# KDMD | The Knowledge-Driven Microenterprise Development Project

# Semi-Annual Report

## November 2011 – May 2012

### THE QED GROUP, LLC
■ The difference, proven

# CONTENTS

# ACRONYMS

**A&L** Assessing & Learning

**AAR** After-Action Review

**ACDI/VOCA** Agricultural Cooperative Development International/Volunteers in Overseas Cooperative Assistance

**ADB** Asian Development Bank

**ALT** Adult Learning & Training

**AMAP** USAID's Accelerated Microenterprise Advancement Project

**AMAP K&P II** USAID's Accelerated Microenterprise Advancement Project Knowledge and Practice II

**AMP** Accelerating Market-Driven Partnerships

**APLU** Association of Public and Land-Grant Universities

**ARS** Agricultural Research Center

**BFS** USAID's Bureau for Food Security (Formerly the Office of Agriculture)

**BRAC** Bangladesh Rural Advancement Committee

**CARE** Cooperative for Assistance and Relief Everywhere

**CDCS** Country Development Cooperation Strategies

**CEDARS** Center for Design and Research in Sustainability

**CGAP** Consultative Group to Assist the Poor

**CI** Conservation International

**CIO** Chief Information Officer

**CLA** Collaborating, Learning, and Adapting

**CoP** Community of Practice

**COP** Chief of Party

**COR** Contracting Officer's Representative

**COTR** Contracting Officer's Technical Representative

**CRSP** Collaborative Research Support Program

**CSO** Civil Society Outreach

**CSS** Cascading Style Sheet

**CUSO-VSO** Canadian University Service Overseas - Voluntary Service Overseas

**DAI** Development Alternatives Inc.

**DCA** USAID's Development Credit Authority

**DCHA** USAID's Bureau for Democracy, Conflict, and Humanitarian Assistance

**DCED** Donor Committee of Enterprise Development

**DG** Democracy and Governance

**DLI** Development Leadership Initiative

**ECYMP** Eastern Caribbean Youth Microenterprise Program

**ED** Enterprise Development

**E&E** USAID's Europe & Eurasia Bureau

**EIG** Evaluation Interest Group

**EG** Economic Growth

**EGLC** Economic Growth Learning Center

**EIG** Evaluation Interest Group

**EP** USAID's Office of Economic Policy (Formerly the Economic Growth Office)

**EPS** Emerging Payment Systems

**ESAF** Expanded and Sustained Access to Financial Services Program

**E3** USAID's Bureau for Economic Growth, Education, and the Environment (Formerly the Bureau for Economic Growth, Agriculture and Trade)

**FACET** Fostering Agriculture Competitiveness Employing Information Communication Technologies

**FAO** Food and Agriculture Organization

**FIELD-Support LWA** Financial Integration, Economic Leveraging, Broad-Based Dissemination and Support Leader with Associates

**FIFO DC** Financial Inclusion Forum of the District of Columbia

**FS** Financial Services

**FTF** Feed the Future

**FY** Fiscal Year

**GenDev** USAID's Gender Development Team

**GLEE** Global Learning and Evidence Exchange

**GLS** Global Learning Systems

**GP** USAID's Global Partnerships Division

**GPO** Government Printing Office

**GROOVE** Growing Organization Value Chain Excellence Learning Network

**GUC** Grant Under Contract

**GWU** George Washington University

**HIFIVE** Haiti Integrated Finance for Value Chain and Enterprise

**HSS** Health Strengthening Systems

**IADB** Inter-American Development Bank

**ICT** Information and Communication Technologies

**IDEA** USAID's Office of Innovation and Development Alliances

**IFAD** International Fund for Agricultural Development

**IFDC** International Fertilizer Development Center

**IFPRI** International Food Policy Research Institute

**ILO** International Labor Organization

**IMTFI** Institute for Money, Technology, and Financial Inclusion

**IRC** International Rescue Committee

**IRG** International Resources Group

**IT** Information Technology

**K&L** Knowledge and Learning

**KDID** Knowledge-Driven International Development Portal

**KDMD** USAID's Knowledge-Driven Microenterprise Development project

**KM** Knowledge Management

**KMIC** Knowledge Management Impact Challenge

**LAC** Latin America and the Caribbean

**LER** USAID's Office of Learning, Evaluation, and Research

**LMS** Learning Management System

**LOE** Level of Effort

**M&E** Monitoring and Evaluation

**MCC** Millennium Challenge Corporation

**MCH** Maternal and Child Health

**MD** USAID's Microenterprise Development Team

**MED** Microenterprise Development

**MEAS** Modernizing Extension and Advisory Services

**MEDA** Mennonite Economic Development Associates

**MENA** Middle East and North Africa

**MFC** Microfinance Centre

**MFIC** Microfinance International Corporation

**MFS** Mobile Financial Services

**MOU** Memorandum of Understanding

**MPEP** USAID's Microenterprise and Private Enterprise Promotion Office (Formerly the Microenterprise Development office)

**MPI** Migration Policy Institute

**MS** Mobile Solutions

**MSU** Michigan State University

**NGO** Non-Governmental Organization

**NPD** Notice of Payment Due

**NRM/CC** Natural Resources Management and Climate Change

**PE** USAID's Private Enterprise Team

**PPL** USAID's Bureau of Policy, Planning, and Learning

**PPL/SPP** USAID/PPL Strategic and Program Planning Office

**PPL/ST** USAID/PPL Science and Technology Office

**PRODEL** Programa del Desarrollo de Empresas Locales

**P3DP** Public-Private Partnerships Development Program

**Q&A** Question and Answer

**QA** Quality Assurance

**SAIS** School of Advanced International Studies

**SCORM** Sharable Content Object Reference Model

**SEEP** Small Enterprise Education and Promotion Network

**SID** Society for International Development

**SME** Small and Medium Enterprise

**ST** Social Transitions

**STRIVE** Supporting Transformation by Reducing Insecurity and Vulnerability with Economic Strengthening project

**TOPS** Technical and Operational Performance Support

**TRG** Training Resources Group

**TSF** Training Support Fund

**UC** University of California

**USAID** United States Agency for International Development

**USDA** United States Department of Agriculture

**USG** United States Government

**USIP** United States Institute of Peace

**UWI** University of The West Indies

**WLSME** Women's Leadership in Small and Medium Enterprises Initiative

**VEGA** Volunteers for Economic Growth Alliance

**VSLA** Village Savings and Loan Association

The QED Group is implementing the 5-year United States Agency for International Development (USAID) Knowledge-Driven Microenterprise Development (KDMD) project. The KDMD project designs and implements state-of-the-art knowledge management, learning and sharing tools, and approaches that promote collaboration among practitioners to speed innovation and adoption. These tools include online and in-person, formal and informal learning events; communications strategy development and implementation; web strategy development and implementation; and assessing and learning methods and approaches.

Through KDMD, the QED team maximizes the impact of USAID's knowledge and learning investments. Since 2008, the QED team has implemented strategies and processes to coordinate learning and knowledge sharing across a range of investments and activities of the Microenterprise and Private Enterprise Promotion (MPEP) Office. As the demand for knowledge and learning services has grown within USAID, other operating units have sought the services of the KDMD project. The KDMD contract allows other operating units to buy into the services that KDMD offers. This allows the project to leverage its successful knowledge management (KM) framework and processes to help USAID maximize its impact. In addition to MPEP, the following USAID operating units have bought into the project:[1]

- Economic Growth, Education, and Environment Bureau's Office of Economic Policy (E3/EP)

- Bureau for Food Security (BFS)

- The Jamaica Mission

- Economic Growth, Education, and Environment Bureau's Development Credit Authority (E3/DCA)

- Europe & Eurasia Bureau's Democracy and Governance Social Transitions team (E&E/DG/ST)

- Office of Innovation and Development Alliances' Global Partnerships Division (IDEA/GP)

- Office of Innovation and Development Alliances' Mobile Solutions team (IDEA/MS)

- Bureau for Policy, Planning, and Learning (PPL)

- Private Enterprise team (MPEP/PE)

The QED Group, LLC is pleased to present this Semi-Annual Report for the period from November 15, 2011 to May 14, 2012. KDMD is implemented by The QED Group and its sub-contractors— International Resources Group (IRG), Training Resources Group (TRG), Global Learning Systems (GLS), Zaloni, and others. This report was prepared collaboratively by the entire KDMD team and it represents their hard work and accomplishments over the 6-month period. The report begins with a brief overview of the portfolios that provide services across the programs. This is followed by sections on each of the programs that include work with MPEP, the grants under contract, and the offices that have bought into KDMD. The report concludes with sections on cross-project initiatives and project administration.

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[1] Due to reorganization within USAID, the names of several bureaus and office that KDMD work with have changed in the last period. The Economic Growth and Trade Bureau has become the Economic Growth, Education, and Environment Bureau (E3). The Microenterprise Development Team in the Microenterprise and Private Enterprise Promotion Office (E3/MPEP/MD) was formerly the Microenterprise Development office (EGAT/PR/MD). The Economic Growth Office (EGAT/EG) has been renamed the Office of Economic Policy (E3/EP).

## 2.1 ASSESSING & LEARNING

The Assessing & Learning (A&L) Portfolio provides support to both internal and external KDMD project products and services. This is done through surveys which measure client satisfaction, perceived usefulness of products and services, and continued use/application of products and services. Through the use of After-Action Reviews (AARs) and other tools, services and internal processes are also assessed and the results are fed back into the project.

During the last six months, the A&L team has continued to provide survey design and analysis support across project activities. This included the completion of baseline data collection and analysis for the Growing Organization Value Chain Excellence Learning Network, the completion of an Annual Learning and Impact Report for the project, and the completion of a follow-up survey for USAID personnel who participated in the KDMD-supported Economic Growth Overview trainings in 2009 and 2010.

## 2.2 WEB DEVELOPMENT

The Web Development & Management Portfolio is the technical leader in the development and management of the Knowledge-Driven International Development (KDID) portal and its family of websites, including Microlinks, Agrilinks, Social Transitions, and the Jamaica Community of Practice (CoP). The Web Development team also provides ongoing development and support for sites external to the portal such as the Economic Growth Learning Center (EGLC) and the Feed the Future (FTF) website. As the architects and maintainers of the knowledge infrastructure for KDMD, the Web Development team continues to advise clients and staff on technology, as well as new tools and capabilities required to achieve client objectives.

The Web Development team employs in-house staff as well as vendors to create all aspects of site design, build, and launch.[2] To accomplish this, the team:

- Works with the server host vendor to create the databases and file systems for each site as part of a multi-site architecture

- Works with clients and key stakeholders to translate needs into specific site requirements

- Utilizes requirements to create functional wireframes to determine layout, functionality, and development strategy

- Creates design slides based on the wireframes to illustrate the visual look and feel of the site and updates these slides as needed

- Builds and develops the sites based on client feedback, agreed upon requirements, wireframes, and design slides

- Coordinates in-house builders/developers and external developers to ensure collaborative work processes

- Trains program managers and key site stakeholders on general and unique site functionality

- Conducts quality assurance tests for functionality and usability

After a site is launched, the Web Development team works closely with designated site managers to ensure each site is kept up-to-date and dynamic. The Web Development team continues to introduce new features and tools to the portal and its family of websites without compromising the integrity of the portal.

During this reporting period, KDID, Microlinks, Agrilinks, Jamaica CoP, Social Transitions, EGLC, and the FTF sites received frequent updates and enhancements.

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[2] The Communications team provides substantial support on design activities, especially the creation of design slides, as well as quality assurance processes.

## 2.3 KNOWLEDGE & LEARNING

The Knowledge & Learning (K&L) Portfolio works with traditional and digital learning mechanisms to develop and implement innovative, creative, and effective ways to capture and share knowledge, leverage good practices, and improve performance for USAID and its partners. The K&L Portfolio, in collaboration with the rest of the KDMD team, designs and manages a dynamic portfolio of knowledge and learning activities utilizing a variety of innovative tools to pilot new approaches, consolidate best practices, and ensure the delivery of high-quality services to USAID. In addition to designing and implementing learning activities for USAID, the K&L Portfolio also documents promising practices through knowledge capture and management to share with the KDMD team, USAID, and its stakeholders.

K&L Portfolio activities include scoping, design, and facilitation of customized knowledge sharing activities and learning products such as:

- Technical seminars in person and online

- Online discussions and webinars

- Screencasts, wikis, and other learning tools and products

- Learning networks, communities of practice, and working groups

- Trainings, workshops, and special events

The K&L Portfolio works with other portfolios across the project to provide support to all KDMD programs. During this reporting period, the K&L Portfolio provided facilitation and documentation support for seminars and online discussions, provided event and training capture support, created over 40 learning products and tools, and provided activity scoping assistance for multiple KDMD programs.

## 2.4 COMMUNICATIONS

The Communications Portfolio provides support across KDMD's programs by developing and implementing communications strategies, creating materials for distribution, leading online content management efforts, and supporting event management. The team's work includes development of online and in-person engagement strategies and materials such as email campaigns, print advertisements, and social media outreach. The Communications team is increasingly involved in the development of new media products to complement existing activities. These include video interviews of event speakers, event photography, and video blogs. In addition, the Communications Portfolio works closely with the Web Development team on all information architecture, design, and branding efforts for new and existing websites.

In this period, the Communications team also helped manage several key project-wide initiatives to promote standardization, reinforce branding, improve efficiency, capture best practices, and enhance user experience. These activities are outlined more fully in Section 14.

The Communications team is structured by program and activity, each of which has a designated point of contact within the team to assist with project management and advise on issues of knowledge packaging and dissemination. In

addition to providing communications strategy and development, the Communications team provides quality assurance including content copy-editing, proofing, and meta-data tagging where appropriate for all project documents and online content. The project's Graphic Designer is also a member of the Communications Portfolio, providing award-winning web-based and print design.

## 2.5 ADULT LEARNING & TRAINING

The Adult Learning & Training (ALT) Portfolio promotes and supports a blended learning approach which combines in-person and online interaction to drive the highest learning impact. Blended learning approaches move beyond the traditional classroom setting and include participatory and self-paced modules, interactive and stand-alone courses, videos, webinars, and other distance learning techniques. The team's blended approach helps to move the participants toward a continuous learning experience that extends learning before, during, and after a workshop or training.

The ALT team consists of instructional designers, adult learning specialists, and USAID subject-matter experts who collaborate to develop blended learning courses. The blended learning solutions can be hosted on the KDID portal and associated sites, the Economic Growth Learning Center (EGLC), the USAID Learning Management System (LMS), and other sites. The Adult Learning & Training team is currently working with the Economic Policy Office, DCA, the MD team, BFS, and IDEA/GP.

# 3. MICROENTERPRISE AND PRIVATE ENTERPRISE PROMOTION PROGRAM

QED's knowledge management and training work began with the former Microenterprise Development office under the Accelerated Microenterprise Advancement Project (AMAP). During this reporting period, the Microenterprise Development office was reorganized into the Microenterprise and Private Enterprise Promotion (MPEP) Office, with two teams, the Microenterprise Development (MD) team and the Private Enterprise (PE) team. The KDMD contract sits in the MPEP Office. The KDMD objectives include:

- Facilitate knowledge sharing and learning by assisting with the accumulation of tacit and explicit knowledge stock related to microenterprise development

- Design, implement, and facilitate scalable, replicable knowledge and learning tools and approaches including implementation of the Grants Under Contract (GUC) mechanism

- Promote collaboration among practitioners by encouraging knowledge flow across the microenterprise development industry

- Contribute lessons learned to the broader fields of KM and adult learning

The work of the MPEP Program is conducted across all project portfolios. KDMD works with the Office in MPEP's priority areas that fall within the scope of the project, although the majority of KDMD's work during this reporting period was with the MD team.

## OUTREACH AND ENGAGEMENT

KDMD works across the MD team's portfolio of partners. There was a great deal of outreach to MD stakeholders in this period that has contributed significantly to the project's work, including engagement with the following key partners:

**FIELD-Support LWA:** After a coordination meeting in December 2011, the KDMD team worked to implement several upgrades to FIELD's project pages on KDID to improve the visibility and connection between those descriptive pages and the

technical content being produced by the projects (which is housed in the Microlinks Library). This included creating a landing page in the Library for the FIELD-Support Knowledge Series. In addition, 18 new resources were added to Microlinks over the 6-month period, 8 of which were part of the popular ICT & Ag series from the FACET project. News about FIELD-funded knowledge products was also featured regularly in the Connections newsletter over the same period for the following projects/activities: ECYMP, ESAF, FACET, HIFIVE, P3DP, PRODEL, the Smart Campaign, and STRIVE's Afghanistan Secure Futures activity.

**The SEEP Network:** The KDMD project continued to collaborate with The SEEP Network during this reporting period through coordination meetings, engagement in KDMD and SEEP events, and cross-promotion through Microlinks and SEEP's website. In January, KDMD met with SEEP representatives to discuss current activities and brainstorm potential areas for collaboration. As a result of this discussion, SEEP participation in KDMD-facilitated events became more deliberate throughout the reporting period. Recent SEEP publications have been shared in the Microlinks and Agrilinks libraries and Jan Maes (SEEP's Poverty Outreach Working Group facilitator) presented on economic strengthening for the poor in the March After Hours Seminar. SEEP also wrote the guest blog for the February After Hours Seminar and provided live note-taking during the After Hours special event in January.

KDMD provides support to other microenterprise- and microfinance-focused partners and industry stakeholders, including AMAP K&P II, at the request of the MD team.

**Women's Leadership in Small and Medium Enterprises Initiative**

Beginning this reporting period, a cross-portfolio team provided support to the MPEP Private Enterprise team's new Women's Leadership in Small and Medium Enterprises (WLSME) initiative through strategy development, branding, and activity

planning. The initiative aims to expand the frontiers of women in SME development to generate new learning about which women's SME entrepreneurship models work best in different developing country contexts. More specifically, this initiative will:

- Demonstrate what works and where

- Identify the most important constraints and which interventions work best

- Increase awareness around issues of women's entrepreneurship

- Showcase what is happening at USAID in this area

Through multiple scoping sessions with USAID representatives, the following activities were proposed for KDMD support under this initiative:

- A grantee learning network in collaboration with the World Bank

- A series of six seminars

- A community of practice

- Website development

As a result of the first strategy session held in May, KDMD developed a one-page factsheet that outlines the initiative's vision. Additional activity support was provided for the launch of the "Growing Economies Through Women's Entrepreneurship Seminar Series" that will begin in June.

As outlined in the subsequent portfolio sections, the KDMD team has continued to support the Microenterprise and Private Enterprise Promotion

Office through dedicated efforts across all phases of the knowledge cycle and across and array of technical areas that fall within the Office's portfolio

## 3.1 WEB DEVELOPMENT

The Web Development Portfolio's work with the MD team during this period focused on Microlinks 2.0. The Web Development team continued to refine the Microlinks site, enhancing functionality and the user experience. Having migrated/archived the pertinent resources and content from Microlinks 1.0, the team redirected microlinks.org to microlinks.kdid.org and removed the "BETA" label.

