



# **Knowledge-Driven Microenterprise Development (KDMD)**

**Contract No. EEM-C-00-08-00004-00**

## **Year-End Report**

### **November 15, 2008 – May 14, 2009**

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# 1. Introduction

The QED Group, LLC and its partners the International Resource Group and Training Resources Group are pleased to present this report to showcase the work that was done over the last 6 months.

This report was prepared collaboratively by the entire KDMD team and we are proud to submit this report as it represents the expansive, inspiring, and often challenging nature of accomplishing KDMD objectives. The final sections include a summary of internal discussions and analysis on current trends that impact the project and lessons to learn from.

## 2. Technical Work plan: Core Activities

To achieve the objectives outlined in the May 14, 2008 – May 14, 2009 work plan during this reporting period, the KDMD team managed work across the six core activity areas below:

- 2.1 Knowledge Stock
- 2.2 Knowledge Flow (broken out by 7 subcategories)
- 2.3 Knowledge Infrastructure
- 2.4 Enabling Environment
- 2.5 Grants Under Contract (GUC) Management
- 2.6 Assessing & Learning

### 2.1 Knowledge Stock

#### **Summary**

Knowledge stock comprises products that capture and share tacit and explicit microenterprise development and KM knowledge, expressed in a variety of formal and informal formats, including but not limited to: online, print, audio, and video products, including products directly funded by MD as well as those by other practitioners, USAID operating units and other partners.

#### **Tasks Completed:**

**Increased knowledge** stock by remaining in frequent contact with key partners, including FIELD-Support, Implementation Grants Program (IGP), AMAP and its successor contracts, SEEP, and other key MD partners to identify areas of opportunity and collaboration.

KDMD has posted more than 350 new resources on microLINKS from 11/15/2008 through 05/14/2009.

KDMD has created a resource section on microLINKS dedicated to following the ongoing global financial crisis.

**Developed Notes from the Field.** KDMD has featured a new Note from the Field on the first Wednesday of the month which is highlighted in Connections newsletter. The following Notes were produced in this reporting period:

**December 2008:** Note from Afghanistan: Increasing Access and Opportunity in Remote Areas (Submitted by USAID)

**January 2009:** Note from the West Banks and Gaza: Decreasing Microfinance's Donor Dependency (Submitted by FIELD)

**February 2009:** Note from Haiti: Education Lending Scales Up in Rural Areas (Submitted by Haiti MSME)

**March 2009:** Note from the Web: Building Microenterprise Capacity through E-Learning (Submitted by the IRIS Center)

**April 2009:** Note from Zambia: Greater Choice, Stronger Voice (Submitted by PROFIT Zambia)

**May 2009:** Note from Uganda: War-Affected Youth Benefit from Education and Market-Driven Skills Training (Submitted by the Women's Refugee Commission/Colombia University)

**MED Essentials.** KDMD designed a process for the MD office to collaboratively develop comprehensive presentation materials to articulate basic MED concepts, principles and best practices and make them accessible for a variety of audiences.

The Knowledge Assets Framework was created on a wiki ([www.microlinks.org/kaf](http://www.microlinks.org/kaf)) to create “layers” of content that progressively achieve the following purposes: Introduce, Inform, Advise, Instruct, and Collaborate.

KDMD contracted with Nhu-An Tran and Gail Carter to draft sections of MED Essentials on behalf of the MD office.

MED Essentials is presently undergoing peer review and we expect further deepening of content to continue into the next reporting period. Ultimately, the MED Essentials wiki will be developed into a “build-your-own-presentation” tool to meet a variety of requests for MD briefings from diverse audiences, when requested. Drafts of all sections of the ED MED Essentials were submitted by Gail Carter. They are currently under review by MD and ACDI/VOCA.

**Three Audio Interviews and / or special events were conducted** and posted to microLINKS, reaching a total of 10 interviews for the year. As special opportunities presented themselves, KDMD was able to quickly take advantage of its recording and screencast capabilities to broadly share insights from leading practitioners.

**Two interviews** were conducted with the winners of the AMAP Innovations in Financing Value Chains Excellence in Achievement Award for 2009.

**Ramiro Ortega Landa** presented his work Introducing Purchase Order Financing in Bolivia and **Luis Jimenez Galarza** of the World Council of Credit Unions discussed his work with Value Chain Finance Methodology.

A special session with **Mr. Vince Carlisle** was recorded for the Society of International Development's **Knowledge Management Working Group** on April 30th as he presented his involvement with the Army's Battle Command Knowledge System (BCKS).

## **2.2 Knowledge Flow**

### **2.2.1 Planning (Strategy & Analysis)**

**Summary:** Strategies, techniques, approaches and tools underlying and comprising project activities at all stages of planning and implementation to promote collaboration and knowledge sharing among practitioners to speed innovation and adoption of new learning in order to replicate innovations and bring them to scale.

#### **Tasks Completed:**

**Activity Planning Guidance** was reviewed by the COTR. It continues to evolve as it is used to plan new activities. For this reporting cycle, the guidance was used to assess and/or develop the EEST website and newsletter, the Value Chain Development Wiki E-Consultation, and guidance for Learning Network Knowledge Products

### **2.2.2 Communications**

**Summary:** The KDMD Team advised on and helped design and develop communication products tailored for specific audiences to easily access, digest, and apply knowledge resources, based on an understanding of optimal formats for intended effect. Siren continued to design and deliver engaging print and digital communication products.

