

9. Appendices

Appendix 9.1. Assessment Overview and Goals

Assessment Overview and Goals

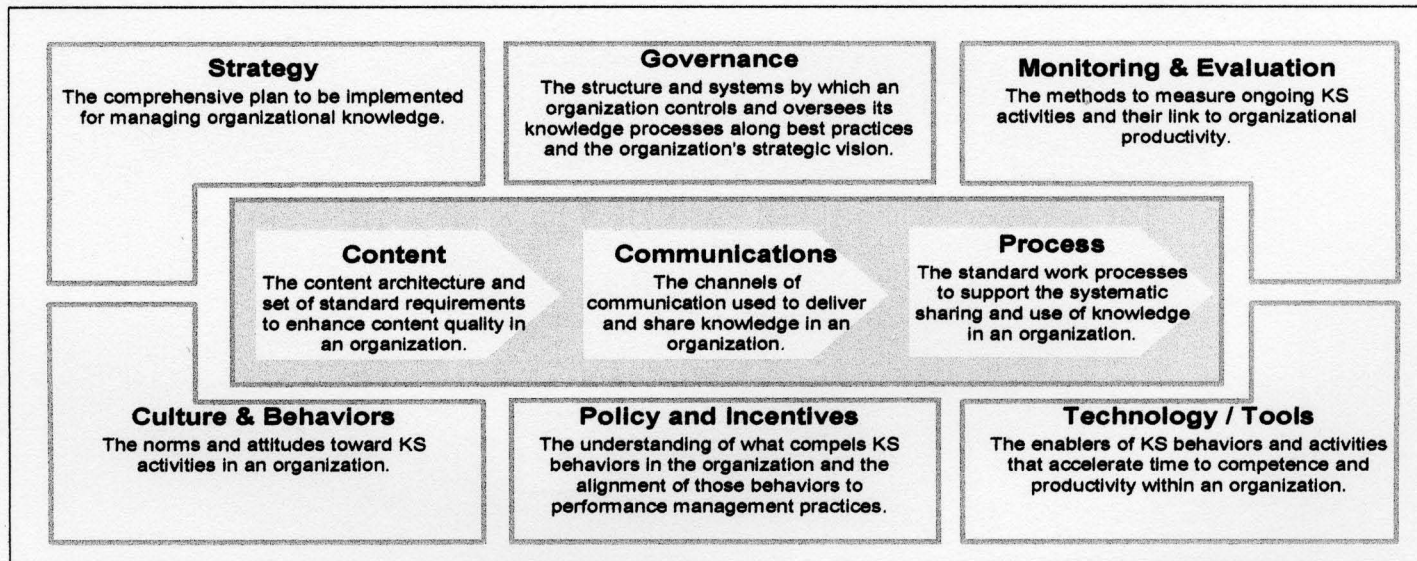
A collaborative analysis was performed to assess the current state of VS&L knowledge sharing practices and identify future desires.

Plan & Gather Initial Information	Conduct Country Assessments	Create Summary Assessment Findings
Goals		
Created detailed KS Needs Assessment Approach	Country visits to gather assessment data	Consider relevant leading KS practices occurring in country
Review existing reports and strategic knowledge sharing assessment	Interviews of key resources, stakeholders to understand participating CO's current and desired state	Compile data and supporting details
Understand VS&L Goals (USA and SWARMU perspectives)	Collect data on current state	Compile observations
Confirm key Knowledge Sharing framework components	Review and revise KS framework	Develop conclusions – highlight common gaps
	Build capability within CARE CO staff to carry out future assessments	Leverage Accenture benchmarking and leading practices

Appendix 9.2. Assessment Framework

KS Leading Practices: Framework Components

This Knowledge Sharing Framework is focused on assessing the knowledge sharing needs across an organization / program.



Please note: This framework is intended to be a flexible approach that could be adapted to be used in other CARE programmatic contexts to assess knowledge sharing and learning opportunities.

