



The Knowledge Management Training Package for Global Health Programs:

Quick-Start Guide for Trainers

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Acknowledgments

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The Knowledge Management Training Package for Global Health Programs

Develop skills. Strengthen capacity. Build better programs.

When global health workers and professionals have access to high-quality scientific evidence and programmatic experience, they can do their jobs more efficiently and effectively, which helps save and improve people's lives. The *Knowledge Management Training Package for Global Health Programs* was developed to help trainers and health program managers develop the capacity of health care workers and other health and development practitioners to manage and share critical knowledge needed to deliver results. Knowledge management (KM) for global health is the approach that the KM Training Package calls attention to in order to make this happen at all levels of the health system—from the global, regional, and national levels to the community level.

The KM Training Package consists of a comprehensive set of training materials, including trainer's guides, presentation slides, exercises, tools, and templates, to share the power of knowledge management.

About Knowledge Management

Knowledge management is a systematic process of generating, collecting, synthesizing, and sharing knowledge. It connects people to knowledge and to each other, so that individuals, teams, and projects can work more efficiently and effectively. While KM brings together people, processes, and technology, it is inherently a social science that focuses on the way that people interact and share knowledge with each other. Historically, KM has been applied at the organizational level to improve employee performance and facilitate innovation. More recently, its definition and practice has expanded to be used in both organizations and programs to facilitate collaboration and knowledge sharing at the national, regional, or global levels.

KM helps to:

- optimize scarce resources,
- reduce duplication of effort by mapping who is doing what,
- ensure those working in geographically dispersed locations are effectively communicating and coordinating with one another, and
- ensure relevant knowledge flows up, down, and across the health care system.

The Knowledge Management Road Map

The KM Training Package was built around the Knowledge Management Road Map—a five-step systematic process for generating, collecting, analyzing, synthesizing, and sharing knowledge—developed by the Knowledge for Health Project. The five steps are:

- **Step 1: Assess Needs** to understand the extent of the health program challenge and identify how KM may help solve it
- **Step 2: Design Strategy** to plan how to improve your health program using KM interventions
- **Step 3: Create and Iterate** using new KM tools or adapting existing ones to meet your health program’s needs
- **Step 4: Mobilize and Monitor** by implementing KM tools and techniques, monitoring their effects, and adapting your approaches and activities to respond to changing needs and realities
- **Step 5: Evaluate and Evolve** to explain how well you achieved your KM objectives, identify factors that contributed to or hindered your intervention’s success and its impact on program outcomes, and use these findings to influence future programming



The KM Road Map can be applied to any project or program, no matter how big or small your budget or what level you are focused on. For more details on each step of the KM Road Map, please refer to K4Health’s seminal KM guide, *Building Better Programs: A Step-by-Step Guide to Using Knowledge Management in Global Health* (available on the [About](#) page of the KM Training Package website). Also available on the About page is *The Knowledge Management Pocket Guide for Global Health Programs*, which provides a basic overview of the KM Road Map.

How to Use the Knowledge Management Training Package for Global Health Programs

The KM Training Package consists of:

- Six key training [modules centered around the KM Road Map](#)—the first module provides an introduction to KM and the others correspond to each of the five steps in the KM Road Map
- Training [modules for specific types of KM approaches](#)—that is, for KM tools and techniques that

can be used to collect, synthesize, and share knowledge, such as communities of practice, share fairs, eLearning courses, and information architecture principles and processes to organize content

- Background materials for trainers to help [design a training course](#), including sample training agendas, guides to different tools for getting feedback from training participants, pre- and post-training questions that can be used to gauge knowledge gains among participants, and tips for effective facilitation

The modules have been organized to allow trainers to use the materials sequentially if interested in providing participants a thorough KM training workshop, or to mix and match the modules of interest to meet participants' particular needs.

Sample Training Agendas

To illustrate how the modules can be organized into a training workshop, we have included three sample training agendas in the KM Training Package:

- **1-day agenda:** For trainers who want to provide an introduction to KM and a brief overview of how to apply KM in health programs, using the KM Road Map as the foundation. This agenda is a good option for people who have limited exposure to KM to get their buy-in to invest further time and resources in the approach, showcasing how KM can be used to improve a global health program in practical terms.