## **Tasks Completed:**

**Instituted regular Promotion, Outreach, and Dissemination** meetings within KDMD to standardize, streamline, and track our activities and processes in these overlapping areas. This has included:

- Creating a tracker of ongoing work in these areas that will feed into Dabble, our activity management database
- Reviewing/streamlining promotion and dissemination channels (to partner organizations, websites, listservs, etc.)
- Standardizing approach to producing and broadcasting promotional materials for activities, including setting up an archival process for electronic and print materials used for promotion and creating standard packages for events and TDY
- Documenting and streamlining contact databases
- Reviewing current methods of dissemination to find opportunities for improvement
- Investigating social networking avenues such as Twitter and Facebook to evaluate how they can work for microLINKS
- Documenting these activities on the Team Wiki

**Maintained, grew, and updated contact databases** for various target audiences.

**Continued building relationships** with key organizations and firms to proactively maintain communication to ensure effective collaboration and coordination. This activity was done in close coordination with the COTR.

Maintained regular contact with other MED knowledge sharing partners—web site and listserv administrators, conference planners, bloggers, working groups/network moderators, etc—to recognize opportunities to maximize visibility and dissemination of MD activities. The Microfinance Website Managers group has continued to provide a valuable working platform for increased communication and knowledge sharing.

**Created targeted communications products** in fulfillment of specific MD communications and knowledge sharing objectives and published communication products showcasing innovation. This included flyers and handouts as requested.

**Advised on the Value Chain Development wiki** and produced products for promotion and outreach to be used at the wiki launch event and beyond.

During this time period, KDMD **contributed Morning Glory stories** to MD on the following topics. [Note: The date below indicates when it was submitted to the MD office because KDMD staff do not have access to the intranet]

- EGAT Recognizes Winners of the Innovations in Financing Value Chains Competition (live on intranet 2/23/09)
- EGAT Hosts Seminar on Remittances - Part of a Global Financial Crisis Mini-Series (4/09)

- "EGAT Unveils Value Chain Development Wiki at Recent Event" (4/09)

Provided ongoing **quality assurance for all materials**—print and digital—to ensure the highest standards in messaging, style, and branding were consistently met.

Continued **streamlining internal communications** and outreach guidance on the team wiki.

## 2.2.3 Event Production

**Summary:** We worked with MD to develop a pipeline of topics; identify and secure appropriate speakers; advise the speakers on appropriate message delivery techniques; organize the seminars; refine, format, and brand the presentations; advertise the events to appropriate audiences; record the seminars; and post a voice-over-PowerPoint of the event, if appropriate. The seminars were organized with improved accessibility and participation through teleconferencing and video feeds (webinars). In the future, seminars may include blogging or presenter discussion forums. We are also in the process of launching a website for a new initiative, the African Diaspora Marketplace, and will host a 2-day award event in December 2009.

### **Tasks Completed:**

**Breakfast Seminar Series.** During the period November 15, 2008-May 14, 2009, three breakfast seminars took place and were posted as screencasts on microLINKS. One special event, the award ceremony for the Innovations in Financing Value Chains Competition, was held in February. On average, these events attract approximately fifty participants per seminar. The events were presented by and entitled:

- November 20, 2008. Thomas Debass and Manuel Orozco, Digesting Nostalgic Trade: A Prequel to a Value Chain Approach
- January 29, 2009. Mike Ducker, Catalyzing Value Chain Development: What We Say, What We Do, What Should We Do?
- February 6, 2009. Ramiro Ortega, Value Chain Financing in Rural Bolivia: Introducing Purchase Order Financing; and Luis Jimenez, Using Market Agreements to Reduce Poverty.
- April 2, 2009. Beatrice Kinyanjui, Early Lessons Targeting Vulnerable Populations with a Value Chain Approach

**Microfinance Learning and Innovations Seminar Series.** During the period November 15, 2008 - May 14, 2009, five After Hours seminars took place. They have been presented to our audience as a timely mini-series on the impacts of the global financial crisis on microfinance institutions and their clients [www.microlinks.org/crisisseries](http://www.microlinks.org/crisisseries), and we have received very positive feedback on the panels. All have been posted as screencasts on microLINKS. On average, these events attract between forty and fifty in-

person participants and approximately forty webinar participants. The event presenters and titles are as follows:

- December 10, 2008.; Eliza Erikson, Monica Brand, John Wasielewski and Martin Holtmann; Capital Markets and the Crisis
- January 7, 2009. Conan French, Kate McKee, Sandra Adams, Dennis Ripley; The Role of Donors and the Crisis.
- February 11, 2009. Thomas Debass, Tanir Helayel, Peter Siu; Coping with Price Spikes: The Impact of Food and Fuel Inflation on MFIs
- March 10, 2009. Jamie Zimmerman, Mary-Ellen Iskenderian, John Ikeda, Jeff Ashe; Savings and the Crisis
- April 15, 2009. Borany Penh, Kathleen Newland, Sanket Mohapatra, and DeVere Kutscher; Are Remittances Still Resilient? Exploring the Impact of the Global Economic Downturn on Migration and Remittances

**Value Chain Finance Competition.** KDMD created space on microLINKS for the February 6th and managed the event promotion, materials and logistics. In addition to the winners presenting at the ceremony, they were also asked to be prepared for short interviews. The questions were developed and the winners interviewed by MD. An AAR was conducted virtually to assess the event success from the perspectives of QED, ACIDI/VOCA and MD staff.

