Adaptable I-LEAD Implementation Guide

Introduction

“Adaptable I-LEAD” is a comprehensive, customizable capacity strengthening package designed to support governments and implementing partners, including national and regional health informatics associations, in adopting and implementing the I-LEAD program. It includes the I-LEAD technical course content, as well as instructions, such as this guide, which is tailored for the implementer (the I-LEAD custodian) and equips users with information, resources, and guidance to coordinate a successful I-LEAD. This includes:

* Coordinating and operationalizing across champions, experts, facilitators, and participants.
* Overseeing logistics such as venue and catering vendor management.
* Driving post-event evaluation and continuous program improvement.

This guide is meant to be used alongside the [work plan template](https://media.path.org/documents/Template_Adaptable_I-LEAD_work_plan.xlsx), [Facilitators’ Guide](https://media.path.org/documents/I-LEAD_Facilitators_Guide.docx), and [Run of Show](https://media.path.org/documents/I-LEAD_Run_of_Show.docx) document.

Phases and timeline

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| **Phase** | **Timeframe** | **Milestone** |
| 1. Engagement | Should begin 3-6 months pre-I-LEAD | * Appoint the implementer as program custodian * Map key stakeholders and secure buy-in from ministry of health * Country commitment to attend I-LEAD * Plan and conduct the Info, Orientation, and ISHO sessions * Assess participant and contextual needs to inform material adaptation |
| 2. Planning | Should begin 3-6 months pre-I-LEAD | * Adapt the work plan and define roles and responsibilities * Finalize agenda and materials based on contextual needs * Manage procurement of venue, accommodation, and catering * Speaker and facilitator confirmation * Feedback and evaluation form set-up |
| 3. Implementation | The week before and during I-LEAD | * Conduct venue walkthrough and confirm catering * Print and setup materials and supplies * Oversee day-to-day workshop execution * Monitor attendance and capture key takeaways * Administer end-of-day evaluations |
| 4. Post I-LEAD | Should happen within 2 weeks after I-LEAD | * Follow up email to participants * Initiate conversations around next steps * Recommendations for next I-LEAD |

Phase 1: Engagement

Overview

This phase launches I-LEAD by building awareness, assessing readiness, and formalizing country commitment. This includes utilizing a detailed work plan, defining roles and responsibilities, and socializing the program with stakeholders.

📝 Contents

* How to utilize the work plan template and match roles and responsibilities
* How to engage stakeholders: socialize I-LEAD and establish a working group
* How to formalize adoption: issue letters of interest, host pre-I-LEAD sessions, and confirm dates

⚙️ Outputs

* A fully populated work plan template with all major tasks
* A completed roles and responsibilities matrix
* Completed Info, Orientation, and ISHO sessions

📁 Resources

* [Work plan template](https://media.path.org/documents/Template_Adaptable_I-LEAD_work_plan.xlsx)
* [Example roles and responsibilities matrix](https://media.path.org/documents/Example_I-LEAD_roles_and_responsibilities.docx)
* [Begin Here document](https://media.path.org/documents/Begin_Here_Document.docx)

* [Expression of interest email template](https://media.path.org/documents/Template_Soliciting_I-LEAD_EOI_email.docx)
* [Invitation letter email template](https://media.path.org/documents/Template_I-LEAD_invitation_letter.docx)
* [Info session presentation](https://media.path.org/documents/Presentation_I-LEAD_Information_Session.pptx)
* [Orientation email template](https://media.path.org/documents/Template_Orientation_webinar_save_the_date.docx)
* [Orientation session presentation](https://media.path.org/documents/Presentation_I-LEAD_Orientation.pptx)
* [ISHO session presentation](https://media.path.org/documents/Presentation_I-LEAD_ISHO_Intro_Session.pptx)
* [Country presentation template](https://media.path.org/documents/Template_Country_Presentation_Part_1.pptx)

