**KM Task Force Meeting**

**September 22, 2014**

**1. Introductions**

1. Sheila Jackson, TOPS/CORE Group
2. Patrick Coonan, TOPS/CORE Group
3. Aaron Buchsbaum, SPRING
4. Mariela Rodriguez, CARE
5. Julie MacCartee, USAID/BFS
6. Jamie Holbrook, Fintrac
7. Eric Firnhaber, Fintrac
8. Alberto Andretta, CRS
9. Madeline Franklin, KDAD
10. Antonia Wolff, SPRING

**2.** **Building a KM Culture at Your Organization** (Aaron Buchsbaum of SPRING)

* SPRING- USAID funded, nutrition focus
* If you build it: they may not always come. How has SPRING evolved in their use of KM?
  + SPRING has altered their practices to include: interactive data features, good content, document submission platforms, etc.
  + Began with a strategy meeting in 2013: tasked with creating a knowledge hub
    - Issues about how to embed KM time into activities
    - Issues concerning budgeting
  + KM Jamboree- March 2014: Entertained and successfully educated people about processes
    - Delved into web-first strategy
    - Discussed publication process- a confusing topic for many
      * Turned a giant process into a simplified and pretty format
      * Kept the conversation lively and active
  + Flew country managers to DC for a meeting, gave 7 hours to KM to come up with strategic communications workshop
    - Developing the SPRING brand became the focus
    - Gave a scenario/story to make material relevant
    - Put together different frameworks to present
    - 35 follow up steps after the meeting, to best support the country managers
    - Everyone left with a Strategic Communications Planning Framework
  + Why did this happen?
    - Project Director encourages communication
    - Support from Director of Country Initiatives
    - Funding from BFS specified the need to use KM
  + Barriers:
    - Get too busy- more in demand but haven’t expanded team
    - Hard to enforce new processes
    - Quality Control is difficult
    - KM can be viewed as a difficult team to work with
  + Steps to consider from SPRING’s experiences:
    - Set aside KM brainstorming time w/out an agenda
      * Develop a plan of action, who to talk to
    - Leverage colleagues: think about who you can convince and who would have an impact
    - Enforce guidelines
      * Ex. Enforce submission formats, etc.
    - Directly link KM and technical teams
      * Get a KM perspective from the beginning
      * Make a point that KM will be important for packaging information
    - Articulate each task and figure out who is the lead on each task, and who is the backup
    - Focus on how to shift things in the long run, if project directors fear timeline or ideas are ‘too advanced’
* Q&A

**Q1:** Did you find any reoccurring activities, what processes can you instill to create KM friendly culture in project?

**A1:** Trainings are both a process that creates the culture and is born out of that culture and interest. Need to make your pitch well, and ‘meet people where they are at.’ Processes to consider: go to the leads of technical team and discuss quality contributions, or return on investment, or other benefits of KM.

**Q2:** Julie: At one point you were faced with a contract that forced use of KM. We are writing more KM into our contracts. That’s not equivalent to a KM culture, though, and doesn’t ensure quality.

**A2.** Aaron: Those are good points. If you mandate webinars, blogs, etc, how do you ensure that the people are equipped to do that? Project directors need to recognize the importance of quality and make a team that can produce high quality outputs.

Sheila: People might not be collaborating or generally sharing information. KM is a technical area that needs to be developed

Patrick: Also, to what end are we doing KM? What is the strategy behind it? WE need to remember that. The other thing is, how do you show the value of KM to people whose job isn’t KM?

Aaron: You need to find a way to keep people engaged. That ties into how to get people involved. It’s also about efficiency, which is a compelling argument for people.

**Q3:** How much are non-KM people engaged in creating processes?

**A3**. Aaron: It’s better to reach out to people as processes are being developed and get feedback from them. Team size and time will be factors in this success, however.

Patrick: If it’s a KM project that affects whole team, we bring everyone in early- but without overwhelming them. If we’re trying to get them to use a new tool, we show them what we’ve created with the tool and get them excited about it. Sometimes it helps to approach people one-on-one.

**3.** **Review of Resource Being Considered for Endorsement (Sheila and Patrick)**

* Supporting Communities of Practice: A TOPS Quick Guide for Development Practitioners
* Not a chance to get feedback: take it or leave it
* Action Item: Opportunity for taskforce to rate the tool on survey monkey to determine whether or not Taskforce will endorse the tool
* Introduction of the tool (Patrick):
  + Written by TOPS staff
  + Geared toward Communities of Practice
  + A number of consultants contributed to the guide
  + Guide includes 9 key areas to focus on to support development of communities of practice
  + Wanted to make the guide easy to access and use (only about 10 pages)
  + Components:
    - Define purpose of community: what do you want people to get out of it
    - Invitation: Identify and reach out to potential members
    - Needs Assessment: Determine the knowledge and experiences your community has and needs. Do a survey to determine what they know, what they want to learn, and what they want to talk about.
    - Structure: Define roles and responsibilities
    - Platform: Select tools and technologies. Not just online tools, but also in-person. Simply: how people going to be brought together.
    - Momentum: Establish a rhythm of activity. Need a steady flow, cannot simply stop activity for 6 months.
    - Relationships: Build a sense of community. Establish emotional connections between people. People will be more interested in engaging if they feel connected with other people.
    - Growth: Raise awareness of your community, if desired or appropriate.
    - Responsive Design: Use data to measure success and make improvements to figure out what is working, what would bring more people in, how do we keep conversations going, and continuing to keep a pulse on your community: what their needs are, who they are and what they can contribute
* Q&A

**Q1.** Do we know if anyone has field-tested this tool?

**A1.** We don’t. Some people have volunteered that this is helpful in thinking things through in planning stages.

**Q2.** Where is the role of the facilitator most highlighted?

**A2.** It’s the person facilitating the conversation: the community manager is the word that we use for that.

**Q3.** Aaron: I appreciate having a resource like this. Might add a table of contents into this tool and hyperlinking it to the different sections. I’m also curious about thoughts on when this is applicable, and when people should think about building a community of practice.

**A3.** Patrick: That’s a good point. It makes me wonder- let’s say we endorse the tool and in a few years down the road, we find other things that improve the process. With this tool, even if we do endorse it, we will have to come back to it and endorse a newer version.

Sheila: I could see us having a sequel to this document that deals with next steps in the field. And we can update the document later down the road.

**Q4.** Where has this been shared, so far?

**A4.** Shared through FSN and Learning Lab websites, for now.

* Final Thoughts and Action Items:
  + Action Item: Survey monkey, which will be sent out soon, to review tool.
  + Action Item: Results of survey will be disseminated
  + Next meeting will be in one month

**4. Closing**

**Resources:** <http://www.fsnnetwork.org/sites/default/files/supportingcommunitiesofpracticefinal_0.pdf>