KDMD supported the **African Diaspora Marketplace** initiative (ADM) by expanding the scope of the KDMD workplan and beginning intensive planning with Thomas Debass and ADM Partners around web development and the two-day "Challenge Event." KDMD COP steered workplan and budget development in initial stages of ADM activity design. KDMD participates on the ADM Steering Committee and has accomplished the following with respect to this activity:

- Designed, developed, and launched the ADM website ([www.diasporamarketplace.org](http://www.diasporamarketplace.org))
- Met with the George Washington University to help shape an MOU with USAID to partner and host the event in December 2009

## **2.2.4 Collaboration & Knowledge Sharing**

**Summary:** KDMD advised on, designed, launched, and supported various collaborative strategies and initiatives to create knowledge-sharing opportunities for diverse audiences. Over this reporting period, KDMD executed an extensive review of the learning networks to date, which resulted in a presentation to MD and several guidance notes for facilitators and learning network planning teams. The review is being used to refine the team operational wiki and inform the activity planning guidance. KDMD prepared for the launch of a new blog, launched the beta version of the MIKAL community, and set up a new learning organizations forum and wiki. KDMD also organized Speaker's Corners, provided support for existing communities and learning

networks, and produced screencasts to leverage the learning from Breakfast and After Hours seminars. KDMD also participated in various learning events and continued its use of internal learning tools on the K&L Community and the K&L wiki. A new GUC learning network was established. KDMD will continue to explore ways to improve these existing activities, and explore and test new models of collaboration, especially in the new Drupal environment.

### **Tasks Completed:**

KDMD facilitated four two- and three-day, on-line, collaborative **Speaker's Corners** hosted by a leading expert or practitioner on topical MED, and poverty analysis issues:

- November 18-20, 2008: Microfinance and Climate Change: Can MFIs Promote Environmental Sustainability? Hosted by GreenMicrofinance. A compilation document was produced and disseminated. This Speaker's Corner also led to a *Notes from the Field* post on GreenMicrofinance's work with local MFI's in India.
- January 27-28, 2009: Lessons for a Cost-Effective Rural or Post-Disaster Household Survey. Hosted by Jessica Shortfall of Social Enterprise Associates. A compilation document and synthesis document were produced and disseminated.
- March 18-19: Value Chain Development Wiki E-Consultation. Hosted by Ruth Campbell and Banu Akin of ACDI/VOCA.
- March 24-26: Increasing Incentives and Reducing Risks: How Value Chains can Increase Industry Competitiveness. Hosted by Janice Stallard of ACDI/VOCA. A compilation document and synthesis document were produced and disseminated.
- April 28-30: Value Chains for Vulnerable Populations. Hosted by Ben Fowler, Christian Pennotti and Luis Osorio. A synthesis document and compilation document were produced and disseminated.

**Screencasts** of each of the Breakfast and After Hours seminars through April were recorded, produced and posted on microLINKS.

After the success of the Conflict Webinar in late October, After Hours and Breakfast Seminars from November to April were simultaneously broadcast as **Webinars** for remote audiences. The webinars are so successful that an upgrade of our audio capabilities as of June 1 is necessary. A more substantial software partner that may better serve the global audience is also being considered. Average attendance online is approximately 35 participants and generally 2 - 4 questions are fielded from this group per event. Guests have signed on from Australia, South America, Europe, Asia, and Africa as well as North America.

**MIKAL:** KDMD developed a strategy with USAID and the Army's Battle Command Knowledge System (BCKS) to implement a civil/military community. A Website for MIKAL (Micro Interagency Knowledge and Learning) is currently active. In addition to



resources for members, KDMD hosts periodic "Peer Jam" sessions. The initial Peer Jam occurred February 3 - 5, with 100% of survey respondents Agreeing or Strongly Agreeing that it was a valuable use of their time. The second Peer Jam occurred March 31 - April 2. As of May 14 registered users approached 200 as we began to include Commanders. On April 29th, MIKAL was presented as a work in progress to the E-Gov conference. On April 30th Vince Carlisle of BCKS and Borany Penh representing MIKAL presented the work at the SID Knowledge Management Workgroup meeting.

**Communities of Practice.** KDMD advised on, initiated and supported CoPs and Learning Networks (LN) as needed and provided training to its facilitators or leaders. KDMD also coordinates activities and learning across CoPs. The following activities, in particular, strengthened communities and networks:

**Building Effective Learning Organizations Forum and Community:** KDMD continued its research into the best way for an ongoing initiative around Learning Organizations, that would build on the BELO GUC and 2008 Speaker's Corner experiences. As part of this process, KDMD explored collaborative opportunities with Data Harvest and Impact Alliance in areas where there is complementarity and greatest potential for synergy. A preliminary concept has been developed and it could potentially catalyze the KDID portal through explicit and tactical linkages with other initiatives on KDID, such as the KM Lab. The BELO CoP concept will also provide an opportunity for KDMD to pilot a completely new and innovative CoP model, one which incorporates many features already in practice under KDMD, such as the LN approach and the wiki platform, as well as some new features drawn from successful CoPs outside USAID and KDMD.

**Learning Networks:** KDMD conducted a thorough review of past and ongoing learning networks with a view to better understand the concept and issues related to their implementation and, more broadly, to refine the existing body of knowledge on LNs that can help inform and improve the implementation of future LNs. The review consisted of 18 interviews (10 LN staff, 3 participants, 2 USAID, 3 KDMD) with past and current PLP, IGP and GUC LN coordinators and facilitators, a desk review of past learning workplans, knowledge products, meeting agendas and an assessment of an after-action-review (AAR) on the ED IGP. The findings were synthesized into a presentation to KDMD staff and MD staff. Recommendations were made and resulting guidance notes have been reviewed by the COTR and shared with the newest GUC learning network. The recommendations on process and planning will be internalized by the staff through updating the operational wiki and incorporated into the RFA process for selecting grantees and facilitators.

