



Assessing the Integration of Knowledge Management in Family Planning Costed Implementation Plans

CHECKLIST

- Ensure the strategic use of KM tools and techniques

Knowledge
SUCCESS

Acknowledgements

This checklist is made possible by the support of the American People through the United States Agency for International Development (USAID) under the Knowledge SUCCESS (Strengthening Use, Capacity, Collaboration, Exchange, Synthesis, and Sharing) Project. Knowledge SUCCESS is supported by USAID's Bureau for Global Health, Office of Population and Reproductive Health and led by the Johns Hopkins Center for Communication Programs (CCP) in partnership with Amref Health Africa, The Busara Center for Behavioral Economics (Busara), and FHI 360. The contents of this checklist are the sole responsibility of CCP. The information provided in this document does not necessarily reflect the views of USAID, the United States Government, or Johns Hopkins University.

Context

Costed Implementation Plans (CIPs) are multi-year roadmaps that reflect a government's priority activities to achieve family planning and reproductive health (FP/RH) outcomes. Whether the plans exist at the national or sub-national level, they give donors and partners a clear idea of how to collaborate with the government and other key stakeholders, and where to meet them in terms of family planning gaps and priority actions.

Increasingly, the technical working groups drafting CIPs are identifying knowledge management (KM) needs and choosing to integrate KM activities into their CIPs to strengthen and improve FP/RH programs. **Knowledge management is the systematic process of collecting knowledge and connecting people to it, so they can work more effectively and efficiently.** It describes a set of skills and approaches aimed at helping people find, share, and use essential knowledge. When people share what they know and can find what they need, programs can reach their full potential and avoid repeating costly mistakes. This translates into better outcomes for individuals, communities, and healthcare systems.

Intentionally incorporating KM strategies and activities into a country's CIP clearly demonstrates the importance of KM to achieving FP/RH objectives and reinforces follow through. Common KM priorities that are finding their way into CIPs include documenting lessons learned, sharing what works and what doesn't in FP/RH programming, and translating research and evidence into implementation. These stakeholders place collaboration, in particular, at the top of their agenda, and use lessons learned from the CIP to inform and/or reorient strategies and interventions, in order to adapt actions on the basis of best practice and lessons learned, for greater effectiveness and efficiency.

Intended Users and Purpose of This Checklist

This checklist is designed to help stakeholders identify potential KM gaps in current CIP implementation, which can be strengthened when drafting the next CIP. Additionally, when a country is considering drafting its very first CIP, this checklist can be used to assess the KM needs that can be addressed. It will help ministries of health, donors, technical and financial partners, and other stakeholders responsible for the assessment, development, implementation, monitoring, and evaluation of CIPs to ensure the existence and strategic use of KM tools and techniques, such as the documentation of best practices and lessons learned, the creation of frameworks for sharing of information internally and externally, and the availability and storage of resources useful to the implementation of activities, among others.

The checklist covers the various elements of the [knowledge management cycle](#) (capture, synthesis, sharing, evaluation, and generation of knowledge), enabling users to optimize KM within the CIP framework.

In addition to informing CIPs, this checklist can be used in the development of strategic plans for FP/RH, to engage stakeholders in considering KM, developing a formal KM strategy, implementing the strategy, and monitoring and evaluating it. That said, the checklist can also be consulted during mid-term or follow-up evaluations of KM initiatives, to gain a clearer picture of how KM is progressing and what improvements need to be made.

KM Tools and Techniques

Common KM tools and techniques include those that **collect and synthesize knowledge**, such as websites and publications, as well as those that **connect people to knowledge and to each other**, such as meetings, conferences, and peer assists.

Effective KM strategies often involve the use of several KM tools and techniques (see the KM tools and techniques matrix on p. 4-5 of the [Knowledge Management Pocket Guide for Global Health Programs](#)). When determining which KM tools and techniques to use, select those that will meet the knowledge needs of your target audience for the CIP. Ideally, try to select a mix of KM tools and techniques that both gather knowledge and connect people to that knowledge, and focus on approaches that will have the greatest impact on the most under-represented members of the target audience.

