

This Case Story was submitted to the 2016 CLA Case Competition. The competition was open to individuals and organizations affiliated with USAID and gave participants an opportunity to promote their work and contribute to good practice that advances our understanding of collaborating, learning, and adapting in action.

## Peer Assists with a Twist: When People Meet for the First Time

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*Share Fair attendees gather for a break during a Peer Assist. Jarret Cassaniti.*

### What is the general context in which the story takes place?

In March 2014, USAID's Kenya-East Africa mission engaged the Knowledge for Health Project (K4Health) to strengthen knowledge management capacity for its intergovernmental partners, the East, Central, and Southern Africa Health Community; the East African Community; and the Lake Victoria Basin Commission. The project, which runs until December 2016, seeks to improve regional collaboration; share, learn, and scale up high-impact practices; boost the quality of health systems across countries; and reduce duplicative efforts.

As part of this work, K4Health designed and implemented a two-and-half-day regional "Share Fair" in partnership with its intergovernmental partners. The goal of the fair, held in Arusha, Tanzania, in April 2016, was to highlight knowledge management tools and techniques and to foster a network of knowledge management experts to accelerate innovation through collaboration, learning, and adapting. More than 100 attendees from 12 countries came together to share implementation challenges and successes, and returned to their home organizations with new perspectives and ideas aimed at improving health outcomes for the populations they serve.

To help advance the region's knowledge management capacity, the Share Fair team aligned the meeting objectives with the priorities in USAID's Vision for Health Systems Strengthening 2015–2019 and the Collaborating, Learning, and Adapting component of USAID missions' Country Development Cooperation Strategies. Share Fair objectives also supported the Sustainable Development Goals (SDGs), particularly SDG 3, which focuses on ensuring healthy lives, and SDG 17.9, which focuses on in-country capacity building through North-South, South-South, and triangular cooperation.

**What was the main challenge or opportunity you were addressing with this CLA approach or activity?**

The Share Fair brought together 102 participants, including representatives from governments, intergovernmental organizations, USAID missions, and NGOs. Attendees were librarians, data analysts, communication officers, project directors, and knowledge management experts from South Africa, South Sudan, and 11 countries in between. The diversity of attendees' organizations, job roles, countries of work, and knowledge, skills, and experience with K4Health (ranging from nonexistent to extensive) gave us the opportunity to facilitate in-depth discussions about common knowledge management goals and challenges and the critical advantage of having strategic, collaborative relationships with practitioners doing similar or complementary work.

An objective of the Share Fair was to showcase and model a variety of interactive knowledge management techniques, from simple to more complex. By modeling the Peer Assist technique, we hoped to expose select participants to the relative ease of using this technique with their organizations. A complementary goal of the fair was to highlight the attendees' diverse work experiences and link participants facing similar challenges. The exercise was meant to foster learning and give-and-take among peers who had either faced a similar challenge in their work or were experienced enough to synthesize the many components of the challenge and present a helpful perspective on how to address it.

Peer Assist exchanges are a valuable way to save time and money and lessen workers' frustration in difficult work situations. Brokering knowledge between the experienced and inexperienced attendees also helped the group bond; all the participants began to trust one another and ultimately created relationships that should last beyond the event.

A Peer Assist brings together a group of peers to elicit feedback on a problem, project, or activity and draw lessons from other participants' knowledge and experience. The individual or organization identifying the problem or challenge is called the "assiste"; the other members of the group are the "assistors." Peer Assists facilitate and provide designated time and space for knowledge sharing, participatory learning, and collective problem solving that can help people and projects avoid "making the same mistakes others have made" (USAID Learning Lab 2016). Those who participate strengthen their individual and team knowledge management capacity, sharpen their leadership and management skills, improve team integration and performance, and enhance their team's overall work environment and ability to achieve results.



