Knowledge Management

and

Building Demand for Sanitation

Pete Cranston

Table of Contents

1   Introduction

This document is the final report from a consultancy assignment focusing on Knowledge Management in the Building Demand for Sanitation (BDS) portfolio of the Bill & Melinda Gates Foundation (BMGF) water, sanitation, and hygiene (WSH) program. The assignment entailed

- Surveying the participants of the 2014 annual Grantee Convening
- Facilitating a consultative and ideation process during the convening on how improved KM could contribute to program and Grantee goals
- Meeting with BMGF staff in Seattle to share the KM requirements and issues that had emerged from the convening
- Developing options for a BDS KM program of activities that aligns with other current KM activities within the Foundation.

In the document we describe our approach to KM, the background and context for the consultancy assignment, the output from the Grantee survey, the activities and outputs from the convening, the post-workshop debriefing meetings in Seattle, and the KM options that have been developed through synthesis of these various inputs.

1.1   Perspectives on KM

It's important to explain the approach to KM that underpins the approach to the assignment and this report especially since there is no agreed definition of KM even amongst KM practitioners. Indeed the term KM is itself contested: "you can't manage knowledge — nobody can. What you can do is to manage the environment in which knowledge can be created, discovered, captured, shared, distilled, validated, transferred, adopted, adapted and applied"[1]. However, there is more consensus on practices and activities that should be included in a definition of KM, including:

- **Information management**: the collection and management of material from one or more sources and making that material accessible to and usable by one or more audiences;
- **Knowledge sharing**: a set of practices that enables people to share what they know with others in the application of their work;
- **Learning processes**: both individual and collective or social, focusing less on the "sending" and more on the "receiving", particularly the processes of sense making, understanding, and being able to act upon the information available.
- **Communication**: in the sense of a meaningful exchange, as a foundational competence for the interactions that are at the center of learning, sharing and managing knowledge

Contested or not, KM has been recognized as an important issue for the International Development sector since at least the mid 1990's, the point at which initiatives such as the high-profile World Bank Knowledge Management were launched. This and other initiatives were driven in part by the potential of new Information Technologies (IT)[2]. IT systems and their digital offspring, social media, have an important role as an enabler of KM. IT operates best as part of tightly organized processes that facilitate the creation, storage and dissemination of 'knowledge products'. The combination has often produced an over-emphasis on formal process and collections of 'knowledge objects', often text documents, at the expense of the messy, chaotic, emergent process that is learning, especially social learning. The challenge for BDS,

---

[1] Chris Collison and Geoff Parcell, _Learning to Fly_ - Practical Knowledge Management from Leading and Learning Organizations (2005), Chapter 2, pages 24-25
[2] 1996 World Bank Annual Meeting address byPresident Wolfensohn, http://web.worldbank.org/WBSITE/EXTERNAL/NEWS/0,,contentMDK:20025269~menuPK:34474~pagePK:34370~piPK:34424~theSitePK:4607,00.html

then, is to find the appropriate balance between the various types of KM practices that best support the portfolio's core goals.

1.2   Background to the assignment

The BDS portfolio has a relatively small number of grantees (around 24) but its focus spans a wide range of development challenges including community behavior change, government policy and advocacy, technology and product development, affordable financing, and product marketing. The BDS portfolio has mainly relied upon face-to-face workshops ("grantee convenings") during which information and progress updates are shared, as well as email; however, there is no formal system for managing information that BDS grantees generate.

KM had surfaced as an issue before and during the 2013 BDS convening. A small amount of time was allocated to discussions in the 2013 meeting and there was consensus that the issue should be explored further.[3] It was agreed that the BMGF WSH team would develop a Terms of Reference (ToR) for a KM project within the BDS portfolio, with input from grantees. The draft ToR was available for the 2014 Nairobi convening. The two objectives described in the ToR set the framework for reviewing KM in BDS:

1) **Enhance WSH grantee knowledge sharing for the BDS portfolio**. Improve the effectiveness and efficiency of the Building Demand for Sanitation initiative's knowledge sharing mechanisms and platforms, and strengthen uptake of effective approaches among its grantees.[4]
2) **Improve knowledge and information management of, and access to Foundation WSH information**. Plan and design a system to organize and annotate WSH resources and to make these resources readily available to grantees as well as to the public.

In the ToR it was suggested that the main KM gaps and challenges of the BDS portfolio are:
   – Convenings are held infrequently (annually) and there is no formal KM activity between meetings;
   – Lack of a common focus (or clear incentive) for sharing information;
   – Lack of a mechanism to share or access new or existing information;
   – Lack of a common set of definitions or performance benchmarks, including financial cost tracking;
   – No access to a common electronic or other platform to upload or download relevant project content;
   – No shared taxonomy for organizing or accessing content.

2   Nairobi Convening

2.1   Background

Five hours were allocated to discuss KM in general and the ToR in particular during the convening. Participants had been alerted to the agenda items and recruitment of a KM consultant. The full agenda of the meeting is included as Appendix One.

---

[3] Details are included in the 2013 Foundation report on the convening.
[4] If successful, the audience may be expanded in the future.

2.2 Survey

A pre-workshop survey was completed by 43 of the 46 participants. The complete answer set is included as Appendix Two. The main conclusions were shared with grantees, and are summarized below:

1. Participant profile
   - Largely urban (capital city), international organizations, though sizeable national focus
   - Primarily development practitioners, enriched with policy actors (4) and academics/researchers [3]
   - The majority have reliable fast Internet, and cost is not an issue for them. However, as is still typical in many locations, several participants experience slow, expensive, and unreliable Internet, especially if they don't work in well-resourced organizations.
   - The technology use profile is on trend for such a sample[5]:
     - Participants all use Internet regularly for personal and work activities
     - Increasing use of phone and pads to connect
     - Use of social media to some extent, but NOT for work:
     - Email, phone and face-to-face (f2f) remain the default
2. Information seeking & knowledge sharing profile
   - To gather information BDS grantees tend to ask a colleague first (50%); then either research online or ask other colleagues (i.e., not from the BDS program). Only after these avenues have been tried, will grantees then contact other Gates grantees.
   - Contacting specialist online communities is even lower on their list.
   - Grantees' preferences for mechanisms to share ideas are (in order):
     - i. Email individuals they know working in the same area
     - ii. Share ideas face to face
     - iii. Contribute at technical workshops/conferences
     - iv. Phone known individuals to talk through the idea
     - v. Publish an article in a specialist magazine or paper in a journal
     - vi. Send an email into a specialist online community or discussion group
   - We noted that 50% of grantees upload 'self-created content to be shared' i.e. uploading content is a regular activity

2.3 Informal soundings

Throughout the convening the consultant engaged with grantees, getting to know people, learning about programs and their contexts, which issues are current within the group and how the balance of interests and experience influences conversations. This was an invaluable part of the research, since social relationships are central to effective KM, but also in terms of developing the knowledge to begin to be able to form judgments about issues, contexts and priorities.

Approximately 50% of the grantees went beyond the standard questions and provided more detailed information and ideas about KM in their responses to the survey. These were used to guide the design of the formal sessions and identified grantees who could be asked to co-facilitate sessions. Outputs from the formal KM sessions are described below but several important issues emerged in these conversations, including:

---

[5] Some elements of the survey were based on questions in a study of the Information Ecosystem of Southern Policy Actors from the Institute of Development Studies at the University of Sussex (http://www.ids.ac.uk/files/dmfile/WP401.pdf), which itself drew from the Pew Internet surveys in the US.