**microRISK Alliance Learning Network Wiki:** A wiki site has been created (on "wikispaces", a new wiki platform), for the microRisk Alliance LN members to stay connected, to share information, knowledge, and resources as well as to collaborate on joint activities, including the planning of stakeholder meetings/consultations and the development of the group's knowledge products. The use of the wiki to support the LN

offers an alternative to hosting the network through an on-line forum, and an opportunity to test a new approach as well as the new wiki platform.

**KDID Blog.** The Knowledge-Driven International Development Blog has been initiated. The blog is available through the KM Lab at [www.microlinks.org/KDIDblog](http://www.microlinks.org/KDIDblog). Increased outreach are planned for later when more postings are available and more is known about the use of blogs as an integrated part of the KDMD web portals on the new Drupal platform.

Building on lessons learned from the Learning Network Review, KDMD planned, coordinated and implemented a new GUC learning network, **the microRISK Alliance (MRA)**. After hiring the technical facilitator, KDMD managed weekly meetings to review the learning network model, timeline, process, roles and responsibilities and the planning for the kick-off meeting. KDMD used a basecamp site to manage to-do items and share presentations and guidance notes. KDMD held an AAR following the kick-off to assess its success and solicit recommendations for the learning network. KDMD is working with the MRA to make sure they are supported and on track to complete the learning agenda and other agreed upon activities. Two other new GUCs are scheduled to kick-off in July and August.

In addition to the collaborative and knowledge-sharing opportunities KDMD currently provides to advance MED practice, the KDMD Team works on a parallel track to learn from others and share our experience with KM activities, approaches, and tools, especially as it applies to the international development community.

We expect these activities to accelerate now that we have put in place key tools and mechanisms, including:

**K&L CoP** on microLINKS continued as a useful place to present and discuss new ideas among the client and implementer team(s). KDMD maintains the community and relevant information is “promoted” to the wiki operations manual.

**Teamwiki:** KDMD continued to grow its internal operations manual in wiki format – an easy-to-access, easy-to-update guide on what we do and how we do it (and improve it).

**KM Knowledge Base:** KDMD is in the process of reviewing, collecting, and codifying good/best practices on KM as a starting point to build up the KM Knowledge Base, starting with examples of successful KM frameworks/strategies and approaches to building CoPs.

**K&L Resources Wiki:** We began developing a “pocket” of the teamwiki to serve as an internal resource on K&L approaches, tools, guidance, best practice, etc. This may one day be spun off as a public resource to complement the KM Lab. This houses the KM Knowledge Base described above.

**KDID Blog on the KM Lab.** As described above, preparations are underway for this blog on knowledge-driven development, which will be a key outlet for promoting cutting-edge KM ideas.

The **Microfinance Website Managers** group has continued to provide a valuable working platform for increased communication and knowledge sharing. At their December meeting, valuable tips were shared on blogging. Notes from the session were posted on the K&L CoP.

KDMD initiated the **SID-W Knowledge Management Workgroup**, a new professional group on KM, under the umbrella of the Society for International Development (SID) - Washington. This is organized in close collaboration with the COTR. The group organized two events: (1) "USAID's Knowledge Revolution: The New and Improved Knowledge Services Center at the Agency's Core," with a presentation by Peter Hobby on January 29, and (2) "Knowledge Management in the U.S. Army: Battle Command Knowledge System (BCKS)," with a presentation by Vince Carlisle on April 30. The workgroup recruited new members and expanded its mailinglist at the May 5 SID-Washington Annual Conference.

## **2.2.5 Product Development & Dissemination**

**Summary:** KDMD continues to proactively identify topics, opportunities and a strategy for effective dissemination of knowledge products to target audiences.

### **Tasks Completed:**

See Promotion, Outreach and Dissemination under Communications above.

## **2.2.6 Training & Learning Supports**

**Summary:** Beginning in the fall of 2008, the KDMD team began work with the Economic Growth Office on their Economic Growth Training Program through the EG KDMD buy-in. KDMD hired Emet Laboone to lead the EG buy-in conducted training under buy-in programs and to increase its level of training conducted online.

### **Tasks Completed:**

KDMD developed a pilot community on Ecco for the EG Training participants. Resources were posted and participants were encouraged to pose questions to presenters/post resources. Participant online behavior was assessed and fed into the design process for an EG blended learning approach.

KDMD also released an RFP for Drupal developers to develop the Economic Growth.

## 2.3 Knowledge Infrastructure

**Summary:** KDMD continued to explore technological features and functions to enable digital and other dynamic knowledge flows, as well as to enhance the structure that knowledge takes, including print, digital, and face-to-face, as in the case of events and meetings. KDMD successfully launched a webinar on the subject of conflict, with a high turn-out rate. Not only have technical and operational wikis continued to take shape, the idea has become an inherent consideration among other technical activities. The iGoogle account aggregates various website tracking statistics and can be used by the MD office to better understand audiences and sell microLINKS to various interests and needs.