If KM is integrated into the CIP and implemented, KM will be embedded into the planning, implementation, and monitoring and evaluation (M&E) of FP/RH programs. One of the goals of systematically integrating KM into your FP/RH programs is to be more intentional in the KM approaches you use and to be equitable in those KM approaches. Many KM approaches can be implemented inexpensively and yield compelling results, such as after-action reviews and peer assists. In addition, you can often take simple but meaningful steps to ensure effective and equitable KM interventions, such as ensuring diverse speaker groups for webinars and conferences, being mindful of how roles are assigned to project staff, and rotating meeting facilitation to distribute power and make meetings more dynamic.

How To Use This Checklist

Who should complete the checklist?

First, we recommend that the checklist be completed by the Ministry of Health (MOH), who may opt to involve close technical partners that are members of a subcommittee of the family planning technical working group responsible for the CIP. After this MOH-led subcommittee completes the checklist, they should share it with the larger family planning technical working group that engages various stakeholders (civil society organizations, religious leaders, implementing partners, young people, etc.). It is preferable for the checklist to be completed by a smaller sized sub-committee of the technical working group or task force responsible for drafting the CIP, even if some or all of the questions and answers need to be communicated to the entire technical working group in order to inform implementation. Although this may vary from country to country, it is generally not necessary to create a new sub-committee or task force dedicated to KM for the purpose of completing this checklist, incorporating KM into the CIP, and overseeing implementation of KM activities in the CIP. In countries where creating a KM sub-committee would be an obstacle, we recommend using an existing sub-committee to ensure that KM is naturally integrated into continuing conversations.

For optimal use of this checklist, the sub-committee should first consult key KM resources, including the [Knowledge Management Pocket Guide for Global Health Programs](#) and the [Checklist for Assessing Equity in Knowledge Management Initiatives](#), to ensure that it fully understands what KM is, why it is important, and how it can be used systematically to improve FP/RH programs. A two-hour workshop to orient stakeholders on KM has proved useful for CIP stakeholders in some countries and may be considered.

How do you answer the questions and interpret the responses?

The checklist is organized by the following four topic areas: 1) Planning, 2) Implementation, 3) Monitoring & Evaluation, and 4) Human, Technological, and Financial Resources.

The subcommittee should respond to the questions under each topic area. Read each question carefully and respond “yes” (with a corresponding score of 2), “partial” (score of 1), or “no” (score of 0). For each question, a notes section is provided to allow for rationale or clarifications about your responses, or aspects that might require deeper discussion with the full working group or other partners external to the working group (such as those with budgeting or implementation experience).

Total the scores for the questions in each section to obtain an assessment of whether your KM practices are at the beginner, intermediate, or advanced stage. Links to supporting resources are also provided to help you advance your KM practice.

CHECKLIST QUESTIONS



Planning for KM

Question	No (0)	Partial (1)	Yes (2)
1. Has a KM needs assessment been conducted to understand the capacity for exchanging knowledge in your health program and to identify knowledge sharing gaps?			
Notes :			
2. Does the CIP include a KM strategy?			
Notes :			
3. Does the KM strategy define clear objectives?			
Notes :			
4. Are the activities in the KM strategy underway or completed?			
Notes :			
5. Are there expected outcomes linked to each KM activity within the CIP (e.g., improved collaboration, improved learning, better decision-making, improved services)?			
Notes :			
TOTAL SCORE			

Interpreting your score

<p>Score 0-2: Beginner</p> <p>There is no clear KM strategy.</p>	<p>Score 3-5: Intermediate</p> <p>Although some KM activities are underway, there is no overall or comprehensive KM strategy to guide activities.</p>	<p>Score 6-8: Advanced</p> <p>There is a comprehensive and clear KM strategy.</p>
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Recommendations for Beginner scores:

- Consult the [The Knowledge Management Pocket Guide for Global Health Programs](#) and other key resources to learn more about the basic principles of KM.
- Establish a KM strategy to be included in the CIP.

