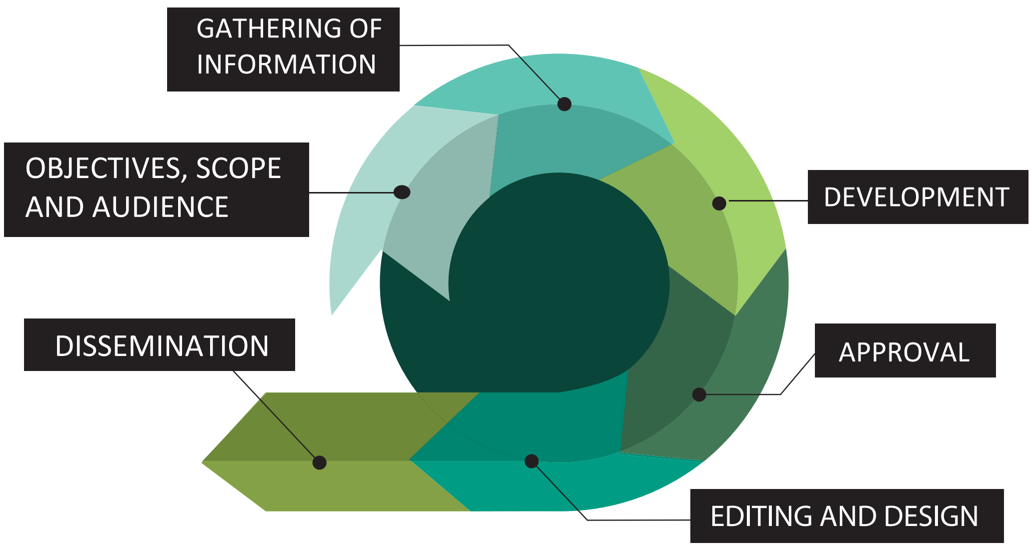
"How-To" Guide

What is it?

A how-to guide systematizes and documents a process, activity, practice, business model or methodology. The guide describes the various operations or steps in their logical sequence, usually indicating what must be done and how, where, when and by whom.

A how-to guide should be based on proven experience and should incorporate the keys to success for implementation. It also should contain references with supporting documentation.

How are they made?



1. Definition of objective, scope and audience

The first step in the development of a how-to guide should be to answer the following questions:

1. Objective: What do you want to achieve with the "how-to guide"? It is necessary to define the main goal, for example: to document a methodology in order to standardize a process or for replication.

2. Audience: Who is the target audience? It is necessary to identify to whom the how-to guide is directed, and what is expected from them. For example, using the guide, the potential audience could apply a solution to a particular problem.

3. Scope: What knowledge do we want to systematize and disseminate? It is necessary to identify high-level content and key messages that will be included in the how-to guide, for example: systematization of a methodology, the lessons learned, the context of the project, etc.

4. Key questions to be answered internally:

   » Who are the recipients of the how-to guide? What do they want to know and why? Is the organization producing the how-to interested in only one

MIN
Multilateral Investment Fund
Member of the IDB Group

concrete topic or area? Do they want to examine just one process or business model or more than one in order to compare and contrast? How is the information going to be used?

- » The reasons for developing of the how-to guide: internal or external? Does the how-to guide it have a learning objective? Is the guide expected to explain a process or business model? Replicate it? Showcase one part of a process or business model? Who is going to share the how-to guide and with whom?
- » What is expected in terms of scope and style? What means or channels of communication should be used for dissemination? Should it be presented as a story? As a technical report? In terms of lessons learned?

5. Selection of the consultant responsible for the how-to guide:

Among the considerations to be taken into account are:

- » Whether the how-to guide will be produced internally or externally. If it is going to be produced internally, consider whether is possible to have an "objective" and "neutral" vision; if it is external, how easy will it be to understand and systematize an experience developed by others?
- » If you decide to hire externally, will you use an individual consultant or a firm?
- » If you decide on an external consultant, in the selection criteria you need to consider many factors, including previous knowledge of the project, topic or area, proficiency in the language and experience. The consultant must be not only an expert in systematization but must also have proficiency in the area of the consultancy.