- As in many other sectors, specialist WSH programs and organizations put a lot of emphasis on managing what is seen as a knowledge cycle, focusing on production of materials and dissemination, as in this typical example opposite.[6] However, there is apparently less focus on the processes whereby individuals, teams, programs or organizations respond to those products, question and sometimes change their perceptions and activities – a learning process, in other words. And an inability to gauge how much of this disseminated material is read, let alone absorbed, was another common factor amongst several organizations.

Our KM Cycle

6 Sharing, disseminating and communicating knowledge
1 Generating knowledge
5 Packaging and repackaging knowledge
2 Eliciting, extracting knowledge
4 Synthesizing and analyzing knowledge
3 Consolidating and organizing knowledge
7 Internal and external sensing

- In the same vein an aspiration from one of the participants was to explore 'how to move from knowledge to action', a theme which resonated with a number of participants, who bemoaned the enormous quantity of documentation available that was rarely absorbed and processed. Taking this further, one of the aims of the Plan International USA KM strategy is to "develop a categorization of the strength of different evidence" to help assess how critical particular material might be used in different contexts, such as influencing policy or programming.
- The importance of *facilitated* KS and learning processes, such as in action learning or cross-country visits, was acknowledged in several conversations and poster-presentations.
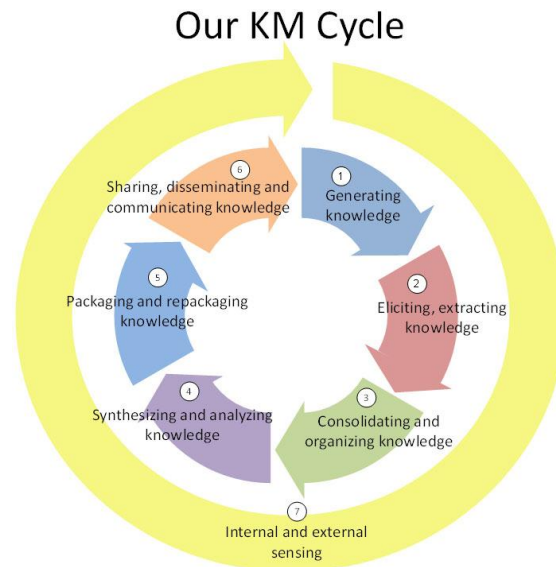
2.4 KM session outputs

The formal KM sessions began with a presentation that reviewed pre-workshop survey results (see table below) showing that the grantees' highest KM priority was to connect with others working on the same issues. This contrasts with results from Question 12 (see graphic below) that suggests most grantees do not reach out very frequently (or do not at all) to other BDS grantees. This suggests that there may be unmet demand for improved knowledge sharing within the BDS portfolio.

6 "Content curation is the process of sorting through the vast amounts of content on the web and presenting it in a meaningful and organized way around a specific theme. The work involves sifting, sorting, arranging, and publishing information. A content curator cherry picks the best content that is important and relevant to share with their community"
http://www.microinsurancefacility.org/about/activities-2008-2013

Context for Knowledge Management (KM): please select the most important areas (at least three) in which improved KM could help you in your work	
Answer Options	**Response Percent**
Link with people working on the same issues	65.1%
Encourage reflection processes on lessons learned in my project	58.1%
Make better use of our partners' and beneficiaries' experiences	58.1%
Plan, monitor, document and evaluate my activities/projects	55.8%
Better access to high quality information that I need for my work	55.8%
Work collaboratively to document and share lessons learnt in my project	37.2%
Improve relationships and collaboration between regional decentralised offices and the HQ	34.9%
Manage and support a network, and share knowledge with them	32.6%
Share documents, links and other resources on the web	30.2%
Manage a project or plan an event in a more collaborative way	25.6%
Support "communities of practice", online and offline	25.6%
Share results from face to face and/or online meetings with those who could not attend, or	23.3%

Q12 Have you been in touch with other BDS project members, excluding Gates staff, since the last face to face meeting?

Answered: 42   Skipped: 0
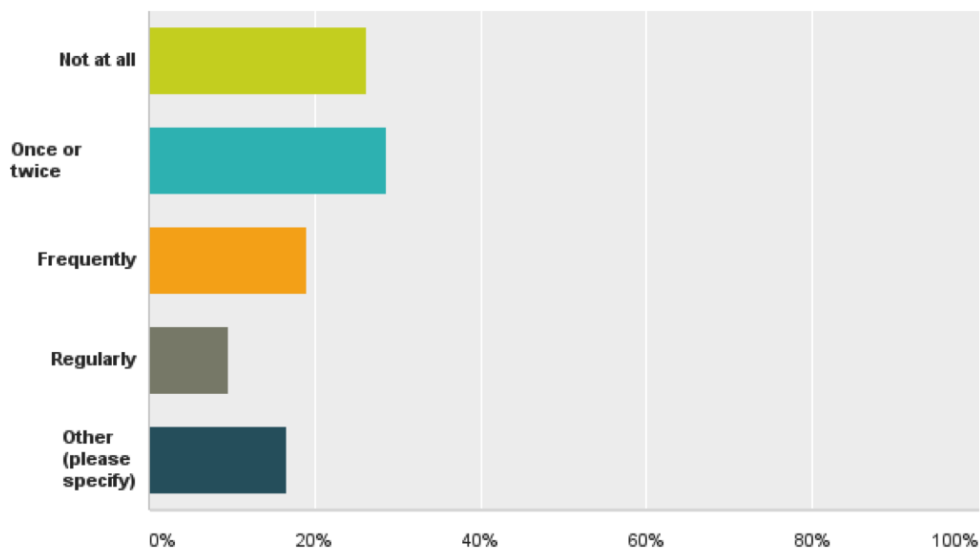
The following summary from survey findings was presented as the basis for workshop planning:

- There is a tremendous amount of good KM practice, often innovative, within the individual programs, which is not being shared or interrogated consistently
- The focus of this KM investigation is at portfolio level, rather than on supporting individual grantees in their KM activities
- The limited amount of inter-grantee communication taking place between annual convenings presents a significant opportunity for a BDS-supported KM initiative
- There are at least five types of activity in which would benefit from improved KM (as shown below)

- There is value in spelling out in more detail what that would mean

We proposed using the five functional areas which scored highest in terms of grantee interest as the basis for further exploration and discussion, using quotes from the pre-workshop survey and conversations with grantees to contextualize the functions in grantee experience:

	Activity/function	BDS context
65%	Link with people working on the same issues	• 'Keeping in touch is a problem' • IDE WASH KM first phase is focusing on relationships, as the building block • " How can we share expertise across grantees?"
57.5%	Encourage reflection processes on lessons learned in my project	• "The recent cross country micro-finance report…. brought it together and made people read and think about their approach."
57.5%	Make better use of our partners' and beneficiaries' experiences	• "There is lots of CLTS activity but 'we don't hear about it'"
55.0%	Better access to high quality information that I need for my work	• "I need real-time Knowledge Management" • I need a short, practical way to share knowledge?
52.5%	Plan, monitor, document and evaluate my activities/ projects	• "How do we manage and use the Knowledge we develop, acknowledging the crucial importance of context"

2.4.1 KM good practice and 2016 vision for the BDS portfolio

There was an active discussion and questioning session during the introductory presentation. However, the assumptions above were accepted as the basis for exploration. Participants were divided into groups looking at each these five functional work areas categories and asked to:

1. Share and record good KM practice in their organization
2. Develop a **KM Vision,** addressing the question, "how would you like to be working differently in 2016 as a group, across the portfolio?" and considering:
   - Activities and processes - what will you be doing, producing?
   - Behavior – how will you be operating differently?
   - What will be the role of digital technology –
   - How is the process sustained - what drives it?
   - Is it animated by the energy, hunger for connecting of participants, or a natural leader(s) or a paid facilitator?
   - Who is included and how are they identified, and is it only grantees?
   - How do you address individual or group learning?
   - **Constraints -** what obstacles had to be overcome?
   - In one sentence, what value are you gaining from it – what is the **KM Value Proposition**?