In collaboration with its subcontractor, the Web Development team undertook major efforts to add new thematic and functionality updates during this period. The most important change to Microlinks was the redesign of the site's main navigation menu and related updates to the banner and site map. The previous menu followed the "3+1" site structure that grouped content into the Learning Marketplace, Good Practice Center, and Library, with content then being aggregated from across the site onto key Topic pages. Feedback from site users in previous periods suggested that this organizational structure was confusing and cumbersome. By making high-demand content more accessible from any page with one click, the new menu and site structure is much more intuitive and user-friendly. The menu now includes the following top-level categories: Topics, Events, News, Resources, and Groups (see Figure 1). The drop-down menus underneath each of these tabs have also been redesigned for clarity.
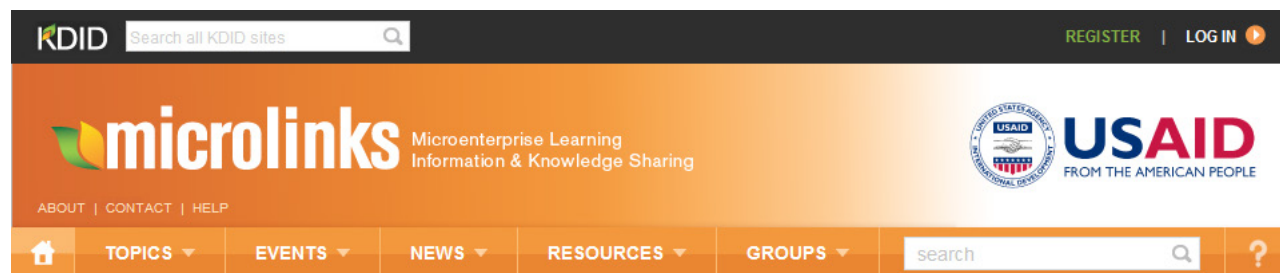


Figure 1:
The new Microlinks navigation menu is simpler and more intuitive for users.

The second important site-wide change was made in the Topics section. Based on revised strategic priorities of the MD team, the key topics highlighted on the site were reviewed and eventually consolidated from 34 original topics to 7 topics (Diaspora Engagement, Emerging Payment Systems, Financial Inclusion, Food Security, Rural Finance, Value Chain Development, and Vulnerable Populations). Not only was the menu simplified to reflect this change, but the Topic pages themselves were redesigned with a more streamlined look and feel with content displayed in sections, "Recommended" and "Latest Activity," rather than the previous four sections. This update also helped to simplify the content management process as it reduced the vocabulary tagging options in the back-end.

| MICROLINKS ANALYTICS (December 1, 2011 – May 31, 2012) | |
|---|---|
| Number of Visits | **78,930** |
| Number of Unique Visitors | **48,849** |
| Number of Unique Page Views | **150,075** |
| Number of New Visitors | **46,929** |
| Number of Returning Visitors | **32,001** |

Additional updates were also made to the site's functionality to improve the user experience, reduce clutter on the pages, and implement Drupal best practices. The library resource pages were redesigned to better highlight multiple content files and links. Modal, or pop-up, windows were added to the site to accommodate Microlinks' growing video repository. This functionality reduces clutter on the page, simplifies the page creation process, and allows users to play videos without navigating away from their current page. Lastly, the Web Development team implemented new best practices for user log-in and account creation, ensuring that users are redirected back to the page they were previously viewing.

## 3.2 KNOWLEDGE & LEARNING

### SEMINARS & EVENTS

The K&L Portfolio continued to support the MD team through the implementation of the Breakfast and After Hours Seminar Series in addition to the Emerging Payment Systems (formerly Mobile Financial Services) and Diaspora Engagement. All four series provided an in-person and online forum for knowledge exchange, including expert panel presentations and Q&A. Online attendees participated via webinar and watched presentations in real time, interacted with presenters and other attendees, and submitted questions for the Q&A portion of the seminar. To encourage continued knowledge sharing and discussion, a suite of learning products (including screencasts, recorded webinars, transcripts, PowerPoint presentations, and audio files) were regularly produced, posted, and promoted after all seminars.

In March 2012, the KDMD project began utilizing Adobe Connect software for the webinar portion of all seminars which greatly enhanced online participant experience through increased interaction with other attendees and presenters, real-time polling, and access to downloadable files directly from the webinar room. For more information about the migration to Adobe Connect, please see the "Cross-Project Initiatives" section of this report.

### After Hours Seminar Series

The After Hours Seminar Series addresses emerging topics in financial inclusion. During this reporting period, the K&L team provided support on three After Hours Seminars as well as a special event on "Moving Financial Inclusion Beyond Microfinance." A total of 548 people participated in the 4 events (both in person and via webinar) and feedback was obtained from 125 people through surveys administered. Presenters were brought in remotely for two After Hours Seminars this reporting period using Adobe Connect. Guest blogs continued to be utilized as a way to engage a

variety of different stakeholders in the events and were posted to the Microlinks blog following all After Hours Seminars.

The special debate-style event on January 30, held in partnership with the Financial Inclusion Forum DC (FIFO DC), targeted the After Hours audience. The debate, "Moving Financial Inclusion Beyond Microfinance," featured David Roodman (Center for Global Development) and Milford Bateman (University of Juraj Dobrila of Pula) with Chuck Waterfield (MFTransparency) and Carissa Page (USAID MPEP Office) as moderators. In a parliamentary-style debate, presenters responded to one question that was selected by the Microlinks community and USAID.

**62** in-person    **196** webinar

In addition to the debate, the following After Hours Seminars were held during the reporting period:

- "Viewing Value Chain and Household Finance From a Demand Perspective," presented by Geoff Chalmers (ACDI/VOCA) and Jason Agar (Kadale Consultants Limited; remote presenter from the United Kingdom) and moderated by Dasha Kuts (KDMD) on February 16, 2012. The guest blog was written by Sonali Chowdhary and Bethany Bengfort (SEEP Network) and was cross-posted on the SEEP website.

**17** in-person    **174** webinar

- "Lessons Learned From Sequenced, Integrated Strategies of Economic Strengthening of the Poorest," presented by Aude de Montesquiou (Consultative Group to Assist the Poor; remote presenter from Paris), Jaya Sarkar (Trickle Up), and Jan Maes (SEEP Network) and moderated by Anicca Jansen (USAID MPEP Office) on March 21, 2012. The guest blog was written by Carine Roenen (Fonkoze, Haiti), Sabina Rogers (Microcredit Summit Campaign), and Bridget Dougherty (Microcredit Summit Campaign).

**25** in-person    **60** webinar

- "Money on the Move: Payments and Money Transfer Behavior of African Households," presented by Jake Kendall (Bill & Melinda Gates Foundation) and moderated by Nandini Harihareswara (USAID IDEA Office) on April 23, 2012. Harihareswara also provided the guest blog.

**31** in-person    **81** webinar

**Breakfast Seminar Series**
The Breakfast Seminar Series brings together practitioners working in small and medium enterprise development and value chains to share their broad experience. During this reporting period, the K&L Portfolio provided support to 4 Breakfast Seminars that reached 233 participants (both in person and via webinar) and generated important participant feedback through the completion of 38 surveys. Breakfast Seminars held during this reporting period included:

- "Emergence of Sustainability in a Complex System: Are Lessons From the Health Sector Applicable to Food Security?" presented by Eric Sarriot (CEDARS at ICF International) on January 26, 2012.

**35** in-person    **33** webinar

- "Tools for Mending Weak and Fractured Value Chains," presented by Curtis Hundley (DAI) and Amy Sink (USAID BFS) on February 23, 2012.

**28** in-person    **55** webinar

- "Market Aggregation: Facilitating 'Game Changing' Opportunities in Ukraine," presented by Nick Ramsing (MEDA) on March 22, 2012.

**28** in-person    **22** webinar

- "Working in Complex Systems: The Rubber Value Chain in Indonesia," presented by Frank Page and Donna Read (Managing Systems for Wellness) on April 26, 2012.

**8** in-person    **24** webinar

**Diaspora Engagement
Seminar Series**

The Diaspora Engagement Seminar Series was launched in May 2011 with the aim of reaching out to diaspora-led development partners for collaboration and engagement. This mini-series explored the six channels of diaspora engagement discussed in the book, "Diasporas: New Partners in Global Development Policy," a compilation of studies completed by the Migration Policy Institute (MPI) under a USAID grant. During this reporting period, the K&L Portfolio provided support for 2 Diaspora Engagement Seminars that reached 144 participants (both in person and via webinar) and generated important participant feedback through the completion of 31 surveys. Diaspora Seminars held during this reporting period included:

- "Diaspora Philanthropy: Private Giving and Public Policy," presented by Kathleen Newland (MPI), Yulya Spantchak (Hudson Institute), Danial Noorani (The Citizens Foundation USA), and Danny Pins (The American Jewish Joint Distribution Committee) on December 15, 2011.

  **41** in-person   **35** webinar

- "Voice After Exit: Diaspora Advocacy," presented by Kathleen Newland (MPI), Jennifer Brinkerhoff (The George Washington University), Nadia Roumani (American Muslim Civic Leadership Institute), and Aram Hamparian (Armenian National Committee of America) on February 15, 2012.

  **42** in-person   **26** webinar

**Emerging Payment
Systems Seminar Series**

The Emerging Payment Systems (EPS) Seminar Series facilitates knowledge sharing on key legal, regulatory, cultural, enforcement, security, and information technology (IT) issues related to emerging payment systems, including (but not restricted to) mobile financial services, with a special emphasis on safeguarding systemically important

payment systems. This seminar series was originally launched in July 2011 as the Mobile Financial Services (MFS) Seminar Series but was re-branded in early 2012. During this reporting period, the K&L Portfolio provided support to 4 EPS Seminars that reached 183 people (both in person and via webinar) and generated important feedback through the completion of 29 surveys. EPS Seminars during the reporting period included:

- "Deposit Insurance and Consumer Protection for MFS," presented by Mark Egerman (Consumer Financial Protection Bureau) and Christopher Hencke (Federal Deposit Insurance Corporation) on November 18, 2011.

  **25** in-person   **36** webinar

- "Financial Action Task Force Recommendations: Relevance & Application within Public & Private Sector Contexts," presented by Emery Kobor (United States Department of Treasury) on February 28, 2012.

  **11** in-person   **24** webinar

- "Barriers to Mobile Money Transfer Uptake in Ghana," presented by Vivian Afi Abui Dzokoto (Virginia Commonwealth University) and Edwin "Cliff" Mensah (University of North Carolina at Pembroke; remote presenter from North Carolina) on March 30, 2012. Mensah also provided the guest blog summarizing the event.

  **21** in-person   **43** webinar

- "How Mobile Phones Can Improve Access to Services for Persons with Disabilities," presented by Axel Leblois (G3ict), Charlotte McClain-Nhlapo (USAID), and Douglas Goist (National Industries for the Blind) on April 27, 2012. The event also included a live demonstration and video by Goist on mobile phone technology for people with visual impairments (see Figure 2). Screencasts produced from this seminar will be used in an upcoming "Emerging Payment Systems Technical Capacity Building Workshop"
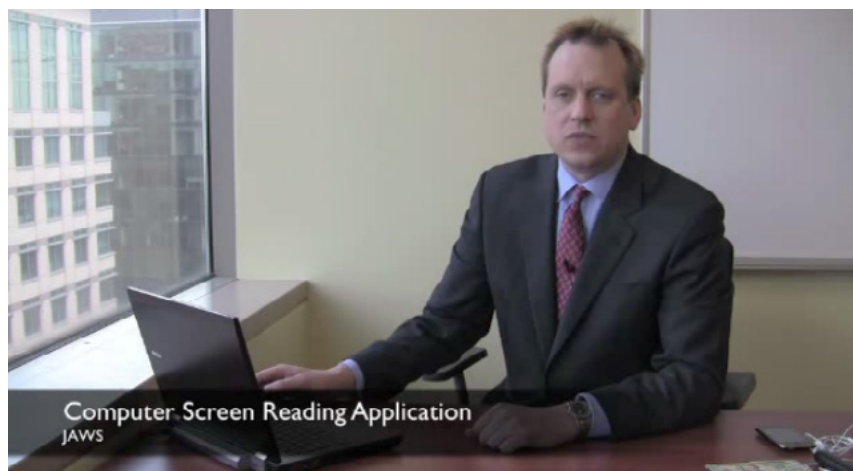
Figure 2:
Douglas Goist of the National Institute for the Blind gives a demonstration on various mobile apps.

that will be held in Bangkok, Thailand in June 2012.

**5** in-person    **18** webinar

### AMAP Learning Event

In February, KDMD supported USAID's Accelerated Microenterprise Advancement Project (AMAP) Learning Event, "Meeting the Challenges of Value Chain Development" that was held in Washington, DC over the course of two days. Prior to the event, the K&L Portfolio assisted ACDI/VOCA staff in scoping capture needs and desired outputs from the event. During the event, the K&L Portfolio broadcasted the opening session live via webinar and provided note-taking for several sessions. In addition, the K&L Portfolio worked closely with USAID's MPEP Office and staff from the Bureau of Policy Planning and Learning (PPL) to design a session on "Learning and Evaluating within Dynamic Systems." Outputs from this event are available on Microlinks.

### ONLINE FACILITATION

The K&L Portfolio supported the MD team through two online discussions held during this reporting period. Speakers Corners are branded online discussions that engage professionals from around the world to share ideas, debate approaches, and learn about new tools and resources related to microenterprise development. E-Consultations,

while similar to Speakers Corners, are more targeted and focused with the goal of obtaining feedback on a particular topic from a specific group of stakeholders. Both types of online discussions utilize the experience and skills of designated subject matter or facilitation experts to facilitate and generate post-event learning products to synthesize main discussion points.

### Speakers Corners

From November 29-December 1, the K&L Portfolio supported Speakers Corner #45, "Mobile Financial Services: Balancing Regulatory Risks with Financial Inclusion Opportunities." This Speakers Corner, which had 63 participants, was a continuation of discussions generated from previous Mobile Financial Services Seminars that took place previously in 2011. A number of resources submitted by Speakers Corner facilitators and participants were uploaded to the online space and were available to participants throughout the discussion. This Speakers Corner was actively promoted by Maria Stephens (USAID MPEP Office) through scheduled events at John Hopkins University School of Advanced International Studies (SAIS) and University of California-Davis (UC Davis) which resulted in increased participation by university students. A synthesis document outlining the main themes of the discussion as well as a full transcript were produced and shared through Microlinks.

**E-Consultations**

In January, KDMD partnered with the USAID-funded Accelerated Microenterprise Advancement Project to design and implement an e-Consultation on "Pathways out of Poverty." This 2-day discussion, facilitated by Ben Fowler (AMAP Consultant) and Anna Cuny (ACDI/VOCA), was built around a series of case studies collected through the AMAP project and was prefaced by an introductory screencast from Ruth Campbell (ACDI/VOCA). The synthesis and outcomes from this discussion fed directly into USAID's AMAP Learning Event held in February. Fifty participants joined this e-Consultation with 33 actively contributing to the discussion through 120 discussion posts. The discussion was viewed over 5,000 times and 8 case studies were shared with discussion participants.

## VALUE CHAIN DEVELOPMENT WIKI

The K&L Portfolio conducted a comprehensive review of the Microlinks Value Chain Wiki during this reporting period. The purpose of this review was to improve user experience of existing content based on the needs of priority user groups. The review included:

- A comprehensive review of migration status from the old value chain wiki

- A review of new wiki content on the current Microlinks website

- Identification of priority wiki audiences in collaboration with USAID's MD team

- Interviews with representatives from target audiences

This content review resulted in the development of "user pathways" based on user familiarity with the wiki as well as learning goals. A detailed "Recommendations" document was developed and shared with USAID and implementation of proposed changes is pending further guidance from the MD team.

## 3.3 COMMUNICATIONS

The Communications Portfolio continued to support the MPEP Program by implementing a multi-faceted communications strategy and developing diverse products tailored for specific audiences to easily access, digest, and apply knowledge resources. This strategy is based on an understanding of creating optimal formats for intended audience engagement. Over the reporting period, the activities of the Communications team largely fell into four broad categories:

- Event support

- Product development

- Outreach and engagement

- Microlinks management

In these efforts, the team worked closely with the other project portfolios, especially K&L and Web Development, as well as the Senior Web Strategist and Knowledge Sharing/Communications Strategic Advisor to support the program objectives.

## EVENT SUPPORT

As part of the project's continuous learning approach, the Communications Portfolio worked with others across KDMD to use the team's experience to inform the planning processes for future events and to review and update existing seminar activities. In the case of existing activities, this involved supporting the MD team seminar series product review in April 2012. To help inform decisions about the future of the four series, Communications conducted an analysis of the seminar audiences and possible audience overlap among the seminars. The analysis found that there was more invited audience overlap than anticipated. Understanding this reinforced the decisions to have the seminars on different weeks from each other.

Also related to MPEP Program seminars, Communications helped lead planning and implementation for the re-branding of the Emerging Payment Systems Seminars to re-frame the series for

**microlinks** Microenterprise Learning
Information & Knowledge Sharing

ABOUT | CONTACT | HELP

TOPICS ▾    EVENTS ▾    NEWS ▾    RESOURCES ▾    GROUPS ▾

**EPS** Emerging Payment Systems Seminars

The USAID Emerging Payment Systems (EPS) Seminar Series facilitates knowledge sharing on key legal, regulatory, cultural, enforcement, security, and information technology (IT) issues related to emerging payment systems, including (but not restricted to) mobile financial services, with a special emphasis on safeguarding systemically important payment systems. Please attend in person, join the webinar, participate in online discussions, and access documents through our expanding library. We welcome active engagement through your posting of comments and questions online and will make every effort to respond to these quickly.

**Recent EPS Seminar**

How Mobile Phones Can Improve Access to Services for Persons with Disabilities
APRIL 27, 2012

VIEW EVENT RESOURCES!

**Past EPS Seminars**

Barriers to Mobile Money Transfer Uptake in Ghana
MARCH 30, 2012 - 9:00AM

Financial Action Task Force Recommendations: Relevance & Application within Public & Private Sector Contexts
FEBRUARY 28, 2012 - 9:00AM
Mr. Kobor will discuss the Financial Action Task Force (FATF) Recommendations.

❯ ALL PREVIOUS

Figure 3:

The Emerging Payments Seminar Series landing page on Microlinks introduces people to the concept of EPS.

Figure 4:
The invitation for the Microlinks special debate, "Moving Financial Inclusion Beyond Microfinance," encouraged participants to vote for their favorite debate question.

wider discussions around emerging payments. The re-branding involved developing an engagement plan, changing the outreach materials, producing an introductory video, and working with the USAID activity lead and the KDMD Web Development team to develop content for a new series landing page on Microlinks (see Figure 3).

The Communications team, along with the Operations team, continued to manage the invitation process and provide enhanced event support for the MD team's four seminar series. Communications also continued to encourage community engagement on social media platforms by actively promoting events and related content via Twitter, Facebook, and LinkedIn.

Over the period, the team also supported two USAID special events. For the January 30 "Moving Financial Inclusion Beyond Microfinance" debate, Communications provided substantial activity planning and engagement strategy support, graphic design production, invitation and web content management, event promotion, and video interview recording and production (see Figure 4). For the February 7-8 "Meeting the Challenges of Value Chain Development" Learning Event, hosted by AMAP, KDMD's communications support focused largely on promotion, both before and after, and video interview recording and production. The Communications team provided design support and developed and sent invitations on behalf of AMAP and USAID. During the event, staff conducted 11 interviews and compiled them into 5 videos. These, as well as the other event products, were then promoted through Microlinks' various outreach channels.

In preparation for the launch of the WLSME Growing Economies Through Women's Entrepreneurship Seminar Series in June, the Communications team led discussions around branding and messaging. The

Communications team worked with the MPEP/PE team Activity Lead to determine the specific focus of the series and develop content for the series landing page on the KDID website. It was decided that the KDID site will serve as the temporary home for WLSME content and engagement while future plans will include developing an independent online space. The team also filmed a summary statement from USAID's MPEP Office Director Shari Berenbach that explained the purpose and significance of the new initiative. The edited video was then posted on the series landing page.

Additionally, the Communications team worked with the PE team Activity Lead and USAID's Senior Gender Advisor to build a targeted list of people and organizations most relevant to the WLSME seminar series topic. This custom list was uploaded to KDMD's email management system for future activity notifications and engagement. Through supplemental research, the Communications team identified several existing online resources related to women and enterprise development. One organization in particular, the Donor Committee of Enterprise Development (DCED), maintains a knowledge portal on women's entrepreneurship development. When this information was passed along, the Activity Lead was able to establish connections with the DCED Program Managers. The PE team Activity Lead is now part of a virtual working group, which includes representatives of DCED, where members are able to discuss and share knowledge around each organization's respective activities in women's entrepreneurship development.