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**Describe the CLA approach or activity, explaining how the activity integrated collaborating, learning, adapting culture, processes, and/or resources as applicable.**

While designing the Share Fair, K4Health considered the broad concept of a traditional Peer Assist and tailored it to a conference setting, in which not all attendees know one another. When designing the activity, we included several differences from traditional Peer Assist methodology, as outlined in [a video](#) based on the book *Learning to Fly - Practical Knowledge Management from Leading and Learning Organisations* by Chris Collison and Geoff Parcell (Capstone Publishing, 2001, 2004):

- A competitive selection process takes place, based on the value of the challenge and limited to the amount of available space and the number of available facilitators.
- The challenge was presented as an organizational issue, rather than an individual challenge, and the assistees represented organizational rather than individual experiences. They were represented by multiple staff.
- The event organizers identified the peers and the facilitator rather than the assistee; the assistors were unknown to the assistee before the Peer Assist.
- The assistor group was designed to be smaller, with 3–4 people instead of 8–10, based on the need to have additional discussions to establish a common foundation and build trust (this is not always needed when the assistors and assistees already know one another)
- We decided on the activity before we were positive that other attendees would have the expertise and knowledge about the situation the team/participant was facing.

The application included questions about the applicant’s contact information, organization, and knowledge management work. The main question in the application focused on the knowledge management challenge:

**Describe one current issue related to knowledge management that you or your team is facing or would like to address (maximum of 200 words) in order to support your health or development-related objectives; for example:**

*The East Africa Development Cooperative (EADC) works to bring organizations together to scale up best practices for infectious diseases as well as RMNCH. They know the importance of Knowledge Management in achieving these goals and have a knowledge management Strategy that focuses on coordination, documentation, and sharing. EADC also believes strongly in the importance of communications and its Communications Officer recently left the organization. There is discussion at EADC on whether to hire another Communications Officer, who has experience with knowledge management, or hire a knowledge management officer with experience in communication.*

EADC, represented by Mr. Mwape, therefore asks his peers for recommendations on the following question: I would like to hire someone to fill a knowledge management role; should I hire an expert in knowledge management, monitoring and evaluation, communications or information and technology?



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Fifteen other examples were listed to highlight the breadth and depth of potential challenges. In addition to considering the background information and the challenge, four requirements were established and framed as yes/no questions in the application:

- Are you able to identify a “real life” issue related to your knowledge management activities that could be addressed through strengthened knowledge management leadership and management skills?
- Are able to describe the history, context, and ideas regarding the issue to a group of eight peers?
- Are you willing to consider experiences from your peers that are relevant to the issue being discussed and take your learning back to your organization/project?
- Are you willing to participate in a follow-up discussion a few months after the Peer Assist session and share how some of the recommendations made by the group of peers have influenced your knowledge management issue(s)?

**Were there any special considerations during implementation (e.g., necessary resources, implementation challenges or obstacles, and enabling factors)?**

The table below outlines the 16-week process we used for planning and implementing the Peer Assist at the Share Fair:

Time (weeks)	Step
16-14	1. Decide if a Peer Assist is right for your conference, meeting, or event.
15	2. Develop application and grading criteria.
14-12	3. Release application.
10	4. Close application.
10-8	5. Review applications for fit and likelihood of finding relevant assistors; accept or reject.
9-7	6. Identify possible assistors and share list with assistees; allow assistees veto power over ultimate decision.
8-6	7. Ask potential assistors to participate.

Time (weeks)	Step
5	8. Share final list of assistors with assistee and other assistors.
4-1	9. Ask all involved to prepare by giving extra consideration to the issue, developing possible discussion points, and reviewing the Peer Assist process.
1 day	10. Introduce assistees to assistors at event.

Six groups applied to participate in the Peer Assist event at the Share Fair. We accepted four groups based on previously developed criteria. Due to unexpected work demands, two of the groups had to return to their organizations before the activity began. Those who had to leave early were disappointed, as were we, but we realized that having two well-structured and well managed Peer Assist groups was actually better than trying to negotiate four groups over the half-day.

Our biggest challenge was linking assistors with assistees based on the evolving attendance list. During the months leading up to the fair, our list expanded to as many as 132 and shrunk to 86 as people were added or removed based on their skill sets, roles, interest and our take on the overall mix of attendees. This added to our struggle to identify participants with similar experiences who would be willing to share sensitive work experiences without reservation. In a culture that operates with limited transparency and values hierarchy, finding professionals willing to discuss work struggles is difficult. Luckily, since we had strategically invited participants with relatively advanced soft skills and collaborative attitudes, we were optimistic about finding appropriate peers.