Appendix 9.3. Standard Country Assessment Agenda

Appendix 9.3: Standard Country Assessment Agenda

Standard Country Assessment Agenda

The following general agenda was developed and utilized during each country assessment:

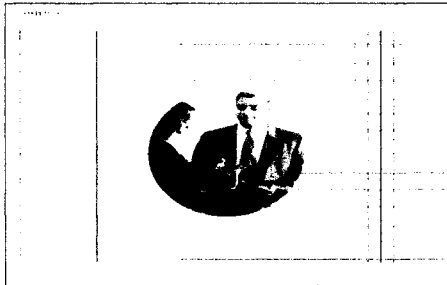
Activity	Purpose	Participants
Kick-off Session	Provide overview of BELO, project activities, country visit, and learn about knowledge sharing.	All Participants
Conduct individual Knowledge Sharing meetings / interviews	Use structured questions to identify current state capabilities, key strengths, capability gaps, and barriers relative to knowledge sharing within the country, between countries, with the regional and headquarter offices, and with the greater community.	<ul style="list-style-type: none">• Leadership (Country Director and / or Assistant Country Director)• VS&L Leadership• MIS/IT Representation• HR/Learning and Development Representation• M&E Representation• Other Program Representation (e.g., Agriculture, Health, Education)• TBD
Conduct VS&L Field Visit (if feasible)	Determine the knowledge sharing needs of VS&L and understand how people synergize / share knowledge amongst field staff and within the local communities.	<ul style="list-style-type: none">• VS&L Field Staff• Other Field Staff• Members of Savings Groups
Wrap-up Session	Summarize and gain agreement on country assessment findings and proposed pilot options.	Identified Participants

Appendix 9.4. Assessment Sources of Information

Multiple Sources of Information

Multiple sources were used to collect information and data for each participating country.

Interviews



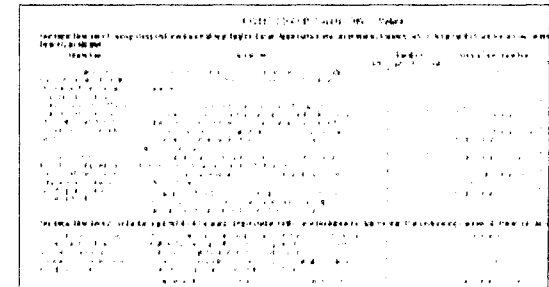
- Interviewed approximately 60 key VS&L practitioners and CO leadership across six countries
- Discussed KS leading practices

Field Visits



- Conducted VS&L field visit to understand different contexts
 - Angola: LURE
 - Malawi: SMIHLE and I-LIFE
 - Mozambique: OPHAVELA
 - SA: LOCAL LINKS
- Facilitated conversations with CARE, partner organizations, volunteers and participants

Existing Documentation



- LRSPs
- AOPs
- VS&L Job Descriptions
- VS&L Proposals
- M&E Reports
- Data Collection Tools
- Lessons Learned
- Case Studies and Videos
- Other documentation

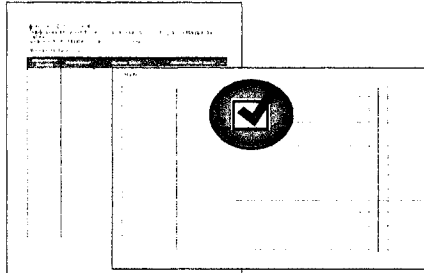
Appendix 9.5. Overall Project Approach Snapshot

Appendix 9.5: Overall Project Approach Snapshot

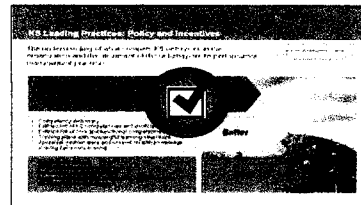
Overall Project Approach

The approach provides a holistic organizational view of knowledge sharing capabilities within CARE USA EDU and the participating country offices, relative to VS&L programs.