🧭 Guidance

1. **Country engagement**

* Designate an implementer as custodian of planning and execution, utilizing the work plan template.
* I-LEAD champions engage with the ministry of health to introduce I-LEAD, build awareness, garner support, and lay the foundation for collaborative planning.
* Adapt and send letters of interest to relevant stakeholders to secure initial verbal buy-in of Adapted I-LEAD.
* Info session:
  + Along with relevant stakeholders, plan the Info session by coordinating timing, confirming speakers, and updating the Info presentation slides as necessary.
  + Invitations: Send the meeting invite with dial-in details and a brief agenda to participants.
  + Facilitation: Host the Info session with stakeholders to review objectives, timelines, and expectations of I-LEAD. This session provides a high-level overview of I-LEAD and who should attend.
  + Follow-up: Send recording, slides, recap of materials and links, and outline next steps.
* Obtain country commitment to conduct I-LEAD and appoint a working group.
* Gather stakeholder input on learning objectives, preferred delivery formats, and language/accessibility needs.
* Finalize roles and responsibilities of the working group in the work plan template or matrix.
* Confirm I-LEAD dates with working group and relevant stakeholders.
* Confirm final participant list (including the working group, facilitators, and other stakeholders) to be invited to attend I-LEAD (full name and email).
* Maintain momentum with regular working group check-ins and communication.

1. **Participant engagement**

* Adapt and send standard I-LEAD invitations (using the email template) to the participant list.
* Collect and log final participant names in the participant tab of the work plan tracker.
  + Send an email to participants requesting their bios, dietary restrictions, and any special accommodations. This can be done using a Microsoft or Google form.
  + Track outstanding documents and send automated reminders.
* Orientation session:
  + Along with the working group and relevant stakeholders, plan the I-LEAD Orientation session by coordinating timing, confirming speakers, and updating the Orientation presentation slides with country context.
  + Invitations: Adapt the Orientation email template to send the meeting invite with dial-in details and a brief agenda to participants.
  + Facilitation: Guide participants through the Orientation presentation and run an interactive Q&A.
  + Follow-up: Send recording, slides, recap, and outline next steps.
  + Schedule a recap call with the working group to refine the I-LEAD agenda based on participant and contextual needs that emerged from the Orientation call.
* ISHO session:
  + Along with the working group and relevant stakeholders, plan the ISHO session by coordinating timing, confirming speakers, and updating the ISHO presentation slides with relevant links.
  + Invitations: Send the meeting invite with dial-in details and a brief agenda to participants.
  + Facilitation: Guide participants through the ISHO presentation, including the ISHO tool and country presentation template.
  + Follow-up: Send recording, slides, recap of materials and links, and outline next steps and due dates.

**Core competencies required from an I-LEAD implementer**

Successfully coordinating a complex, multi-stakeholder national training event demands:

* **Stakeholder engagement:** Build trust with stakeholders, speakers, and participants through tailored communications and regular check-ins.
* **Logistics and vendor management:** Define venue requirements, negotiate contracts, schedule walkthroughs, and oversee catering, transport, and lodging under relevant guidelines.
* **Communication and cultural liaison:** Adapt and send standardized emails, concept notes, and invitations; offer country-specific safety and travel guidance with cultural sensitivity.
* **Schedule and resource planning:** Craft detailed Gantt charts and agenda task-lists; track dependencies, milestones, and daily event flows.
* **Quality assurance and document control:** Manage slide decks, SOPs, glossaries, and translation trackers; ensure accurate printing and distribution of participant materials and interpreter setups.
* **Facilitation and training:** Identify and train facilitators and presenters; run pre-event workshops; guide virtual speakers; implement feedback loops throughout the multi-day event.
* **Adaptation and problem-solving:** Address last-minute venue hiccups, tech issues, or travel delays; refine processes based on daily evaluations; compile a thorough trip report with lessons learned.

Phase 2: Planning

Overview

This phase includes adapting the I-LEAD materials to your context, training your core team, securing venue and catering, and finalizing session materials.