### **Tasks Completed:**

The KDMD team re-evaluated its plan for upgrading its core knowledge management platform. Our original plan was to upgrade from Tomoye Simplify to Tomoye Ecco during FY 2009. However, based on our own professional judgment and requests from USAID, we re-assessed the Drupal platform as a possible alternative to Ecco. The rationale for the assessment was our:

- Realization that Drupal has matured since our feasibility study in 2008
- Understanding that Drupal has stronger web content management (WCM) features than Ecco
- Realization that open source developers have built an extensive library of “modules” that extend Drupal’s out-of-the box WCM features to community building, social networking, and collaboration
- Understanding that Drupal has an architecture and framework technologists and IT analysts such as Forrester have praised
- Knowledge that Drupal has reached critical mass
  - Among the open source community
  - As a platform for many prominent websites
  - Within USAID (GDC, Allnet)
- Uncovering of significant weaknesses in the Ecco platform during training and testing
- Ecco’s features do not meet our content management requirements (e.g., centralized taxonomy and tag management features)
- Ecco’s administration features are under-developed
- Ecco requires too much customization of code to arrange “custom boxes” and change the look and feel
- We will need to implement Windows SharePoint Services for wiki features, but full Tomoye and SharePoint integration hasn’t been realized (e.g., search)

Ultimately, the KDMD team, in conjunction with USAID, decided to forego an upgrade to Ecco. We have moved to a Drupal-based KM platform and are currently developing new sites (such as the African Diaspora Market and Economic Growth Learning Portal) in Drupal, as well as preparing to migrate our Simplify sites (microLINKS and PovertyFrontiers) to Drupal in 2009. Ultimately, we believe Drupal is a better long-term platform for KM at USAID because:

- It is used more widely than Ecco
- USAID accepts Drupal as a standard
- It has a robust development community as an open source application
- It is flexible
- Its modules provide extensibility and scalability
- It meets our requirements better than Ecco does

KDMD implemented the infrastructure required to convert from Ecco to Drupal and begun building new sites there. Specifically, KDMD:

- Signed an agreement with Acquia, the premier company that supports and monitors Drupal
- In anticipation of growth of web work, signed a web hosting agreement for two dedicated servers with BlackMesh, a local tier one application service provider.
- Set up production environment on Blackmesh
- Issued a request for proposals to identify a Drupal development firm (Trellon) that will help us maximize Drupal's capabilities (see Management Section below)
- Built and launched the African Diaspora Marketplace website on our new Drupal platform. The steps involved include:
  - Work through three rounds of designs with developers (Trellon)
  - Finalize theme and configuration
  - Receive site from Trellon
  - Load site on Blackmesh (development environment)
  - Finalize design
  - Add Content
  - Incorporate Steering Committee/SME edits/suggestions
  - Work with developers to fix any “bugs” or template changes
  - Migrate to production environment
  - Launch site
- Built the development version of the new Economic Growth Learning Portal website on our new Drupal platform.
- Began planning a variety of potential new sites, including KDID and E&E
- Strategized microLINKS v2.0 and PovertyFrontiers v2.0 on Drupal
- Built a microLINKS Event Blog on Drupal

KDMD continues to add web 2.0 capabilities to its offerings. As described earlier, an RSS feed for the latest research has been added to microLINKS' home page.

The use of wikis continues to be an integrated featured of microLINKS over the past six months, both for its internal operations and for MD and its partners. KDMD has helped set up a number of wikis, has trained technical teams in using them, and provides support for technical functionality and usability.

Webinars have become a de facto offering of our presentations and seminars where participants are unable to attend in person. KDMD supported USAID in reaching appropriate approvals to enable the business card function (excluding the use of photos) on the KDMD knowledge sharing portals. The business card on microLINKS has been enabled. New KDMD portals will be able to take full advantage of this new level of opportunities for collaboration.

KDMD consolidated website tracking information on an **iGoogle account** and has incorporated this into its **MD webkit** launch.

## 2.4 Enabling Environment

**Summary:** We continue to appreciate and build an awareness of the enabling environment for active knowledge sharing and collaboration, by considering contextual elements to our work, including culture and technology, and accelerating adoption by providing incentives and removing existing roadblocks. We actively seek opportunities to do this at every level, including the MD office, USAID operating units, external partners, and field practitioners.

### **Tasks Completed:**

KDMD continued to **build relationships** and energize internal and external networks through active participation in communities and discussion forums, attending leading conferences, workshops and events (including the attendance of the APQC and MFC Conferences, which occurred after the end date of this report and will be elaborated upon in the next report); and continued to test, enhance, and refine our knowledge-sharing tools.

KDMD initiated kick-off discussions to plan the Mission Advisory Group. A one page concept/description of the advisory group was drafted and a basecamp space is set up with to-do items to keep the planning on track.

KDMD has developed and will soon launch a customized **online Webkit** to further aid the MD office in integration, improved coordination and leveraging activities and events across MD, its partners, and the KDMD Team. We have selected a variety of tools and aggregated them on a customized iGoogle page, including: a shared calendar; a social bookmarking tool; an upgraded Basecamp site for collaborative project management; RSS feeds from microLINKS; a **customized digital A&L dashboard** that aggregates and creatively showcases user statistics, and customized website feeds to display a selection of industry blogs and online resources.

## **2.5 Grants under Contract (GUC) Management**

**Summary:** The grants-under-contract component progressed from the development stage to the implementation stage during this reporting period. After KDMD received approval on the GUC manual in January, the program proceeded to procure four rounds of grants. The creation of the first GUC learning network also took place.