## PRODUCT DEVELOPMENT

The Communications Portfolio continued to produce the Connections e-newsletter on a monthly basis and distribute it to a mailing list of approximately 8,000 (see Figure 5).
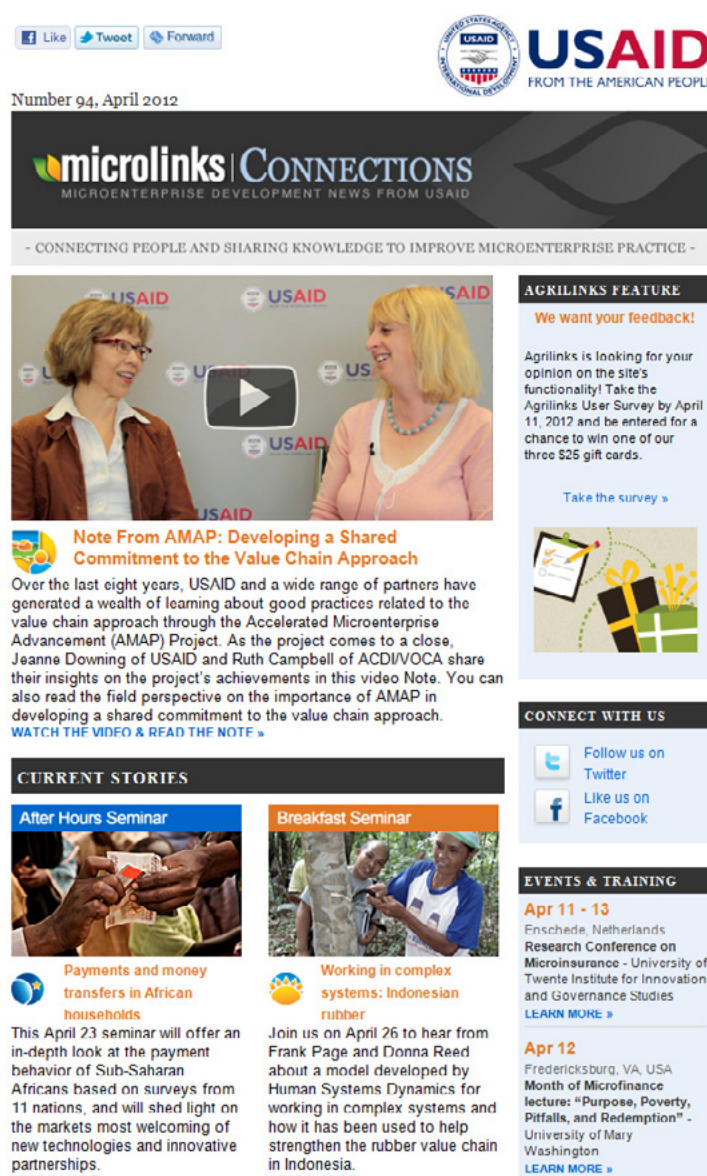


Figure 5:
The Connections newsletter highlights news, events, and resources relevant to the microenterprise development community.

Over the period, the mailing list grew 10 percent to reach a distribution of 8,393 people[3] in more than 90 countries. Industry partner contributors include the FIELD-Support LWA, CARE, Making Cents, AZMJ, CGAP, the USAID/Iraq Tijara Project, the SEEP Network, the ILO's Microinsurance Innovation Facility, the Microcredit Summit Campaign, Trickle Up, MIX, IMTFI, Souktel, Virtue Ventures, MicroRate, ACDI/VOCA, Women's World Banking, Imp-Act, and the Microinsurance Network. Despite the many and varied industry and partner submissions, newsletter content provided directly by or about USAID and its initiatives continues to maintain the highest readership with the top five stories over the six months covering the following:

- USAID- and FIFO-hosted "Moving Financial Inclusion Beyond Microfinance" debate

- Launch of the USAID "Learning Value Chain Basics" e-learning course

- USAID AMAP project video Note From the Field

- Release of USAID's "Rural and Agricultural Finance" stock-taking

- Launch of the USAID Growing Economies Through Women's Entrepreneurship seminar series

Concurrently, the team developed six Notes From the Field and highlighted these case briefs in

Connections. The following Notes were produced in this reporting period:

- December 2011: "Note From IMTFI: Mobile Money Regulation - A story arc of best practices and emerging realizations" by IMTFI

- January 2012: "Note From the Horn of Africa: Leveraging Mobile Technology to Link Somali Youth with Jobs" by Souktel

- February 2012: "Note From the Dominican Republic: Empowering Girls and their Communities Through Savings" by Women's World Banking

- March 2012: "Note From Central Europe: Roma Economic Inclusion and the Road to Legitimacy" by The QED Group

- April 2012: "Note From AMAP: Developing a Shared Commitment to the Value Chain Approach" by USAID and ACDI/VOCA

- May 2012: "Note From Ivory Coast: VSLAs Emerge From Crisis" by the International Rescue Committee (IRC)

Due to the strong viewership and positive responses from Microlinks video series in the previous period, Communications continued to record and produce video interviews for Microlinks three standing

## MICROLINKS VIDEO STATISTICS

| VIDEO SERIES | NUMBER OF VIDEOS | COMBINED VIEWS AS OF 7.6.12 |
|---|---|---|
| Breakfast Seminar Greenroom Interviews | 4 | 411 |
| MFS/EPS Seminar Greenroom Interviews | 7 | 475 |
| "Moving Financial Inclusion Beyond Microfinance" debate | 3 | 517 |
| "Meeting the Challenges of Value Chain Development" Learning Event | 6 | 390 |
| Other | 3 | 343 |
| **Total** | **26** | **2,438** |

[3] Beginning in March, actual USAID readership was affected by an electronic distribution problem which prevented Connections from being delivered to @usaid.gov email addresses because of the Agency's email firewall. See the Cross-Project Initiatives section for more information on how this issue is being addressed.

seminar series as well as other special events/activities as requested. The Microlinks Video Statistics table summarizes the number and reach of the new videos in KDMD's growing multimedia library over the last six months.

## OUTREACH AND ENGAGEMENT

As mentioned earlier, KDMD continues to engage with many industry partners, especially with regards to collecting, publishing, and promoting online content. The team's two other industry engagement efforts involved events that will not occur until the following period: The World Bank's Mobilizing Knowledge Networks Conference (June 19-20) and AZMJ's Cracking the Nut Conference (June 25-26). For the World Bank conference, the Communications team worked with other KDMD staff to develop successful session workshop and exhibit proposals that led to Microlinks' inclusion in the inaugural KM event. This represents an opportunity to showcase the work that the MD team is doing through KDMD's MPEP Program and Microlinks on knowledge management and learning networks.

Planning also began for KDMD's participation in the 2012 Cracking the Nut conference based on a successful partnership at last year's conference. After USAID, KDMD, and AZMJ discussed desires and expectations for this year's collaboration, an MOU was drafted based on partnership agreement templates developed out of the 2011 Microlinks Roadshow. The main KDMD activities agreed upon include:

- Pre-conference promotion

- Learning products publication on Microlinks and Agrilinks

- Video interviews recording and production

- Social media reporting

- Participation in the pre-conference online community discussions to help stimulate active conversations

- Design of the USAID conference program ad

- Representation of USAID at a conference exhibit booth

The last two activities will be conducted jointly with the FIELD-Support LWA, which will also represent USAID at the conference.

In addition to KDMD's collaborative efforts with the FIELD-Support LWA in planning for Cracking the Nut, the team also continued to work closely with FIELD over the reporting period to assist in knowledge sharing and dissemination of the work done by FIELD's associate award projects as mentioned earlier.

## MICROLINKS MANAGEMENT: CONTENT, DESIGN, AND PROMOTION

As Microlinks viewership and site use continued to grow over the last six months, another key function of the Communications team was to upload and/or moderate the content being submitted by partner organizations and external users for inclusion on the site in the form of contributed event announcements, news stories, opportunities, and library resources. The Communications team also spent time routinely researching new and relevant content, especially MD events and trainings, to be featured on Microlinks. This content was regularly promoted through Microlinks social media channels.

Especially noteworthy content was also promoted on the Microlinks homepage in the slideshow rotator. Communications developed promotional graphics to highlight Microlinks events, USAID and industry announcements, site information, important new resources, and more. The rotator images were updated

| NEW MICROLINKS CONTENT (November 15, 2011 – May 14, 2012) | |
|---|---|
| Blogs | **59** |
| External Events | **101** |
| Library Resources | **97** |
| News Items | **55** |
| Opportunities | **22** |
| Rotator Images | **51** |

Figure 6:
The homepage rotator provides eye-catching and easy access to new content.

each week to promote the newest content and maintain viewer interest. Prior to the site navigation update in May 2012, the rotator was also important because it provided easy access to the site's most current content from the homepage (see Figure 6).

The navigation change and related redesign of the Microlinks banner and menus was arguably the most important site update that the Communications team supported during the period. Communications provided input about menu improvements based on feedback collected during the Summer 2011 focus groups and KDMD's Graphic Designer developed

design slides based on the team's consensus. Communications staff also evaluated site content and collateral to identify what updates would be necessary to reflect the new Microlinks structure and menu (i.e. removing references to the Good Practice Center and Learning Marketplace). Others Microlinks support included creating design slides for the new Topics landing pages and possible project pages (14 designs), and migrating the newly-updated USAID "Facilitating Value Chain Development" training curriculum resources into the Library and promoting them through the site and in Connections.

# KUDOS

"So glad to see this! I was just going through the documents posted online after the [Meeting the Challenges of Value Chain Development] conference - it was over-capacity so I wasn't able to attend. This is a much-needed resource."
> *- NGO practitioner regarding the "Learning Value Chain Basics" e-course*

"Very well organized, without any technical hiccups, which is so crucial for these events. Great idea to continue the discussion afterwards through blogging, video interviews, and responding to questions from the audience."
> *- Presenter for After Hours Seminar #59*

"Thank you very much for supporting us during our presentation. I had a very good time in the online session and I believe you did as well in the face-2-face. It was my first time being engaged in that fashion, BUT, it was a very wonderful experience."
> *- Remote presenter for EPS Seminar #6*
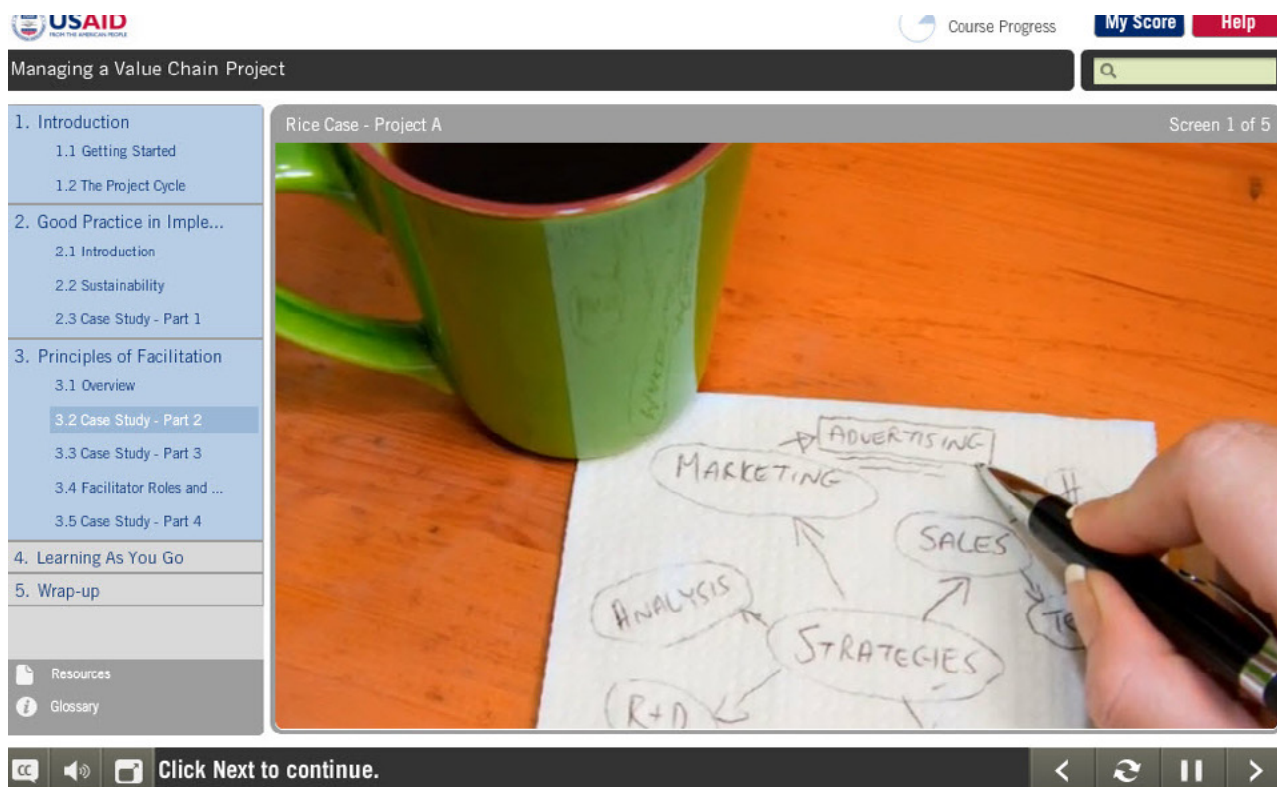
Figure 7:
The online learning modules are easy to navigate and track progress.

Lastly, Communications assisted in populating the new Training section of Microlinks with both the USAID Learning Value Chain Basics course and the CARE/MEDA e-Course on Market Analysis and Value Chain Project Design. By working with the KDMD ALT team and the COTR in the first case and staff from CARE and MEDA in the second case, the Communications team developed landing page descriptions for both courses and promoted them on Microlinks, through Connections, and across various social media outlets. In the case of the Value Chain Basics course, there was a particularly high response from LinkedIn of people interested in the material. Communications also developed business cards to promote the course at the "Meeting the Challenges of Value Chain Development" Learning Event and future Breakfast Seminars.

## 3.4 ADULT LEARNING & TRAINING

After much anticipation, the first value chain

e-course, Learning Value Chain Basics, was launched in November 2011 and was promoted at the December EG and BFS trainings. This first course reaches a broad audience for USAID staff and implementers working across numerous practice areas. The course was uploaded to Microlinks and will also eventually also sit on USAID University. Since the course launched, 339 members have joined the training group.

Course 3, Managing a Value Chain Project, was also completed in this time period. The course will be launched at the beginning of July and the first promotion of the course will go out in the July Connections newsletter (see Figure 7).

As Course 3 was being finalized, the MD team and KDMD  confirmed that the audience for this course as well as the two remaining courses could include both USAID and non-USAID users. Though USAID is the primary audience, these courses

help all international development practitioners to understand and apply USAID/MPEP's value chain approach. The project team determined that all four courses will be hosted on both Microlinks and USAID University.

KDMD continues to collaborate with the MD team to finish Course 2, Designing a Value Chain Project, and Course 4, Monitoring and Evaluating a Value Chain Project. It has been particularly difficult to finalize the content for these courses due to competing demands and USAID's re-launch of their project design guidance. The project team hopes to have these last two courses completed by this coming fall.

## 3.5 FORWARD STATEMENT

At this time KDMD will continue to produce the existing suite of activities for the MD team throughout the summer. In August, the KDMD team will meet with Jeff Levine (new MD Team Lead), Shari Berenbach (MPEP Office Director), and MD team members Jeanne Downing, Lane Pollack, and Jennefer Sebstad to determine the direction of KDMD activities for the remainder of the project. Activities in this upcoming period will include an Evidence Summit in October that will set the intellectual direction of the new MPEP Office.

# KUDOS

"I haven't watched [my Greenroom Interview] until today...you guys did a fantastic job of editing to make it sound all so coherent. It's wonderful and much appreciated. You and your team are experts. I appreciated all the support and patience you gave to me. Perhaps on my next great project, we'll have an opportunity to do this again. I would be honored."
    - *Presenter from Breakfast Seminar #66*

"These breakfasts are such a wonderful opportunity for practitioners to get together and share their expertise as well as their project experience. I have learned so much from attending them and, even though I am not an ag sector professional, because I work across the sectors the learning I have gained has been extremely useful in understanding certain technical aspects of projects with which I have been involved. A really neat benefit is the networking in the group and the really delicious breakfasts! So keep up the good work!"
    - *Presenter from Breakfast seminar #68*

"A quick note to say thanks for pulling the invitation together quickly, and getting it out on MailChimp. I think you did a great job of fitting it to the template, but maintaining the original look/feel [ACDI/VOCA] put together."
    - *USAID KDMD COR regarding the invitation for the*
    *"Meeting the Challenges of Value Chain Development" event*

KDMD continued to administer several grants and facilitate one learning network over the past six months. This work yielded several exciting knowledge products and industry events, as described in the following K&L section. Momentum continued to build as the GROOVE Learning Network members work to complete their final milestones and prepare for close-out. Below are highlights from the grantees' activities during the reporting period:

- Mercy Corps' "iIMPACT Brazil" grant period of performance was extended to support the Global Impact Economy Forum hosted by Secretary of State Hillary Rodham Clinton and to conduct research related to the Accelerating Market-Driven Partnerships (AMP) program launched by the Global Partnership Initiative at the Department of State.

- Virtue Ventures, Inc., under a no-cost extension, completed its last deliverables and led a webinar on January 18, 2012, which discussed the role of social enterprise in international development. The webinar recording and presentation materials can be found on the [seToolbelt website](#).

- The "Seal of Excellence" grant with Results Educational Fund completed its first deliverable, forming a technical committee and developing a set of draft indicators. The grantee began coordinating with KDMD to prepare for an e-Consultation in July 2012.

- The "Higher Education Finance" grant with Omitrix, Inc. will finalize deliverables and come to a close in June 2012.

As part of the project's Grants Under Contract (GUC) activities, KDMD also issued Training Support Fund (TSF) awards during the reporting period for the following purposes:

- To cover travel expenses for author Milford Bateman and moderator Chuck Waterfield, who participated in the January 2012 special event, "Moving Financial Inclusion Beyond Microfinance."

- To cover travel expenses for Danial Noorani, CEO of The Citizens Foundation, who co-presented at the December Diaspora Engagement Seminar, "Diaspora Philanthropy: Private Giving and Public Policy."

- To cover travel expenses for Curtis Hundley of DAI who co-presented at the February Breakfast Seminar, "Tools for Mending Weak and Fractured Value Chains."

- To support the Boulder Institute of Microfinance and the initial scoping activities for CGAP's engagement in rural and agricultural finance. Scoping activities and products include the following:

  › Literature review of studies that look at the supply from a full range of financial and non-financial providers and demand for all types of financial services in rural areas.
  › Conversations with interested members to explore an eventual role for CGAP in rural and agricultural finance.
  › Conference calls with key individuals to develop the core elements of an impact model for rural and agricultural finance and methodology for its deployment.
  › PowerPoint that outlines key findings, defines parameters, and articulates options for CGAP's future engagement.
  › White paper that frames the role of rural and agricultural finance in the portfolio of poorer rural farming families.
  › Briefings to the microfinance community via Microlinks and CGAP-related events.
  › Process design for a second scoping that would craft the full framing, evidence gathering, and model generation in this area.

- To cover travel expenses for Jaya Sarkar, Vice President of Trickle Up, and Jan Maes of the SEEP Network, who co-presented at the March After Hours Seminar, "Lessons Learned From

Sequenced, Integrated Strategies of Economic Strengthening of the Poorest."

- To cover travel expenses for Vivian Afi Abui Dzokoto, Assistant Professor at Virginia Commonwealth University's Department of African American Studies, who co-presented at the March Emerging Payment Systems Seminar, "Barriers to Mobile Money Transfer Uptake in Ghana."

- To cover travel expenses for Axel Leblois, founder and Executive Director of the Global Initiative for Inclusive Technologies, who co-presented at the April Emerging Payment Systems Seminar, "How Mobile Phones Can Improve Access to Services for Persons with Disabilities."