Individual Interviews

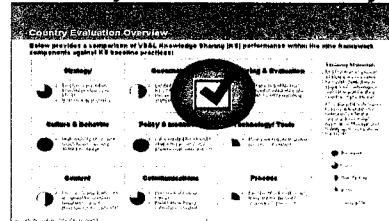


Assessment Questions

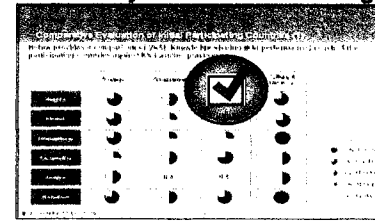


Knowledge Sharing Leading Practices

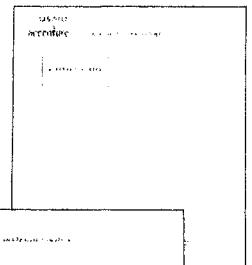
Country Assessment Summary



Summary Assessment Findings



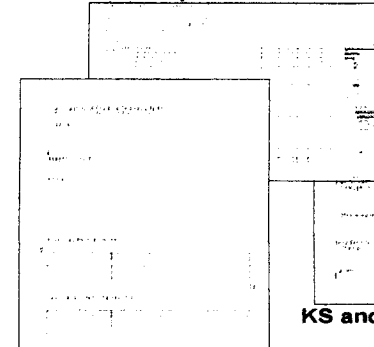
Notes from the Field



Regional Workshop



Pilot Implementation Plan



Technical Notes

KS and Learning Strategy

- Pilot Strategy
- Pilot M&E Approach
- Long-term Strategy

Appendix 9.6. Knowledge Sharing and Learning Strategy



USAID
FROM THE AMERICAN PEOPLE

Knowledge Sharing and Learning Strategy

September 2006

Version	V1.0
Status	Final
Author	David T. Metnick, Jen Byres
To be Reviewed by	Lauren Hendricks, Christopher Jurgens

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Executive Summary

Purpose

The purpose of this document is to provide an overall approach for improving knowledge sharing with respect to the VS&L program, and a specific set of activities and recommendations to carry out during the course of the one year Pilot. The program-level strategy is linked with and aligned to the broader organizational Knowledge Sharing Paper developed by L&OD in conjunction with ADP. This document supports the tasks outlined in the Pilot Implementation Plan and should be referenced on an ongoing basis while carrying out the plan.

This document satisfies the following deliverables:

- VS&L Knowledge Sharing and Learning Strategy
- Monitoring & Evaluation Approach

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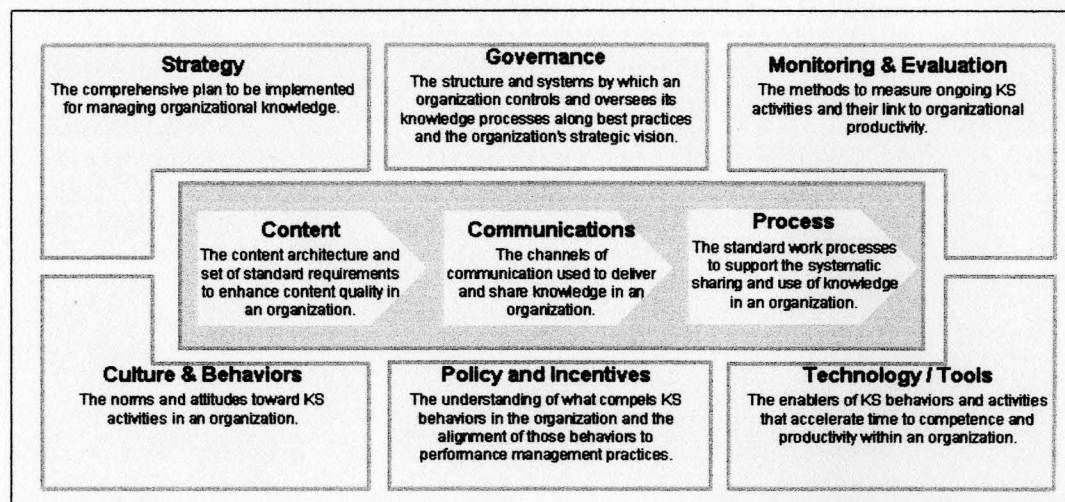
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Background

This strategy document is a result of the Knowledge Sharing Assessment carried out in six countries in Southern Africa. The assessment team interviewed approximately 60 individuals from different levels and divisions within the country offices of Malawi, Mozambique, South Africa – Lesotho, Angola, Zambia and Zimbabwe to understand the uses and value of Knowledge Sharing with regards to VS&L in CARE.

Many of the interviews at the country level focused on VS&L, but they were also with individuals in the other programs, Country Office Leadership and key individuals in the SWARMU office. As a result, the assessment team gained an understanding of the current state of VS&L Knowledge Sharing and has been able to identify key successes and strengths, unmet needs and capability gaps, and key barriers. This information is detailed in the BELO VS&L Summary Assessment Findings document, available on SharePoint at <http://edu.care.org/belo/Shared Documents/KS Needs Assessment/>. The assessment findings are further classified by the 9 Knowledge Sharing Framework components.