Whatever choice is finally made, one fundamental principle for all professionals developing case studies is to be receptive to learning from those with whom they are working. This attitude encourages the development of a process of mutual learning between "the systematizer" and "the systematized."

Documenting a how-to guide will also require other skills, such as:

- » Knowing how to write
- » Listening
- » Knowing how to collect information
- » Capacity for analysis
- » Capacity for reflection
- » Previous experience in systemizing processes

2. Collection of information

In this phase you should gather and analyze the material to be used for the production of the guide.

Possible sources of information:

- Project documentation: donors' memoranda, mission reports, project status reports (PSR), diary of the project, evaluation reports (interim and final), baseline studies, information on the project's monitoring and evaluation system, technical visits, etc.
- Interviews and/or focus groups with specialists or others involved in the matter.
- Questionnaires or surveys to gather specific data.
- Other knowledge products carried out for the project.

- Relevant documents on the subject or context of the project from external sources, which can provide additional information.

As a result of this review process, a first draft of the how-to guide, with a maximum length of 2 pages, will be produced. This first document should be kept deliberately short in order to give a snapshot of what will be documented in the final how-to guide.

3. Development of the guide

Structure. Here are the sections that should be included in a "how-to guide":

- **Prologue (optional):** The prologue is a brief piece that explains the motivations that led to the creation of the guide, or highlights some aspects that may be relevant or decisive to its interpretation.

- **Executive Summary:** The how-to guide must contain an opening section of no more than one page that clearly summarizes the content and scope of the guide.

- **Introduction:** This section should present the project's key information in order to provide context to the reader:

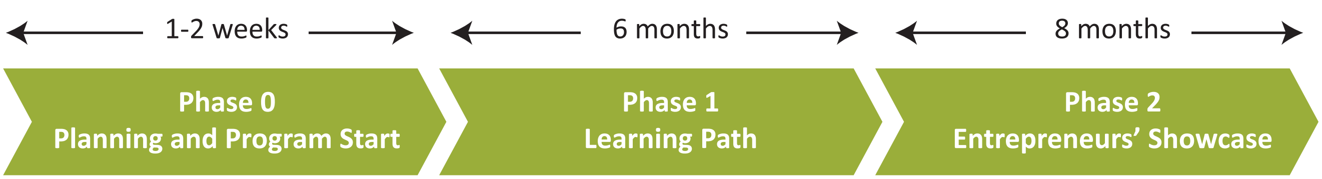
  » The context in which the process, activity, practice or methodology have been developed
  » Background and problems to which the project responds
  » The objectives of the process, activity, practice or methodology. If they have been identified, it is also advisable to indicate the results achieved, as well as their benefits in terms of efficiency and effectiveness.

- **Body of the guide:** This is the main section of the how-to guide, and must describe sequentially and in detail the steps that were carried out during the process, activity, practice or methodology. This section must contain:

  1. Methodological approach (if applicable)

  2. Identification of the major phases

  3. Sequential and orderly identification of activities that make up each stage



0.1 Planning and Kick-off
0.2 Opening of the program

1.1 Seminars in business schools
1.2 Incubation
1.3 Business Training
1.4 Mentoring with experts

2.1 Design
2.2 Deployment
2.3 Operation

  4. Detailed description of each of the activities, presenting in a simple and concise manner:

     ✓ the objective of the activity
     ✓ details of the tasks
     ✓ tools and techniques to use

- ✓ expected results
- ✓ factors of success and failure
- ✓ stakeholders
- ✓ associated budget (if applicable)

At the end of each phase, it is recommended to include a small checklist of mandatory activities, to ensure that all the necessary steps have been met before progressing to the next stage.

- **Conclusions:** The objective of this section is to present the main points of the guide, and the recommendations, if any, for the implementation of the process, activity, practice or methodology. The conclusions should collect the lessons learned from the result of applying the process, activity, practice or methodology in other projects.

  Lessons learned can be defined as knowledge gained about a process or one or more experiences through reflection and critical analysis. The results of this experience or process can be positive or negative.

  Important components of documenting lessons learned:

  » Lessons must explain the relationship between the result of the experience and the critical factor or conditions that may have contributed to or hindered its success.
  » Lessons should help identify trends and cause-effect relationships for the specific context.
  » Lessons should be constructive (suggest recommendations).