The detailed output from those sessions is gathered in Appendix Three. It may help give a flavor of the outcomes by including here verbatim the summary value propositions that emerged from the group work:

Functional Area	KM Value Proposition
Link with people working on the same issues	"Stronger as one connected group with the same values"
Encourage reflection processes on lessons learned in my project	"We would shorten the learning curve and with a shared vision we would leverage each other's work; we would feel the value of 'our part' in influencing the 'whole'."
Make better use of our partners' and beneficiaries' experiences	"A common digital Community of Practice (CoP) with common goal of this portfolio: sustainable sanitation services at scale"
Better access to high quality information that I need for my work	"It will negate our risk of making wrong decisions and help us do things smarter/faster/cheaper"
Plan, monitor, document and evaluate my activities/projects	"KM leads to a virtuous cycle, where portfolio grantees are recognized as (become) the 'go-to' person in their own country/context"

2.4.2 Technology and KM in the BDS program

To set the scene participants were reminded in more detail on what the survey revealed about their use of social media, as summarized below:

- Participants generally don't use Social Media….
  - to communicate with a group (22/39 said No)
  - to contact individuals (30/39 said No)
- ….yet, there is increasing use of Social Networking Sites [e.g.. Facebook; LinkedIn; Ning]
  - 29% - use frequently
  - 21% - use sometimes
  - 21% - use rarely
  - the remaining 29% knew of them but didn't use them

Two participants, Shankar Narayanan (PSI) and Erik Harvey (WaterAid UK) shared their experiences of what digital technology is being used in their work and their organizations. Little new material emerged from the subsequent general conversation that wasn't already captured in the survey responses. Peter Feldman (BMGF) also shared the opportunity to be one of the pilot projects for the *Atrium* project, which is supporting experimentation in the use of digital tools as part of the overall KM effort in the Foundation.

2.4.3 Grantee proposals and recommendations

Grantees were then asked to think of ideas or recommendations to BMGF of actions that will move the grantees, individually and collectively, and the Foundation towards the visions articulated the previous day, using the following criteria

- Distinctive competence of Foundation BDS portfolio: what couldn't be/isn't being delivered elsewhere?
- **Practicality:** is this realistically something that will have impact within two years?
- **Motivation:** is this something for which you would make time because it would contribute to your work, or save time or add value in other ways?

Participants were asked to reflect individually and then present their ideas to others, seeking support or ways to combine ideas. All the cards were recorded, and are presented fully in Appendix Four. To help manage the variety of responses we grouped and loosely classified the responses, which were then ranked by 'popularity', i.e. how often each category of response appears in the total, as shown below:

No. of selections	Responses categorized and grouped
24	Curation (collecting, organizing and sharing information relevant to a particular topic or group of people[7]
21	Share emergent/ experiential/ process learning
15	Linking/ connecting (as in the functional area shown above)
14	Learning events, with facilitation i.e., bounded, time-limited, organized events, either or both online and face-to-face, focusing on specific content, issues, or the process of learning
13	Failure: finding ways to share and learn from projects that partially or wholly fail to meet their objectives, acknowledging that for sharing such experiences safely, is extremely challenging difficult
12	Content database (referring to a curated, online collection of WSH/BDS relevant material, formally organized as in a traditional database, and with features such as user ratings to make the material more accessible and dynamic)
12	Thematic issues (as the basis for learning events, focused conversations and curated content)
11	Curated news updates, as a specific suggestion
11	Improved Communication
7	Mentoring/ guidance, especially for those with less experience or new to the BDS portfolio
6	Repurposing content (so that it is accessible to people with different levels of experience and knowledge, rather than those who regularly participation in global events, or academic discussions)

3   Meetings at BMGF in Seattle

3.1   Context

Following the Convening, meetings were arranged at the Foundation in Seattle in early February 2014 to present the findings of the information gathered during the KM (and other relevant) sessions and discuss their implications for future KM work with the BDS grantees and partners, including implications for the Foundation Grantee Atrium Project. There were three key constituencies:

3.2   WSH team

In intensive discussions with the BMGF WSH team, particularly Jan Willem Rosenboom and Peter Feldman, we devised a proposal for a plan of KM activities for the BDS portfolio, based on the grantee consultation. The proposals were discussed with Brian Arbogast, Director, Global Development who is responsible for the Foundation WSH program, and Katie Simmons, Deputy Director of Strategy, Planning and Management for Water, Sanitation and Hygiene (and also Global Libraries). Funding for an 18-month program of BDS KM activities was approved.

---

[7] . - See more at: http://www.bethkanter.org/content-curation-101/#sthash.9qcImp1G.dpuf

Meetings were also held with two other key members of the WASH team, Roshan Shrestha and Doulaye Kone, who will be internal reviewers for the project.

3.3 Grantee and Partner Atrium Project

This pilot project is focused on improving engagement with and between Foundation staff, grantees, and other partners. From a consultation process the project is recommending a combined set of capabilities – including technology, process, culture and skillsets - to enable both a common area for broad dialogue and multiple smaller spaces for targeted group sharing. The project scope is illustrated below:

The BDS program is working with the Atrium project. The goals of the BDS pilot were defined as:
- To support the BDS Knowledge Management project's Planning & Design phase by:
- Testing out knowledge sharing capabilities (technology, process and skills) for a group of BDS grantees/partners
- Helping identify a value proposition for enhanced knowledge sharing
- Evaluate and learn from the pilot to inform the longer term Design of BDS' KM System

After detailed discussions with members of the Atrium team[8] it was agreed that the most effective way forward would be three sets of activities:
1. Find the best way to publish online the content from the BDS January convening rather than produce a written report. Email will be the main channel for communication with grantees and will act as a foundation step in the plans to increase connections with and between grantees
2. Support the BDS KM program in selecting a social and communication platform as well as a platform to support a curated document repository (see below)

3.4 Knowledge Flow effort

We met with Sarah Chesemore and Brian Forcum, who are leading the *Knowledge Flows* (KF) work-stream, whose illustration of the concept is included below.

---

[8] Judy Spunt, Jim Malone, Denis Kurkov, Cynthia Mealy, Amie Newman

Knowledge Flow – Definition and Primary Levers

Knowledge flow is the continuous flow of capturing and applying learning and expertise
to ensure that *relevant* knowledge is easy to access at the point of need.

Connections

*Creating stronger
networks of people*

- Personal network
- Team identity
- Central connectors/ boundary
  spanners/ knowledge brokers
- Social groups
- Alumni network

Key Enablers

Process
Technology
Roles/Skills

Catalysts

*Activating knowledge for specific
purposes*

- Research activities
- Communities of practice
- Peer advisories
- Working groups
- Team meetings/retreats
- Learning events
- MLE plans/meetings

Culture

*Transforming cultural norms to
support improved knowledge flow*

- Rewards & recognition (incentives)
- Power dynamics

Collections

*Curating collections of specific knowledge
assets*

- Structured data (curated/mined)
- Unstructured information (curated/search)
- Packaging/ dissemination of content

Usefully, KF is built around a set of principles that map onto many core elements of the BDS KM concept elaborated during the process that began in Nairobi and continued on through the meetings in Seattle. There was mutual interest in sharing plans and progress, which would be of enormous value to a KM BDS program since KF are part of a high-level effort to mainstream KS good practice across the Foundation. The KF effort has a Shared Learning agenda that is particularly relevant:

> *"The intent is to identify and coordinate opportunities for cross-foundation learning that address common needs and interests of Knowledge Flow Community members. We hope to grow our collective knowledge base while strengthening connections both within the community and with external resources."*

The potential for synergy between the BDS proposals and the wider BMGF KM effort was reinforced when we participated at a Brown Bag Lunch with a number of BMGF staff who meet regularly to discuss KM issues. Ideas for BDS KM activities were presented and the group contributed useful and perceptive responses, rooted in their experience of working in the Foundation. The participants expressed interest in continuing to share experiences.

