

Identifying, documenting, and sharing BEST PRACTICES

*A short guide for the Canadian presenting field and a companion to the
Presenter's Toolkit*

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Introduction

The objective of this guide is to provide guidelines and strategies aiming at increasing the capacity of the Canadian presenting field in the area of sharing best practices. It is meant as a companion to the best practices module of the [Presenter's Toolkit](#), but can definitely also be used also as a stand-alone resource. The guide is oriented towards presenting networks, because they are ideally positioned to facilitate the circulation of best practices: their close relationship with presenters enables networks to witness singular practices, to identify which ones are outstanding and to disseminate them.

Why is it important?

The [Presenters Training Gap Analysis](#) (CHRC, 2007) revealed that presenters often acquire skills through trial and error, successes and setbacks, but that they learn foremost through their peers: "Presenters emphasize the importance of on-the-job learning networks to this profession in particular... Direct contact with knowledgeable peers is the best way to cultivate industry knowledge." While trial and error may sometimes be the only way to experience something, it may not always be the most efficient way to acquire knowledge and competencies. On the other hand, when presenters call on their peers or on mentors to solve a particular problem, they can avoid repeating mistakes and they can start replicating successes.

That's in essence what the sharing of best practices is about.

Best practices: a working definition

For the purpose of sharing best practices in the Canadian presenting field, the following definition will be used:

Best practices: Actions, approaches, and methods that are most successful or have proven most successful in the past in achieving or contributing to an objective, and that are shared with peers in order to contribute to collective learning.

Sources: Combined definitions found in *Grand dictionnaire terminologique* and in *Termium* (provided by Human Resources and Social Development Canada).

Note: There is still much debate around the definition of best practices. They are sometimes understood as a business process with demonstrated ability to achieve superior results or as a code of conduct/principles that identifies recommended behaviours from an efficiency or ethical standpoint. For the sake of this guide, we will focus on individual practices which are deemed exemplary and capable of contributing to collective learning.

Identifying a best practice

Just as there are many definitions of a best practice, there are also different aspects which make a practice a “better” one. Below are three groups of identification criteria: a first series of criteria deemed as fundamental in all sources on best practices, a second series of widely accepted criteria, and a third series of optional criteria or of criteria that would be specific to the presenting field.

Essential criteria

1. Success

- a. The practice comes from a presenting organization who is reputed for its overall quality and professionalism.
- b. The practice itself demonstrated evidence of success. It has reached its expected result(s) and the success is corroborated by quantitative and/or qualitative measures.

2. Relevance

- a. The practice affects something important within the presenting field. As an example, it may contribute to the presenter’s mission or propose solutions to sector challenges.
- b. The practice is related to presenters’ competencies (see [Presenters – Competency Chart](#)) and/or it responds to needs identified in the [Training Gap Analysis](#).

Common criteria

3. Sustainability

- a. The practice is not anecdotal or the result of a one-time opportunity. It was repeated and/or pursued and has proven to be robust.

4. Replicability

- a. The practice is not based on environmental or individual factors.
- b. The practice has the potential to be transferred (replicated or adapted) to other settings and to generate comparable success.

5. Innovation

- a. The practice is original. It introduces new approaches and methods that have not been used before or else it offers a creative application of existing approaches.
- b. The practice contributes to advancing the state of knowledge of the presenting field.

Optional criteria

Besides these standard criteria, you may want to also consider other criteria that are in line with your organization/network’s values or strategic objectives:

- Collaboration or partnerships
- Community engagement
- Contributing to arts education or to cultural mediation
- Paying special attention to underserved groups
- Ethical soundness
- Cost-effectiveness

When am I supposed to do that!?

- Make use of your internal association meetings to identify potential best practices and record them on a flying sheet.
- Remind your members to report their successes to you over the phone or via e-mail.
- Take note of potential best practices in a journal or an electronic document for a future reference (when you have time to assess them or when you have need of them).
- Create a Facebook group, a blog or any other online space for your members to share their successes and let them do the work for you.
- Use your conference evaluation to ask participants what best practice they learned and from whom.
- Listen to your members.