Key 1-Day Agenda Elements
Introduction to Training
KM Introduction (KM Video and KM: Why, What, How) Exercise: Understanding Our Own KM Practices KM is Systematic: The Road Map and KM Tools and Techniques
Lunch
KM is Systematic: The Road Map and KM Tools and Techniques (continued) Example from Indonesia Exercise: How Can KM Help Your Program

- **3.5-day agenda:** Starts with an overview of KM, as in the 1-day agenda, but then expands on that foundational knowledge by covering in detail the five steps of the KM Road Map to teach participants how to apply KM in their health programs.

Key 3.5-Day Agenda Elements			
Day 1	Day 2	Day 3	Day 4 (½-day)
Introduction to Training	Expectation Wall	Expectation Wall	Expectation Wall
What is KM	Step 1: Assess Needs	Step 3: Create and Iterate	Step 5: Evaluate and Evolve Training Wrap-up
Lunch	Lunch	Lunch	Lunch
What is KM	Step 2: Design Strategy	Step 4: Mobilize and Monitor	

- **5-day agenda:** Builds on the 3.5-day agenda, adding training sessions to explore the following four KM tools and techniques that a health program can use to share and organize the knowledge produced by the program:
 - Share fairs
 - Communities of practice
 - eLearning
 - Information architecture principles and processes to organize content

Key 5-Day Agenda Elements				
Day 1	Day 2	Day 3	Day 4	Day 5
Introduction to Training	Expectation Wall	Expectation Wall	Expectation Wall	Expectation Wall
What is KM?	Step 1: Assess Needs	Step 3: Create and Iterate	Step 3: Example of a KM Tool and Technique for “Asking”: Communities of Practice	Step 3: Example of a KM Tool and Technique for “Searching”: Organizing Content
Lunch	Lunch	Lunch	Lunch	Lunch
What is KM?	Step 2: Design Strategy	Step 3: Example of a KM Tool and Technique for “Telling”: Share Fair	Step 3: Example of a KM Tool and Technique for “Publishing”: eLearning	Step 4: Mobilize and Monitor
				Step 5: Evaluate and Evolve

Training Module Components

Three types of **core materials** are included in each training module:

- **Trainer’s Guide:** Each guide includes the module’s purpose, objectives, instructions for the Trainer, sample agenda for that module, and expected time needed to deliver the training module

in a workshop.

- **Presentations:** Each module contains one to three PowerPoint slide decks—with detailed presenter notes in the notes section of the slides—that the trainer can use or adapt to explain the content of the training module to workshop participants.
- **Exercises:** Exercises are included throughout the training modules (at least one in each module) to promote interactivity during the workshop, allow participants to practice putting the theory from the didactic presentations into action, and demonstrate selected KM tools and techniques in the process.

Each training module also includes **supplementary materials** to provide additional insight or extra options for the trainer to include in the workshop or in the work setting. These supplements include tools, templates, sample outputs, guidebooks, and additional readings.

Make This Your Own: Adaptation Guidance

Although the KM Training Package has been developed with the intention of delivering the content in a face-to-face setting, it can also be delivered virtually or through a blended-learning approach (i.e., a combination of face-to-face and virtual sessions). We encourage you to think creatively about designing your training workshop based on your needs and available resources. For example, you could start with the [1-day training agenda](#) and then implement the [KM Road Map step modules](#) over time as you develop or implement the work plan for your health program, as appropriate. You may also devote more or less time on a particular KM Road Map step based on previous work, available time, or access to key stakeholders.

Feel free to use the individual resources included in each training module exactly as they are if they meet your needs and those of your workshop participants. However, to ensure the content is most useful to the participants, particularly with regard to the PowerPoint presentations, we anticipate the materials will need to be adapted in order to make them culturally, contextually, and technically relevant. Some ideas for what you can adapt:

- Replace the global-level examples included in the PowerPoint slides with local or project-specific examples
- Add context-specific content to the slides, such as your own challenges, goals, processes, and protocols.
- Include culturally appropriate photos on the slides
- Make the exercises more relevant by replacing the global examples with project-specific ones. For example, the [card sorting exercise to organize resources](#) instructs participants to organize family planning-related categories into a cohesive structure. If workshop participants work primarily on HIV programs, however, then you can replace the list of family planning-related categories with HIV-related categories instead.

Note the core resources in the KM Training Package (trainer’s guides, presentations, and exercises) are provided in editable formats (Microsoft Word documents and PowerPoint slides) to facilitate adaptation.