4 Conclusions

This is an opportune time for the BMGF WASH program to be investing in KM. Firstly, there is demand for enhanced KM and an appreciation of how it can deliver benefits, illustrated by these comments from grantees:

- "good initiative - in general there is much scope for improving KM in the sector"

- "I know we have to improve, not sure how."
- "Gates Foundation can play an instrumental role in generating WASH related knowledge and evidence and use it for global public benefits through enhanced KM"
- "Focus should be on openness to critically analyze success AND failure of programs on the ground. - How to incorporate time/money for documenting and learning in output based aid programmed"
- "We're still talking about the same problems we were talking about ten years ago"
- 'Keeping in touch is a problem'
- "How can we share expertise across grantees?"
- "There is lots of CLTS activity but 'we don't hear about it'"
- "I need real-time Knowledge Management"
- "I need a short, practical way to share knowledge?"
- "How do we manage and use the Knowledge we develop, acknowledging the crucial importance of context"
- "I hope the Foundation will consider increasing the requirements of all Grantees to focus on knowledge management within their projects and actively collaborate with other grantees when appropriate."

And judging from the deep engagement and quality of output during the 2014 convening, there is energy within the grantees for a KM program. Several grantees have already indicated that they are interested in helping actively to shape and guide the process.

Secondly, as the analysis above shows, there is consensus among the grantees on a cluster of priorities. This has helped in defining a set of program activities that could address those interests and felt needs. In particular, the focus on learning, on, "how to make sure learning is leading to action", as one grantee put it, resonated with other grantees and staff at the Foundation. "How do we know that our material is read and used?", said one grantee from an organization that generates huge amounts of information and 'knowledge products'. As one of the grantees put it later, in a recent online Q&A on sanitation, "we will live or die by our critical reflection and ability to internalize learning"[9].

Thirdly, there is increasing KM activity within the Foundation and therefore opportunities to share, learn and align activities. The related Atrium project will specifically support some of the proposed BDS KM activities, especially in terms of researching, selecting and using digital technology. The context to develop a program is therefore especially favorable, with a demand-led BDS KM program able to engage with ongoing KM activities in the wider Foundation.

4.1 The case for investment

To summarize from grantee consultations: there is a perceived need for enhanced KM; there is a pool of experience and capacity in KM that can be drawn upon; there is a degree of consensus on priorities and willingness to engage in a KM program; and the grantees want to connect and collaborate more than they do currently.

---

[9] http://www.theguardian.com/global-development-professionals-network/2014/mar/10/sustainable-sanitation?CMP=twt_gu&commentpage=1#start-of-comments

4.1.1 Enhance WSH grantee knowledge sharing for the BDS portfolio

The case for enhancing KM within the BDS portfolio rests on a series of assumptions, some that underly Knowledge Management in general, and others specific to the BDS portfolio, including:

- many minds are better than one, particularly in addressing intractable or recurring problems and identifying the best ways to move forward, whether on the basis of new ideas or learning from what works well or fails to deliver;
- building stronger connections between people is a pre-requisite for collaboration in shared problem solving and development programing
- 'thinking out loud' together, sharing experience and news about activities while they are underway builds understanding about what is specific or generalizable, and can catalyze fresh thinking
- more connections are important to build the relationships necessary for the partnerships that all agree are necessary to address development challenges, especially the complex sets of issues involved in the BMGF WSH agenda, addressing the critical need for better sanitation in the developing world;
- the focus of BDS is important as a way to harness monetary and intellectual resources from a global, multi-stakeholder group to develop solutions at scale;
- the group of grantees brought together in the portfolio can contribute original answers and share good practice

These assumptions, of course, describe what happens in a well-organized and facilitated face-to-face meeting, such as the 2014 BDS convening. On each occasion participants get a tantalizing glimpse of the contribution that could be made by this deeply experienced, knowledgeable well connected, group of people and organizations, spread globally, if they were able to operate in a similar way outside the meetings. The challenge is to find ways to maintain at least some of that energy, creativity and social learning beyond the face-to-face meetings; to build on the trust that begins, each time, to develop between participants; to provide tools or services that help in identifying and sharing relevant thinking and resources; and, crucially, learn about learning, how to improve take up – a problem that is not unique to the WSH sector. The proposal is to build a KM program containing a cycle of rapid learning pilots to test these assumptions and provide the basis for recommendations on the most effective approach to KM within the portfolio longer-term, which could also inform a wider range of sanitation programs.

Grantee priorities and interests that emerged during the survey and convening do not require significant resource investments. There are a host of well-tried and tested techniques and tools to address the primary goal, that of enhancing knowledge sharing among grantees. These tend to exploit existing or low cost digital platforms and can draw upon a large body of evidence and experience of how best to develop communities of practice (CoP), the core building block for Knowledge Sharing. CoPs, when they are well facilitated, and when – as in this case – they build on face-to-face meetings, are a route to deepening relationships and building trust – essential for an honest exchange of ideas and experience. Similarly, there is good practice that can be drawn upon from within and outside WSH on ways to explore learning in practice, and explore the extent to which it leads to impact.

The primary benefit of developing closer relationships, building trust through facilitated exchanges, communicating more regularly about new ideas and exploring how individuals and organizations learn best is that it establishes an *enabling environment* for genuine learning and knowledge exchange to take place. Learning, of course, will not be straitjacketed by program plans. People learn what is relevant

to them at a particular time and in a specific context. That may or may not map onto the aims of a program, or activity. But by also building in activities that build a *self-consciousness about learning*, the process of learning is enriched and has a better chance of becoming embedded in how people work and interact (and thereby increasing the likelihood of sustainable change).

4.1.2   To improve management of, and access to, Foundation WSH information

Activities to address this KM goal need not be resource intensive. There is a clear steer from grantees that a mammoth, indexed database of resources is not required. Instead, grantees prioritize curated resources, looking for a selection of the best, the new, the challenging or the tested and impactful. Grantees already develop their own filtered resources that can contribute to a solution. And there are many in the WSH sector in general and the BDS portfolio in particular who have the experience and knowledge to be able to direct, support or possibly provide those curation services. Further, there are live online platforms that could host a resource base. Finally, there are techniques derived from the ICT and digital domains that can be harnessed to transform this process into a responsive, user focused one. These methods include building resources such as Frequently Asked Questions (FAQ) – link to existing one – rating schemes, linked to regular updates. The benefits of focusing on selecting and curating resources is that it will address one of the most widely shared complaints in WSH, and indeed most development sectors, that there is simply too much information – that the signal to noise ratio is unbalanced, so that important information and ideas are often obscured.