Documenting best practices

Great ideas are regularly shared among presenters during one-on-one conversations or during regional networking activities. The value of documenting best practices is in capturing in writing the most promising ideas, to render them explicit, so that they may be shared at a much larger scale.

The Presenter's Toolkit provides a template for documenting best practices, which is also [available in Rich text format](#). It includes a series of sample questions one can ask to the initiator of a best practice.

Background

Who is the presenting organization and in which setting does it operate?

Initial situation and projected outcomes

When was the practice or the initiative developed and implemented?

What motivated the practice or the initiative? What issues, needs or challenges did it seek to address? Was there any particular opportunity to be seized?

What were the projected outcomes?

Detailed description

How was the problem tackled? Which tools and techniques were used?

Who were the involved partners (if applicable)?

What were the end-results (quantitative or qualitative)? Are there any data or participants' feedback that can attest of the success of the practice?

What skills or resources were needed to implement the practice or the initiative? Was it cost-effective?

Did the practice or the initiative prove to be sustainable?

How is the practice or the initiative similar or different from other practices/initiatives?

Lessons learned

What has proved to be difficult? Where there any unexpected outcomes? What suggestions would you make to your peers about applying the practice or reproducing the initiative?

References

The presenter's contact information.

Don't forget

... to obtain from the presenter's the authorization to disseminate its practice and its contact information.

How can I possibly find the time to do this!?

- If your network has an awards program, make use of your awards nominations process. By adapting your awards' guidelines and nomination form to match the above template and criteria, you will get your presenters to do most of the documenting on their own.

Tips for communicating best practices

- ✍ *Keep potential users in mind to ensure that what you write is user-focused.*
- ✍ *Understand the needs of potential users. What problems do they want to address? How do they want to learn about best practices?*
- ✍ *Not sure what to include in your best practice descriptions? Give some brief guidance, but do not write an essay.*
- ✍ *Do not make rules. Rather, stimulate thinking, action, and dialogue.*
- ✍ *Provide enough contextual information to help users understand the conditions in which a practice has worked well and why.*
- ✍ *Direct people to the developers of a practice and to related communities of practice so they can learn from other people's hands-on experiences.*

Source: Skryme, "Are Your Best Practices Really the Best?", quoted in USAID, *A Tool for Sharing Internal Best Practices*

Sharing best practices

Identifying and documenting a best practice is only worth it if it is followed by adequate dissemination activities. Here are a few suggestions:

- Publish them in the Presenter’s Toolkit. It’s very easy to do: open an account, post a resource and select “Best practice”. If you have any question, don’t hesitate to contact the Toolkit [coordinator](#).
- Take advantage of your award ceremony (if applicable) to outline publicly the best practice of the winner.
- Feature a presenter member on the homepage of your website, and ensure to underline any relevant practice.
- Feature a best practice in your electronic bulletin, and then feature it again in your annual report.
- Dedicate a time to the sharing of best practices during your next annual retreat or other member meeting.
- Look for successful implementation of a best practice and tell that story, in order to bring renewed attention to the practice and to encourage other presenters to replicate best practices.

References

The guide is adapted in part from the following sources:

Cultural Human Resources Council. Human Resources Management: Best Practices in the Cultural Sector. N.d.

http://www.culturalhrc.ca/hrtools/pdfs/E_Best_Practices.pdf

United States Agency for International Development. *A Tool for Sharing Internal Best Practices*. Prepared by Margaret D’Adamo and Adrienne Kols for The INFO Project, 2005.

<http://info.k4health.org/practices/InternalBPs/index.shtml>

Neale, Palena, Thapa Shyam and Carolyn Boyce. *Preparing a case study: A guide for designing and conducting a case study for evaluation input*. Pathfinder International: Watertown, MA, 2006.

http://www.pathfind.org/site/DocServer/m_e_tool_series_case_study.pdf?docID=6302

Guidelines and nomination forms from diverse award programs delivered presenting networks.

This guide can be used in conjunction with the [Template for the documentation of best practices](#).

Presenter’s Toolkit

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