No permission is required to adapt the materials, but we would love to hear how you are using and adapting the KM Training Package. We plan to create a space on the KM Training Package website to share such experiences so that others may benefit from them. Send your feedback to:

KMCollection@k4health.org.

Overall Training Considerations

Some key issues to consider when planning the training are:

- **Decide on the budget:** Making the training a priority in the work plan and including training as its own budget line item will ensure appropriate allocation of staff time and other resources. Setting a budget early in the process can help determine the size and scope of the training workshop.
- **Develop clear goals and objectives:** We have provided three agenda options (1 day, 3.5 days, 5 days) to meet varying needs, but we encourage you to spend time with your team to develop clear goals and objectives for the training workshop, adapting the agendas as needed, before finalizing the training plan.
- **Gather feedback:** Understanding participant experiences can help improve current and future trainings. Consider implementing short quizzes before and after the workshop or each workshop module. We have provided a list of questions you may use or adapt in the [question bank](#). We have found that continually assessing the participants' understanding of session content can be a fun way to engage the group and have highlighted three methods you can use throughout the training:
 - [Expectation board](#)
 - [Audience response system](#)
 - Informal conversations over breaks
- **Ensure availability of equipment and resources:** The KM Training Package has been developed under the assumption that electricity and Internet connection are available. A projector and computer or laptop would be needed to project slide presentations and other resources. In cases where this might not be possible, we would recommend printing resources in advance.
- **Provide visual resources:** Three key graphics—the KM Road Map, the KM Tools and Techniques Matrix, and the KM Logic Model—have been mentioned throughout the training, and we suggest hanging them as posters in the workshop venue.

Last, and most importantly, HAVE FUN!

Glossary

Following are definitions of several key terms used throughout the KM Training Package (as defined by the KM Training Package creators).

Knowledge Management: A systematic process of collecting knowledge and connecting people to it so they can act effectively and efficiently.

Knowledge Management Road Map: A five-step systematic process for assessing, generating, collecting, synthesizing, and sharing knowledge. The five steps are: (1) Assess Needs, (2) Design Strategy, (3) Create and Iterate, (4) Mobilize and Monitor, and (5) Evaluate and Evolve.

Knowledge Management Road Map Outputs: The final results or deliverables produced after a health program successfully completes each step in the KM Road Map. For example, the output of Step 1 is a synthesis of your needs assessment findings in a suitable format, such as a brief or report.

Knowledge Management Training Package Outputs: Completion of the exercises included in each module of the KM Training Package, which forms the groundwork for developing the KM Road Map outputs. For example, in the Step 1 training module the output is to complete the exercise focused on exploring needs assessment questions and data collection methods; this can form the foundation for participants to develop and implement a needs assessment plan, culminating in a needs assessment findings report—the output of Step 1 in the KM Road Map. We make this distinction between outputs of the KM Road Map vs. the KM Training Package to clarify that participants who complete the KM Training Package training modules will not necessarily automatically and immediately produce KM Road Map outputs, depending on the particular step in the KM Road Map and how the training is set up.

Knowledge Management Strategy: The blueprint that guides a team in developing and implementing KM activities to improve the health program. Key components of a KM strategy include KM intervention objectives, audiences, KM tools and techniques, information and communication technologies, budget, and implementation and monitoring and evaluation plans.

Knowledge Management Theory of Change: A description of how and why a set of KM activities are expected to lead to initial, intermediate, and long-term program outcomes over a specified period.

Knowledge Management Approach: One of four broad categories—Ask, Tell, Publish, or Search—that describes the type of KM method that a particular KM tool or technique uses to generate, capture, and share knowledge. For example, peer assists (a KM technique) makes use of Asking approaches in KM to elicit tacit knowledge, whereas job aids (a KM tool) make use of Publishing approaches to share explicit knowledge with people.

Knowledge Management Tool or Technique: A product or method that helps to collect information and/or connect people to that information. Some tools and techniques are especially useful for collecting explicit knowledge, such as publications, libraries, and eLearning courses, while other tools and techniques focus on engaging people in conversations to help facilitate knowledge exchange, especially tacit knowledge, such as knowledge cafes and communities of practice.

Explicit Knowledge: Information in a format that can be stored and shared with others, such as databases or publications.

Tacit Knowledge: Information in people's heads, for example, their experiences and know-how.