4.2   Program Design Principles

The following Design Principles, drawn from consultations, conversations and meetings described above, should guide program design and implementation:

1. **Re-use where possible**: wherever practical we should collaborate with existing WASH networks, online platforms and events.
2. **Invest in-house**: – where possible, fund grantees for specific cross-BDS KM work
3. Maintain the **Knowledge to Action**[10] focus: exploring and improving learning processes and knowledge products that trigger action or maintain the movement within knowledge flows.
4. **Less is more**: reducing the *signal to noise* ratio is a key demand from grantees, meaning a focus on curation and targeting of Knowledge products.
5. "**Turning more peers into 'people I know'**", was a goal suggested by a grantee in the pre-workshop survey: strengthening connections and conversations between grantees is a central element of the proposed program but we should remember a lot of that activity will be contributing to intangible but essential personal relationships, the foundation for the trust that is an essential component of learning and KS processes.
6. **Encourage learning about learning**: build in reflection and sense-making activities, synthesizing and recording emerging material and evidence/results
7. **Common themes**: notwithstanding 5 above, in order to align the BDS KM activities to the overall goals of the BMGF WASH program, conversations and activities should be organized around topics or research questions which are demonstrably common issues for grantees and critical to advancing the program
8. **Insider facilitation**: those who are facilitating or animating the BDS community need to have a deep understanding of the WASH sector.

---

[10] Thanks to Blake McKinley for the phrase

9. **Fail fast**: the activities in such a short program should be recognized as a series of rapid learning pilots, and those which show little promise of making progress towards their goals will cease, making space for other projects.
10. **Sustainability**: as much as possible all of the activities and experiments should be constructed so that there is a clear route to longer-term continuation of the activity should BMGF resources no longer be available to sustain the activity. This applies to platforms, if they are funded or managed from within BMGF, and to services, where they would ideally be constructed as an addition to existing services or activities that would add value to the provider, so they would be likely to continue, or could generate revenue.

5 Recommended Pilot KM Activities

The recommendations below are the culmination of a design process that began in the Nairobi convening and, informed by the ideas, views and wishes of the portfolio grantees, continued on through the meetings and discussions at BMGF. The summary tables below describe at high-level five areas of activity. For each there would need to be more detailed planning, including definition of success criteria and monitoring plans. The aim is to include grantees in all of those processes as much as possible. The project aims to respond to the aspirations and criteria identified during by grantees who will need to remain involved to ensure that the project stays on track.

5.1 Curated content updates

Curation has become an essential digital competence. To harness the resources available over the Internet requires us all to adopt skills and habits typical of librarians and information managers. However, there is an active market for information services that centralize curation, usually engaging subject specialists who select relevant content that is then provided to users in aggregated formats. Such services are often more useful for busy people than self – selected, unfiltered RSS feeds, or automated news services such as Google news, in that curated material is selected against a set of criteria.

5.1.1 News updates

A I M	To provide regularly a selection of curated updates relevant to the interests and contexts of BDS grantees
R A T I O N A L E	Information overload, the difficulty of identifying what is useful and relevant from the flood of data and information (experienced as a poor signal to noise ratio) and the need to keep up-to-date with research findings and new developments were priority problem areas identified during Grantee consultations. This proposal seeks to replicate the many examples of curated information services in other specialist areas and test whether a sustainable service model can be established that is perceived as added value by grantees.
A C T I V I T Y	1. Solicit applications for grantees to experiment with the curation role. 2. Define/select a taxonomy of relevant issues and topics. 3. Begin to compile, in collaboration with grantees, a public resource list 4. Agree technical platform(s): note that the starting assumption is for the use of an emailing service such as MailChimp that includes an archive function and good user statistics. An additional, desirable, function would be a ratings system 5. Develop and test a prototype

	6. Run a "*publish, review, adapt, publish*" cycle for 12 months 7. Prepare a final report, building on interim reports generated during the project.
M & E	Indicators will include reads, downloads, results of user satisfaction surveys, ratings
I S S U E S	• The wide range of approaches and activities covered in the BDS portfolio, some reflecting very different perspectives, will probably require more than one WASH specialist to do the curation, which will require resources and careful coordination. • It will be a challenge to provide a simple service that caters to the wide range of interests and needs within the BDS portfolio. • Sustainability: curation takes time, and will only persist on a voluntary basis if sufficient benefits are perceived by curator and audience alike (NB: the BDS project will provide seed money for this effort during its 12-month pilot).

5.1.2 Database of selected WASH content

A I M	To provide a working prototype of a curated database of core WASH digital content.
R A T I O N A L E	From the beginning of planning for a BDS KM program in 2012 one of the main aims has been to develop a database of relevant WASH material based on the huge amount of content resources available within BMGF but also including external material. However, there was a strong steer from the Grantee consultation that curated resources would add the most value. The need is for elements like 'the top 10', or 'must-reads' rather than an exhaustive compendium of material. Accordingly, this proposal seeks to identify an economical, accessible platform on which material can be stored, develop criteria for content selection, and then develop a working prototype through a collaborative review process.
A C T I V I T Y	1. Define technical and functional requirements for the database. 2. Building on the review of the SuSanA platform, due to take place in the early part of 2014, select an appropriate platform 3. Develop collaboratively a set of criteria for content selection and a process for identifying and updating content. 4. Select and publish a sample of content. 5. Review the prototype collaboratively with BDS grantees and proceed iteratively until there is an agreed-upon working model that can be extended and/or replicated. 6. Prepare a final report, building on interim reporting generated during the project.
M & E	Indicators will include publication and access statistics, including downloads; results of user satisfaction surveys; ratings
I S S U E S	• The mix of grey and formal literature, and how it will be rated and/or sorted • How to include user ratings dynamically, so that content display, for example, responds to ratings • Agreeing on criteria for judgment-based publication • Sustainability of such a curated database service

5.2 Link and connect via social platforms and other means

A I M	To identify and provide or connect to a low-cost digital platform for grantees to engage with each other, and to facilitate conversations amongst grantees about BDS business and issues.
R A T I O N A L E	One of the most striking findings from the survey of grantees was the paucity of conversations and contact between them except during face2face convenings. A related finding was that grantees didn't see other members of the portfolio as important potential information sources. Both of these were in marked contrast to the finding that grantees rated conversations and connections as the area of their work that could benefit most from improved KM. This represents an untapped resource and a low-cost opportunity for improving learning and Knowledge Sharing as well as collaboration. Three important design principles emerged from the grantee consultation 1. Time-limited, focused conversations, probably concluding with some kind of summary product or output, are the most likely to engage participants. 2. Social information – personal and/or organizational details, including, importantly, photos, are important for building a sense of connection, so any platform needs to include appropriate functions. 3. Conversely, grantees are interested in engaging with conversations addressing key challenges, learning from 'failures', long-standing questions, new developments or issues around which there is disagreement and debate. Most will not be interested in simply engaging socially with each other.
A C T I V I T Y	1. Review, select and trial an online platform 2. Agree with grantees on a set of relevant issues or questions. 3. Solicit applications from grantees to be involved in facilitating and/or reporting conversations 4. Trial, review and adapt the process of launching and facilitating conversations, as well as the production of summary output. 5. Prepare final report, building on interim reporting generated during the project.
M & E	Indicators will include statistics on engagement in conversations; connections between grantees; general activity within the platform; user survey responses and, perhaps, responses from a rating system
I S S U E S	• Facilitation is a skill that can be acquired, but some people will always be better at it than others. At the same time, a deep knowledge of WASH is essential to facilitate effectively topic-centered conversations. It will be important to bring together the right combination of skills and experience. • All grantees are busy so, however much they are interested, they may not be able to engage fully. At the same time, open conversations that go beyond the trivial require a degree of trust, a supportive environment and at least some level of relationship between participants. Therefore online communities of practice take time, and resources, to grow. Therefore project goals and indicators will need to be realistic, modest in their ambitions. • There are a number of issues to be resolved in the selection of appropriate technology, including, whether to use a public, commercial platform such as LinkedIn or one of the leading, existing, 'private' WASH platforms such as SuSanA or Blue Planet, or another more specialist connecting platform such as *Yammer* or *Jive,* the tool used by the BMGF Global Libraries program