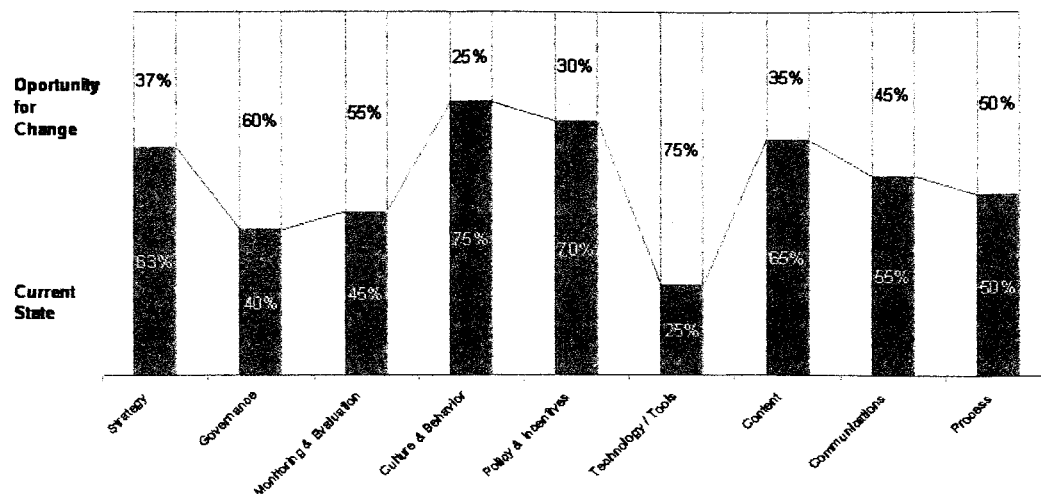
Below provides a snap-shot of the Knowledge Sharing Framework, focussing on assessing knowledge sharing needs across an organization / program:



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This framework was intended to be a flexible approach that could be adapted to be used by other CARE programmatic contexts to assess knowledge sharing and learning opportunities.

Below provides a high-level snapshot of VS&L knowledge sharing performance across the participating countries against baseline practices in each of the 9 framework components:



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Additionally, each specific country assessment is detailed, available on SharePoint at:

CARE Angola

<http://edu.care.org/belo/Shared Documents/KS Needs Assessment/CARE Angola>

CARE Malawi

<http://edu.care.org/belo/Shared Documents/KS Needs Assessment/CARE Malawi>

CARE Mozambique

<http://edu.care.org/belo/Shared Documents/KS Needs Assessment/CARE Mozambique>

CARE SA-Lesotho

<http://edu.care.org/belo/Shared Documents/KS Needs Assessment/CARE SA-Lesotho>

CARE Zambia

<http://edu.care.org/belo/Shared Documents/KS Needs Assessment/CARE Zambia>

CARE Zimbabwe

<http://edu.care.org/belo/Shared Documents/KS Needs Assessment/CARE Zimbabwe>

Following the assessment a two day regional workshop In Johannesburg was held. The participants included two representatives from each of the six participating countries, as well as VS&L Practitioners from Burundi, Niger, Uganda and Rwanda, key SWARMU and EDU representatives. The purpose of the workshop was to present the findings of the assessment, to synthesize knowledge sharing practices, VS&L themes for collaboration, and specific content for the Pilot phase. Participants were asked to prioritize the different practices that could be implemented during the pilot.

As a result of this work, key objectives have been identified. Initially, there are a number of “building blocks” which are required to be implemented to start improving knowledge sharing. These are:

1. Establishment of VS&L Community of Practice (COP)
2. Establishment of Knowledge Sharing Processes
3. Establishment of Knowledge Sharing Application
4. Establishment of Knowledge Manager Role