- To cover travel expenses for Aishwarya Ratan, Director of the Microsavings and Payments Innovation Initiative, who co-presented at the May After Hours Seminar, "Matching Products with Preferences: Innovations in Commitment Savings for the Poor."

## 4.1 KNOWLEDGE & LEARNING

### GROOVE LEARNING NETWORK

KDMD continued support and facilitation of the GROOVE Learning Network throughout the reporting period. KDMD's GROOVE co-facilitators led a series of six monthly meetings with grantees and USAID staff. Sub-group calls and meetings focused on individual knowledge products including monitoring & evaluation briefs and an "administrator's guide" for the GROOVE capacity building mentorship program.

Additional support for the GROOVE mentorship program included the design and facilitation of four webinars. In December 2011 and February 2012, group check-ins were arranged for mentors, mentees, and the grantee administration team to share progress on the capacity building curriculum, exchange successes and challenges, and offer advice on approaching the content and delivery of the

program. In January 2012, mentees from CARE Ghana presented on their ongoing value chain development projects and how the mentorship program had become integrated into their work. The mentee from Conservation International (CI) presented to GROOVE and colleagues in April 2012, highlighting the experience of CI's mentor-mentee team in Cambodia and their progress on an ongoing aquaculture value chain initiative.

In addition to the capacity building and M&E knowledge products, KDMD supported the ongoing development of a knowledge product on "learning about learning." This product builds upon KDMD's previous experience in implementing learning networks and other grant-funded learning mechanisms to identify good practices for implementation of future USAID learning initiatives. The learning network co-facilitators conducted regular meetings with Lane Pollack (USAID) and Scott Yetter (CHF) throughout the reporting period to refine the focus and audience of the product, identify themes and trends from the GROOVE Learning Network experience to illustrate the identified good practices, and develop an outline for a working paper and additional multimedia inputs.

Finally, KDMD led the planning for a final in-person meeting of the GROOVE grantees in Washington, DC in June 2012.

### VIRTUE VENTURES

The K&L team designed, moderated, and supported facilitation for a webinar with the grantees from Virtue Ventures. Kim Alter (Virtue Ventures), Anne Henricot (Phillips Foundation), and Lindsay Miller (Virtue Ventures) discussed the intersection of social enterprise and international development, and the seToolbelt website. This discussion included active participation from 89 attendees from 26 different countries. A transcript of the discussion chat and questions were shared with the Virtue Ventures team to inform future interaction on their seToolbelt site.

Figure 8:
The seToolbelt webinar was promoted on Microlinks through clickable ads like this one.

## 4.2 COMMUNICATIONS

In support of the seToolbelt webinar on "Social Enterprise and International Development," hosted by KDMD grantee Virtue Ventures in January 2012, the Communications Portfolio provided outreach and promotion to generate interest in the event. The event was promoted in Connections and on the Microlinks homepage with links to the Microlinks-hosted event page and registration (see Figure 8). The Communications team also worked with the grantee to develop and distribute a series of email invitations that reach over 2,000 people, as well as the post-event resource email.

Communications also worked with K&L during the period to outline strategies and advise on communications channels for future promotion and dissemination of major GROOVE deliverables anticipated in Summer 2012. This included planning for interview capture at GROOVE's summer event and a Note From the Field in August featuring the learning network.

## 4.3 FORWARD STATEMENT

In the next six months, the GROOVE Learning Network and the KDMD team will work together to complete the final milestones and capture lessons learned by the grantees and their project teams and prepare for the close-out of the grants.

KDMD will continue to implement TSFs and grants that have already been awarded in previous periods.

During this reporting period, KDMD worked with the Economic Policy (EP) Office on the design and development of the Economic Growth (EG) certification program, organizing and supporting design of three in-person courses, and designing an improved EG Learning Center (EGLC). KDMD continued to work with Alex Gainer as the EP Activity Manager and other activity leads from the EP Office that headed up the December and March courses.

GLS continued to lead the effort in designing the certification course experience with QED providing management and coordination support. The certification program team made considerable advancement in solidifying the user experiences and the course structure. Additionally, the team scoped out the needs for the certification test although the final testing mechanism has yet to be determined. Though the team was focused on building the Financial Services in-depth course during this period, the progress made around scoping the course and testing experience will feed into each of the other in-depth certification courses.

In December 2011, KDMD supported the implementation of another Economic Growth Overview Course. This course was designed in a blended format with six weeks of preparatory work followed up by 5-day in-person workshop. For this iteration of the course, KDMD made some instructional design changes to both the online discussion portion of the pre-workshop activities and to the design of the in-person activities. Please see the ALT section below for more information.

The team also supported the development and implementation of new in-depth in-person EG courses: the Trade Course and the Advanced Topics Course. KDMD collaborated with the EP Trade team and CARANA Corporation mainly to provide logistical support for the Trade Course. Then, KDMD collaborated with numerous experts in the EP Office to design a new course called the Advanced Topics Course. This course was designed to provide EG officers with a better understanding of the tools and knowledge needed to advise mission

management and in-country counterparts on how to tackle economic development challenges.

During this reporting period, KDMD also made considerable strides in the redesign of the EGLC. The Web Development and Communications teams led Alex Gainer and the KDMD EP Program through a scoping process to assess and build consensus about changes needed in the navigation, functionality, and the overall look and feel of the site. The design efforts progressed to the development of the wireframes and design slides. However, in March, KDMD was asked to pause the development of the new site due to news that USAID was rolling out a new Learning Management System (LMS) and the EP Office wanted to explore the possibility of moving the EGLC onto the new LMS.

Upon recognizing the shift in strategy, KDMD then participated in meetings with USAID's new LMS team to assess functionalities of the new LMS. KDMD found that the new LMS could potentially meet almost all of the functionality needs that are currently ensured through the EGLC. It is uncertain, however, if all potential functionalities of the USAID LMS will actually be built. It has been challenging for the EP Office to organize meetings with the LMS team. These meetings are necessary so that KDMD can help the EP Office make an informed decision to either stay with EGLC or transfer all activity to the new LMS. Additionally, KDMD and the EP Office cannot confirm if USAID will have the technical and human resource capacity to manage the functionality needs of the new LMS. The EP Office continues to push the new LMS team to collaborate with KDMD and to share the LMS technical manuals so that a decision can be made.

## 5.1 WEB DEVELOPMENT

Though the site development is on hold, the redesign and launch of the EGLC website represented a sizable web activity during this period and a notable accomplishment of the project. The Web team—in collaboration with the Senior Web Strategist, the KDMD EP Program Manager, and

the Communications team—worked closely with the EP Office to develop, manage, and implement a web development process.

The redesign planned an aggressive approach, performing multiple development stages (discovery, architecture and design, content development and migration, and site build) over an abbreviated timeline. The Web team created functional wireframes, which in turn fed into the design slides created by the Graphic Designer. The Web team further ramped up its Drupal 7 knowledge and worked with developers to begin to turn those slides into the functional website.

## 5.2 KNOWLEDGE & LEARNING

The K&L Portfolio provided technical and capture support to the EP Program for multiple events during this reporting period. In December, K&L recorded audio for four sessions of the week-long EG Overview Course including:

- "Special Topic: Trade and Development" presented by Paul Fekete (USAID/E3/EP) on December 6, 2011

- Lunch session with presenter Hernando de Soto (Institute for Liberty and Democracy) on December 6, 2011

- "Changing a Legal, Business and Governmental Culture" presented by Boris Kozolchyk (National Law Center for Inter-American Trade) on December 6, 2011

- "Special Topics: Evaluating Enterprise Development Programs" presented by Elizabeth Dunn (Impact, LLC) on December 9, 2011

Audio files for the December EG Overview Course were provided to project partner GLS, but post-event production needs have yet to be determined by the USAID Activity Manager.

From March 5-9, 2012, the K&L Portfolio recorded presentations from all sessions of the EG Trade Course and audio files were then provided

to project partner GLS for post-event production. In addition, the K&L Portfolio also supported the participation of remote presenter Beth Keck (Walmart) for the session "Market Access Issues III: Buyer Perspectives: Understanding and Meeting Market Demand" on March 6. Finally, the K&L Portfolio, in collaboration with the ALT Portfolio, also researched the possibility of utilizing audience response technology for in-room polling during the March EG Trade Course. Although this activity was ultimately not integrated into the training, information obtained from the research will be used for future KDMD activity scoping.

Also in March, the K&L Portfolio captured audio for all presentations at the EG Advanced Topics Course held on March 12-16. Audio files were provided to project partner GLS for post-event production.

In May, the K&L Portfolio assisted the ALT portfolio in implementing a welcome webinar for the June EG Overview Course. Team members consulted on the design of the online meeting space and managed technical aspects of the webinar. Presenter David King was brought in remotely from Bosnia and attendees participated from a variety of diverse areas worldwide with no technical issues.

## 5.3 COMMUNICATIONS

The Communications Portfolio has worked with the EG Program Manager to provide video capture for the financial services certification sessions. Intended to supplement presentations and audio in the final e-learning product, these videos of presenters can be inset into the course to help learners maintain interest and connect with the material. K&L and Communications worked together to stage the presentations to enable the speaker to read from a pre-arranged script while still maintaining eye contact with the camera, giving viewers the feeling of interacting with the speaker. The team plans to continue applying this capture format as they move forward with the Trade certification course.

In an effort to inform training participants about the many resources available on KDMD's web

platforms (namely Microlinks and Agrilinks), the Communications team also provided promotional collateral for distribution at the in-person EG courses.

Finally, as part of the EGLC website effort, the Communications team Graphic Designer also worked with the redesign team to develop 33 new design slides.

## 5.4 ADULT LEARNING & TRAINING

### IN-PERSON COURSES

During this reporting period, KDMD supported the implementation of three in-person courses: the EG Overview Course in December 2011, Trade Course in March 2012 and a new Advanced Topics Course in March 2012.

**EG Overview Course:** Each iteration of the in-person EG Overview Course continues to effectively address the learning needs of its participants. The training needs are identified from several methods of feedback: daily participant feedback via individual evaluation, course organizer feedback from observation, and a facilitated participant feedback session on the last day of the course. The standard practice during the final phase of the training course close-out activities cycle includes analysis of common themes per individual course and per iteration of the course. From these feedback sources, several unique priority items are selected for targeted improvement.

For the December 2011 EG Overview Course, ALT determined specific areas for improvement primarily around the overall content and the evaluation of the course. While there were a number of changes to the content of the course, one of the largest changes occurred in the structure of the participant presentation format on the last day of the course. The basic idea for this change originated in the Day 5 participant feedback session from the June 2011 EG Overview Course.

Upon reviewing the participant feedback, the ALT team re-designed the activity and the learning objectives to reflect a decentralized,

small group-oriented adult learning format. The roundtable structure produced the initial effect of an increased level of course attendance. By requiring each team member to present, the activity subsequently redistributed the accountability among the individual members of the case study groups. Additionally, the informal format shifted the knowledge transfer from a lecture to a more interactive method of learning.

**Trade Course:** For the Trade Course, the KDMD project provided only logistical support and shared standardized logistical best practices with the course organizers.

**Advanced Topics Course:** The Advanced Topics in Development Economics Course addressed a need for a more comprehensive and advanced look at applied economics. In the interest of providing context and the time necessary for an in-depth look at the course's themes, this pilot contained several different case studies in addition to lengthened daily sessions. In keeping with the advanced content in the course, the participants mostly included participants with EG-related backstops.

### CERTIFICATION PROGRAM

There was also considerable progress made on the development of the EG certification program during this reporting period. There were some challenges in forming the core Financial Services (FS) team as the originally identified lead subject-matter expert backed out of the work one month into the project. The team then identified David King as the lead content organizer. Having already worked with King, his familiarity with KDMD's instructional design processes and capture methods allowed the team to proceed uninterrupted with the project. The team demonstrated a sample module for the Office in early March to show the user experience and a prototype of the first FS module. The demo was well received and many of the attendees provided positive feedback and excitement for the completion of the first certification course.

The key accomplishments during this period include reaching agreement on the course and testing

experience. There are still design specifications that need to be determined for the certification test (such as the proctoring request) but many specifications, such as the randomization of questions and a timed questioning session, have been nailed down. Additionally, the team developed the majority of modules for the first course.

As this is a new process for KDMD and the EP Office, the ALT team continues to spend a considerable amount of time scoping out the content and technological needs. There was confirmation that USAID's LMS would be the hosting environment for the future certification program. KDMD has been meeting with the USAID HR and LMS team to share the needs of the new certification program and assess USAID's capacity to reach the user requirement needs. The team is confident that the new LMS can facilitate the needs for the certification course but further exploration is needed to confirm whether the requirements for the testing mechanism can be met with the new system.

## 5.5 FORWARD STATEMENT

KDMD is currently preparing for the June EG courses: EG in Post-Conflict Countries and the Economic Growth Overview Course. After the upcoming June 2012 EG courses, KDMD will support one more offering of the Economic Growth Overview Course in December 2012. KDMD will continue to provide design and logistical support to these three courses.

The certification team plans to finish the development of the Financial Services Course by October 2012. In June 2012, the team will begin to engage with the EP Trade team to agree on a process and timeline for developing this next course. At the same time, KDMD will continue to consult with USAID University's new LMS team to understand the capabilities of the new system and the certification courseware and the testing mechanism will be capable with the new system.

# KUDOS

"Thank you for helping make sure we had a very successful demo of the course at AID this morning. The praises were genuine and we have a clear mandate to stay on the track we're on, complete the FSD course, and begin other subjects. Everything looked and sounded very professional today. Thanks again for the good (and hard) work! "
*- USAID/EG Course organizer regarding the certification demo for the EP Office*

"I highly recommended this course to my colleagues in the EP team and I hope that they will have the opportunity to attend the next round."
*-EG Trade Course participant*

"As a non-economist, this training is an eye opener and a must for everyone in Economic Growth."
*-EG Overview participant*

"Great job on its design and on the [Day 5] presentation format."
*-EG Overview participant*

This reporting period was characterized by an increase in the number and variety of activities implemented by the Food Security/Agriculture (FS/Ag) Program. Building upon strengthened processes, improved online infrastructure, and an increase in dedicated staffing from the previous reporting period, the FS/Ag Program continued to creatively and efficiently support the USAID Bureau for Food Security's knowledge management goals.

The Agrilinks website stood at the center of many program activities, serving as the hub through which many KDMD and BFS knowledge sharing efforts were honed and promoted. KDMD made successful efforts to increase the content and the membership base for Agrilinks during this period. Recognizing that Agrilinks has great potential but still requires changes to enhance functionality, the FS/Ag Program initiated an Agrilinks upgrade process in Spring 2012. The discovery phase of the upgrade process was completed, soliciting feedback from numerous Agrilinks stakeholders to refine the vision and structure of the site.

During this reporting period, the FS/Ag Program implemented a long list of activities to support its three main objectives:

**Objective One:** Develop and grow the knowledge base of agriculture and agriculture-led food security approaches, tools, and lessons learned from the field.

- Organized eight public seminar/webinar events, including six Agriculture Sector Council Seminars, two Feed the Future Stakeholder Meetings, and one Special Seminar

- Published screencasts, audio files, and transcripts for each public seminar to the Agrilinks library

- Held an AgExchange online event to solicit opinions and discussion from the Agrilinks community on new approaches and lessons learned in knowledge sharing for agriculture programs

- Initiated the new "Video Note" blog series; produced two short video interviews with field

implementers highlighting lessons learned from their projects

- Implemented the first #AskAg Twitter chat, allowing Twitter users to ask questions of two USAID experts on the Women's Empowerment in Agriculture Index

- Significantly increased contributions to the Agrilinks blog from USAID staff and implementing partners

- Supported an event held by the USAID Natural Resources Management/Climate Change group to develop targeted questions around good practices in the field

**Objective Two:** Improve knowledge flows within BFS; between BFS and other USAID offices and missions; and between BFS, partners, and implementers.

- Strengthened the Agrilinks knowledge sharing platform; continued to make the Agrilinks website more user-friendly and attractive

- Met with potential partners both within and outside USAID to discuss how the Agrilinks platform could assist them in sharing information with their desired audience

- Facilitated an online training event to allow USAID/Washington staff to teach Mission staff about Feed the Future reporting requirements

- Grew the number of resources in the Agrilinks library and the number of external events listed on the site

- Increased Agrilinks' social media presence on Twitter, Facebook, LinkedIn, and YouTube

- Piloted the first Agrilinks working group in conjunction with the December 2011 Agriculture Core Course to allow participants to view and share resources

- Encouraged greater online discussion following seminars and events to promote continuous engagement and learning

- Supported BFS in designing a Private Sector Hub for the Feed the Future website

- Distributed Agrilinks promotional materials, including one-pagers and bookmarks, to boost awareness of the brand and of opportunities to engage

**Objective Three:** Build the professional and technical capacity of USAID staff to design, implement, and manage effective agriculture and agriculture-led food security programs.

- Collaborated with over 35 USAID staff on refining training content to meet course objectives for the Agriculture Core Course

- Trained 31 USAID staff at the December 2011 Agriculture Core Course

- Engaged USAID DC-based and Mission staff in continuous learning through seminars and webinars on a variety of relevant technical topics

- Planned the first regional implementation of the Agriculture Core Course, to be held in Bangkok, Thailand in July 2012

- Initiated planning for a new Agriculture Project Design Course

## 6.1 WEB DEVELOPMENT

### AGRILINKS WEBSITE

The Food Security/Agriculture Program aims to promote the exchange of lessons learned and key technical approaches to increase the impacts and reach of investments in agriculture and food security. One of the program's cornerstone activities has been the launch of the [Agrilinks](#) website on the KDID portal.

Agrilinks currently provides opportunities for agriculture and food security practitioners to:

- Engage with each other to share ideas, network, and learn from each other through the blog, social media, AgExchanges, and Working Groups

- Make technical knowledge consumable in multiple formats, including video interviews, screencasts, and blog entries

- Extend the reach of training and seminar events with webinars, screencasts, commenting on event pages, blog entries, and social media

- Be audience-centric, responding to and acting on individual audience needs and interests by reviewing surveys to incorporate feedback into activities and programs, and providing feedback buttons and subscription opportunities

In addition to contributing and managing content, KDMD oversees the growth and development of the site in consultation with BFS. The site has been supported by the Web Development team, development partner Zaloni, the Food Security/Agriculture Project Coordinator, the Communications team, and a part-time Site Manager. The Agrilinks Site Manager leads quality assurance (QA) and coordinates the KDMD team around new features and requests. The site has also benefited from the advice of KDMD's Senior Web Strategist, the Assessing & Learning Portfolio Manager, the Food Security/Agriculture Program Manager, and most recently web analytics consultant Click for Help.