5.3 Learning events – learning about learning – cross cutting

AIM	To organize a series of short events, both face-to-face and online, to experiment with and learn from different ways to improve learning and knowledge sharing within the BDS portfolio.
RATIONALE	• The wish to 'share emergent, experiential or process learning' and for 'facilitated learning events' were the second and fourth ranked category in the grantee recommendations. While there is some overlap with the activities to energize connections and community described above, this component can be seen as an additional dimension to those and other events, such as conversations on the social platform or the annual convening. The key issue is learning about learning", which includes building self-awareness, monitoring of ongoing processes, discussing and recording what works and what doesn't. • An important related concept is that of "*working out loud"* a term central, for example, to the UNDP KM strategy, "continuous sharing of work in progress and open reflection on ongoing activities … sharing what we do as we do it, in person as well as online[11]. • Note that pre- and post-event activity is crucially important, in terms of engaging participants and the wider group who are not physically present in both the subject matter of the activity and the learning reflections.
ACTIVITY	1. Engage with grantees and select an activity timetable 2. Test methodology during the first one or two events 3. Record feedback and incorporate changes into future iterations 4. Prepare final report, building on interim reporting generated during the project.
M&E	Indicators will include statistics on online activity; user survey responses; a peer appraisal of the material generated during and after events
ISSUES	"Busyness – even more than already mentioned: reflecting on activity, sharing and perhaps capturing lessons, is notoriously unattractive to busy people, especially those involved in operational activities, where the dominant issue is the drive to delivery. So there will be a need for animation as well as facilitation, and expectations should be kept realistically modest regarding levels of engagement.

5.4 BDS process – developing a Learning Culture

AIM	To work with BDS program staff as they develop and model a way of working and principles of good practice that maximize the opportunities for learning and knowledge sharing across the portfolio
RATIO	Many of the practical suggestions made by grantees about improved KM address the BDS process, the way it operates, the demands it makes and the processes for reporting and sharing ideas or lessons. It's a truism that change happens fastest and most sustainably if it is led from the top. Modeling, 'being the change we want to see', is an effective form of leadership for change. This

---

[11] "UNDP will establish continuous sharing of work in progress and open reflection on ongoing activities as a key principle of its business, in thematic policy work and advisory services as well as operational and administrative work. Sharing what we do as we do it, in person as well as online, will be promoted, incentivized, supported with appropriate tools and rewarded as default mode of doing business, with senior management staff leading the way". http://bit.ly/1f3nhpQ

N A L E	activity will focus on helping the Foundation's BDS portfolio leadership to orient its processes and procedures, as well as its relationships, so that it becomes a model for leading the KM process.
A C T I V I T Y	1. Develop a vision of a 'KM-maximized' BDS and map out a model of good practice, incorporating principles such as *working out loud*. 2. Review the range of BDS activities, processes and ways of working that could be adjusted to encourage knowledge sharing and learning. Develop proposals for a different way of working. 3. Share the vision, model and areas of focus with grantees, and develop a timetable 4. During normal engagement with grantees operate according to the new template 5. Reflect and report periodically, with grantees, on whether or how practices and attitudes have changed. The annual convening in early 2015 is a natural checkpoint for a more thorough review 6. During the convening and afterwards, work with all or a subset of grantees on program learning and a new strategy. 7. Draw up a final set of recommendations on how to operate in BMGF in order to maximize learning and knowledge sharing.
M & E	Indicators could include responses from grantee surveys and interviews; a process diary kept by management and perhaps some grantees; peer review of outputs following changes
I S S U E S	• Changing project or portfolio management processes can impact many people not directly involved in the program content. For this and other reasons, change can be difficult and slow • Gathering evidence of process change, and especially its impact, will be difficult. While some changes will be clearly apparent, others (such as changes in the ways that people work and learn with one another) will be harder to track. • The power relationship between the Foundation and its grantees will be at their most acute in this work. Grantees inevitably respond differently to a donor than to each other and other organizations. It will be crucially important to find ways to enable honest feedback and objective evaluation.

5.5 Learning about learning

A I M	To reflect collectively on our learning process through the project and deliver recommendations on how to create and foster an environment in which learning is more likely to happen
R A T I O N A L E	The default focus in activities or programs that are to do with KM or learning tends to be on capturing or harvesting knowledge in digital or other formats. While this is clearly an essential part of a comprehensive KM or learning strategy, there is often less attention paid to the process whereby the people involved in the program learn from those products and each other. As a consequence there is a plethora of Knowledge products seeking an audience coupled with a perception, aired at the BDS convening, that 'we're still talking about the same issues we talked about 10 years ago' and little consensus has developed around how to move from knowledge to action. This element of the program will focus on the chaotic, emergent processes of learning, both individually and collectively aiming to understand better what comprises and effective learning culture.
A C T	1. Gather and share good KM practice from within the BDS portfolio, starting with the data collected in the pre-convening survey and the output from the convening.

I V I T Y	2. Develop a concise Theory of Change, or Impact Pathway, drawing upon relevant Learning in Development material 3. Develop a plan, dovetailing with the other activity stream, for a series of enquiries into those activities, seeking to surface and record experiences and reflections on what is or isn't working. 4. Record this learning journey openly in blog(s) and or other online material, seeking to engage BDS grantees and the group of people working on Knowledge Flows, in an open conversation about the experience. 5. Develop a final report that brings together guidance for BDS grantees and the BMGF WASH team on how to foster a learning culture.
M & E	The Theory of Change or Impact Pathway will attempt to identify and describe behaviors and activities that would be associated with improved KS and a learning culture.
I S S U E S	• A weakness of the 'Knowledge to Action' strapline is that it implies knowledge always leads to action when, in fact, the 'action' is often to decide not to do anything, or not to change a program that is progressing at least moderately. It will be important to focus on the deliberation and reflection processes at the center of learning as well as tangible outputs or changes. • There is an enormous body of material on learning and as many learning theories as stars in the night sky. It will be important to maintain the focus on practical activities and collective learning, which may be enriched, selectively, by learning from outside.

6   Appendices

6.1   2014 BDS Convening Agenda

Sanitation Partners Workshop 2014
Bill & Melinda Gates Foundation

January 20 –23, 2014

Ole-Sereni Hotel –

Nairobi, Kenya

- -

Meeting Agenda

Day One – Monday, January 20th

MORNING

Time	Activity	Facilitators/Presenters
08:00	Registration	Sarah Herr & Peter Feldman
08:30	Opening Remarks	Jan Willem Rosenboom
08:30	Welcome Address	Dr Kepha Ombacho, Chief Public Health Officer, Kenyan Ministry of Health
09:00	Warm-Up Exercise	Jan Willem Rosenboom
09:15	Review of previous meeting	Peter Feldman
09:45	Meeting Objectives and Expectations	Michael Ojo (WaterAid Nigeria)
10:15	Coffee/Tea Break	
10:30	Grantee Updates – Poster Presentations and Gallery Walk	Jan Willem Rosenboom & Peter Feldman
12:00	Lunch	

