How To Guides

Introduction

Developing a How To Guide is an increasingly important process, as it enables the know-how of staff within an organisation to be captured, documented and made available to others. The simple aim is to help organisations make better and wider use of existing knowledge by drawing it out from selected people and making it available to a wider group. The ultimate goal is to capture an effective sequence or process with enough accuracy so that it can be repeated with the same good results. In development and humanitarian organisations, 'how to guides' can be used for a wide range of situations. The key is only to spend time developing these guides when there is a clear need and/or an articulated demand.

Useful 'how to guides' might be: i) related to programming or projects to address a specific problem, issue or challenge, e.g. HIV/AIDS or gender; ii) contain knowledge about a relationship with a particular type of stakeholder, e.g. donors; iii) give knowledge about key operational processes, e.g. fundraising or negotiation; iv) offer knowledge about a key system, technology or piece of equipment, e.g. how to access the intranet while travelling; or v) provide knowledge about the organisational culture and the internal infrastructure.

Detailed description of the process

Although there is no set formula for developing a 'how to guide', there are general guidelines:

- Focus: Decide on what specific knowledge and expertise you want to capture, and be clear about what the benefits will be. You may need to focus on the knowledge that is most important to the success of the organisation, relative to goals and objectives.
- Understand the audience: Establish who will be using the 'how to guide' before you start the research process, to ensure you pitch your research at an appropriate level of complexity. Consider other aspects of your audience that may be relevant, e.g. numbers, location, current knowledge, access to ICTs, etc.
- Find the knowledgeable sources: Identify the people who have the know-how you are seeking to capture. A staff pages system could be a good start, if you have one. Otherwise, ask people working on similar issues, or scan organisational literature.
- Choose appropriate researchers and the right questions: The researchers should be people with strong communication, interpersonal and interviewing skills, such as recruiters, trainers, counsellors etc. Get these people to work in workshop format with the knowledgeable sources and ask them to talk about what they do, when they do it, how they do it and why they do it. A tape recorder or note-taker is essential. It might also be worth having a potential user of the 'how to guide' present in order to ensure the right questions are being asked. This could also be done in a separate workshop of potential users.
- Organise, package and share: Once the information has been gathered, it can then be edited, organised and presented (or 'packaged') into the form that best meets the needs of the users. This may be a checklist, a manual or a set of guidelines which can then be made available either in hard copy or via an electronic medium.
- Apply, evaluate and adapt: 'How to guides' can sometimes result in documents that are never accessed or are quickly obsolete. In order to counteract this, it is necessary

to track use and regularly update the information.

Key points/practical tips

- 'How to guides' will only work when people share their experiences in an open fashion, so targeting knowledge that is a clear source of internal status or power could lead to a poor resource.
- Not all know-how can be captured, and some believe that knowledge collection through tools such as 'how to guides' is far less useful than a well connected internal network. In reality, a balance must be sought between the 'collection' and 'connection' approaches.

Example: 'How to guide' used by UNDP in the Europe and CIS Region

In the UNDP region of Eastern Europe and the Commonwealth of Independent States, 'how to guides' are used for project and programme design as an aid in development of programmes, projects or initiatives. The aim is to present readers with a concise overview of main debates and issues in the selected area, as well as a framework for developing projects and programmes conforming to the latest international good practice. The guides consist of three elements: i) introduction of an issue; ii) synthesis of methodological and strategic approaches for programming; and iii) a checklist for programme and project development. This last part forms the bulk of the guide, covering the main issues that need to be taken into consideration and presenting a range of FAQs (questions typically posed by programme officers, project and programme managers and others tasked with project development of implementation in the area), and sets out concise and practical responses. The final section sets out references, useful reading materials, web resources and UNDP project and programme contacts for further information.

Sources and further reading

- UNDP's WaterWiki: http://europeandcis.undp.org/Waterwiki.