The KDMD team enhanced Agrilinks in the following ways during the reporting period:

- Strengthened the Agrilinks knowledge sharing platform, completing the beta phase to enhance technical knowledge sharing and increase access to technical materials

- Established dynamic external and internal global event resource library pages on Agrilinks

  › Created new design slides
  › Developed new content types and functionality

- Launched a social media presence for Agrilinks including Twitter, Facebook, YouTube, and the Agrilinks blog

- Designed Working Groups for Agrilinks and piloted

the first group in December 2011 in conjunction with the USAID Agriculture Core Course

> Created new design slides
> Developed new content types and functionality

- Enhanced seminar and webinar processes, post-event communication, and online functionalities to promote continuous engagement and learning

- Created and disseminated Agrilinks promotional materials including one-pagers, bookmarks, and a banner to boost awareness of the brand and opportunities to engage

- Enhanced the front page image rotator to promote the events and resources on the site

> Developed new functionality for the rotator including the ability to add more content types and links to external pages
> Re-designed the style of the image rotator on the home page

- Added Google Translate functionality

- Added functionality for videos to play in a modal window

- Modified the templates for and added styling to the KDID Event, External Event, and Library Resource content types

**Agrilinks Upgrade Process**

Since the launch of Agrilinks in May 2011 the FS/Ag team has taken note of several opportunities for improvements and expansion to better design the site for enhanced usability. In conjunction with the USAID/BFS Activity Manager, it was decided that the site should be upgraded.

| AGRILINKS ANALYTICS | |
|---|---|
| (December 1, 2011 – May 31, 2012) | |
| Number of Visits | **24,908** |
| Number of Unique Visitors | **13,502** |
| Number of Unique Page Views | **52,232** |
| Number of New Visitors | **12,974** |
| Number of Returning Visitors | **11,934** |

In an effort to plan an upgrade that was strategic, comprehensive, and sustainable, the KDMD team implemented a discovery phase to prepare. The goal of the discovery phase was to better understand how BFS staff and Agrilinks users experience the site and where there are opportunities to design an upgraded version to better meet their needs. To accomplish this, the KDMD team implemented the following approaches:

**1.** BFS staff focus groups
**2.** BFS staff client surveys
**3.** BFS staff interviews
**4.** Agrilinks user surveys
**5.** Agrilinks user focus groups (one in-person and one via webinar)

The secondary goals of the discovery phase was to engage users, promote the site, increase awareness, answer questions, and create champions. Through this phase, which occurred between February and April 2012, the KDMD team facilitated activities and product creation to align with these goals and inform the future development of the Agrilinks website.

In order to move forward with designing the "Phase II" Agrilinks site, the KDMD Graphic Designer created design slides which were vetted by members of the Communications team, the Web team, the Senior Web Strategist, the Agrilinks Site Manager and Project Coordinator, as well as the client. KDMD recommended that Phase II be a complete redesign, a stand-alone site built on Drupal 7, separate from the KDID portal. The design slides are in the final stages, the wireframes will be annotated, and KDMD will manage the development process with Zaloni. The new site is scheduled to launch in Fall 2012.

### FEED THE FUTURE WEBSITE

Day-to-day management of the FTF website was handed over to Jennifer Cupp of USAID/BFS. The Web team provides technical/administration guidance and troubleshooting as needed.

**Private Sector Hub**

During this reporting period, KDMD continued

efforts to outline and design a Private Sector Hub for the Feed the Future website. KDMD facilitated a 3-day workshop to establish the scope, functions, and components of the hub, and presented the concept for a decision tool to Feed the Future senior leadership. The Private Sector Hub will:

- Educate potential private sector partners about partnership opportunities; models for effective partnerships; and what to expect from the process to establish and implement different types of partnerships

- Make it easier to match potential partner interests with the needs of Feed the Future

- Provide a mechanism that enables systematic, coordinated triage of partnership inquiries

- Provide a mechanism to capture leads for follow-up

- Communicate the critical role partners play in the Feed the Future initiative

- Ensure all partners are supported in their efforts to understand the opportunities available to them in Feed the Future, including those that are not eligible for alliances

The hub is scheduled to launch in Fall 2012.

## 6.2 KNOWLEDGE & LEARNING

### SEMINARS

The K&L Portfolio supported the Food Security/ Agriculture Program this reporting period through two ongoing seminar series: the Agriculture Sector Council Seminar Series and the Feed the Future Stakeholder Meetings. For these seminars, the K&L team designed and facilitated webinars, captured audio/video, and developed interactive learning products. Post-event learning products were posted in the Agrilinks library within approximately one week of each event, a turnaround time that encouraged maximum visibility on the website. In addition, the K&L Portfolio provided support for one special seminar during this reporting period in collaboration with USAID BFS partners International Food Policy Research Institute (IFPRI)

and Michigan State University (MSU).

**Agriculture Sector Council Seminar Series**

The Agriculture Sector Council Seminar Series is a monthly seminar series that highlights the latest developments in agriculture and food security, explores tools for effective programming, and discusses key lessons learned with industry experts. During this reporting period, the K&L team provided support for 6 seminars that reached a total of 607 participants (both in person and via webinar) and generated important participant feedback through the completion of 169 surveys. Presenters were brought in remotely for one seminar this reporting period using Adobe Connect. Agriculture Sector Council seminars held during this reporting period included:

- "Making Transformational, Scalable, and Sustainable Changes in Rural Bangladesh," presented by Dan Gudahl (Winrock International) on November 30, 2011

    **50** in-person     **70** webinar

- "Enabling a Private Sector-Led Seed Industry: Policy Perspectives," presented by Joseph Cortes (Iowa State University), Mark Huisenga (USAID BFS), and Judy Chambers (IFPRI) on December 14, 2011

    **37** in-person     **62** webinar

- "Voucher Schemes for Enhanced Fertilizer Use: Lessons Learned and Policy Implications," presented by Ian Gregory (IFDC) and David Rohrbach (World Bank-Tanzania; remote presenter) on January 25, 2012

    **36** in-person     **83** webinar

- "Public Sector Agricultural Research: Why it Matters for Sustainable Development," presented by Ibrahim Shaqir (USDA/ARS) on February 29, 2012

    **23** in-person     **75** webinar

- "Knowledge Sharing in Food Security and Agriculture: Improving Practice for Increased Impact," presented by Joan Whelan (TOPS Program), Andrea Bohn (MEAS Project), and Meaghan Murphy (KDMD Project) on March 28, 2012

**37** in-person   **69** webinar

- "Experimental Approaches to Understanding Market Segmentation Strategies for New Agricultural Technologies," presented by David Spielman (IFPRI) and Nicholas Magnan (IFPRI) on April 25, 2012

**19** in-person   **46** webinar

## Feed the Future Stakeholder Meetings

Feed the Future Stakeholder Meetings provide information to stakeholders on key issues, approaches, and guidance relevant to the Feed the Future Initiative. During this reporting period, the K&L team provided support for 2 seminars that reached 404 participants (both in person and via webinar) and generated important participant feedback through the completion of 79 surveys. FTF Stakeholder Meetings held during this reporting period included:

- "Efforts to Enhance Resilience in the Horn of Africa," presented by Nancy Lindborg (USAID/DCHA), Gregory C. Gottlieb (USAID/BFS), Susan Fine (USAID/Africa), Jeff Hill (USAID/BFS) on February 24, 2012

**54** in-person   **184** webinar

- "New Country and Region-Led Efforts and Partnerships for Enhancing Resilience and Building Growth in the Horn of Africa," presented by Nancy Lindborg (USAID/DCHA), Greg Gottlieb (USAID/BFS), Jeff Hill (USAID/BFS), Susan Fine (USAID/Africa), and Tom Beck (USAID/PPL) on May 10, 2012

**74** in-person   **92** webinar

## Special Seminars

In addition to the Agriculture Sector Council Seminars and FTF Stakeholder Meetings, the K&L Portfolio also provided support for the following special seminar:

- "Approaches to Building Food Security Policy Analysis Capacity in Development Countries: IFPRI and MSU," presented by Paul Dorosh (IFPRI), Duncan Boughton (MSU), Prabhu Pingali (Bill & Melinda Gates Foundation), Julie Howard (USAID BFS), Daniel Karanja (Partnership to Cut Hunger and Poverty in Africa), and Jeff Hill (USAID BFS) on March 13, 2012

**59** in-person   **95** webinar

## ONLINE FACILITATION

The K&L Portfolio supported BFS through a 3-day AgExchange that was held during this reporting period. AgExchanges are branded online discussions that bring together professionals from around the world to share ideas, debate approaches, and learn about new tools and resources related to agriculture and food security. AgExchanges utilize the experience and skills of designated facilitators and typically generate post-event learning products to synthesize main discussion points.

On March 20-22, the K&L Portfolio supported the Food Security/Agriculture Program on its second AgExchange, "Best Practices, Lessons Learned, and Effective Tools in Knowledge Sharing for Food Security and Agriculture Programs." Throughout the 3-day event, 116 attendees (with 36 active contributors and 19 countries represented) shared information on best practices and lessons learned in knowledge capture, dissemination, and application. Over 50 resources, available through the event page, were gathered from the discussion and a synthesis document highlighting the major discussion themes will be completed in the following reporting period. Summaries from each of the three days were cross-posted as blog posts on the Agrilinks website.

## SPECIAL CLIENT ASSISTANCE EVENTS

### Feed the Future Monitoring System Guidance Review

In December 2011, Tatiana Pulido and John Spears (both of USAID BFS) discussed features of the new Feed the Future Monitoring System during a 2-hour webinar facilitated by the KDMD project. The webinar was intended to provide information to USAID mission staff about new reporting requirements and to solicit questions from system users. The K&L and Communications Portfolio, in coordination with the FS/Ag Program Manager and Project Coordinator, supported the webinar through participant outreach, presenter management, webinar facilitation, and technical support. Approximately 60 participants from at least 20 countries (mostly in Africa) participated in

# KUDOS

''Thanks for organizing the KM AgExchange. You and your team took on a very difficult task and successfully pulled it off. I am using some of your links to better inform our M/CIO/KM project more about BFS and USAID's program cycle.''
   - *Discussion participant from USAID project*

''I have been participating in a very lively discussion for the last two days that Zachary Baquet and his team have been facilitating on best practices, lessons learned, and effective tools in knowledge sharing....I am forwarding this because I wanted to share the link in it with you. The link goes to a ''Learning and Impact Report'' that was prepared for Zachary and his team by the KDMD project. I think it's a interesting model of a progress report and wanted to share it with all of you.''
   - *A USAID KM Advisor*

''Once again, KDMD spins straw into gold.''
   - *USAID/BFS Activity Lead regarding work on the Learning & Impact Report*

the event. The webinar, which utilized the Adobe Connect technology for the first time, included several opening and closing polls, a PowerPoint with screenshots of the online tool, and time for questions and answers.

### NRM/CC Group Pre-GLEE Event

The Natural Resources Management and Climate Change group within the Bureau for Food Security held a half-day event on February 9, 2012 to obtain input and expertise from participants to help identify and articulate key review questions for programs that aim to integrate food security, natural resource management, and climate change. The key questions are to be used at a Global Learning and Evidence Exchange (GLEE) event planned for July 2012. KDMD assisted with planning and logistics, connected USAID with a TRG facilitator, provided catering, and assisted with production of a summary document after the event.

### Feed the Future Public-Private Partnership Technical Forum Virtual Break-Out Event

In February 2012, USAID held a Feed the Future Public Private Partnership Technical Forum at the White House. The event organizers asked KDMD to help design and facilitate an online breakout session to engage a broader audience in conjunction with the in-person event. KDMD selected Adobe Connect as the platform for the event, and identified four facilitators to run a virtual brainstorming session on four different topics. Participants were asked to identify opportunities and discuss barriers for USAID to collaborate with private sector organizations. The event also featured a plenary and a closing session that was broadcasted live from the White House to virtual session participants.

## 6.3 COMMUNICATIONS

The Communications Portfolio continued to support the Food Security/Agriculture Program by implementing a communications strategy based on an understanding of optimal formats for intended effect and developing products tailored for specific audiences to easily access, digest, and apply

knowledge resources. Over the reporting period, the major areas of focus for the Communications team were:

- Agrilinks upgrade
- Video development
- Expanded social media outreach
- Enhanced event support

In addition to these activities, the Communications team played an integral role in maintaining and updating content on Agrilinks and continued outreach and engagement for the site. KDMD's outreach efforts have focused on engaging USAID staff, missions, select partner organizations, and the industry as a whole through venues and channels appropriate to each. By reaching out to these various audiences, the team has worked to build channels to

both capture knowledge about agriculture-led food security and effectively organize and disseminate it to provide increased value to the greater agriculture and food security community. The Communications team worked with other KDMD staff to develop successful session workshop and exhibit proposals that led to Agrilinks' inclusion in the upcoming World Bank Mobilizing Knowledge Networks Conference. This represents an opportunity to showcase the work that BFS is doing through KDMD's Food Security/Agriculture Program and Agrilinks on knowledge management and the use of social media as an engagement tool.

The Communications Portfolio also created new collateral and continued to update previous materials as needed. To provide the Agrilinks audience with regular updates on site activity, the Communications team developed the eUpdate newsletter. In this period the concept, layout, and design were finalized and the



Figure 9:
The Feed the Future Style Guide sets standards for logo, font, and color usage.

template was created in MailChimp for use during the next reporting period. Building on KDMD's extensive experience with email campaigns, the eUpdate was designed for maximum flexibility and ease of use.

In support of the Feed the Future website, KDMD's Graphic Designer created a style guide and templates for web and printed materials for the Feed the Future team. This includes logo, font, and color usage, as well as layouts and overall styling of collateral materials (see Figure 9). In May, the Feed the Future website, developed in a previous reporting period, received the 2012 "American Web Design Award" from Graphic Design USA.

## AGRILINKS UPGRADE

The Communications Portfolio worked with the KDMD team during the initial discovery phase of the Agrilinks upgrade process. To gather information about the site from key USAID stakeholders, Communications participated in several phone interviews and recorded notes. Communications also supported a webinar focus group that targeted an international audience. To reach the general Agrilinks audience, Communications spearheaded the development of a user feedback survey on usability and functionality of the Agrilinks website. Communications led various promotional efforts to maximize the response rate. The survey received 87 responses. During this period, the Communications team participated in regular meetings to discuss site feedback results to inform the new site design.

KDMD's Graphic Designer began preliminary scoping work on design slides for the upgraded site.

## VIDEO DEVELOPMENT

Due to the strong viewership and positive responses from Agrilinks video series in the previous period, Communications continued to conduct interview recordings for the program's two standing seminar series as well as other special events/activities as requested. The Communications team developed a new video series entitled "Video Notes" to highlight successful projects and organizations working in food security and agriculture development. During this period, two Video Notes were produced featuring Andy Medlicott of Fintrac Inc. on the Feed the Future ACCESO project in Honduras and Erin Hughes of Winrock International on the Education for Income Generation project in Nepal. In support of the Agriculture Core Course held in December, the Communications team also filmed two video interviews to capture the technical expertise of course presenters Lisa Gaylord and Holly Ferrette. To introduce the Agrilinks audience to the March AgExchange on knowledge management, the Communications team produced an introductory video featuring Zachary Baquet that highlighted the goals of the AgExchange and explained how to participate.

The following table summarizes the number and reach of the new videos in KDMD's growing multimedia library over the last six months:

### AGRILINKS VIDEO STATISTICS

| VIDEOS/SERIES | NUMBER OF VIDEOS | COMBINED VIEWS AS OF 7.6.12 |
|---|---|---|
| Ag Sector Council Greenroom Interviews | 7 | 449 |
| Video Notes | 2 | 573 |
| AgExchange Online Discussion Introduction Video | 1 | 255 |
| USAID Ag Core Course Interviews | 2 | 51 |
| **Total** | **12** | **1,328** |

## EXPANDED SOCIAL MEDIA OUTREACH

Social media has continued to open up tremendous opportunities for enhanced engagement between USAID and its partners. Social media use by the KDMD team has allowed BFS to broaden its reach and respond to different audiences through different learning styles. As part of outreach and engagement efforts, the Communications Portfolio has been implementing a social media strategy in alignment with USAID's efforts.

### Blog

The Agrilinks Blog continued to gain traction during this period with 51 blog posts published, as compared to 31 in the last reporting period. In this period, there were 3,203 unique views of all blog posts and 981 unique views of the blog landing page on Agrilinks respectively (as compared to 1,237 and 695 during the last reporting period). Communications distributed blog guidance to various partners and key stakeholders to assist with the writing and development of blog posts. The Communications team also provided support on copy-editing, formatting, and meta-data tagging for all blog posts.

The Agrilinks Blog featured four new blog series this period. The "Reader's Corner" features commentary and recommendations from KDMD's agribusiness and food security specialist, Veronica Letelier. "It's All About M&E" provides a peek inside the world of Feed the Future monitoring and evaluation. The "News Roundup" shares a compilation of news, resources, and events each week. "Video Notes" feature the aforementioned video series where technical experts share insights on food security and agriculture development (see Figure 10).

### Twitter

The Communications team continued to integrate Twitter into Food Security/Agriculture Program activities. By the end of this reporting period, the Agrilinks Twitter account posted 566 total tweets (82 last reporting period), had a total of 800 unique followers (116 new in the last reporting period), and was listed 25 times (6 last reporting period). The Communications team developed a list of key partners to monitor on Twitter to increase engagement opportunities and continued to use Twitter for partner engagement by cross-posting with various individuals and organizations. As part of enhanced seminar support, Communications also live-tweeted during all Agriculture Sector Council seminars. During this period, Agrilinks received 492 unique visits via Twitter.

### #AskAg Twitter Chat

One of the main social media initiatives during this reporting period was the #AskAg Twitter Chat with the Feed the Future monitoring and evaluation team on the Women's Empowerment in Agriculture Index (see Figure 11). The goal of the Twitter chat was to create a space for individuals and organizations to ask questions about the Index. Twitter chats are scheduled gatherings on Twitter to discuss a specific topic. A hashtag is used to keep track of the conversation. This format is useful because it is easily accessible online or via mobile around the world. It also provided KDMD with the opportunity to use an innovative platform for connecting development practitioners. Using Twitter is also cost-effective and makes use of a pre-existing platform. In preparation for this pilot Twitter chat, guideline documents were developed and shared with the Feed the Future



Figure 10:
Each of the blog series can be easily identified by its colorful icon.

Figure 11: USAID/BFS staff Emily Houge and Jennifer Cupp answered questions via Twitter during the KDMD-facilitated #AskAg chat.

M&E team. KDMD led several meetings and a dry run with the Feed the Future M&E team to ensure all facilitators were comfortable and familiar with the Twitter platform. The Twitter chat was successful in engaging with the food security and agriculture audience and created a useful dialogue on the Index. The Twitter chat generated approximately 318 tweets and over 30 questions from participants.

During this reporting period the Communications team also began utilizing LinkedIn to connect with the agriculture and food security audience by posting event announcements within pre-existing groups on relevant topics. The Communications team continued to use Facebook for promotion and engagement. All videos created by KDMD have been uploaded to the Agrilinks YouTube account. Communications also developed and conducted two comprehensive online webinar trainings on basic social media open to all USAID staff (approximately 20 attendees total). This training was recorded for future distribution.

### ENHANCED EVENT SUPPORT

The Communications team supported the Food Security/Agriculture Program during six Agriculture Sector Council Seminars, two Feed the Future Stakeholder Meeting, and two special events held during this period. Communications continued to provide general support around invitation preparation and dissemination for the program's

events. Invitations reached an audience of 3,642 people on average (compared to 2,400 in last period). In addition to initial invitations, recipients also received a reminder email prior to the event and a follow-up email after the event to provide the event screencast, presentation, blog post summary, survey, and/or other relevant resources. Overall during this period, the Food Security/Agriculture Program mailing list grew 61 percent to a total of 4,414 contacts. Communications continued to implement enhanced event features for all events including live-tweeting, blogging, and greenroom interviews.

The Communications team played a facilitation role during the March 20-22 AgExchange, "Best Practices, Lessons Learned, and Effective Tools in Knowledge Sharing for Food Security and Agriculture Programs." During the Day Two discussion, "Tools and Approaches," Communications team members led the conversation on social media in knowledge management. Communications also developed several resources on social media guidance and best practices for use during the discussion.

## 6.4 ADULT LEARNING & TRAINING

### AGRICULTURE CORE COURSE

KDMD implemented the third iteration of the USAID Agriculture Core Course in December 2011 in order to provide agriculture officers and

other employees managing agriculture and food security programs with an understanding of current policies, technical approaches, and best practices for increasing rural incomes and reducing hunger. A core team of BFS staff and KDMD technical and logistical experts made minor revisions to the curriculum, inserting more concrete examples and opportunities for interaction but keeping the well-tested sessions intact. KDMD coordinated the active involvement of 35 course instructors from USAID, IFPRI, MCC, ACDI/VOCA, University of Illinois, and Michigan State University. Thirty-one participants attended the course, representing four world regions and Washington, DC.

