Tables Experience Capitalization

Blue = About the experience capitalization process

Green = About the experience itself

**Preparation**

*To help orient the experience capitalization process.*

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| --- | --- | --- | --- |
| **Why?** | **For whom?** | **What?** | **Why this case?** |
| *What is the purpose for doing an experience capitalization process now?* | *Who will be the target audience for the experience capitalization outcomes?* | *What is the case you have selected?* | *What is the unique, relevant contribution of this particular case?* |
|  |  |  |  |

**Setting the boundaries**

*To help focus on the selected experience.*

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| --- | --- | --- | --- |
| **Title (what?)** | **Location** | **Stakeholders** | **Starting date and duration** |
| *What is the case you have selected?* | *Where did the experience take place?* | *Who was involved in the experience?* | *When did the experience take place?* |
|  |  |  |  |

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| --- | --- | --- | --- |
| **Objective(s)** | **Problem(s)** | **Previous attempt(s)** | **Context** |
| *What was the objective of the intervention/the case?* | *What were the problems that the intervention tried to address?* | *What was done before to try to solve the problem(s) identified?* | *Which (social, environmental, political, economic, etc) factors shaped the setting in which the experience took place?* |
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**Description (organizing information)**

*To organize all the information available and identify which information might still be missing. To understand: a) the initial situation, b) the intervention process and c) the current situation.*

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| --- | --- | --- | --- | --- |
| **Components** | **Activities** | **Positive outcomes** | **Negative outcomes/ challenges** | **Unexpected results** |
| *Which groups of activities were part of the experience?* | *What was done in response to the problems? Include:*  *- Who was involved in which activities*  *- Where, when and for how long did each activity take place*  *- Details on the content of the activities* | *What were positive outcomes of the activities? Include:*  *- Direct results*  *- Long term impacts*  *- Details*  *- Evidence (numbers, quotes, examples)* | *What were negative outcomes of the intervention, and which challenges did you encounter? Include:*  *- Direct outcomes*  *- Long term impacts*  *- The effects of the challenges*  *- Perhaps what you did to counter the challenges* | *What were outcomes that you did not plan for? These can be positive and negative.* |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| Etc… |  |  |  |  |

**Analysis**

*To reflect and understand the reasons behind success or failure. To generate new knowledge based on practical experience.*

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| --- | --- | --- | --- | --- |
| **Criteria** | **Indicators** | **Contributing factors** | **Limiting factors** | **Lessons** |
| *How do you decide whether the experience was successful or not? (The “lenses” with which to look at your experience)* | *How can you measure or observe the criteria in real life? Indicators can be quantitative and qualitative.* | *What are the reasons behind the positive results? Can include:*  *- approaches*  *- implementation*  *- attitudes*  *- context*  *- etc.* | *Why is it that (even) better results were not possible? Can include:*  *- approaches*  *- implementation*  *- attitudes*  *- context*  *- etc.* | *What can you learn from this?* |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| Etc… |  |  |  |  |

**Dissemination plan**

*To plan for sharing the results of the experience capitalization process.*

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| --- | --- | --- | --- | --- |
| **Audience** | **Purpose** | **Message** | **Products and channels** | **Timeline** |
| *Who do you want to reach, who needs to learn about your experience?* | *For each target audience: what is the purpose for sharing with them? (Link this to your objective for doing the experience capitalization process in step 1)* | *For each target audience: what are the lessons that you want to share with them? (Link this to your objective for doing the experience capitalization process in step 1 and the lessons from the analysis)* | *For each target audience: what are the best ways to reach them?* | *For each product/ channel: when do you plan to share? Which steps need to be taken?* |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| Etc… |  |  |  |  |

**Action plan**

*To plan for completing the experience capitalization process.*

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| --- | --- | --- | --- | --- |
| **Activity** | **Who is involved** | **Timeline** | **Resources needed** | **Anticipated challenges** |
| *What needs to be done to complete the process?* | *Who is involved in each activity, and what is their role?* | *When should each activity take place?* | *What resources are needed for each activity?* | *Which challenges might be involved in each activity (and what can you do to minimize them)?* |
| Debriefing |  |  |  |  |
| (Re-)Framing |  |  |  |  |
| Interviews/ meetings |  |  |  |  |
| Reviewing documents |  |  |  |  |
| Writing |  |  |  |  |
| Validation |  |  |  |  |
| Etc… |  |  |  |  |