A closely related challenge revolved around identifying assistors whom the assistees would trust (and vice versa) and who had sufficient time to devote to the activity. Once we confirmed that the assistors had the right technical experiences, we needed to find out if they would fit well with the assistees. The Peer Assist requires not only trust and transparency, but also a sufficient amount of time to sort out the underlying issues and then develop appropriate next steps. We solved these challenges through thoughtful internal deliberations and then used a back-and-forth process with the assistors to ensure that the fit was right.

**With your initial challenge/opportunity in mind, what have been the most significant outcomes, results, or impacts of the activity or approach to date?**

A small group representing 16 percent of Share Fair attendees participated in the Peer Assist. This group responded to a survey about their experience at the conclusion of the activity. As the table illustrates, responses were very positive.

	Strongly Agree	Agree	Disagree	Strongly Disagree
The purpose of the Peer Assist and everyone's roles were clear.	100%	0%	0%	0%
The session facilitated participatory learning and collective problem solving beneficial to the health and development in the East, Central, and Southern Africa regions.	78%	22%	0%	0%
I intend to apply what I learned from the session in my work.	67%	33%	0%	0%
The facilitator helped to create a comfortable and welcoming environment and to build trust among participants to express themselves openly and freely.	63%	38%	0%	0%
I intend to keep in touch with participants to obtain updates on their activities and new lessons learned in the future.	56%	44%	0%	0%
The knowledge, best practices, lessons learned, and experiences shared during the session were relevant to my work.	44%	56%	0%	0%

Some participants identified the Peer Assist process as a knowledge management technique they would use in their organizations:

- “As an assistor, the lessons were not necessarily directly related to my work and challenges, but the process of developing recommendations and defining the challenge in a root cause analysis approach helped.”
- “If I encounter a problem/challenge I will try to set up a peer to help [brainstorm] on it and if it doesn't work then I will contact my peers out the Agency for help.”



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**If your project or activity is in the development phase or just recently underway (less than 1 year into implementation), how do you intend to track results and impact? What outcomes do you anticipate?**

Formative research activities include plans to measure outcomes after three months (July 2016), using in-depth qualitative interviews, and after six months (October 2016), through an online survey. The formative research activity seeks to answer the following research questions about the Peer Assist activity:

- Which social knowledge management techniques, tools, and approaches most effectively facilitated knowledge transfer and exchange during the Share Fair?
- Which social knowledge management tools were shared and adopted in practice by public health professionals after the Share Fair?
- To what extent has the knowledge (tacit and explicit) gained from the Share Fair been transferred from the participants to their contacts?
- What worked or did not work at the Share Fair in terms of event coordination, including logistics, venue, session topics, and facilitation, based on participants' perceptions and ratings of these elements?

Specific questions about the Peer Assist activity for both the assistors and assistees include:

- What would you say were the benefits of attending the session?
- Were there any aspects that you think could be improved in the future?
- In comparison to the other Share Fair sessions, how, if at all, do you think the Peer Assist format helped facilitate knowledge sharing and exchange?
- Have you been in contact with any of the assistors or assistee since the Share Fair?

**What were the most important lessons learned?**

The preparation process — establishing trust and ensuring that the assistors had experience related to the challenge and were willing to share them in a collegial atmosphere — was vital to the activity's success. The assistors were happy to discuss their challenges in a safe space, hear that others had had similar challenges, and learn that the challenges could be overcome with practical tools and approaches.

**Any other critical information you'd like to share?**

We framed the Peer Assist as a brainstorming session, but it was important to stress that the assistees were not required to adopt or act on the assistors' suggestions and recommendations unless they felt confident and comfortable doing so. Similarly, it was important to stress that after the



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Peer Assist was completed, the assistors were not obligated to continue to provide advice or support to the assistees, although we highlighted the benefits of doing so. The establishment of a feedback loop for follow-up could help sustain the relationships and knowledge-sharing practices set during the Peer Assist. Specific accounting of the challenges and discussions at the two Peer Assists are not included here to maintain confidentiality.

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