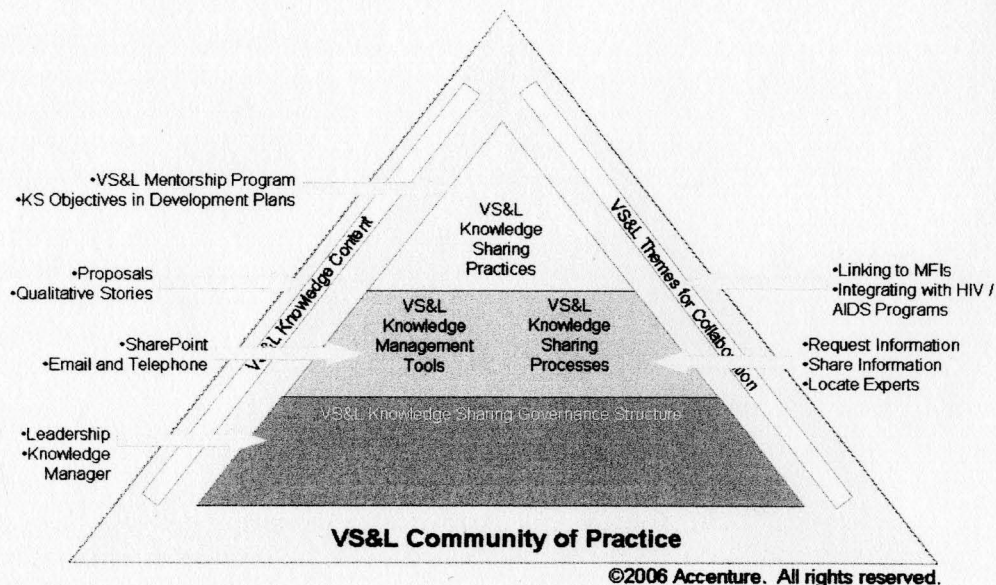
These will be detailed in the KS Building Blocks section of this document.

Once these foundational building blocks have been laid, there are several KS practices which have been identified as a priority for the period of the pilot. There is an overview of each of these practices, the benefits, how to overcome any identified challenges, as well as high-level implementation notes which link to the Pilot Implementation Plan.

As the pilot will run for less than a year, it is not possible to implement all identified knowledge sharing practices in this time. In addition, there are some wider implications and larger scale changes which are required to effect long term change in knowledge sharing behaviors in VS&L and CARE as an organization. These are detailed in the Long Term Strategy section of this document.

Definitions

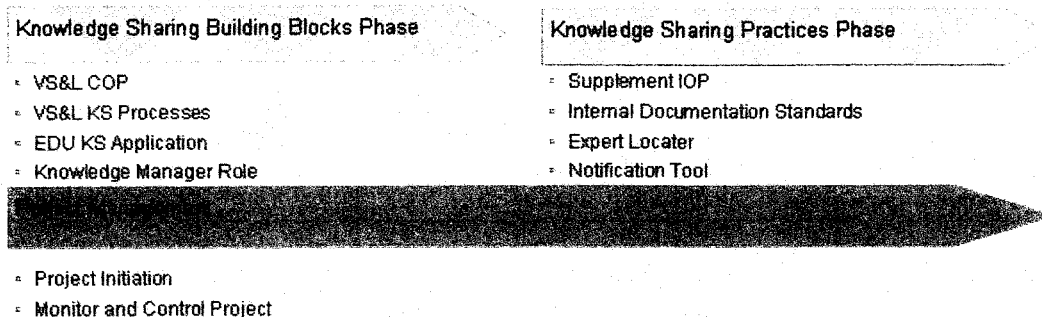
The below diagram depicts the different VS&L knowledge sharing components that are referenced throughout this document:



Pilot Implementation Plan

EDU will organize a Knowledge Manager to manage the BELO VS&L Pilot Implementation Plan. The plan will be carried out over a period of approximately 195 days, with an anticipated start date of 03 October, 2006.

Below is a high-level illustration of the Pilot Implementation Plan:



See Pilot Implementation Plan for specific implementation tasks and resource requirements, also available on SharePoint at:
<http://edu.care.org/belo/Shared Documents\KS Strategy and Implementation/>

Knowledge Sharing Building Blocks

Overview of KS Building Blocks

The Knowledge Sharing Needs Assessment identified some good examples of knowledge sharing within or between certain countries; however this is occurring mostly on an ad hoc basis. As a result, some VS&L practitioners are disadvantaged, because they are not aware and able to communicate and learn from their colleagues in Southern Africa.

The basis of good practice in knowledge sharing is to have an identified group of people with a common interest “**Community of Practice**” who are able to interact on a regular basis; core **Processes** to share knowledge, a **Knowledge Sharing Application** to enable sharing of and access to knowledge, and the identification of a **Knowledge Manager** role to lead the implementation. These are detailed individually below.

VS&L Community of Practice

“Communities of practice are groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis.”¹ Efficient access to the VS&L Community of Practice and expertise of practitioners is critical because documented knowledge is not always accessible.

¹ Etienne Wenger, Richard McDermott and William M. Snyder, *Cultivating Communities of Practice: A Guide to Managing Knowledge* (Boston: Harvard Business School Publishing, 2002)

Within the VS&L Community of Practice, members can assist each other to resolve problems. Discussion group debates can be used to resolve open issues. Resolutions documented via “learnings” and “best practices” should be created.