Time	Activity	Facilitators/Presenters
13:00	Gallery Walk – Part II	Jan Willem Rosenboom & Peter Feldman
14:00	Open Discussion Space	Ann Thomas (UNICEF)
15:00	Coffee/Tea Break	
16:00	Field Trip Overview and Logistics	Sarah Herr & Peter Feldman
17:00	Hosted Happy-Hour Reception for Participants	

Day Two – Tuesday, January 21st

Time	Activity	Facilitators/Presenters
08:00	Departure for field visits	Sanergy/Umande Trust urban sanitation innovations sites, Nairobi
		Plan International urban CLTS, Nairobi
		UNICEF/Gov't of Kenya rural CLTS, Navaisha
		UNICEF/Gov't of Kenya rural CLTS, Kajiado
17:00	Return to Hotel	
18:00	Hosted Buffet Dinner open (at Ole-Sereni Hotel)	
20:00	Hosted Buffet Dinner closed	

Day Three – Wednesday, January 22nd

MORNING

Time	Activity	Facilitators/Presenters
8:30	Field Visit Reflections & Discussion	Patrick Apoya (Water & Sanitation for Africa)
10:00	Coffee/Tea Break	
10:30	Studies and Special Reports	Eduardo Perez (WSP Washington)
	PSI India & Water for People iDE & PATH Yale University (IPA)	Shankar Narayanan & Steve Sugden Cordell Jacks & Tim Elliott Mushfiq Mobarak
12:00	Lunch	

AFTERNOON

Time	Activity	Facilitators/Presenters
13:00	Knowledge Management (KM) – Facilitated Session	Pete Cranston (Euforic Services)
14:30	Coffee/Tea Break	
15:00	Knowledge Management (continued)	Pete Cranston
17:00	Wrap-Up and Close for the Day	
18:30	Board busses for transport (Hotel Lobby)	
19:00	Hosted Dinner for Participants/Invitees at Carnivore Restaurant	

Day Four – Thursday, January 23rd		
Time	*Activity*	*Facilitators/Presenters*
8:30	*Knowledge Management (continued)*	*Pete Cranston*
10:00	*Coffee/Tea Break*	
10:30	*Case Studies and Special Reports*	*Yolande Coombes, WSP Africa*
	RICE	*Dean Spears*
	BMGF	*Radu Ban*
	Plan/UNC	*Jonny Crocker*
12:00	*Lunch*	

Time	*Activity*	*Facilitators/Presenters*
13:00	*Updates from BMGF*	*Jan Willem Rosenboom*
13:30	*Plenary Discussion – Summary Observations & Next Steps*	*Darren Saywell (Plan USA)*
14:30	*Closing Statements*	*Jan Willem Rosenboom*
15:00	*Meeting Adjournment*	

6.2   Appendix Two – Survey Responses

A PDF file of summary results is available as a separate document

6.3   Appendix Three - KM good practice and 2016 vision

6.3.1   Summaries of experience
(grouped according to the five functional areas

1. Link with people working on the same issues
   - Use one existing network. Examples include *Netwash* (India) and *Garnet* (South Asia region)
   - Link in with existing networks and products, like the S.H.I.T.S monthly newsletter from Malawi which is aiming at 'horizontal' learning
   - Thematic leadership has the best impact
   - Share case-studies. Water.org is a good source, as is the IDS CLTS resource
   - Exposure visits stimulate learning, as do impromptu network based meetings
   - Working collaboratively – having skin in the game – forges links
   - Being visible to influential networks, people and programmes is a crucial output – otherwise, 'we are invisible'

2. Encourage reflection processes on lessons learned in my project
   - Set learning questions in advance
   - Learning retreats with external facilitation
   - Structured action learning with stakeholders
   - Weekly review of learning goals
   - Write shop to capture oral tales
   - Community feedback on implementation
   - Advisory groups (donors, country partners)
   - Retreats with 'social aspects', inclusive of all
   - Follow up on learning
   - Way to capture tacit knowledge – 'tips'
   - Feedback from colleagues at 'BBC'
   - Innovation techniques
   - Emerging learning capture

3. Make better use of our partners' and beneficiaries' experiences
   - People use four approaches: face-to-face, publications, blogs and websites and training

4. Better access to high quality information that I need for my work
   - Quality
     - EmW/*Blue Planet network*
       - Member based
       - Members do five peer reviews per year of proposals and reports, to "identify" quality
     - Use "likes" and "views" to help assess quality
       - Saves on document storage
       - There is a risk of losing specific information from a rating at document level
       - Relevance is a key criteria
       - Will be less labour-intensive
     - PSI

- Uses *Social Cast* (internal social network platform): more accessible, like FB but contains less quality content
- Has a repository – *KIX*: content has been validated for quality (at two levels) and uses a star system of rating
  - Access
    - PSI University
      - Two courses per employee per year
      - KIX is the basis, with sector content
    - Key importance of content that is digestible, short and using simple language
      - BMGF bi-weekly output – also helps with quality control
      - Short case studies, with pictures
      - Briefing notes (see *Frontiers of CLTS* publications)
      - Notes from Jan W – include a brief summary of the document and why it is useful
      - UNICEF Big reports include a short summary, a small video, promotion on Facebook and Twitter as well as the door stopper

5. Plan, monitor, document and evaluate my activities/projects
   - Plan
     - Clear links with KM activities and outcomes (WSP)
     - Clear KM goals (WSP, Plan)
     - Key learning questions, audiences (WSP)
     - Right skills mix in team (WSP)
   - Monitor
     - Blunt instruments exist – a problem area
     - Citation index (Yale, Rice)
     - Learning coach to monitor implementation (WSP)
   - Document
     - Establish methods for uptake
     - Minimum standards – publish your work in formats which are searchable (Yale, Rice, UNICEF)
     - Recognise differential incentives for KM and documentation (UNICEF)
     - Package results for different audiences (Yale, Rice, WSP)
   - Evaluate
     - Establish quality of evidence (generic)
     - Be clear about design and method of study to aid comparison and to establish effectiveness (Yale)
     - Performance reviews/plans (WSP, Yale, Rice)
   - Key themes
     1. "There's a trade off between speed and rigour"
     2. "Err on side of disseminating knowledge (early) → but have incentives to rigour"
     3. "Science of service delivery"

6.3.2   Vision 2016

1. Link with people working on the same issues
   - One web for all, using Susana.org
   - Use tools like Web-Ex to support learning and collaboration
   - Support from other grantees should be a right
   - We need a grantee database
   - There should be more contractual tie-in between grantees, both bi and multilateral

- "We will not be invisible"
- Value Proposition: "Stronger as one connected group with the same values"

2. Encourage reflection processes on lessons learned in my project
   - Reflection takes place on how each organisation's programme or project fits into the BMGF portfolio
   - BMGF has adapted its own sector vision to reflect the learning and developed/aligned its vision from feedback from grantees/together with grantees → co0creation of vision
   - Reflection process involves Government and other implementing partners who may hold different vision to Foundation
   - There is a learning facilitator who is external to both the Foundation and grantees
   - Reflection of individual projects/programmes is able to feed into other grantees work
   - Our interaction/reflection does not add additional burden
   - How do we sustain the process:
     o Recreate the one to one more frank discussions/reflections in a group environment (*Behaviours)*
     o Reflecting more on failure (*Behaviours)*
     o If there is an openness to interaction with Foundation vision and shape it for a shared vision then there will be more reflection and energy to play a part
     o Sharing processes as well as results – emerging learning
     o Reflection process needs to be facilitated and incentivised (internally, in the Foundation portfolio) – on ideas, techniques, processes
     o Foundation produces a database/document on grantees
     o More accessible updates about other partners/grantees
     o Emerging learning updates from all grantees shared (includes failures) [one paragraph aka san updates] low frequency
   - Value Proposition: We would shorten the learning curve and with a shared vision we would leverage each others' work; we would feel the value of 'our part' in influencing the 'whole'.