📝 Contents

* How to prepare for implementation: orient facilitators; select trainers and subject matter experts
* How to manage onboarding: provide travel guidance, track documents, and share hotel and shuttle details
* How to choose the venue and catering: evaluate options and select vendors
* How to finalize program sessions and organize all materials into an accessible repository

⚙️ Outputs

* Adapted I-LEAD materials ready for implementation
* Participant materials-submission tracker
* Venue and catering evaluation form and meeting checklist
* Drafted agenda, expanded glossary entries, populated materials tracker, and organized folder structure

📁 Resources

* [Work plan template](https://media.path.org/documents/Template_Adaptable_I-LEAD_work_plan.xlsx)
* [Facilitators’ Guide](https://media.path.org/documents/I-LEAD_Facilitators_Guide.docx) / [Run of Show](https://media.path.org/documents/I-LEAD_Run_of_Show.docx)
* [Venue requirements checklist](https://media.path.org/documents/Template_Meeting__Event_Checklist.docx); [venue evaluation form](https://media.path.org/documents/Template_Venue_options.xlsx)
* [Agenda template](https://media.path.org/documents/Template_High-level_agenda_for_external_audiences.docx); [glossary example](https://media.path.org/documents/Example_I-LEAD_glossary_of_digital_health_terms.xlsx); [materials-tracker tab](https://media.path.org/documents/Template_Reimagined_I-LEAD_work_plan.xlsx)

🧭 Guidance

1. **Adapt and finalize I-LEAD content**

* Within the working group, finalize agenda using stakeholder and participant feedback.
* Tailor sessions, exercises, and existing slides and materials to the contextual priorities as documented in the Orientation and ISHO sessions.
* Pilot key sections within the working group sessions to validate usability and adjust as needed.

1. **Speaker and facilitator coordination**
   * + Match subject-matter experts and facilitators to each topic.
     + Send invites with dial-in links, session times, and prep instructions.
     + Collect and brand-check all materials; host planning calls to review flows and roles.
     + Utilize the Facilitators’ Guide and Run of Show document to follow best-practice guidance on pacing, design, and engagement.
2. **Venue, accommodation, and catering**
3. **Venue**
   * Adapt the venue checklist to I-LEAD standards
   * Solicit bids from at least three venues; compare costs and services using the venue evaluation form.
   * Once the venue is decided, finalize contracts and schedule coordination calls.
   * Design seating plans for plenary and breakout rooms.
   * Confirm audio and visual capabilities (projectors, sound, Wi-Fi, laptops).
   * Book a conference room for a preparatory meeting the day before with facilitators.
4. **Accommodation**
   * Work with the venue to negotiate hotel blocks, rates, and policies; distribute reservation details.
   * If the venue is not a hotel, solicit bids from at least three hotels to compare costs and services using the venue evaluation form.
   * Once the hotel is decided, finalize contracts and schedule coordination calls.
   * Arrange transportation as necessary by communicating with participants and venue/hotel.
5. **Catering**
   * Check if the venue offers in-house catering; if not, solicit at least three external vendor bids and evaluate menus for cost, quality, and dietary coverage.
   * Once the catering is decided, finalize contracts and schedule coordination calls as necessary.
   * Finalize meal schedules, delivery logistics, and point-of-contact details.
6. **Participant materials finalization**
   * Expand the glossary as necessary.
   * Assemble agenda, bios, and other relevant materials into a single participant packet.
   * Establish a centralized folder structure with clear labels, permissions, and archiving protocols.
   * Use materials tracker to identify missing bios, ISHO results, presentations, or BYODD materials.
   * Send reminder emails at regular intervals, reinforcing deadlines and offering support.
   * Address FAQs proactively in reminders to reduce back-and-forth and last-minute gaps.

Phase 3: Implementation

Overview

Ensure each day of the I-LEAD event unfolds smoothly and professionally so participants and facilitators can focus entirely on learning and networking.