The Knowledge Manager (KM) role is used to monitor discussion groups and champion potential new best practices. KM serves as both subject matter expert and publisher due to complexity of content.

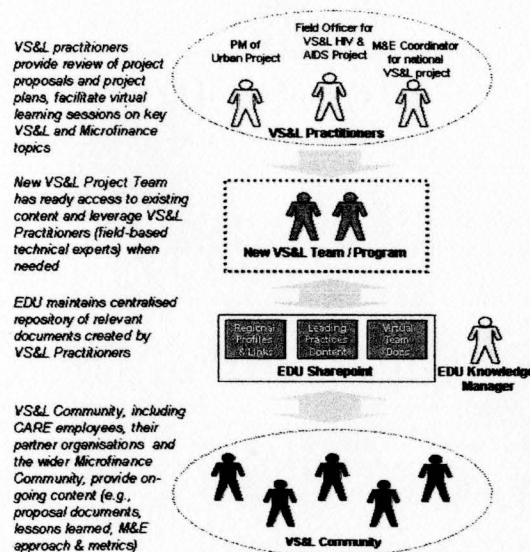
A Community of Practice has many benefits to both individual members and to CARE as a whole:

- A forum for problem solving
- Improved quality of decisions, as decision making becomes more informed
- More perspectives on problems
- Coordination, mainstreaming, and synergies across countries
- Reducing duplicate work / rework and effort
- Succession planning / preventing brain drain - knowledge is kept within CARE because it is shared within the group
- Help with challenges
- Access to expertise
- Better able to contribute to team
- Sense of belonging
- Get quick answers to questions

Ongoing COP activities:

- E-conference (leveraging Skype) – decide frequency and what should be covered
- How to decide who contributes
- Define format of e-conferences (standard agenda, guest speakers, facilitating discussions lead by experts, etc)
- Communication in advance

Leveraging VS&L Experts example:



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FINAL

Knowledge Sharing Processes

In order to more effectively support the Village Savings and Loans (VS&L) Building an Effective Learning Organization (BELO) Pilot, a standard Knowledge Sharing (KS) application can be in place.

The technical note highlights the following areas:

- Benefits / value of standard KS application
- Goals of the standard KS application
- Navigation pane
- Contributing Knowledge
- Finding Knowledge
- Requesting Knowledge
- Retiring Knowledge
- Soliciting Feedback
- Creating Orientation / Tutorial
- Clearly defined Application / Technical Support
- KS Application Roles

See technical note, available on SharePoint at:

<http://edu.care.org/belo/Shared Documents\KS Strategy and Implementation\>

See Pilot Implementation Plan for specific implementation tasks and resource requirements, also available on SharePoint at:

<http://edu.care.org/belo/Shared Documents\KS Strategy and Implementation\>

Benefits / Value to VS&L Community of Practice

Standard KS application with defined support roles can provide the specific benefits:

- Identification of consistent and common application to support all VS&L practitioners
- Clear roles for staff supporting the KS application and supporting processes
- One place to find all relevant VS&L information (documentation, discussions, training and event information, etc.)

Knowledge Sharing Application

In order to more effectively support VS&L knowledge content sharing, baseline knowledge sharing (KS) processes should be in place. Each high-level process can be expanded upon and integrated into EDU and VS&L practitioner practice during the BELO Pilot phase.

The technical note highlights the following for each process:

- Name of Process
- Process Definition
- Input
- Narrative (Number, Step, Owner, Tool)
- Output

See technical note, available on SharePoint at:

<http://edu.care.org/belo/Shared Documents/KS Strategy and Implementation/>

See Pilot Implementation Plan for specific implementation tasks and resource requirements, also available on SharePoint at:

<http://edu.care.org/belo/Shared Documents/KS Strategy and Implementation/>

Benefits / Value to VS&L Community of Practice

Standard VS&L knowledge sharing processes provide the specific benefit:

- Identification of consistent and common processes across VS&L knowledge sharing practices

Knowledge Manager Role

The Knowledge Manager Role would be an integral part of the EDU team and the overall BELO Pilot phase. This position would be responsible for managing critical EDU offerings, curriculum and skill development, and operations related to the BELO Pilot phase. In addition, the Knowledge Manager would be responsible for maintaining and improving the knowledge assets stored on the EDU Knowledge Sharing Application and providing support to VS&L practitioners around the globe.