### **Tasks Completed:**

- The GUC manual was approved by USAID in January 2009
- Three grants were awarded in February 2009 to create the microRisk Alliance. The members of the alliance are creating tools for MFI's to mitigate risk associated with currency exchange fluctuation. The learning network kick-off meeting took place April 28 - 29th at QED's office.
- A bidder's conference, value chain development training seminar, and EOI and proposal review process took place under the "New Partners in Value Chain Development" grant competition from January 2009 until May 2009.
- An EOI and final proposal review procurement process took place under the "Strengthening Assessments of Poverty Interventions in Conflict / Fragility" grant competition in April and May 2009.
- An RFA was developed and will be issued at the beginning of the next reporting period for a sole-sourced GUC to the Migration Policy Institute on the topic of "Diaspora Engagement Studies" in May 2009.

## **2.6 Assessing & Learning Plan**

**Summary:** Assessing and Learning (A&L) is an integral component of each of our activities. Through quantitative and qualitative measures, we have tracked the adoption and application of KDMD-disseminated knowledge by measuring traditional outputs such as the accessibility, popularity, and value of training and web-based information. We consistently learn from experience, adapt, and incorporate results into project planning and activity design. This dynamic process is outlined and captured on our team wiki in the Activity Planning Guidance section. Action-Reviews (AARs) are a common forum used by the KDMD team to reflect on past activities and articulate lessons learned; which, in turn, are woven into future planning.

### **Tasks Completed:**

Baseline stats on microLINKS and Poverty Frontiers as well as other operational and activity stats continued to be collected on a monthly basis. A monthly dashboard on the MD iGoogle page is customized to present this data. A presentation of the igoogle dashboard was prepared for MD, which was attended by the COTR. Content management decisions on issues such as, promotion, page placement, and navigation were made to improve usability based on the web stats analysis. This will continue during the next period and become more systematic in our team processes.

Several A&L meetings and presentations with MD to further develop our A&L approach and work towards an A&L plan. On January 9, 2009, the KDMD and MED teams participated in a half-day learning session about Assessing and Learning, with presentations on the AMAP Benchmarking study, PROFIT approaches to M&E, and an Open Space session. A consultant to support the A&L plan is scheduled to be added in the beginning of Year 2.

A member of the KDMD team participated in a one-day training on "Measuring the Impact of Knowledge Management" at the 2009 APQC Annual Conference on May 13. Session results were shared with the team and will be used to strengthen KDMD's internal A&L and ability to demonstrate the effectiveness and business case for its knowledge management activities.

The Activity Planning Guidance on our internal wiki was developed and is continually being refined. This real-time, A&L mechanism, that simultaneously builds our own best practice, will be opened up as a collaborative tool to share our knowledge to a public audience during the next semi-annual period.

KDMD regularly conducts AARs to capture lessons learned and to make ongoing improvements to process at all levels, via continual updates to the KDMD operations wiki. Seven AARs were carried out during the reporting period including those for the Conflict Webinar, AMAP TA/KMC, Speaker's Corners (following the Savings SC), Outsourcing options SC, PASSN, AMAP, and Learning Networks.

Dabble, our activity database continues to capture A&L triggers for each activity with indicator, output/accomplishment, and recommendation fields for each activity. This will improve and systematize our current A&L processes.

### **3. Buy-In Strategy**

**Summary:** KM is increasingly being built into new USAID programs as a central way to achieve development impact. As a result of MD's KM success, several USAID operating units are now planning similar KM activities and have approached the MD office for support, guidance, and access to K&L services. The KDMD Team is uniquely positioned to educate other operating units on the developmental benefits of K&L and to aid in the design and implementation of cost-effective solutions. When an opportunity for a buy in is presented, KDMD will work with the COTR to produce a work plan that parallels the structure and activities of this work plan (with the assumption that buy-in activities will only comprise a subset of core KDMD activities).

#### **Tasks Completed:**



**Support to other USAID units and country missions:** Over this reporting period, the demand for KDMD's advisory and support services to other USAID units, including country missions interested in buying into KDMD, has increased markedly. Units and missions requesting support include the following:

**EGAT/EG:** KDMD prepared and presented an FS CoP concept, which led to EG expressing a strong interest in building a CoP specifically focused on the current global financial crisis. The CoP will be implemented in year 2 through a buy-in arrangement on FS Share, managed by Chemonics, with KDMD playing a lead advisory role throughout the entire CoP building process. The proposed concept offers yet another opportunity to pilot test a new CoP approach and could potentially evolve from a CoP focused specifically on financial crisis issues to a longer term and broader FS CoP.

**Europe and Eurasia/Social Transition Team:** During this reporting period, KDMD continued to work off the approved Knowledge and Learning Recommendation Plan. Activities were organized relevant existing events. For example, in December USAID had '16 Days of Activism Against Gender Violence'. In response to this, we organized a seminar at USAID around the paper 'Serving the Victims of Domestic Violence & Trafficking in Persons'. Materials were posted on PovertyFrontiers. On February 10, the team hosted an event on social work as it relates to child welfare/protection in development assistance at The QED Group. Each presentation was recorded. Resources are available on [www.povertyfrontiers.org/socialwork](http://www.povertyfrontiers.org/socialwork). An evaluation survey was created and sent to all invited participants. The KDMD Team also continued to push forward in having the team identify what their external web presence would be. These discussions took place because during this reporting period, it became clear that there was uncertainty within ST team members of how they were utilizing their resources. The KDMD Team met with the ST team members several times for information gathering sessions to further understand their current KS systems, newsletter functionality and their vision for best moving forward. The KDMD Team prepared a proposal and went through a discovery phase to provide the ST team as much information as they could to allow them to make an informed decision on how the team should move forward. At the end of this reporting period, it became clear that the ST team was ready to make a decision. It is anticipated that much more movement will take place with this buy-in during the forthcoming reporting period.

