Assessment Phase 4: SHARE

Plan Learn Analyze **Share** Act

During the sharing phase, the team draws on external reviewers to strengthen and finalize the assessment report. The team may also seek input from local stakeholders to ensure the validity of the findings and recommendations. Increasingly this has been accomplished through in-country consultations with a cross-section of stakeholders that participated in the assessment. After feedback has been received and changes incorporated, the report is published—ideally, shared (electronically) with all stakeholders and made available on a website. All notes and documents related to the assessment are archived for easy retrieval.

Step 1: Disseminate Draft Report

The first step in the sharing phase is to disseminate the "master draft" for external review, preferably by reviewers who have strong technical expertise or country-specific knowledge of the material covered in the report. Reviewers should be able to identify whether the findings are plausible and whether the recommendations are actionable given the country context.

> TIP ► Have one person (either the team lead or team coordinator) serve as the point person for contacting reviewers. This person should be responsible for receiving and consolidating all comments on the draft, as well as coordinating with team members to incorporate feedback into their respective sections.

External reviewers usually include experts from any organizations that provided financial or technical support to the team during the assessment process. Reviewers could include representatives from USAID headquarters or country missions, the World Bank and International Finance Corporation, other donors, and local or regional organizations—

including the Ministry of Health and private sector organizations. After each round of reviews, the team lead and team coordinator should work with the experts on the specific subject matter, or local private sector experts, to incorporate feedback into their respective sections.

TIP ► If an in-country validation and prioritization workshop is not feasible, the external review stage should include a wider range of local stakeholders. Representatives from medical councils, private sector associations, NGOs (including women's organizations), and private provider networks, among others, should all have a chance to review the report

Step 2: Validate and Prioritize

After disseminating the draft report for external review, teams typically engage a wider range of local stakeholders to validate and prioritize the assessment's findings and recommendations. Convening local stakeholders to provide input through an in-country consultation has emerged as a best practice. This step is designed to draw on local knowledge and insights, and identify which of the recommendations are most feasible and should be prioritized as this effort moves from assessment to action.

If funding is available, teams can organize a one- or two-day workshop for stakeholders representing all sectors—public, nonprofit, and commercial, as well as the donor community. This workshop builds local ownership and results in a prioritized list of actions. A sample agenda provides an overview of the typical sequence and content of these meetings.

2.1 Identifying Workshop Participants

After feedback has been received from external reviewers, the team leader and team coordinator (possibly with help from the local logistics consultant) should identify stakeholders whose input will improve the final report.

This group should be a subset of the key informants interviewed during fieldwork, or organizations whose input is essential to getting local buy-in. Ensure strong and diverse representation from all sectors to get a range of views and build trust in the process and the assessment's recommendations. Remember to include groups that have been traditionally overlooked—women's organizations, networks of key populations, etc. In some cases, all stakeholders who were interviewed as part of the assessment are invited to the consultation.

To facilitate discussion and encourage active participation, ideally the maximum number of attendees would be no more than 40. Facilitation guidelines are available as a resource.

2.2 Workshop Logistics

Working with the logistics consultant as necessary, the team coordinator should secure a comfortable venue, refreshments, and other necessary materials, such as flip charts, sticky notes, and markers.

To strengthen local ownership, a local partner should be identified to help with issuing invitations, sending advance copies of the report, tracking RSVPs, and developing the agenda. Depending on the context, that partner could be the Ministry of Health, a private sector organization, or the local PPP technical working group, if one exists.

TIP ► Local support is critical to the success of the workshop. Make sure to secure high-level representation from key organizations, including the Ministry of Health, Ministry of Women/Family Affairs, and private sector associations or umbrella organizations. Representatives from these bodies should be invited to provide opening and/or closing

2.3 Workshop Structure

Start with a high-level overview. The facilitator—likely a member of the assessment team—should review the key findings and recommendations for each of the technical areas covered in the report. After a short break, the attendees can break up into smaller groups based on their area of expertise. To the extent possible, aim for a balance of women and men in the working groups. Provide printed copies of the specific chapter that each group will be reviewing. The group can then go review individual findings and recommendations and provide their insights. They should identify any errors, gaps, or inconsistencies, and prioritize the top three recommendations that should be implemented. This template may be useful in guiding the prioritization process, reminding participants to consider potential impact as well as feasibility. This feedback will help shape the final report and will help create a road map for action. Depending on the length of the workshop, this part can be broken up into two separate break-out sessions: one focused on the findings, and another focused on the recommendations. A completed prioritization exercise is available as an additional resource.

TIP ► Work with local counterparts ahead of time to prepare them to lead break-out sessions. This will help focus the discussion and ensure that one person or topic does not dominate the conversation.

After every group has finished reviewing its sections, participants reconvene in a final plenary session. Each group reports on its discussion, including explaining the rationale for its top three prioritized recommendations.

Next, participants select the five recommendations that they feel are most essential to strengthening the health system and leveraging the private health sector. During this “vote,” participants should be advised to consider “low-hanging fruit”—achievable actions that can build momentum for future collaboration and partnerships.

Step 3: Finalize the Report

Once the team has received comments from all reviewers, as well as from in-country workshop participants, it is time to finalize the report. The authors of each respective section are asked to make any necessary edits, although the team coordinator commonly tracks and consolidates all the revisions in a single document. Reports will benefit from professional editing to improve grammar, readability, and consistency, as well as formatting in accordance with the project or donor's branding guidelines.

TIP ► If the team held an in-country consultation, it will be important to write a short summary of the discussion including the top five prioritized recommendations. This summary should be included as an appendix, and may serve as the basis for an action plan outlining potential follow-on activities.

Step 4: Review and Archive

Once the report is final, recommended practice is to conduct an after-action review. The purpose of this step is to learn from each assessment, and advance practice. The team leader convenes a meeting (local private sector experts and the logistics consultant can be included virtually, if feasible) to review each phase of the assessment process and identify:

- What worked?
- What failed?
- Where were the unexpected obstacles? How did the team address them?
- What approaches or resources facilitated the assessment process?
- What was learned?
- How might the Assessment to Action guide be improved?

Capture feedback using sticky notes and then take photographs of the collective notes afterwards—this can facilitate summarizing the results of the discussion.

4.1 Disseminate Assessment Findings

It is important to disseminate the final report to all stakeholders who participated in the effort. The most practical way is to send an electronic version via email. Alternatively, a thank you email can be sent to stakeholders, with a link to the full version of the report residing on a publicly accessible website. The assessment and its findings may be relevant beyond the country participants, so making the report and any related products, such as a shorter brief [link to Malawi PSA brief on the SHOPS website], publicly available will further extend their utility.

TIP ► Developing a brief summary of the assessment report can help extend its reach beyond the country of interest. The best time to do this is upon finalizing the full report. SHOPS has developed a series of 12-page briefs [link to assessment briefs on SHOPS website] for country assessments conducted under the project.

4.2 Archive Documents

Key documents related to the assessment should be archived in a central location for easy retrieval. The team coordinator typically performs this task.