The Knowledge Manager should be an expert in the creation and enablement of key EDU practice areas, and can be responsible and accountable for the availability and quality of EDU knowledge assets.

The scope of a Knowledge Manager includes participating in and leading the BELO Pilot phase to create, manage, disseminate and maintain key components of the Implementation Plan across target VS&L practitioners and communicate to pilot leadership, the steering committee and other key CARE HQ stakeholders (KNOWSHARE, etc.).

Recommended Key Responsibilities:

- Set strategy, priorities, and goals for the BELO KS Pilot. Includes the development and management of budget and work plan and monitoring of progress toward objectives.
- Develop and manage a communication plan to aid in the uptake of critical KS practices by key stakeholder groups.
- Manage and execute implementation plan for the EDU KS Application to create, capture and package EDU knowledge capital and learning enablers for targeted VS&L themes and contexts.
- Manage the creation of new knowledge capital, including case studies, articles for publication, VS&L project histories and stories, tools and VS&L methodologies, and materials for education/learning initiatives.
- Evaluate and mine internal/external sources of knowledge around key the organization content areas e.g. journals, market research, analysts reports, workshop proceedings, etc.
- Identify and manage relationships with external experts relevant to the assigned content area(s). Establish and manage Subject Matter Experts networks and Communities of Practice for assigned content area.

- Plan, manage and synthesize external research (working with greater Microfinance community) to keep abreast of relevant developments and emerging areas in the market place.
- Assess and articulate the current skill set and skill gaps of the VS&L practitioners in order to enable quality delivery of VS&L programs.
- Measure and evaluate ongoing knowledge sharing progress.
- Manage the development, customization, and sourcing of content for EDU learning and capability development programs.
- Manage architecture and taxonomy for the EDU KS Application (and corresponding newsletters or other dissemination vehicles).

Recommended Knowledge and Skills:

- Project Management including work planning, budget management, risk identification and mitigation, resource allocation
- Deep content expertise in Economic Development
- Exceptional written and oral communication
- Experience with the Microsoft SharePoint including contributing assets, managing content and improving usability and quality of knowledge capital

Pilot Practices

Overview of Pilot Practices

In addition to the core knowledge sharing practices, there are a number of additional practices which meet the needs identified during the assessment. These were prioritized by VS&L practitioners at the Regional Workshop.

Communications Planning

Challenges	Mitigating Actions
Requires ER/ SWARMU buy-in	Arrange meetings with ER / SWARMU leadership to ensure that representation is following communication plan when requesting VS&L-specific information
Translation will need ACD/ CD support time	Provide communications in both English and French and work closely with ACD / CD in specific country to determine feasibility of local translation

Benefits / Value to VS&L Community of Practice

Communications plans provide the specific benefits:

1. Explains the objective / purpose of the communications program.
2. Establishes target audiences for all communications
 - Those who need to approve the communication program
 - Those who need to implement the communication program
 - Those who are affected by the communication and/or need to take action as a result of the program
3. Allows all VS&L staff to plan for required information and to avoid last minute requests for urgent information
4. Facilitates sharing of key VS&L information at regular intervals
5. Ensures that those responsible for creating the communications receive timely inputs
6. Ascertains understanding of current realities
 - Knowledge level of audience
 - Sense of urgency/need
 - Attitudes/values
 - Attitudes that you want to change
 - Anticipated resistance
 - Desired commitment and/or compliance
 - Timing

7. Captures clear Key Messages to be reinforced across all communications.

See technical note for additional details, available on SharePoint at:

<http://edu.care.org/belo/Shared Documents\KS Strategy and Implementation\>

See Pilot Implementation Plan for specific implementation tasks and resource requirements, also available on SharePoint at:

<http://edu.care.org/belo/Shared Documents\KS Strategy and Implementation\>

Supplementing Individual Operating Plans

Supplement ongoing Individual Operating Plans (IOPs) Process with the creation and implementation of a defined list of knowledge sharing and learning objectives and integrate those into VS&L practitioners' IOPs

Overview

Core knowledge sharing and learning objectives and measurements of success are to be designed for use in VS&L practitioners' IOPs, promoting those behaviors and aligning them with CARE's performance management practice.