**South Africa:** KDMD provided detailed technical input into a draft CoP concept note prepared by S. Africa as well as guidance on its implementation.

**Jamaica:** KDMD prepared a preliminary concept and proposal for a CoP on Education for the mission to present and consult with the donor community in Jamaica. A budget for the buy-in was also prepared and submitted.

**Colombia:** KDMD assessed knowledge sharing opportunities to support the work of the USAID mission in Colombia and activities, helping to assess and stimulate interest in a mission-level buy in.

## 4. Management and Personnel

Effective contract and financial management is important for this large, complex project. QED management regularly communicates with the COTR and the CO regarding financial and contractual matters. Accurate and detailed monthly vouchers for KDMD are submitted to USAID for approval. Quarterly accruals and other financial reports, as requested, are submitted to the COTR. KDMD management reviews and approves all project time and expense reports.

### **Ongoing and Completed Tasks include:**

KDMD management has worked with the COTR and the CO through the personnel approval process. During this period, KDMD has added 2 new full-time QED employees and a part-time IRG staff member.

To address rapid deadlines required by the ADM and EG Learning Portal projects, KDMD initiated an aggressive request for proposal (RFP) issuance and award for a Drupal development firm. We wanted a local organization, which we felt would facilitate the absorption and transfer of Drupal knowledge to the KDMD team. We sent out 7 RFPs, received 3 responses, and conducted a thorough vetting of resources, timelines, cost, and references. We selected Trellon as the winner.

QED continues to manage its subcontractors and resource firms:

- IRG
- TRG
- Siren Digital Communications, LLC
- WaldoWare
- Trellon

Internally, KDMD management reports to the QED Vice-President for Economic Growth & Governance through monthly contract review and periodic meetings and reports.

In addition to financial reporting, the KDMD team reports programmatically through bi-weekly Work in Progress (WIP) meetings. KDMD also prepares this Semi-Annual Progress report.

KDMD Staff continually coordinate and communicate with the MD contractors, grantees and other partners collaborating on knowledge sharing, knowledge dissemination and training activities.

## 5. TRENDS

The KDMD team discussed trends and lessons learned in several categories, including Internal - KDMD team; USAID, including our relationship with them; Content; and Context, including trends in government, technology, and microenterprise.

The results of the session are below. Recurrent themes included:

- Need to incorporate feedback to become demand-driven
- Need to clarify indicators for success
- Vagueness in roles and need to streamline processes
- Tendency to isolate and need to communicate with others in field

### Internal - KDMD team

We've been streamlining systems and processes (dabble, wiki). This process has been challenging and it has been interesting to see what it takes for real behavior change internally. We have captured what we know about behavior change as we have experienced it as a team to apply more broadly to our constituents, especially as we transition to new platforms and paradigms.

We have been agile and responsive to projects of interest (eg. Event blogging from MFC). We would like to see this continue and our work become even more demand-driven.

### USAID

- An understanding and appreciation for enhanced knowledge sharing seems to be increasing, which is resulting in more buy-ins
- There's a lack of clarity of the bigger picture. What are USAID's focus and priorities? What is their larger KM strategy and how can we link up to it?

### Content

- Usage stats are available on the dashboard. Use of most products has stayed the same or increased. We have more products and are disseminating them better.
- Most popular products are probably Connections, ED pages, and conversations. Speaker's corners and webinars have seen a big increase.
- Will we see a shift from in-person participation to internet use? We suspect so but not sure how to measure that (yet).
- The global economic crisis has influenced content.

## Context

- We expect to see changes in government under the new administration, particularly in terms of communication and transparency
- The popularity of mobile technologies in other countries may influence both microenterprise development and e-learning. Will this affect us, or do we need to adapt our approach? For example:

"The number of people in Africa using their mobile to access the Internet has rocketed over the last year. In many instances the number of mobile Internet subscribers far outstrips their fixed line equivalent. ... By the end of 2008, South Africa had 1.35 million Internet subscribers, of which, according to World Wide Worx, 794,000 were wireless Internet subscribers."

- Russell Southwood, Balancing Act Africa

<http://www.africafocus.org/books/isbn.php?9956558532>) features case studies of Burkina Faso, Cameroon, Ghana, Mali, Sudan, and Tanzania; excerpts from another recent article from Balancing Act Africa on the rapid advance of mobile phones for cash transfers in Kenya; and a report on a South African initiative to promote a strategy to deliver broadband internet access available to all South Africans.

- There is an increased interest in using M&E for online collaboration, defining indicators for success
- KM more and more is putting people first, rather than focusing strictly on the technology
- As Grants-Under-Contract are awarded and learning networks are formed, there are more opportunities for KDMD to link grantees' projects and learning network activities with other KDMD activities.

## 6. LESSONS LEARNED

KDMD endeavors to pay attention to opportunities to learn at every level of the project – including our own interactions on the team, how our work is received, and greater lessons to learn from others in their experiences. This section also summarizes an internal discussion on what we have learned as a team over the course of implementing this project in its first year. This is not an exhaustive list of lessons learned, but rather a collection of insights from across the team. Lessons learned from individual activities follows.

### Internal - KDMD team

- It's hard to remember how foreign our work can be to an outsider. We can do a better job training/orienting/communicating, specifically when it comes to a growing team and also to the MD office representatives we work with on a periodic basis.