Recommendations for Intermediate scores:

- Assess KM needs in relation to CIP objectives with the CIP Task Force and/or Technical Working Group and discuss results.
- If you've received several "partial" answers, or if you're not sure how to respond, you may need to confirm who is the right partner to answer. Building relationships with colleagues to collaborate on finding these answers is one of the reasons this tool is considered useful.

Recommendations for Advanced scores:

- Review responses that could be strengthened.
- Take this opportunity to ensure that you've thought through the [Checklist for Assessing Equity in Knowledge Management Initiatives](#) and that your KM strategy and activities are as inclusive as possible.

Key resources:

- **Learn how to use KM:** Get the information and know-how you need, when you need it, to improve your healthcare programs in the [Knowledge Management Pocket Guide for Global Health Programs](#).
- **Conduct an information needs assessment:** Understand the current knowledge exchange capacity in your healthcare program in this training module in the [Knowledge Management Training Package: Assess Needs](#).
- **Developing a KM strategy:** Discover the key elements of a KM strategy in this training module in the [Knowledge Management Training Package: Design Strategy](#).



Implementing KM

Question	Score		
	No (0)	Partial (1)	Yes (2)
1. Are the main results of FP/RH programs shared in formats that are accessible to government and other program stakeholders (e.g., briefing notes, fact sheets, infographics)?			
Notes :			
2. Is information on successes and lessons learned from FP/RH activities shared by implementing partners at the community, district, regional, and national levels?			
Notes :			
3. Are reports and other written documents drafted in a way that resonates with local stakeholders?			
Notes :			
4. Do program reports and other written documents take into account the views of community members (e.g., through interviews or testimonials)?			
Notes :			
5. Do reports and other written documents use visual elements (e.g., photos, graphs, diagrams) to easily communicate and reinforce key messages?			
Notes :			
6. Is information on FP/RH shared through various means (e.g., forums, conferences, webinars, meetings) at local, regional, national, and international levels?			
Notes :			
7. Are program results and lessons learned used to inform decision-making?			
Notes :			
TOTAL SCORE			

Interpreting your score

Score 0-4: Beginner Few, if any, formal KM tools and techniques are used to document, store, and share information.	Score 5-9: Intermediate Some KM tools and techniques are used but not in a formal or systematic way.	Score 10-14: Advanced KM tools and techniques are implemented, both formally and systematically.
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Recommendations for Beginner scores:

- Explore the range of KM tools and techniques that may be relevant by referring to the matrix on page 4-5 of the [Knowledge Management Pocket Guide for Global Health Programs](#).
- Implement systematic, simple, and harmonized KM tools and techniques within the CIP framework.
- Remember to use KM as part of the CIP development and implementation process to communicate progress on the CIP.

Recommendations for Intermediate scores:

- Revisit your lowest scores and discuss what obstacles exist and how they could be overcome to achieve a "yes" response.

Recommendations for Advanced scores:

- Revisit any responses that could be strengthened.
- Take this opportunity to consider how the quality of your KM implementation may be improved by, for example, diversifying tools and techniques used or scaling them up further.

Key resources:

- **Explore KM tools and techniques:** Select KM tools and techniques that collect information and connect people to each other in this training module on the [KM Training Package: Create and Iterate](#).
- **Learn how to implement KM approaches:** Review [the KM Training Package](#) for templates, slides, and resources on how to implement various KM approaches.