3. Make better use of our partners' and beneficiaries' experiences
   - "A common digital CoP with common goal of this portfolio: sustainable sanitation services at scale"
   - Should be linked to existing network(s)
   - Thematic discussions that fill knowledge gaps
   - Network actively used to solve emerging problems
   - Information must be accessible on all platforms, to be accessible in the field
   - It should be a proposal requirement that there is experiential learning in the field
   - Members sharing guidance on effective or ineffective scaled-up programmes
   - Attention must be paid to language (error free automatic translation would be good!)

4. Better access to high quality information that I need for my work
   - "Targeted access to high quality knowledge and information that improves performance
     o Increased access (possibly supported by donors) to Peer reviewed journals
     o Identification of 'best existing tools'

- o Behaviour: High digestibility of knowledge for implementing staff – not research language
- Functioning:
  - o Networks of common information, with access to the 'ideal' amount of quality information
  - o Database with <u>limited</u> knowledge products submitted by implementers – with <u>ratings</u>
  - o Not only for Gates grantees
- Constraints
  - o Too much information
  - o Getting information through to field staff
  - o Motivating commitment
  - o Targeting information
  - o Funding
- Value proposition: it will negate our risk of making wrong decisions and help us do things smarter/faster/cheaper

5. Plan, monitor, document and evaluate my activities/projects
   - Initial discussion
     - o Importance of both digital technology (Google glasses as a KM tool) and documents (which ideally contain distilled outcomes and context specific judgements)
     - o But, there are creative tensions:
       - OTOH a shift to distilling complexity (one page to one para to a soundbite) risks losing the ability to interpret
       - OTOH there is a 'tsunami of data' with no ability to anlayse
   - Vision
     - o Projects/activities must all have
       - A Theory of Change
       - A learning strategy
       - Indicators
       - KM framework/processes/strategy
     - o Behaviour change needed:
       - Stronger diagnostics (involving situational assessments and admitting at the outset what don't know)
       - Institution-wide learning – a culture in which learning can succeed and be systematised
       - Incentives (value time for reflection – often currently stigmatised as non-operational time, which means addressing/moving social norms e.g. Google Corp's 'nap pods'
       - An enabling environment, addressing resources and people
   - Value proposition: KM leads to a virtuous cycle, where portfolio grantees are recognised as (become) the 'go-to' person in their own country/context

6.4   Appendix Four – Grantee recommendations and ideas

Quality 'Emerging Learning' update which has less than 200 words from each grantee, tagged, with links to projects * has to be reflected in RCTs, to make them more iterative?
Have a grantee database which is searchable by topics, people, organisations * includes trigger for new grantee alert to be sent out from BMGF to all grantees so we know who is new, and what they are doing
New grantees need an 'orientation to the other grantees that they should meet/discuss with * maybe even during project preparation * a condition of a grant?
BMGF can support an e-newsletter that summarises grantees failures and successes
Facilitate virtual or real study tours
Introduce all grantees to a "workable in any environment" social space
Monthly (or maybe quarterly) **top 10** learning products, emerging learning, lessons from the field, etc. pushed out the BMGF from reports/inputs as 100 word (max) summary + link
Practitioners advocacy group at regional level * pooling of knowledge * create a Forum: e-group * if possible, bi/annual forum meeting * more frequent video-conferences on pre-determined subjects, facilitated
BMGF to hire someone dedicated to facilitating/curating BMGF generated knowledge
Consolidation of the learning coming out of the grantees projects
BMGF is responsible for filtering and directly sharing key learnings of grantees and grantee KM are responsible for repurposing for field staff
Force Problem Solving Around Challenges: * BMGF does strategic match-making between grantees around a specific challenge and <u>requests</u> that they discuss amongst themselves and reply with a 1/2 page brief of their thoughts to solve the challenge
Database of links to existing collections
Improve signal to noise ratio: decrease time needed
Newsletter - 2 bullets per organisation, each three months (knowledge, failure, field learning) * low time impact, low noise
Publicly share (repurposed) project reports
Require/ask grantees to write a public "end of project report", summarising evidence
Understand local learning and knowledge flow and adapt approaches to this * position papers, articles etc. not effective: Westernised concept of learning
Day for published received articles

To create a benchmark platform for technologies, products, solutions, where every product developer enter well categorised information about its product
*product description
* level of solution
* prices
* features

"Experential" or "Total Immersion" Knowledge Transfer
* very small group site visit to connect visually, personally: hands-on
*facilitate problems solving: far more effective to 'touch & feel" from a site visit

Joint Voices
* Use Google docs to quickly create the debate around a topics
* all work at once on some document
* (PC:perhaps accompanied by learning event)

Re-iterate: failure to achieve promised results is OK, as long as grantee knows why (have evidence) of what went wrong and have good ideas on what needs to be done to improve/be successful

Collaborative Strategy development for BMGF

Writing
* good discipline
* forces reflection
* improves thinking, structures thinking

BMGF needs to be clearer about their goal and how grants should contribute to it

Spot and engage with emerging issues, like emerging connection between disease and Sanitation
* how to ask for that publicly, then share and get replies

Engage with triple loop learning across grantees, with financial support based on applications around topics

BMGF to support a moderated "Sustainable Total Sanitation at Scale" sub-group on existing active network/community (improves practicality)
* suggest Susanna
* should include facilitated thematic discussions...
* …. Towards a summarised product, eg fecal sludge management
* BDS has convening power
* BDS has ability to support existing platform
* Motivation comes from it being facilitated; themes that interest us; focus on agreed outputs

System that allows each grantee within a specific region or country to learn and share knowledge and experiences

I need a space which I can select whom I want to communicate to for a specific issue and later de-select bt remain recorded
* it should be simple and topical
* it should help in linking to relevant documents or references which are already authentic and have worked

Virtual working group on addessing challenges to sustainability in sanitation behaviour. How?
* Share - digital conversation group
* review existing information - meeting(s) at country level
* produce/share key findings with CoP + ???

Sharing between grantees - using Webex or similar forum on set topic
* maybe experience presented by Grantee
* sufficient time to discuss
* could try failure/constraints/ current issues series. Eg topic could be around "mistakes we made when implementing X"
* could be done in other forums, but maybe the smaller group would facilitate honest sharing
* not too much additional time needed
* not too frequent
* compulsory

---

support to produce quality case studies
* a writer to go out and work in countries
* host a write-shop for grantees - maybe an added day on next annual meeting?
* not too much time and cost realistic

---

create a digital platform for world market share analysis, with well categorised information inputs that permits understanding of every country's context
* local san networks would do the inputs on each country
* eg WASH conditions; legal and policies; purchasing power

---

better disssemination of best practices with grantees regarding KM
* either lead by BMGF or through a communal channel

A facilitated expert review on a weekly basis that summarises and shares all new knowledge coming into the sector
* output is distilled and shared new knowledge

I like the idea of sharing biggest failure and what was learned
* incentivise with failure lottery:
* select failures where still stuck
* other grantees propose solution
* grantees vote on best failure/solution combo
* BMGF funds collaborative ???

Receiving a grant from BMGF comes with a requirement to present a Failure/lesson learned at least once during the grant (likely at convening)
* AND there is potential to receive funding to remedy it if a good strategy is presented

---

BMGF be the gatekeeper to inform grantees about learning opportunity - provide abstracts & reference

---

Safe place for sharing failures: motivate people to do so