- We've had a hard time prioritizing and keeping our work load in check. We don't want to say no to anybody, but quality suffers.
- The team doesn't give itself credit for a job well done. This may be linked to a lack of clarifying what "success" looks like.
- We could be better at creative solutions, new story-telling techniques, etc.
- To be demand-driven, we must understand our end-users. We don't get a lot of feedback, but moreover we're not entirely sure who we should satisfy and how to balance needs. Should we be more concerned with the donor or with those who use our site? The answer is probably both, but we're not sure how to balance that.
- We need to define our niche and move forward with that in mind. What is our industry position and who are our competitors? Our competitive advantage lies where KM meets MED. We should create partnerships with groups doing similar things, who have similar projects, and share knowledge with them about our work.

## **USAID**

- Buy-ins need new staff and well-defined processes. We might slow down the process to give time for hiring on our side and for refining goals and processes (MOUs, etc) on the buy-in side.
- We would like to preserve our opportunities to set expectations, identify roles, and determine processes for work in advance of buy-in activities.

## **CONTENT**

- Even use is hard to measure. Different target audiences, different ways to keep statistics. Some usage stats are subject to outside sources, including even seasonality and weather.

## **CONTEXT**

- The business case must be made for investing in KM and learning
- We can learn a lot from the broader KM community

## **ON INDIVIDUAL ACTIVITIES**

### Grants-Under-Contract

- Proposal review committees can be smaller than what we originally planned. Instead of five people, we determined that it will be sufficient to have one QED representative, one USAID representative, and one independent reviewer.
- Evaluation score sheets don't need to have the same extensive ranking system for expressions-of-interest (EOI's) as for proposals, so we will switch to a "yes," "no," "maybe" system for EOI's in the future.

- The GUC manual needs to be edited to include processes for bidder's conferences, EOI's, monitoring, and other activities that were not foreseen before the GUC program started. We learned that the more we can standardize, the less time and effort we need to spending making a judgment determination to solve each problem that arises. The updated manual will be submitted in June along with the Year 2 work plan.
- It is critical to screen grantees for commitment to participating in a learning network as well as potential for complementarity and/or synergy up-front. Our experience with the microRisk Alliance proved that a learning network is a challenge when the members don't want to readily share information, especially when they are direct competitors, or take time away from their daily routine to participate. We started to incorporate more specific language into the RFA's for the past two grant rounds in order to receive proposals that detail how a grantee will be involved, which will help us to better select grantees that are interested in being in a learning network.
- The SOW for learning network facilitators should not only detail the responsibilities but how much time should be taken for each task.
- Coordination logs help with communication flow between KDMD and partners.

### Learning Networks

KDMD's recent experience with the microRisk Alliance (MRA) reinforces the need to separate the technical advisory support function from the facilitation function. It is very difficult to find a subject matter expert with adequate facilitation skills and experience to guide the LN in person and online.

USAID's role proved to be crucial, especially as the initiator of the GUC round, to ensure that the LN meets USAID's expectations and specifically delivers outputs that add value to the sector or community in question. The absence of the initiator, in the case of the MRA, made it difficult to keep members engaged, committed, and motivated.

Stacey Young's involvement in the MRA kick-off meeting was critical as it helped ensure a clearer understanding of what it means to be a LN, how to develop a joint learning agenda, and of USAID's expectations (especially in the absence of the MRA GUC instigator). She should continue to be involved in future LN kick-off meetings as a USAID resource person on LNs.

### Buy-Ins

It is critical that KDMD prioritizes its own activities and other opportunities are evaluated against core priorities. An unintended consequence from the EG and E&E buy ins and taking on other ad hoc activities is that we haven't prioritized the microLINKS' upgrade, which has undermined our ability to showcase the KDMD approach and has created a constant feeling of being behind the curve, no matter how successful our accomplishments have been.

We recommend the following criteria for buy ins – both must apply in order to take on additional partnerships:

- Buy in activities must leverage, extend, or pilot desired KDMD core objectives and activities (KDMD must be involved in the initial assessment and design of potential Buy In portfolios).
- Clients must be on board with KDMD principles AND have the capacity to support/implement KDMD activities (this assessment should proceed acceptance of the buy in).

#### Optional Criteria

- Buy in activities must create a demonstration effect within USAID

## 7. KUDOS

KDMD regularly receives expressions of interest, appreciation, and indications of value. The team collects these and shares a few below:

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5/7/2009:

"I think your site is just fantastic. Tons of useful information. Keep up the great work".

Best,

Bhalchander Vishwanath  
Founder and CEO  
United Prosperity

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4/23/2009:

"Dear Lisa,

Thanks a lot for your kind help. I was just admiring Microlinks as a good resource as I came to know and read about it some weeks earlier. It has helped me get more info for the literature review. I will also learn from the questionnaire and see any possible improvement to the one I have just prepared. Thanks and express my admiration to your effort to build a resourceful website.

In the meantime, I want to express my deep interest to be associated with USAID or related projects working in value chain and related development research and consultancy service areas.

Thanks a lot."

Masresha Yimer.  
from Addis Ababa, Ethiopia.

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March 26, 2009

Hi Catherine,

I just heard Luis' interview. You guys did an amazing job editing it!

THANKS!

Stephanie Grell Azar  
Development Finance Manager  
World Council of Credit Unions (WOCCU)

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March 20, 2009

I have reviewed both of the screencasts. Your team has done a tremendous job with putting them together. They are great tools.

EMAIL March 26, 2009

I actually listened to both of these pod casts and think they were done very nicely - with the PP following along with the audio. Great!

Janice Stallard, ACDI/VOCA

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