Monitoring and Evaluating KM

Question	Score		
	No (0)	Partial (1)	Yes (2)
1. Are KM activities included in the overarching CIP monitoring and evaluation plan (e.g., number of results-sharing meetings, number of best practice sharing documents)?			
Notes :			
2. Does the monitoring and evaluation plan for the CIP include KM indicators to assess reach, engagement, usefulness, and outcomes of the KM activities?			
Notes :			
3. Do you collect feedback from different stakeholders (healthcare staff, program managers, community members, decision-makers) on their knowledge needs and KM practices?			
Notes :			
4. Are documentation activities carried out (e.g., annual review, mid-term review, evaluation report)?			
Notes :			
5. Are the documentations regularly shared with a diverse audience (e.g., through scientific journals, webinars, sharing meetings, blogs)?			
Notes :			
TOTAL SCORE			

Interpreting your score

Score 0-3: Beginner KM monitoring and evaluation needs to be better planned for.	Score 4-7: Intermediate There are some initiatives in place to monitor and evaluate KM.	Score 8-10: Advanced There is a strong monitoring and evaluation plan for KM in place.
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Recommendations for Beginner scores:

- Check with the steering committee or other body responsible for overseeing the monitoring and evaluation of CIP implementation to determine whether the formal monitoring and evaluation mechanism encompasses KM activities (which is preferable) or whether KM activities require a separate monitoring and evaluation effort (which is less sustainable).
- Identify and define KM indicators in the CIP monitoring and evaluation plan.
- Create a plan for sharing the results of monitoring and evaluation specific to KM with stakeholders. Bear in mind that it may be necessary to ensure coordination between several thematic groups if KM activities fall under several priority action sections in the CIP.
- Don't forget to use KM as part of the CIP development and implementation process to communicate progress in implementing the CIP.

Recommendations for Intermediate scores:

- Revisit your lowest scores and discuss what obstacles exist and how they could be overcome to achieve a "yes" response.

Recommendations for Advanced scores:

- Revisit responses that could be strengthened.
- Take this opportunity to reflect on how you can improve the quality of your monitoring and evaluation efforts by, for example, ensuring that results are adequately disseminated to inform decision-making.

Key resources:

- **Select KM indicators:** Review the [KM Indicator Library](#) to select indicators to measure and demonstrate the value of your KM activities.
- **Monitor your KM initiatives:** Learn how to track what is occurring and compare it with what you had initially planned to accomplish in this training module on the [KM Training Package: Mobilize and Monitor](#).
- **Conduct a KM evaluation:** Assess how well you achieved your KM objectives in this training module on the [KM Training Package: Evaluate and Evolve](#).



Human, Technological, and Financial Resources

Question	Score		
	No (0)	Partial (1)	Yes (2)
1. Are there human resources (e.g., staff) dedicated to KM at the national or sub-national level?			
Notes :			
2. Have KM capacity-strengthening activities been carried out for stakeholders at national and sub-national levels?			
Notes :			
3. Are the appropriate tools and technologies available for the selected KM activities (e.g., Internet connection, computers, cell phones, printed materials where needed)?			
Notes :			
4. Is there a budget allocated to KM activities at national and sub-national levels?			
Notes :			
TOTAL SCORE			

Interpreting your score

Score 0-2 : Beginner There are insufficient human, technological, and/or financial resources for KM.	Score 3-5: Intermediate Resources are dedicated to KM but not sufficient.	Score from 6 to 8: Advanced There are sufficient human, technological, and financial resources for KM.
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Recommendations for Beginner scores:

- Revisit your lowest scores and discuss what obstacles exist and how they could be overcome to achieve a "yes" response.

Recommendations for Intermediate scores:

- Ensure that the human, technological, and financial resources allocated to KM are properly used.
- Revisit your lowest scores and discuss what obstacles exist and how they could be overcome to achieve a "yes" answer.

Recommendations for Advanced scores:

- Revisit any responses that could be strengthened.

Key Resources:

- **Develop a skills matrix and include KM in job descriptions:** Record the skills and competencies of each team member and include KM in job descriptions using the templates available in this training module on the [Knowledge Management Training Package: Create and Iterate](#).
- **Identify your KM team:** Explore the common skills required for KM activities in Step 3.1 of the [Building Better Programs Guide](#).