  Additional resources (optional): As an annex, this section may include additional checklists, FAQs, document templates, bibliographies, references of projects/initiatives, etc.

- **Review:** The review process is time consuming. It is recommended to go through the following steps:

  » Perform an initial check, with all those in the field whose comments have been consulted to ensure that they agree with the way their words have been used and shared, especially if they have been quoted directly in testimony or life stories. Often it is not necessary to send the entire document but only the parts that include their contributions.
  » The participation of "peer reviewers". Peer reviewers could be trusted colleagues or advisors. They should have both some independence from and some knowledge of the goal of the how-to guide, in order to be able to comment on it and hold a discussion. If a group of consultants is working together, a useful way to check their work is to exchange studies between them.
  » Maintain close conversations and share information with the organization that commissioned the how-to guide to get feedback and comments, and make sure that the work is adequately addressing the original objectives of the research.
  » In reviewing, employ a panel of experts in the topic or case study area, with capacity to comment in a constructive way and confirm the results.

  Adapt the material to audiences.

  In order to assure that the information that has been collected is adequate, the needs of its different audiences should be carefully identified beforehand. The information can be adapted to the needs of an “internal public” or ”external public.”

To achieve a product that is adaptable to different types of audiences, it is very important to include a variety of materials in different sections of the how-to guide, such as:

- ✓ Infographics: are there data that can be represented graphically?
- ✓ Flows of activities, processes
- ✓ Interviews: a section of the how-to guide be supported with a short interview?
- ✓ Images: what image or images best represent a given section?
- ✓ Testimonials: what testimonies could be chosen in order to enhance the presentation of a section of the how-to guide as a good practice?
- ✓ Other resources (maps, graphics, illustrations): what portrays the paragraph being written?

4. Approval

Prior to its dissemination, the how-to guide will require the approval of the contracting organization and the MIF (by at least the MIF specialist in charge of the supervision of the project and any other person defined by the MIF).

5. Editing and design

Once the final text has been endorsed by all parties involved, it is highly recommended to send it to an editor / journalist to proceed with reviewing and editing grammar and spelling errors. After finishing the editing process, the text should be sent to graphic design to format and design using the standard template provided by the MIF (which can be downloaded from the online toolkit).

After editing and design, it is suggested to send the final version of the how-to guide for a final approval by the MIF´s supervision team leader.

6. Dissemination

Dissemination is key to guarantee that the how-to guide reaches the target audience. This step will require selecting and using the most effective communication channels to reach that audience. Moreover, the information acquired in the field can provide a whole range of products that support the dissemination of the how-to guides.

6.1. Communication channels. Each communication channel requires a different format and message, hence the importance of having different types of materials generated from the how-to guides (audiovisuals, images, testimonials, interviews, etc.).

6.2. Communications products resulting from how-to guides. As noted above, testimonies and life stories are essential to support the communication of the how-to guide. But in some cases, they can also be used outside of the publication as material for posters, presentations, websites, social media outreach, etc. It is therefore appropriate to include a list of testimonies and life stories that the researcher deems relevant, whether or not used in the publication.

The interviews that were carried out during the field visit may also constitute, in themselves, material for independent publication on websites, in magazines, etc. So it is important to make a list of the interviews conducted and the location of the material of the interview.

An audiovisual gallery is also a key product to support the publication, and it could also serve to illustrate other communication products and channels such as websites, magazine articles, and presentations.

6.3. Measuring impact. It is important to have adequate tools to measure the impact of each dissemination action, and prove whether we are reaching the key audiences and to receive their opinion on the how-to guide.

In order to achieve this, each communication channel should be accompanied by an indicator and the most accurate tool to measure its impact.

Characteristics:

- Format: may be several formats such as publications, interactive guides or multimedia.
- Length: if published, it is recommended that the guide have a maximum length of 50 pages.
- Frequency: depends on the project's execution plan.
- Responsible for the preparation: consultants hired by the Executing Agency
- Responsible for validation and approval: Executing Agency and MIF supervision team leader.

FOMIN
Multilateral Investment Fund
Member of the IDB Group