A fourth objective was added to the list of objectives for the course: Strengthen USAID's agriculture community of practice. The training team made efforts to support this objective in several ways:

- Held an informal reception as an opportunity for networking among participants and other DC-based points of contact

- Added more opportunities for participant discussion and interaction during the course, including more group activities

- Piloted an online working group on Agrilinks to serve as repository for course materials and allow participants to continue discussions and share resources after the course

Preparation for the fourth iteration of the course began in January and continued through the end of the reporting period. The next course will be held from July 16-20 in Bangkok, Thailand, in an effort to make the course more accessible and salient for regional participants. The FS/Ag Program held weekly meetings with the training team to reorganize the curriculum so as to make the course "portable" while still covering all major session objectives. Several members of the KDMD team, in addition to several sub-contractors, will join 15 USAID staff in traveling to Bangkok to implement the course.

### GAME OF LIFE IN THE VILLAGE

KDMD supported the ongoing development of the USAID-created simulation activity "Game of Life in the Village" through the organization of several village test runs with various USAID and practitioner audiences, and contributed refinement of the game and processes through noting ongoing revisions, suggestions, and developing a Facilitator's Guide.

## 6.5 FORWARD STATEMENT

The Food Security/Agriculture Program team continued to be responsive and adaptive to client needs and demands. KDMD has been able to provide consistent and creative solutions to knowledge sharing requests from the USAID Bureau for Food Security. In addition to supporting seminars and trainings, team members implemented new ideas and activities, including Twitter engagement, video notes, and several new blog series. The program's growing reputation and an increase in requests for event support mean that the staff will be managing many competing demands over the next six months.

The FS/Ag Program will continue to support the well-established Agriculture Sector Council Seminar series and other special events going forward. In order to work within existing staff capacity, efforts will be made to limit scheduling of special events to once every other month. In August 2012, KDMD will hold a seminar review session to analyze aggregated evaluations from the previous year's events and discuss creative enhancements to both the planning process and the participant experience for Agrilinks-branded seminars.

In July 2012, KDMD will bring the Ag Overview Course to the field for the first time, holding the training at the USAID Asia Regional Training Center in Bangkok, Thailand. This effort will allow a group of USAID Mission Foreign Service Nationals (FSNs) who otherwise would have trouble traveling to the U.S. to participate in this important training. It will also allow regional presenters, including representatives from the UN Foreign Agriculture Organization, the Asian Development Bank, and the USAID Regional Development Mission for Asia, to

contribute their expertise on Asian agriculture issues to the curriculum. KDMD will closely monitor the success of this regional course through on-site observations, participant evaluations, and an After-Action Review, in order to determine whether USAID should put further resources into holding future trainings outside of Washington, D.C.

KDMD will assist with the planning and implementation of two additional BFS trainings in the next reporting period. The fifth iteration of the 2-day Ag Overview Course will be held in early September, featuring only minor curriculum changes. A new week-long Agriculture Project Design Course is scheduled for early October 2012. This pilot activity will require a concentrated effort in August and September to finalize session objectives, select course presenters, and work with presenters to refine the curriculum. Demand for project design training is high within BFS.

KDMD greatly anticipates the launch of the upgraded Agrilinks website in the fall of 2012. The new design will be more user-friendly and will better display key content to allow viewers to consume and benefit from the information contained within the site. New project pages and improved formats

for groups (formerly "working groups") and for the AgExchange platform will encourage more partner engagement and allow for new knowledge to be generated through online collaboration. Agrilinks will forever be a work-in-progress as the team continues to conduct quality assurance and solicit new content from the site's broad audience. KDMD will also continue to support the Feed the Future website as needed, focusing on the development of the Private Sector Hub and a decision tree tool that will help private sector representatives identify partnering opportunities with USAID.

Finally, the FS/Ag Program will continue to cultivate relationships with USAID clients and with external partners to support the program's objectives. During this period, USAID champions for Agrilinks, the Ag Sector Council Seminar series, and the Ag Core Course proved invaluable for building content and facilitating knowledge flows. External partners contributed blog posts and library resources to Agrilinks and helped grow Agrilinks membership. A focus on relationships through the completion of the KDMD project will allow the FS/Ag Program to have a broad and lasting impact within the knowledge management sphere to improve agriculture-led food security projects worldwide.

# KUDOS

"I want to reiterate my comments regarding Ag Sector Councils. As I said, it is the best such production of its kind I've ever seen. I find the topics interesting and important. The panels always represent subject matter experts who bring a compelling perspective to the discussion. I am impressed that the webinars always start on time and end on time. The graphical accompaniments are well-designed and add materially to my understanding of the topic. I try not to miss any broadcasts and consider them an integral part of my effort to remain current on topics that make me smarter as an agricultural development consultant."
   *- Feed The Future Private Sector Engagement Hub consultant*

"I went on the Feed the Future website today - it's by far the best government one, and in general one of the most organized, very useful (interesting data), I was completely impressed."
   *- OPIC Administrator*

"Thanks for all your help...the Agrilinks support team is terrific."
   *- Presenter at an Agriculture Sector Council*

The purpose of the Jamaica Basic Education Program is to implement and manage the Partners for Educational Progress Community of Practice (CoP), a country-level community focused on improving basic education and early grade literacy in Jamaica. The CoP is a network of education professionals and stakeholders who collaborate virtually and in person to share knowledge, discuss critical issues, and provide peer support with the goal of advancing the country's education sector. The CoP is supported by a two-person facilitation team that is co-located with the USAID/Basic Education Project and works closely with community stakeholders and the USAID/Jamaica Mission to respond to CoP priorities. The CoP concept was introduced at a stakeholder workshop in June 2010 and formally launched on December 15, 2010.

During the second year of implementation, the CoP continued hosting EduExchange online discussions, publishing EduFocus bulletins (see Figure 12), posting resource content on the CoP website, and conducting in-person outreach with the membership. The CoP also introduced a new CoP product, the Online Library Update, which highlights new and timely resources and information that may be useful to the membership. A membership survey was designed and administered in April to gauge the value and usefulness of the CoP to members, and to inform the CoP hand-off documentation process. Additionally, the CoP began the process of identifying an organization interested and capable of taking over the management of the CoP. Very preliminary conversations were held with the University of West Indies (UWI) School of Education, who expressed interest.

The Jamaica CoP facilitation team planned and implemented two EduExchange online discussions, four EduFocus Bulletins, and two Online Library Updates.

EduExchanges:
- January 10-12, 2012: "Collaboration or Collision: A Tale of Two Languages"
- March 13-15, 2012: "Linking Early Childhood Development to Literacy Development"

EduFocus Bulletins:
- February 2012: "How Much Value Does an Effective Teacher Add?"
- March 2012: "Early Childhood Development and its Importance to Early Literacy Achievement"
- April 2012: "Examining the Success of Preparatory Schools in Jamaica"
- May 2012: "Multigrade Schools Continue to Struggle: What Does the Inspection Report Tell Us?"

## 7.1 KNOWLEDGE & LEARNING

The Knowledge & Learning team provided ongoing technical and logistical support to the Jamaica



Figure 12:
Briefs in the EduFocus series highlight local and international research and good practices.

facilitation team during this reporting period, which included training support for EduExchange moderators, recommendations for improving participation in events, support managing the membership list, and troubleshooting support during EduExchange events.

## 7.2 COMMUNICATIONS

The Communications team continued to advise the Jamaica Basic Education Program on communications strategy development. The Communications team provided copy-editing, 508 compliance, and design support for EduFocus publications and EduFocus Bulletins produced during this period. Communications also provided copy-editing, proofreading, and design support for the Camp Summer Plus Report. To continue the development of the Jamaica social media presence, Communications provided guidance on Facebook best practices and set up a Flickr account. The Communications team will continue to support the Jamaica facilitation team to develop and refine engagement materials, and build on the existing communications and social media strategy as the budget allows.

## 7.3 WEB DEVELOPMENT

The Web Development team provided ongoing support for the CoP's online EduExchanges. In addition, the team updated the site as needed with functionality and theming that was deemed important for the portal.

## 7.4 FORWARD STATEMENT

Over the next several months, the KDMD team will work closely with Claire Spence at USAID/Jamaica and the University of West Indies School of Education to advance discussions about the possible transition of the CoP. From the beginning of the CoP, it was always envisioned that a local,

neutral party would take over at the end of the project. KDMD and the CoP facilitator, Carol Watson Williams, has worked with USAID and CoP members to try to find a suitable organizations.

At the end of June, Carol Watson William, the CoP Facilitator will leave the project. KDMD's Washington, DC-based team and Kingston-based Research Assistant will develop a new work plan and budget, which will detail the process, the timeline, and the requirements to successfully transition the CoP to another organization. A major component of the transition is the technical transfer of the website and the implementation of any redesign or customizations necessary to ensure a smooth transition, so the Web Development team will be closely involved in the transition planning.

In early June, the CoP Facilitation Team and Project Manager will begin compiling hand-off documentation for the eventual transition of the CoP, which will include the following:

- Lessons learned, good practices, successes, and monitoring information collected during the implementation of the CoP

- Original CoP concept note and background materials

- Facilitation team training materials

- Facilitation team terms of reference

- CoP activity manual

- CoP contact list (members and core resource group)

In addition to the hand-off documentation, it is anticipated that the KDMD team will lead an in-person strategy session with the UWI team during which this information will be presented and discussed.

The purpose of the Development Credit Authority (DCA) Program is to provide support from KDMD's A&L and ALT Portfolios to complement the Portfolio Management and Risk Assessments support to USAID's credit guarantee programs.

DCA Portfolio Management responsibilities under KDMD cover 3 DCA Regional Portfolios (LAC, Africa, and Asia/MENA), covering over 50 countries. Specific activities include monitoring and reporting on guarantee performance on a semi-annual basis, processing any claim requests, ensuring all fees are paid in a timely manner, and troubleshooting any problems related to the guarantees.

During the reporting period, the KDMD team:
- Completed the March 31, 2012 reporting cycle, reviewing and approving 136 loan schedule reports

- Coordinated the issuance of Notice of Payments Due (NPDs) for partners to pay their utilization fees

- Processed nine claim requests for defaulted borrowers under the guarantees

Since March, consultant Kate Naughton has reviewed Risk Assessments and advised on other risk issues. In May, consultant Nhu-An Tran did a desktop analysis of two banks in Albania for a multi-bank Loan Portfolio Guarantee to increase private sector lending in targeted areas of agriculture, information and communication technologies (ICT), tourism, the garment and footwear sectors, and clean energy. This deal will be presented to the USAID Credit Review Board in July.

DCA continues to benefit from the DCA online course developed by KDMD and completed in September 2011. During the reporting period, 20 more training participants have completed the course and have received their certification. These participants include Foreign Service Officers, Foreign Service Nationals, Financial Management Specialists, and Auditors from the Inspector General's Office. Some of their comments from the evaluations highlight that they liked the varied format and they felt the content was useful. The course allows participants to take only one lesson as a refresher or any of the lessons at their leisure.

Before the end of 2012, DCA plans to revise the DCA online course to incorporate the recent changes in the office and also organize a learning event to share lessons learned and best practices from DCA experiences.

## 8.1 FORWARD STATEMENT

Future activities under the KDMD DCA Program will focus on maintaining relationships with financial institutions and USAID missions in the Asia and Middle East/North Africa region, as the Portfolio Managers for Africa and LAC/E&E have been hired directly by USAID and no longer work under the KDMD contract.

The overarching mission of the Social Transition team (ST) in E&E/DG/ST is to enhance the ability of all people in E&E countries to improve their quality of life by helping these countries establish effective and efficient social systems appropriate to market democracies. The ST team covers these key sub-sectors: education, labor markets, social services, social insurance, and social assistance, as well as issues relating to gender and trafficking in persons. Health issues are covered by the E&E Bureau's Health team. The Democracy and Governance (DG) team continues to encourage economic and democratic policy gains in the region.

KDMD's role is to assist these teams—ST, Health, and DG—to develop knowledge sharing activities and products that increase awareness of the teams' work in these areas among staff at USAID missions and Washington offices, the State Department, other donors, NGOs, implementing partners, researchers, and other constituencies in the region.

During this reporting period, KDMD engaged with the DG team around a 1-day, in-person event, "Twenty Years of Democracy and Governance Programs in Europe and Eurasia," and with the Health team on the development of digital stories. KDMD continued to maintain the Social Transitions website and worked with JBS Associates, another E&E Bureau contractor that

uploads site content, to address website questions.

The "Twenty Years of Democracy and Governance Programs in Europe and Eurasia" event, which took place at the University of George Washington's Elliott School of International Affairs on December 12, 2011, was a huge success, drawing a total of 159 participants, far exceeding the 80-100 attendee goal (see Figure 13). The event included a kick-off, lunch, closing keynote presentations, and four panel sessions covering the following topics: civil society and the media; political competition; governance, rule of law, and human rights; and regional trends. KDMD developed the communication materials, coordinated the venue and catering, and managed the knowledge and learning capture of the event.

During this reporting period KDMD made great strides in developing digital stories. Interviews were conducted with seven missions (Albania, Armenia, Azerbaijan, Belarus, Georgia, Russia, and Ukraine) to gather content for storylines. KDMD then was able to determine appropriate storyline approaches, grouping the content into two digital stories — one story on maternal and child health (MCH) and one story on health strengthening systems (HSS). KDMD developed the draft narrative scripts and worked with the missions to revise them. KDMD also gathered media resources from the missions and started to align the scripts with relevant pictures and video.



Figure 13:
At the closing session, panelists have a final reflection on USAID's impact in democracy and governance Europe and Eurasia.

## 9.1 KNOWLEDGE & LEARNING

The K&L Portfolio supported the E&E Program this reporting period through the capture of presentations at the "Twenty Years of Democracy and Governance Programs in Europe and Eurasia" event. Screencasts were produced from the event using a combination of recorded audio and still photographs since PowerPoint presentations were not available from all panelists.

The K&L Portfolio also worked with the Communications Portfolio on two digital stories that will be produced by the program in the next reporting period. K&L provided guidance and best practices on interviewing, storyboarding, and video production and shared feedback on drafts. Please see the Communications section for more information on the digital stories.

## 9.2 COMMUNICATIONS

The Communications team participated in the "Twenty Years of Democracy and Governance Programs in Europe and Eurasia" celebration by photographing the day-long event, as well as updating and refining the online event page on the KDID portal. Along with logistical support, the Communications team created three custom multimedia videos to be used as the post-event products which captured sessions by Paige Alexander, Daniel Rosenblum, and Thomas Carothers.[4] The Communications team also assisted in the writing and editing of the post-event email which went out to all individuals who attended the event as well as anyone who showed interest.

The Communications team facilitated the storyboarding process for the two digital stories that are being produced for the E&E Bureau to commemorate the closing of the health programs in the Europe and Eurasia regions. The digital stories will capture impact and legacies left behind after the official graduation of the USAID health programs in the E&E

region. Along with editing, the Communications team streamlined the updating process of the two scripts and the collection of resources (photos, music, and video clips) that will be used in the final versions of the stories. Communications also created a Recording Best Practices Guide which will be shared out to all USAID missions participating in the digital story process. Currently KDMD is waiting for final approval from USAID of the two scripts in order to start the recording process which will lead into the final step of assembling the stories.

## 9.3 FORWARD STATEMENT

KDMD looks forward to completing the digital stories and sharing the final products via various channels. The digital story process utilized for this program will be useful for those who pursue digital stories as an avenue of sharing knowledge and promoting learning.

In terms of new activities, the ST team has expressed interest in developing several seminars around reports that will be made public soon. KDMD will consult with the ST team to develop a knowledge and learning capture strategy for these events, as well as logistics management.

As the KDMD contract winds down this coming year, KDMD will work with the three teams to close out the program and ensure that the website and other knowledge products are successfully transitioned.

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[4] It was decided by the E&E Office not to publish the screencasts.

In February 2012, KDMD re-engaged with the Global Partnerships (GP) team, formerly known as the Overseas Development Partners team. KDMD collaborated with this team last year to design and implement a 5-day course in March 2011 on building alliances. The GP team organized a series of in-person courses that will occur in summer and into the fall of 2012. KDMD and the GP team are designing an online course which will serve to prepare participants for the in-person GP workshops. The title of the future online course is "Introduction to Partnerships at USAID" and the objectives are to help participants gain access to basic information about USAID partnerships, gain knowledge of background terms and concepts, and provide a history of partnerships at USAID. This course is aimed to be complete by the end of October 2012.

## 10.1 ADULT LEARNING & TRAINING

KDMD is providing instructional design and project management support in the development of the "Introduction to Partnerships at USAID" course. KDMD is working closely on the storyboarding process with the subject-matter experts from Dexis who are collaborating with USAID to build course content. Despite some early ambiguity around roles between the contractors at the outset of the project, clear responsibilities and communication flows were quickly delineated and the project has experienced strong collaboration since then.

The primary audience for the course will be learners preparing to take the 5-day course. The secondary audience includes other USAID learners including technical, program, procurement, and administrative staff (both in the missions and headquarters-based bureaus and offices) who need to know more about the Agency's partnership profile.

The course will be configured to be a stand-alone online course that can be accessed from any computer. The duration will be approximately 75 minutes and this will be hosted on USAID University. The design team plans to include various interactive techniques throughout the course, including infographics, interactive scenarios, video clips, a global partnership timeline, exercises, and quizzes. Since it is suggested that learners have basic knowledge of the USAID Project Design Process, a link to the "Project Design Guidance" document will be included in the course for the benefit of learners who would like to learn more.

The GP office would like to use the online course as a prerequisite for a series of workshops in the summer and fall of 2012. However, the GP team needed to postpone the launch of the course because the team had to finish preparation of their in-person courses. The team now hopes to launch the final online course in October. Once the beta version is launched, KDMD will facilitate a review process which will include user feedback surveys for the participants of the in-person courses. The feedback from those surveys will inform changes/improvements to the final version of the course.

## 10.2 FORWARD STATEMENT

Due to the GP team's need to shift their full attention to the development and preparation for their summer workshops, the timeline for the online course has been postponed. KDMD learned of this schedule change in May. The team aims to finish the storyboards at the end of July and to have a beta version of the course ready to share at the beginning of September. This will allow participants of the September course to complete the online course and provide their feedback through an evaluation survey. This feedback will then inform the final content and functions of the third iteration of the course.

Established in June 2010, the Bureau for Policy, Planning, and Learning (PPL) is responsible for leading USAID's policy planning efforts, shaping overall strategic and program planning, ensuring the Agency's evolution as a learning and evaluation organization, overseeing donor engagement, and institutionalizing science and technology in USAID work. KDMD's work with PPL is centered in the Office of Learning, Evaluation, and Research (LER). The LER Office was created to catalyze USAID's transformation into an effective learning organization that continuously learns through evaluation and research, applying outcomes from that learning to everything USAID does.

During this reporting period, PPL developed key efforts to integrate learning into USAID work: the Strategic Learning Plan, and guidance for missions on the Collaborating, Learning, Adapting (CLA) component of Mission Country Development Cooperation Strategies (CDCS), which integrates learning throughout the Mission Program Cycle. To learn more about these initiatives, please see Appendix 1.

### KDMD'S WORK WITH PPL/LER

To support the above efforts, KDMD undertook the following scope of work in the past six months:

- Supported the roll-out of Phase I of an Agency Strategic Learning Plan, i.e., integration of learning throughout the Mission Program Cycle

- Provided guidance for mission staff and implementing partners to develop and implement learning strategies/plans supporting all or part of mission portfolios

- Developed and managed the USAID Program Cycle Learning Lab Library space on KDID

- Supported LER trainings to USAID staff

- Supported LER-hosted discussions, such as the Evaluation Interest Group (EIG) discussion, to share evaluation expertise, best practices, and findings with the greater community of evaluation professionals at USAID

- Supported the development of methods for better M&E learning efforts and investments

- Supported improved KM and learning practice among USAID implementing partners

During this reporting period, KDMD implemented this scope to integrate learning into USAID work through the following program activities:

- Maturity Model Research

- KM and Learning External Scan

- Knowledge Resources Mapping

- Baseline and Monitoring and Evaluating Plan for Mission Collaborating, Learning, and Adapting

- USAID Learning Lab

- Event Capture and Logistics

These activities are all explained in greater detail here.

**Maturity Model Research:** As the program embarked on a series of activities to gain a comprehensive sense of the KM landscape, the KDMD team conducted targeted research on the best thinking on learning organization maturity models. The resulting documentation of this research briefly outlined the connection between organizational culture and learning; presented mini-case study examples; and demonstrated levels, relevance, steps, and characteristics of KM organizational maturity. Gaining a better understanding the goals, activities, stages, and behaviors of organizational learning and KM equipped the team to assess the broader context of mapping and scan activities, propose recommendations, make decisions, and set targets.

**KM and Learning External Scan:** One of the most significant achievements during this period was the valuable information generated from the KM and Learning External Scan. The objective of the activity was to learn from other donors, comparable multilaterals, and implementing partners undertaking KM/learning strategic work

on how strategic learning is integrated into their organizational processes, programming, and operations. KDMD worked with several consultants to develop multiple written products representing research extracted from multilateral, private sector, and private voluntary organization sources that answered various client research questions around both KM and learning. KDMD also developed a matrix outlining potential questions missions would raise when integrating learning into the program cycle and matched related research with these questions to shape more detailed mission guidance. This research was also aligned with PPL's draft Program Cycle Learning Guide; specific resources from the research were identified for specific sections of the Guide and referenced as supplemental resources at the end of those sections. To ensure that missions would be able to easily utilize the approaches/concepts from the external scan resources, KDMD developed excerpts to accompany the resource. The hope is that the excerpts will allow missions to more easily apply collaborating, learning, and adapting approaches throughout the Program Cycle. The excerpts describe why the resource is useful to a mission and how particular concepts/tools from the resource could be used in different stages of the Program Cycle.

KDMD also conducted interviews with staff from three other donors—IFAD, World Bank, and ADB—to further the understanding and exchange ideas on how learning can be integrated into an organization. These three organizations were chosen due to their similarities to USAID in terms of size, structure, and organization. KDMD recorded the conversation with IFAD and ADB (the World Bank staff member was not comfortable recording the conversation), and posted them in Basecamp for future reference. All three organizations expressed interest in keeping in touch and participating, as appropriate, in activities related to learning integration (e.g., through follow-up discussions, participation in future communities of practice, and/or events). A synthesis report of the interviews, as well as recommendations on engaging with IFAD, the World Bank, and ADB in the future, is the last

outstanding deliverable from KDMD's consultant.

In response to PPL's interest in finding out how USAID has internally integrated learning across the Agency, a proposal and recommendations for a "Challenge" were developed to support future internal solicitation efforts.

**Knowledge Resources Mapping:** Many USAID missions are currently developing their CDCSs and many more are anticipated to initiate this process over the next year. PPL asked KDMD to compile technical resources as a short-term solution in order to rapidly assist current missions developing a CDCS. KDMD developed the Knowledge Resources Mapping document and supplemental table, which incorporated the following:

- Updated data from USAID's Quest technical programming tools, providing links to various technical design, implementation, and evaluation resources

- Information gathered from KDMD interviews of USAID staff who participate in working groups and networks around technical sectors

- Information from KDMD interviews of mission staff who offered information on technical resources they found most useful when developing a CDCS

**Baseline and Monitoring and Evaluating Plan for Mission CLAs:** Since missions are either just starting to develop a CDCS or expressing interest in developing a CDCS, it was decided that it would be important to establish a Baseline and Monitoring and Evaluating Plan for Mission Collaborating, Learning, and Adapting (CLA). The goal is to develop a plan to monitor PPL's progress toward supporting the integration of learning throughout the mission Program Cycle. This is an ongoing project with multiple proposed phases. Thus far, KDMD has worked to complete the monitoring and evaluation plan and has made some progress on refining evaluation methods and questions to ask missions to inform the baseline.

**USAID Learning Lab:** The concept of a Program Cycle Learning Lab evolved from a general idea of providing a webspace that promotes learning and knowledge management to the development community at large. Initially it was thought that the Program Cycle Learning Lab would be one element of this general space, with the idea that the rest of the space would be developed later. However, as the demand from missions for resources on how to integrate learning into the Program Cycle increased, it was clear there was a need for a webspace where missions could interact and feel comfortable engaging on questions around how to incorporate collaborating, learning, and adapting. Therefore conversations shifted towards developing a site specific to this need.

KDMD participated in discussions with another USAID project currently developing an internal Agency site, Program Net, which provides missions with technical resources around design and implementation elements of the Program Cycle. Through these conversations, it was decided that a new Program Cycle Learning Lab will be designed to interface with Program Net with matching platform and design requirements and a seamless experience as users navigate between the sites.

In support of the web needs assessment and planning for this effort, the KDMD team worked with PPL to outline a comprehensive vision for the Learning Lab website. This involved identifying requirements regarding PPL goals and user needs for sharing resources. As a temporary solution prior to the development of the full Learning Lab, KDMD developed a Learning Lab Library on KDID to provide missions immediate access to resources around collaborating, learning and adapting. For more information on the library, please see the Web Development section 11.1.

**Event Capture and Logistics:** To support LER's request to leverage learning by providing knowledge and capture and/or logistical management for events and by developing a plan to improve research policy, KDMD conducted the following:

- Research Policy Development: KDMD developed a plan to facilitate two working group discussions. The working group would discuss research policy and develop a process map outlining the steps for how research is carried out across the Agency. This exploration would then inform the development of a final agency research policy paper. This activity has not progressed past this initial plan.

- Evaluation Design Workshop with Jim Rugh: KDMD provided knowledge and learning capture services, as well as logistical support to the event held in March 2012.

- LER Office Retreat: KDMD facilitated the event and managed the logistics for the retreat in April 2012.

## KDMD SUPPORT FOR PPL/ST AND PPL/SPP

In addition to supporting LER Office activities, KDMD also worked with two other PPL offices: the Science and Technology (ST) Office and the Strategic and Program Planning (SPP) Office. The ST Office aims to transform USAID into the global leader in development by pioneering scientific, technological, and research-motivated approaches to traditional development challenges. The SPP Office leads Agency efforts to revitalize country and regional strategic planning and project design, and enhance institutional capacity in development programs as part of the USAID Forward Reform Agenda.

KDMD worked with the PPL/ST Office to develop and implement a plan to capture breakout session content and participant reactions to the Symposium on Future Development Challenges event by conducting and producing video interviews.

KDMD engaged the PPL/SPP Office to discuss Program Net in order to determine the gaps that the Program Cycle Learning Lab can fill and make the transition between the two sites as seamless as possible. KDMD also supplied logistical support for two office staff retreats in March and April.

## 11.1 WEB DEVELOPMENT

Over the six month period, the Web Development Portfolio provided the following support to the PPL Program:

1. **Symposium on Future Development Challenges:** The Web team developed an event page on the KDID portal to meet the special requirements for this symposium hosted by USAID, the Department of State, the National Defense University, and the Woodrow Wilson International Center for Scholars.

2. **USAID Learning Lab Library:** As mentioned earlier, the Web team created a space to provide resources/guidance to support the integration of learning throughout the program cycle in missions. In order to build out the library, KDMD staff defined a taxonomy structure for tagging resources and then the Web team converted the existing KM Lab on the KDID portal to incorporate the Learning Lab, creating a new content type specifically for Learning Lab resources, adding new vocabulary items to tag resource materials, and uploading resources with appropriate descriptions and tags for ease of navigation.

3. **Working Groups:** Web Development added Working Groups content types/functionality that brought a key feature utilized on Agrilinks and Microlinks to KDID.

As part of a coordinated effort to redesign the Program Net site to increase functionality, navigation, and encourage learning and exchange, the Web team, along with the Chief of Party, Senior Web Strategist, and Senior Knowledge Sharing and Communications Strategic Advisor, also engaged in several meetings with Program Net implementer IRG, PPL, and IT staff. The discussions focused on the interaction/communication between the external and internal elements of the site, hosting platform, single sign-on functionality, and implementer roles and responsibilities. Over the course of multiple in-person meetings and conference calls, the Web

team made recommendations and advised on best practices, incorporation of existing functionality on the KDID portal, and proposed wireframes created by IRG.

Plans are in place to develop the full Program Cycle Learning Lab site, which will provide peer and expert support and a community of practice for missions, implementing partners and the broader KM field. The Learning Lab will also provide training on knowledge and learning (via module/curriculum development).

## 11.2 KNOWLEDGE & LEARNING

The K&L Portfolio provided support to the PPL Program this reporting period through event capture, post-event product development, working group coordination, and scoping assistance for an upcoming online discussion. In addition, the A&L Portfolio worked closely with PPL on documentation of lessons learned from the KM Impact Challenge that were included in the May 2012 issue of the KM4Dev journal.

### EVENTS

In March, K&L recorded two presentations ("Evaluation Methods in the USAID Context" and a book review and presentation) by independent subject matter expert Jim Rugh. Screencasts and transcripts were produced from the sessions and shared with the PPL Bureau. K&L also assisted with the implementation of a presentation by Tony Pryor (USAID/PPL) and Stacey Young (USAID/PPL) on the USAID Program Cycle in February. This presentation included the participation of remote participants and was recorded through Go-To-Meeting online software. The recording was shared with the PPL Bureau as well as internally with KDMD staff members.

### SID WORKING GROUP

In February, KDMD supported an annual planning meeting for the SID-Washington Knowledge Management Working Group. This activity brought together over 20 working group members in person and 22 online participants to discuss feedback on the

content and format of working group activities and to decide on a 2012 pipeline. Ideas were generated with the audience and further refined with PPL staff following the event. The identified pipeline will be implemented through the remainder of the 2012 and beginning of the 2013 fiscal year.

### ONLINE DISCUSSIONS

The K&L Portfolio supported PPL staff in reviewing USAID's draft Program Cycle Learning Guide and designing an e-Consultation discussion. K&L reviewed the draft document and proposed thematic daily agendas and guiding questions to solicit feedback on key areas. K&L staff also assisted in refining a target list of participants, identifying "seed participants" for different topics, and compiling supplemental resources for the discussion. The e-Consultation has been placed on hold until further notice.

### GUIDANCE DOCUMENTS FOR THE LEARNING LAB LIBRARY

To support missions as they implement collaborating, learning, and adapting throughout the Program Cycle, KDMD was tapped to extend its expertise with a variety of knowledge capture and sharing activities by creating guidance documents. Although a range of experiences and best practices have been documented on the KDMD wiki, it was necessary to inventory existing resources, identify additional resources to be created, and create a template to synthesize information for a mission audience. During this reporting period, the team identified approximately 30 activities and assigned various portfolios to write specific sections. The Communications team also designed a template for sharing in a PDF format. Several guidance documents have been drafted (e.g., AAR Utilization and Focus Group Planning) and many more are planned for future development.

### K4DEV JOURNAL

KDMD, led by the A&L Portfolio, also worked with PPL to co-author and edit the May 2012 issue of the KM4Dev Journal, focusing on the results of the Knowledge Management Impact Challenge (KMIC) held in 2011. This involved overseeing the development of nine articles that explained the KMIC processes and activities and highlighted six of the most

highly ranked case stories submitted to the challenge. In organizing this issue, KDMD worked with the authors of the featured KMIC case studies to expand their case stories into full-length journal articles.

## 11.3 COMMUNICATIONS

The Communications Portfolio supported a number of activities designed to help catalyze USAID's transformation into an effective learning organization. The Communications team provided support on event promotion, video recording and production, web design, and content management. Communications also created a YouTube account and branded landing page for PPL's future use.

In November 2011, KDMD was involved in PPL's Symposium on Future Development Challenges, conducting 32 video interviews with conference participants consistent with the video capture strategy previously developed with the PPL Program Manager. The eight resulting videos provided viewers with an understanding of why the conference was organized and highlighted participant reactions in how the lessons may be applied to their work following the conference. Communications coordinated transcription services for these videos and then edited the clips for brevity and consistency with USAID branding standards. Once all the videos had been edited, Communications designed a conference landing page on the KDID website which aggregated the content and made it easier to find (see Figure 14). As of July 6, 2012, the 8 videos have attracted 350 views. A link to the webpage was included in the March issue of Connections promoting the conference and related videos.

As part of support to the LER-hosted Evaluation Interest Group, the Communications team provided input on interview questions to be directed to presenter Jim Rugh after the Evaluation Design Workshop in March 2012. The team then conducted a video interview with Rugh and edited the footage into a final product that was delivered to LER. The video was part of an effort to share evaluation expertise, best practices, and findings with the greater community of evaluation professionals at USAID.

## Symposium Report-Outs

**On Isaac Asimov**

**Three Development Scenarios**

**Why Futures and Development**

**Populations**

**Political Economies**

**Environment**

**Science & Technology**

**Future Analysis Implications**

Figure 14: These videos captured informal interviews with Symposium participants about the insights they gained from the event.

Additional capture assistance included providing logistical support to set up and record virtual interviews with IFAD and ADB as part of the program's KM and Learning External Scan. The Communications team also advised on the content management strategy for resources collected during the scan. As resources were uploaded to the Program Cycle Learning Lab Library, the team recommended including short summary descriptions of each resource and why they are important. The team also developed basic USAID-branded guidance templates in Microsoft Word for internal USAID-generated resources that lacked branding.

## 11.4 FORWARD STATEMENT

KDMD will continue to support USAID/PPL's efforts to implement Phase 1 of its Strategic Learning Plan by packaging guidance and developing a site for missions on integrating learning throughout the Program Cycle. KDMD will develop knowledge and learning activities to ensure PPL receives feedback on learning guidance for further development, and to build supporters of integrating learning into USAID. The Baseline and Monitoring and Evaluating Plan for Mission Collaborating, Learning and Adapting will continue to be developed and implemented. KDMD will also have a role in developing Phase 2 of the Strategic Learning Plan and shaping activities which will strengthen integrated learning in the technical/pillar bureaus.

In addition, the LER Office would like to invest further resources into KDMD to increase KDMD's involvement in its leveraging of learning activities

that increase knowledge around evaluation and research. KDMD would therefore have the ability to develop knowledge and learning capture options and provide logistic management for workshops and seminars.

Finally KDMD will continue to support PPL's efforts in engaging with the wider KM/Learning development community by coordinating SID KM working group events and managing the event pipeline.

# KUDOS

"Thanks again to you and your talented staff for this final product -- from start-up interviews months ago to this first-rate set of videos...super!"
  - *USAID Activity Lead regarding the Future Symposium videos*

"Thank you so much to you and your colleagues at QED for helping out in so many ways to make [Jim Rugh's] visit and workshop a success."
  - *USAID activity manager for the Evaluation Design Workshop*

"Thank you again for all you did to make yesterday run so smoothly!!"
  - *USAID PPL/LER staff on the LER Office retreat*

KDMD started to re-engage the Gender Development (GenDev) team in March 2012 after USAID began promoting its new policy on gender. USAID's Gender Equality and Female Empowerment Policy mandates that basic training on gender equality and female empowerment is required for all Agency staff who design, evaluate or manage strategies or projects; Agency staff (including Mission and Operating Unit Directors and Deputy Directors) who directly or indirectly supervise staff who design, evaluate, or manage strategies and projects; all Contracting and Assistance Officers; and Program Officers. The Agency's goal is for all new staff to receive basic training within two years of their start date and for all other staff mentioned above who have not had gender training to receive training within two years. In addition, the policy requires missions to appoint Gender Advisors and/or Gender Points of Contact and for the Agency to provide advanced training for these individuals.

The GenDev team met with KDMD in April 2012 to begin scoping out the needs to meet this training mandate. KDMD is providing project management and instructional design and development support. Subject-matter support is being provided by Fiona McDowell, QED's gender expert. The GenDev team requested support in developing three modules: Gender Equality at USAID (Gender 101), Gender Analysis (Gender 102), and The Role and Responsibilities of Gender Advisors/Points of Contact. However, the team will only focus on the first two modules under the current funding of this program. The projected completion date for the modules is the beginning of February 2013.

## 12.1 ADULT LEARNING & TRAINING

KDMD worked with the GenDev team to define the following goals for the training:

- Comprehend gender issues necessary to comply with USAID's Gender Equality and Female Empowerment Policy

- Master skills needed to perform gender analysis as mandated by USAID's Country Development Cooperation Strategy guidance, Program Cycle guidance, Project Design guidance, and USAID Automated Directives System

The courses will reside on USAID University and some tracking capabilities will be built into the modules. Quizzes, short case study scenarios, and other functionality will create a substantial level of interactivity between the student and the course material. The modules will also include selected video and audio clips featuring international, USG, and USAID representatives presenting their views and key statistics on the importance of gender integration.

## 12.2 FORWARD STATEMENT

Module One, Gender Equality at USAID, is expected to be complete at the end of October 2012 and Module Two, Gender Analysis, is scheduled to be complete in February 2013. KDMD has established a project plan and work flow process to begin working with the GenDev team on developing the storyboards. KDMD hopes to find opportunities to cross-promote the GenDev courses with other programs that are doing trainings. Gender online learning modules could be particularly interesting for USAID staff participating in the EG and BFS trainings.

# 13. INNOVATION AND DEVELOPMENT ALLIANCES PROGRAM

In December 2011, the KDMD team proposed a knowledge management and facilitation strategy for the Innovation and Development Alliances (IDEA) Mobile Solutions team. The knowledge management strategy was designed based on a needs assessment exercise conducted with members of the Mobile Solutions team and staff from four pilot missions: Haiti, Afghanistan, Indonesia, and the Philippines. The defined goal of the knowledge management activity was to facilitate behavior change at the mission level to improve and scale up mobile programming while making the Mobile Solutions team's model of support to missions sustainable and scalable. To achieve this, the KDMD team proposed four general areas of facilitation and support:

1. Identifying and sharing lessons learned

2. Identifying and sharing resources

3. Identifying and addressing technical gaps

4. Encouraging peer-to-peer knowledge exchange

In May 2012, KDMD work with the Mobile Solutions team resumed with a revised 12-month facilitation plan. Interviews were planned with an expanded group of nine pilot missions (Haiti, Afghanistan, Philippines, Colombia, Mozambique, Indonesia, Malawi, Ecuador, and Kenya) to be conducted in June 2012.

## 13.1 FORWARD STATEMENT

Based on the revised timeline and workplan developed in May 2012, the KDMD project will support the Mobile Solutions team and nine pilot missions over the course of a 12-month facilitation period. Anticipated activities include:

- Ongoing engagement to assess evolving needs, priorities, and capacity of mission teams

- Baseline, mid-term, and final evaluations to be conducted by the A&L team to identify changing mission behaviors related to knowledge sharing, mission-to-mission communication, and the impact on technical programming

- Coordination with USAID web development contract to develop a Mobile Solutions internal website with library, profile, and discussion forum functionality

- Design and delivery of online courses on Mobile Money and Mobile Data Collection

- Facilitation of technical webinars, peer assists, and online discussions

- Potential support for regional mobile money events

- Capacity building of IDEA and mission staff to sustain ongoing knowledge management support for mobile money programs

Throughout the course of the project, KDMD's programs and portfolios have developed a variety of tools, procedures, and technologies that have been instrumental in providing high quality services to the project's clients at USAID. Many of these tools cannot be directly attributed to a specific program within the project, yet are critical to the day-to-day operations at KDMD and are utilized across the project. The following section provides an overview of the cross-project initiatives that have assisted KDMD in streamlining its activities, both internally and externally, and have allowed the project to remain on the cutting edge of knowledge management.

## 14.1 PROJECT PLANNING TOOLS

### BACKPACK CALENDAR

Calendar challenges have been an issue on the project. Outlook was not accessible to subcontractors and Google did not provide the view or organization necessary for a multi-dimensional project. Although KDMD had been using a Google doc to record key dates and upcoming events, the format prevented people from seeing a dynamic, visual representation of the information and often led to unintentional oversights and double-booking of resources.

In January, the team began exploring options and discovered that the existing project management system, Basecamp, had upgraded its shared calendar feature (called Backpack) and now had the capabilities to help centralize information for KDMD team activities and plans. The goal of this shared team calendar is to provide a "big picture" place for the KDMD team to see major events, deadlines, holidays, and staff travel plans (vacation and off-site/working remotely). Each program has its own color-coded calendar and each event has a notes section for additional details (see Figure 15).

Backpack was successfully launched in February 2012 as part of a strategically planned roll-out process. It has been successful at keeping the team on the same page and has taken the guesswork out of planning for upcoming events and activities.
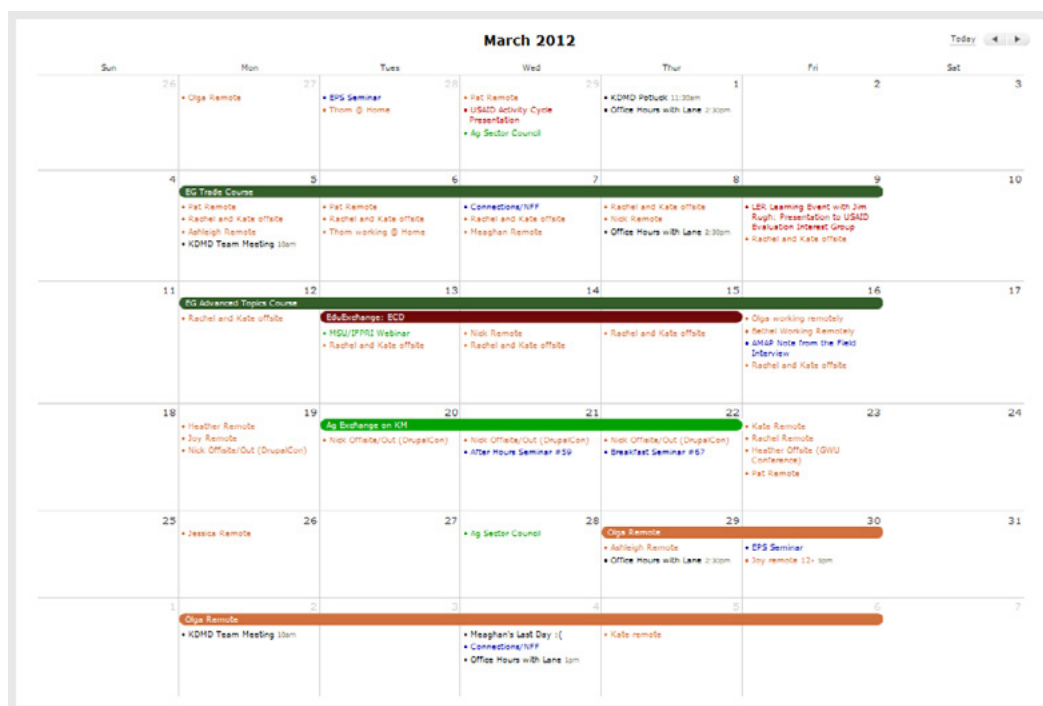


Figure 15:

This shared team calendar provides a quick and easy way to keep track of major events and deadlines.

Figure 16: Keeping the pipeline updated is a shared team responsibility, allowing KDMD to monitor project deliverables and coordinate on activity support.

## KDMD ACTIVITY PIPELINE

During this reporting period, KDMD began utilizing a cross-program pipeline to monitor current activities, track upcoming events, and document past events supported by the project. The pipeline, developed as a Google spreadsheet, is editable by all KDMD staff members and allows the team to monitor project deliverables and coordinate more efficiently on activity support, thereby reducing LOE. The pipeline is organized by program, activity, due date, and KDMD Activity Lead and also includes links to supporting Basecamp documents as well as space for additional notes (see Figure 16).

In February 2012, KDMD began sharing the pipeline with the project's COTR on a monthly basis and, in May 2012, expanded its recipients to include key Activity Managers within the MD team and the Bureau for Food Security.

## 14.2 ADOBE CONNECT

For several years, the KDMD project has facilitated webinars as a component of all USAID-branded seminar series as well as for special online learning events. In February 2012, the KDMD project, led by the K&L Portfolio, migrated from Go-To-Meeting and Go-To-Webinar software to the Adobe Connect platform. This decision was made after piloting Adobe Connect for selected special events including webinars, trainings, and online discussions

over the previous year. Adobe Connect offers many benefits compared to Go-To-Webinar including a customizable webinar space, polling capability for participants, increased interaction between webinar attendees and hosts, and sophisticated recording capability with interactive post-event products.

The KDMD project purchased three licenses that have been used for the following online activities:

- Ongoing branded seminar series including
  › After Hours
  › Breakfast
  › Emerging Payment Systems
  › Diaspora Engagement
  › Agriculture Sector Council
  › Feed the Future Stakeholder Meetings
  › Women's Leadership in SMEs

- Special webinar events

- Online facilitation

- Online trainings

- Online focus groups

- Internal meetings and collaboration

In February and March 2012, the KDMD team engaged in a comprehensive migration strategy, working across programs and portfolios to ensure that the transition to Adobe Connect was smooth with minimal disruption to ongoing project activities.

This migration strategy included designing and standardizing webinar "rooms" for branded seminars, developing communication language for webinar participants, and training KDMD staff on how to use Adobe Connect. Adobe Connect was officially rolled out in March 2012 and has since been utilized successfully in all branded seminars as well as trainings, special events, and internal meetings.

The KDMD project has also been able to bring in several remote presenters using Adobe Connect. During the reporting period, the K&L team facilitated remote presentations from London, Paris, California, North Carolina, and the Philippines. Ease of connection, combined with multiple ways to interact with both in-person and online attendees, allows remote presenters increased presentation flexibility. Response to Adobe Connect has been positive, with participants commenting on webinar quality, increased interaction with other participants, and convenient access to relevant documents through the online room. KDMD will continue to utilize Adobe Connect for all webinars and selected online events and will continue to explore ways to make participant experience more interactive and engaging.

## 14.3 PORTAL STREAMLINING

In an effort to streamline (and "speed up") the sites and improve the user experience, the Web Development team has undertaken the intensive and laborious tasks of cleaning up the portal. This entails disabling/deleting unnecessary modules, removing legacy blocks and views that are no longer of use, and cleaning up the code in all of the template and cascading style sheet (CSS) files in accordance with best practices. The next step is to examine the JavaScript files to understand why certain ones seem to be called unnecessarily or take an inordinate amount of time to load. Furthermore, all contributed modules in need of updating will be re-examined.

## 14.4 CONTINUOUS LEARNING TOOLS

### LEARNING AND IMPACT REPORT

The Learning & Impact (L&I) Report is an annual report designed to compile the lessons and improvements made in all the individual KDMD activities. It is part of the KDMD project mandate and serves as a great opportunity to record lessons learned that clients and program and portfolio managers can refer to as they manage activities.

During this reporting period, the KDMD team helped compile the lessons learned; most of the information comes from the Program Managers as they lead KDMD activities that are supported by the Portfolio Managers. These often include details such as kudos or particular incidents that can help KDMD gauge the success of its activities but that are not recorded in AARs or any other medium. Although the L&I Report will be completed in the next reporting period, information gathering and documentation is an on-going process that helps the team be reflective and continually improve its processes in an adaptive manner.

### KSLAM

As a way of internalizing the knowledge management principles that KDMD implements on USAID's behalf, approximately twice per month the team hosts "Knowledge, Sharing, and Learning in the AM," or KSLam, meetings as a venue to learn from one another in a fun, less formal atmosphere. Examples of KSLam meetings during this reporting period focused on:

- The Cynefin Framework

- Fail Fair concept and demonstrations

- Communications style guide review

- Introducing KDMD scheduling tools
  (Backpack Calendar and Pipeline)

- Knowledge management KDMD-style

- KDMD mapping

These meetings allow the team to share new ideas and gather feedback from staff across the project. They are also an opportunity for creativity and out-of-the box thinking that engage the whole team and helps to build relationships and trust. Following each KSLam, the agenda, outcomes, and follow-up materials are posted to the KDMD wiki or KDMD Community for ongoing reference and team contributions.

### KDMD COMMUNITY

The KDMD Community is a working group for the KDMD team hosted on the KDID website. As such, it serves several purposes. First and foremost, it is a learning space for the KDMD team to share ideas, ask questions, and post interesting documents and tools. Second, it allows KDMD staff to interact with the KDID working groups function from a user perspective, which provides an opportunity to understand the potential and realities of the format so that activity leads can discuss and propose the best solutions with USAID programs and partners. And finally, it serves as a virtual repository of KDMD ideas and resources over time. Examples of recent resources and discussions include:

- USAID Policy Framework 2011 - 2015

- Eric Berlow: How Complexity Leads to Simplicity

- USAID Program Cycle Walk Through

- Adobe Connect Video: Welcome to the Webinar Meeting Room

- Online University Education Discussion

- Five Ways to Make Your Company More Innovative

## 14.5 KDMD BLAST NEWSLETTER

Along with several other information sharing and team building activities, this reporting period marked the inception of the KDMD Blast newsletter, an internal resource that provides weekly updates on high-level program news, tools, ideas, information, facts, and team profiles and announcements. The newsletter creates a regular opportunity to connect staff across the project and focus on program and portfolio highlights that would otherwise only be shared through informal mechanisms and a brief description at the monthly team meetings.

The impact has been an increased understanding of programs and activities throughout the team, allowing people to make connections and follow up on specific areas of interest or synergy. It has also created documentation of KDMD accomplishments, priorities, and transitions. And last but not least, it has built relationships and trust among team members who have gained a deeper understanding of each other's background and experiences.

## 14.6 USAID/MAILCHIMP TROUBLESHOOTING

As part of its support to virtually all of the USAID programs involved in the project, KDMD sends out regular email news updates and invitations for USAID-sponsored events to over 2,500 USAID employees. Since June 2010, these e-campaigns have been sent out via the cloud-based email marketing platform MailChimp. However, with USAID's implementation of Google Mail as its email platform in early 2012, KDMD began to experience serious issues with MailChimp email delivery to USAID email addresses. In a effort led by Zachary Baquet (USAID/BFS), Lane Pollack (USAID/MPEP), and the KDMD Communications Portfolio, the team has worked to identify the specific technical program and resolve the issue with the USAID Office of the Chief Information Officer (CIO). This has involved completing the Information Completion Checklist and going through the Software Approval Request process, which is still underway at the end

of this reporting period. The CIO review hearing is scheduled for late May 2012. In the meantime, the Communications team has worked with KDMD and USAID activity managers to implement temporary solutions to minimize the interruptions in the project's ongoing communications with USAID staff.

## 14.7 PROCESS AND TOOLS STANDARDIZATION

In order to standardize event management across the project's various seminar series, KDMD began an initiative in the previous period to streamline its complex and multi-portfolio seminar management processes. Based on several mapping exercises undertaken in Summer 2011 to identify seminar best practices and build general agreement on portfolio roles and responsibilities, an initial task list template was developed and detailed seminar process documentation began on the team wiki.

In the last six months, the team has taken the opportunity to re-evaluate the task list and wiki and make necessary changes to incorporate new learning into its best practices and balance roles/responsibilities across the portfolios. This review and updating has also been critical as many processes have changed with KDMD's migration to the Adobe Connect platform and the adoption of new project planning tools (see Sections 14.1 and 14.2). As a result, the team has produced 3 seminar task list templates on Basecamp that capture 37 critical pre-, during-, and post-seminar activities. In most cases, these tasks are then linked to the wiki for more detailed instructions, additional templates, and/or sub-task lists. So far, the standardization effort, coupled with KDMD's thorough documentation, has helped to reduce LOE (by outlining step-by-step processes to reduce the need for rework and by clarifying roles and responsibilities) and to ensure best practice across the seminars.

Other project-wide standardization efforts included the creation of a KDMD style guide for writing and a document template updating initiative. The style guide, which is housed on the team wiki, documents KDMD's approach to certain elements of writing style that need to be consistent. While not a comprehensive instruction manual on grammar and punctuation, the guide is meant to standardize certain things that can vary greatly from writer to writer, especially on a project this size. For example, the style guide contains:

- Acronyms and abbreviations
- Project-specific capitalization rules
- Government Printing Office (GPO) guidelines for when to use numerals or write out numbers
- Approved names for programs and portfolios

The document templates created or updated are also now centrally located on the wiki and serve two important purposes: they insure proper USAID and KDMD branding and they employ embedded styles to maintain consistency and reduce LOE by providing a predefined combination of font formatting, color, and text size. Available templates have been developed for PowerPoint presentations, reports, guidance documents, various ALT training course resources, activity synthesis reports, and more.

## 14.8 BEST PRACTICE ARCHIVES

### KDMD WIKI REFRESH

The Communications team, along with K&L and Operations, took on the arduous task of redefining and updating the KDMD team wiki. Before the refresh, the wiki served as a place to capture and collect data for reporting purposes. During the refresh process, the wiki team surveyed the wiki to identify gaps and other areas that were not being utilized in order to create an efficiently run informative space for KDMD members. As part of the initiative, the team:

- Structured and edited the tagging process to enhance the search results
- Created a KDMD Toolbox with resources that are pertinent to the project's KM work
- Reorganized portfolio and program pages to better inform KDMD members of work being done, how it is being conducted, and who to contact

- Created linkages throughout the wiki to better serve the user in finding information

- Documented guidelines on capturing processes for KDMD activities and other tasks

This wiki enables the staff and contractors working on the KDMD project to capture and share knowledge about how the project implements knowledge generation, capture, sharing, and application activities. The wiki serves as an assessing and learning tool for continuously improved services, standardized operations and procedures, and up-to-date staff resources.

**KDMD GUIDANCE DOCUMENTS**

Thanks in part to the KDMD wiki, the KDMD team has long been good at capturing "how tos" for various products, tools, and activities. This tended to occur on an inconsistent and uncoordinated basis, however. Many programs and portfolios regularly captured lessons and shared their processes and experiences, but it was done in a variety of formats. During this reporting period, the KDMD team strategically reviewed existing "how to" guidance and created a list of missing tasks and activities that were integral to the project. Additionally, a consistent format/template was designed to help the entire team better understand the importance and function of activity guidance, with headers to help organize information (i.e. About/Goals, Assumptions/Requirements, How Tos, Lessons Learned/Best Practice/Limitations, Resources, Examples, Timeline, and Budget). Several guidance documents have been created and/or updated, including Adobe Connect, e-Consultations, and AARs, and many more will continue to be generated based on a prioritized list. Not only do these guidance documents support the internal KDMD team, they can be (and have been) adapted for USAID use and will serve as critical reporting resources at the end of the project.

## 14.8 FORWARD STATEMENT

The KDMD team will continue to refine its knowledge management tools and practices to take advantages of efficiencies across the project, capture lessons learned, and refine activities where necessary as a result. Ongoing initiatives, like best practice archiving, will continue throughout the life of the project, while other activities, such as the MailChimp troubleshooting, will hopefully be resolved within the upcoming period.

## 15.1 KDMD MANAGEMENT

Effective contract and financial management is important for this large, complex project. QED management regularly communicates with the COR and the Contracting Office 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 COR and Program Managers in their respective offices and bureaus. KDMD management reviews and approves all project time and expense reports.

The KDMD project is headed by Thom Sinclair, Chief of Party (COP), who has overall responsibility for the project. He directly manages the deputy chief of party (DCOP) and the portfolio managers. The COP is responsible for the relationship with the COR (formerly COTR), Lane Pollack (USAID/MPEP). The DCOP manages the program managers and the Project Operations team.

In 2011, KDMD created two positions Senior Web Strategist and Senior Knowledge Sharing and Communications Strategic Advisor. Colleen Popson is the KDMD Senior Web Strategist. In this role she provides facilitation and leadership to clients and cross-portfolio teams engaged in developing dynamic, interactive web spaces. In her role as Senior Knowledge Sharing and Communications Strategic Advisor, Jennifer Dahnke also leads and facilitates cross-portfolio and client teams to design, develop and implement activities that create, capture and share knowledge. She has been engaged across programs, but her work has been increasingly focused on BFS and PPL. These two roles have allowed us to provide a better value to USAID in our ever increasing web-based KM and communications work.

The portfolio managers are responsible for the work in the technical areas of Assessing & Learning, Web Development & Management, Knowledge & Learning, Communications, and Adult Learning & Training. The portfolio managers supervise the activity leads within their portfolios. Program managers manage the relationship with the USAID activity managers, managing the budget and providing quality control for deliverables.

As a large and complex project, KDMD has personnel changes throughout the life of the project. The effects of these changes have been minimized with the use of online activity management tool (Basecamp), the team wiki that serves as a living repository for project knowledge, the KDMD orientation materials, frequent and consistent use of AARs, and hand-off procedures.

## 15.2 KDMD PERSONNEL

As noted above, such a large and complex project has turn over and finds new areas where it needs to expand its capacity. Over this reporting period, the following personnel changes have taken place:

- QED hired Heather Risley as a Communications Specialist
- QED hired Kenneth Turner as the DCA Program Manager
- QED promoted Julie MacCartee to Food Security/Ag Program Manager
- QED promoted Maciej Chmielewski to Communications Specialist
- QED employee Lindsay Levin transitioned from Communications Specialist to Communications and Social Media Consultant

## 15.3 KDMD SUB-CONTRACTORS

International Resources Group (IRG), Training Resources Group (TRG), and Global Learning Systems (GLS) continue to provide support to KDMD. Web development work continues to be supported by Zaloni, the lead website development firm for KDMD's many websites.

PPL developed a Strategic Learning Plan with the goal of leveraging collaborating, learning, and adapting to increase the effectiveness of USAID's development efforts.

The objectives of the Strategic Learning Plan are to:

- Improve the quality and relevance of USAID's development practice by grounding it in evidence and making it quickly adaptive to new learning and changing contexts

- Extend USAID's influence and ability to leverage other actors' resources and actions

- Catalyze learning among country development actors to build capacity and facilitate country-led development

The plan is broken out into three phases. Phase 1 of the Strategic Learning Plan focuses on integrating learning and adapting learning throughout the Mission Program Cycle directly addressing the work of USAID missions. Phase 2 will address the role of regional and pillar bureaus in supporting learning and evidence-based adaptation throughout the Agency's work. Phase 3 will address the role of central bureaus in creating and maintaining policy, workforce assistance, and the technology environment that supports continuous learning and adapting for increased aid effectiveness.

### INTEGRATING LEARNING INTO THE MISSION PROGRAM CYCLE

Currently, efforts within PPL are underway to support Phase 1 and to integrate learning throughout the Mission Program Cycle. The Program Cycle ensures a degree of continuity from analysis to impact and back; integrating learning throughout the Program Cycle renders the Program Cycle more fluid and adaptable, grounded in learning about contextual reality and effective interventions, both reflecting and refining strategic goals and approaches.

Creating the conditions for development success will be the focus of the work of the Collaborating, Learning, Adapting (CLA) process that is incorporated throughout the Program Cycle. Implementing the CLA process ensures that the CDCS works as a living strategy, providing guidance and reference points not only for implementation but also for learning and course correction as needed. Improving coordination within USAID, among USAID's implementing partners, and with other donors and host country government counterparts will reduce duplication of efforts and redundancies and provide a focal point to coordinate efforts to achieve the development objectives articulated in the CDCS.

The CLA will:

- Ensure coordination among USG agencies, partners, and stakeholders

- Strengthen the evidence basis on which decisions about development assistance are made

- Ensure that experience and observations inform program decisions

- Facilitate adaptation of activities to changing conditions

- Capture and share new learning about what works and what does not

Knowledge and learning regarding the Mission Program Cycle will be easily accessible to key stakeholders, resulting in increased development effectiveness, improved cooperation between USAID and partners, more transparency in the Mission Program Cycle, and improvement in USAID's ability to engage partners and host country government entities productively to mitigate corruption and impose accountability.