.

# Appendix J. Sample Social Media Toolkit

## Social Media Toolkit Regional Knowledge Management Share Fair Arusha, Tanzania: April 13-14, 2016

### Overview

This social media toolkit has been developed for Regional Knowledge Management Share Fair attendees, to be held in Arusha on April 13-14, 2016.

The purpose of our social media efforts before, during, and after the event is to:

- Generate awareness and enthusiasm about the share fair
- Document event highlights and share lessons learned with both participants and interested individuals and organizations unable to attend in person
- Demonstrate the importance of knowledge management techniques in global health and development work in East, Central, and Southern Africa

### Start the conversation!

We're using Twitter and Facebook to promote the upcoming Regional Knowledge Management share fair, which will be attended by representatives from over 13 countries. Presenters will include health experts who lead, manage, and govern health and development programs, knowledge management thought leaders, ministry officials, USAID mission staff members, and key funding groups focused on advancing collaboration and learning. Share your ideas, photos, videos, quotes from your organization's leadership, and more in the lead-up to and during the event.

**The official hashtag is #KM4Africa**

### Activities now through April 13:

Help drive attention to the event and promote the use of knowledge management tools and approaches by sharing your ideas, priorities, and plans to use collaboration and learning to advance sustainable global health and development goals with our presenters, partners, and peers within your social media networks.

### Suggested Tweets:

- *@USAIDKenya @K4Health @ecsa\_hc @jumuiya are hosting a Regional Share Fair in Arusha April 13-14. Follow hashtag #KM4Africa for highlights!*
- How does knowledge management support global health and development? We'll answer that & more at the Regional Share Fair April 13-14 #KM4Africa
- Do you work in global health and development in Africa? If you could ask your peers one question about their work, what would it be? #KM4Africa

Note: Your organization may also wish to tweet details about your presentations at the share fair, or describe the knowledge management methods you already employ. These are also valuable ways to promote the share fair and its purpose: to expand knowledge management capacity. Please use the #KM4Africa hashtag so that we can retweet/share your posts and to help us track these tweets.

## Suggested Facebook posts:

*Representatives from 13 African countries are gathering in Arusha from April 13-14 for a Regional Knowledge Management Share Fair. We'll review knowledge management tools and approaches that can be used to support sustainable global health and development goals across East, Central, and Southern Africa. Follow us here for updates and event highlights.*

*We're looking forward to attending the 2016 Regional Share Fair with USAID Kenya and East Africa, K4Health, the East Central and Southern Africa Health Community, and the East African Community/Lake Victoria Basin Commission on April 13-14. Follow #KM4Africa on Twitter for live updates from the event!*

## Activities during the share fair (April 13 & 14):

While social media is permitted and encouraged throughout the event, we have scheduled five minutes at the end of each session to give participants designated time to post comments, questions, and highlights to social media.

Keeping with the spirit of the share fair, K4Health staff will be available to help answer individual questions about posting to Twitter and Facebook and using social media for knowledge management during these breaks. A social media card with the event's hashtag and handles of organizing partners and cohosts will be distributed.

We hope that you will help lead the online discussion about the share fair by sharing quotes from presenters and reflections on key themes.

*As a reminder, some participants may share information that they only feel comfortable sharing with other event participants. Please use your discretion regarding the information you share publicly. When in doubt, ask your peer if you can share their information.*

## Activities after the event (April 15 onward):

K4Health is planning to write an event summary on our blog; we will share this link with the event organizers. We hope others will consider writing about the share fair on their blogs, websites, and other online platforms. If you do, please share the link with Anne Kott, K4Health's Communications Director (akott1@jhu.edu) so that K4Health can help promote it.

Additionally, please consider using the hashtag #KM4Africa after the event for all knowledge management-related social media posts.

## Engage with event organizers and cohosts

Organization	Twitter	Facebook
USAID	@USAID	facebook.com/USAID
USAID Kenya and East Africa	@USAIDKenya	facebook.com/USAIDKenya
Knowledge for Health (K4Health) Project	@K4Health	facebook.com/k4health
East African Community/Lake Victoria Basin Commission	@jumuiya	facebook.com/proudlyeastafican
East, Central & Southern Africa Health Community	@ECSA_HC	facebook.com/ecsahc

Contact Jarret Cassaniti (jarret.cassaniti@jhu.edu) at K4Health with questions about the event.

This guide is made possible by the support of the American People through the United States Agency for International Development (USAID). The Knowledge for Health (K4Health) Project is supported by USAID's Office of Population and Reproductive Health, Bureau for Global Health, under Cooperative Agreement #AID-OAA-A-13-00068 with the Johns Hopkins University. K4Health is led by the Johns Hopkins Center for Communication Programs (CCP) in collaboration with FHI 360, Management Sciences for Health, and IntraHealth International.