📝 Contents

* How to deliver and manage the onsite I-LEAD workshop
* How to design and distribute feedback surveys (with QR codes)

⚙️ Outputs

* Assigned and confirmed roles in the daily task sheet
* Generated and tested QR codes for daily feedback surveys

📁 Resources

* [Work plan template](https://media.path.org/documents/Template_Adaptable_I-LEAD_work_plan.xlsx)

* [Facilitators’ Guide](https://media.path.org/documents/I-LEAD_Facilitators_Guide.docx) / [Run of Show](https://media.path.org/documents/I-LEAD_Run_of_Show.docx)

* [End-of-day feedback form](https://media.path.org/documents/Template_End_of_Day_Evaluation.docx)

🧭 Guidance

1. **Implement I-LEAD**
2. **Week before I-LEAD**
   1. Final coordination and setup: Secure conference room and confirm room layouts.
   2. Print and prepare materials: This includes participant packets, sign-in sheets, agendas, handouts, and certificates.
   3. Catering: Finalize headcount, dietary restrictions, menu, and delivery schedule.
   4. Feedback and documentation: Insert end-of-day evaluation forms into a Google or Microsoft form; create a shared drive for participant materials and event photos.
3. **Day before I-LEAD**
   1. Facilitator sync: Host in-person preparation meeting, utilizing the Facilitators’ Guide and Run of Show document as needed.
   2. Venue setup: Conduct full walkthrough, verify signage, seating plans, and test all audio/visual equipment.
   3. Catering: Confirm catering plans are in place as discussed.
   4. Materials and check-in: Place notebooks, pens, table identifiers, and set up the check-in station with badges and sign-in sheets.
   5. Digital tools: Generate and test QR codes for evaluation forms and prepare slide decks or table tents with QR placements.
4. **During I-LEAD**
   1. Daily execution and review: Review the agenda task sheet in the work plan each morning to confirm role assignments (facilitator, notetaker, etc.). Utilize the Facilitators’ Guide and Run of Show document.
   2. Media and documentation: Capture photos and key takeaways from each session and upload to the shared drive.
   3. Evaluation: Instruct participants to use the QR codes to provide feedback at the end of each day.
   4. Session debrief: After each day, implementers and facilitators meet to discuss how the day went, review participant feedback, and make any changes necessary for the next day.

Phase 4: Post I-LEAD

Overview

After I-LEAD, close the loop by following up with participants, gathering and analyzing feedback, and capturing lessons learned. This ensures future events build on successes, address improvement areas, and embed the program into national systems for lasting impact.

📝 Contents

* How to send follow-up emails with key resources and next steps
* How to analyze survey data and extract common themes, summarizing outcomes, lessons, and recommendations
* How to facilitate an After Action Review to reflect and plan for the next I-LEAD

⚙️ Outputs

* Feedback summary with future recommendations
* Completed After Action Review with core stakeholders

📁 Resources

* [After Action Review template](https://media.path.org/documents/Template_After_Action_Review.docx)

🧭 Guidance

1. **Follow-up communication**
   * Send a thank you email to participants including links to any relevant materials or photos.
2. **Survey analysis and theme identification**
   * Review evaluation results and aggregate quantitative responses.
   * Code qualitative feedback for recurring themes and standout comments.
   * Populate a feedback dashboard with charts and key metrics for stakeholder review.
3. **Lessons learned debrief and continuous improvement**
   * With the working group, convene an After Action Review meeting using the template to discuss what went well and what could be improved.
   * Agree on concrete action items, owners, and deadlines for improving the next I-LEAD.
   * Archive final documents, dashboards, and templates in a shared repository for easy reference.
4. **Long-term sustainability integration**
   * Map I-LEAD modules to existing national training curricula, educational frameworks, CPD accreditation processes, or regional health informatics networks.
   * Appoint a champion/custodian to maintain the program as part of national systems.