Benefits / Value to VS&L Community of Practice

Integrating KS objectives into the IOP process provides the specific benefits:

1. Increased individual incentive to participate in ongoing knowledge sharing and learning practices
2. Facilitates integration of tangible knowledge sharing actions into an individual's work
3. Ability for supervisors and other stakeholders to effectively measure individual knowledge sharing and learning practices
4. Very easy way to supervise KS process
5. Best way to focus CARE staff on KS
6. Integrates with existing systems
7. Guarantees staff commitment

The following are potential challenges to be aware of when implementing this practice:

Challenges	Mitigating Actions
Need to identify clear KS objectives that aren't just technology	Create list of interventions that includes committing to contribute to VS&L Community of Practice
This helps CARE staff, what can we do to incentivize partners	Discuss specific individual development / operating plan procedures with partner organization leadership

Challenges	Mitigating Actions
Time constraint	Should be integrated in to existing process, so should not add too much extra time
Is this "just another thing to put on IOP"?	Provides tangible, measurable interventions which can improve knowledge sharing
Just finished IOP Process, how does that fit into timing	IOP should be an open document that can be added to at any time

Overview of Implementation Plan Roles and Time Commitment

To successfully create and implement a defined list of knowledge sharing and learning objectives and integrate them into the IOP process, the following resources are required to participate:

- Knowledge Manager
- Local HR Representation
- LEDU Representation
- Country Leadership
- Steering Committee Members

The following has duration has been determined for end-to-end creation, implementation and measurement of this pilot practice:

Duration: 12 Days (Does not include ongoing support)

See Pilot Implementation Plan for specific implementation tasks and resource requirements, also available on SharePoint at:

[http://ledu.care.org/belo/Shared Documents\KS Strategy and Implementation\](http://ledu.care.org/belo/Shared Documents\KS Strategy and Implementation)

Additional Information

Example objectives that could be integrated into IOPs:

- Lead VS&L Community of Practice e-conference on HIV / AIDS integration theme
- Provide feedback on VS&L content to EDU and other stakeholders
- Review project documentation and contribute good examples to EDU
- Volunteer to take part in BELO project team
- Create a template using an existing document and post it to Sharepoint

Standard internal documentation templates

Overview

Standard templates for core VS&L documentation, e.g. case studies, project plans, proposal documents, are created using existing examples. These are shared with all VS&L practitioners and used as a guideline when creating new documentation.

Benefits / Value to VS&L Community of Practice

Documentation standards provide the specific benefits:

1. More common documentation across VS&L programs
2. Acts as a training tool - aids new VS&L practitioners when creating documents for the first time
3. Reduces time for creating documentation and re-inventing the wheel
4. Promotes understanding between project staff
5. Facilitates monitoring of activities/ comparison across projects

The following are potential challenges to be aware of when implementing this practice:

Challenges	Mitigating Actions
Inflexibility	Create flexible guidelines and communicate that these can be modified to suit the local context and/ or donor requirements. Provide sample templates from multiple existing projects, so that practitioners have a choice of versions which can be adapted
How to create guidelines that satisfy everyone	Keep the format simple, user-friendly and useful, including detail for implementation
Time constraint	Ensure that templates and guidelines are easily accessible for practitioners so that they do not spend a lot of time searching for them
"Just another thing to put on IOP"	Make sure that the list of possible objectives is as comprehensive as possible, so that practitioners can easily integrate it into their plans
Just finished IOP Process, how does that fit into timing?	Spend a short amount of time selecting some appropriate objectives and add them to existing plan. Inform supervisor that you have additional objectives to achieve.

Overview of Implementation Plan Roles and Time Commitment

To successfully create and implement internal VS&L documentation and program close-out checklist, the following resources are required to participate:

- Knowledge Manager
- Steering Committee Members
- VS&L Community of Practice (Project Team)

The following has duration has been determined for end-to-end creation, implementation and measurement of this pilot practice:

Duration: 13 Days (Does not include ongoing support)

See Pilot Implementation Plan for specific implementation tasks and resource requirements, also available on SharePoint at:

[http://edu.care.org/belo/Shared Documents/KS Strategy and Implementation\](http://edu.care.org/belo/Shared Documents/KS Strategy and Implementation/)

Expert Locator

Overview

“Expert profiles” capture details on the expertise of VS&L practitioners and store this information on the VS&L knowledge sharing application. All VS&L practitioners can then search for people who are knowledgeable in certain areas of practice, to provide them with insight and advice as required. It is essential to keep this information up to date.

Benefits / Value to VS&L Community of Practice

“Expert Locator” functionality provides the specific benefits:

1. Simple method to locate other VS&L practitioners
2. