**KM Task Force Meeting**

**October 29, 2014**

In attendance:

1. Cheryl Fries, Sr. Specialist, KM & Communications, Save the Children
2. Lynette Friedman, Consultant
3. Antonia Wolff, SPRING Project
4. Shelia Jackson, Sr. Specialist, KM, TOPS/CORE Group
5. Patrick Coonan, Specialist, KM, TOPS/CORE Group
6. Aaron Buchsbaum, WFP
7. Dalmar Ainashe, CARE
8. Jessi Mann, Program Associate, TOPS/Save the Children
9. Jamie Holbrook, Fintrac
10. Julie MacCartee, KM Specialist, USAID
11. Mari Pierce-Quinonez, KDAD
12. Harley Stokes, Tufts

Agenda:

1. Presentation from Lynette Friedman. Lynette is the main author of a tool that the task force is considering for endorsement - [Designing Participatory Meetings and Brownbags](http://www.fsnnetwork.org/sites/default/files/designingparticipatorymeetingsfinal_0.pdf).
   1. She'll be giving us an overview of the tool and answering questions from us so we can consider whether it meets the criteria for endorsement.
   2. Content:
      1. Thinking through your objectives
      2. Choosing the right format
      3. Making room for reflection and dialogue
      4. Managing the flow
         1. Time-keeping tips
         2. Managing Q&A
         3. Working with small groups
      5. Additional Resources
2. Cheryl (SC) – guide would be strengthened with examples of each format. Potential annex in the future (1 pagers for each format).
3. Julie McCart (BFS) – What in the guide makes it specific to development practitioners?
   1. Lynette – it is really relevant to any field. This was done within the context of the FSN Knowledge Sharing Meeting; targeting an audience who is very varied in their experience, and working to encourage sharing across sectors. But the tools are certainly relevant regardless of sector.
4. Were there any types of methods that you decided to exclude because they weren’t relevant this field?
   1. Not really. We purposefully excluded training methods and really focused on knowledge sharing formats. All of the methods included in the resource have been used in FSN Network meetings and/or CORE meetings.
5. Aaron Buchsbaum – I’ve seen a lot of people using sticky notes to get ideas from participants and then putting them up around the room, in a way of vetting/sorting ideas. That could be added to the resource. Additionally, your experience with successfully facilitating panel discussion across a variety of sectors? How do you scope the entire panel discussion to be relevant to everyone in the room and to make sure the topics cohere?
   1. Lynette – a lot of it depends on the pre-work and how much the presenters work with you. When people are willing to go with the program and the goals are agreed upon ahead of time. Where there is a very well laid out thought process (goals, pointed questions, careful selection of panelists), then it can work really well! The issue comes when we have people who buy into it and are the right organization/position, but aren’t willing to share their thoughts ahead of time and prepare.
6. Antonia Wolff – Does it only address people in-person? Has there been any thought designing participatory forums that are with people in different countries, places, remotely, etc.?
   1. This document is focused 100% on having people in the room. This does not address any remote/virtual connections.
      1. Shelia – this might be something that the KM TF can take on – how to engage people virtually.
      2. The KDAD project has a webinar guidance document, we could take a look at that and decide if it’s something we want to endorse/update/add to.
         1. Aaron Buschbaum – I would also love to see some guidance about a “blended” meeting space (virtual and in-person).
7. Harley Stokes – Has anyone had an opportunity to share this with field staff? Have they received any reactions? How well does this translate, or is it specific to people working at HQ?
   1. Patrick – I don’t think it’s specific to HQ people. It’s online, but we haven’t yet followed up with people in the field to see if they are using it. The Bangladesh KS Meeting would be a good opportunity to get reactions from the field staff, and to ask about their specific needs.
   2. Shelia – This document is already translated into French, and we’ll be getting it translated into Spanish, which will also help.
8. Harley Stokes – Useful tips regarding facilitating panels and time keeping?
   1. Lynette – There are a few in the guide! e.g. Getting peoples’ presentations ahead of time, providing time queues, etc.
9. ?? – Is there any guidance that could be included in this guide or somewhere else that discuss cost-effective ways to address language barriers in meetings?
   1. Lynette – It is not discussed in this guide, but I would suggest that when participants are clustered in small groups, make sure that the small groups are formed around the same language.

Moving forward 🡪 We’re putting this tool up for endorsement by our taskforce. If we decide to endorse it, then this tool will get a “FSN Network Approved” stamp on our website. We will send out a survey monkey to get votes later this week.

1. 11 Ways to Create an Environment of Inquiry within your Organization
   1. Purpose: These tools and activities are practical ways to support an organization culture that incorporates learning and sharing into its very fabric.
2. What should we do with this tool? Should we invest in it? Or is there another direction in which we should take it?
   1. Shelia – We need to make the distinction between people who are internal, or external facing.
   2. From the Health perspective, KforHealth created a toolkit that’s being used across home office staff and field staff. My question would be, “is this a need that’s actually going to fill a gap? Is this actually needed?
   3. Would this include some sort of decision tree? What makes it a “tool”?
      1. It’s a tool right now because it provides steps to plan specific activities. Perhaps this is more of a ‘guide’ and not a ‘tool’?
   4. Is this to be used at the organizational level, or the individual level? Is it internally-facing or externally-oriented? Potentially both.
   5. Antonia Wolff – Have we shared the tool with the general public yet?
      1. No, not yet. We wanted to get preliminary feedback on the big picture of whether there is a need first.
   6. Harley – I’m wondering who the audience is… If it’s KM people, then maybe it’s not a priority. But if you’re really trying to bust silos, to get M&E people involved, for example, then this seems like a great way to introduce that idea.
   7. Patrick – Is “creating an environment of inquiry” actually what this tool is about? What’s the central idea of a document like this?
      1. It could be scoped better: E.g. noting that these are “ways to engage more staff” or “these are technology-focused approaches”.
      2. It might be good to focus our energy on web events/hybrid meetings, or some other specific approaches, and to use those to help our thinking about a larger document.
   8. Mariela – In terms of a practical standpoint, it is really useful to have step-by-step guide. Shared ownership is the real obstacle, within the organization. What about an accountability mechanism? How do we ensure that people are following through with a commitment to a KM culture?
      1. Patrick – So would that document be focused on strengthening KM in relation to their own jobs, or for managers who want to foster more KM among their team?
         1. Mariela – I think it would be more for foster KM within your own teams, but the point about breaking down silos to encourage collaboration across teams, would be very useful.

Moving forward 🡪 We’re going to look at KDAD’s webinar guidance, which will then feed into the environment of inquiry document. Who would like to be part of the next iteration of the inquiry tool? Or of a tool focused on virtual/hybrid participation? Or of one about busting silos? We’ll follow up with people via email to request which committees people would like to work on.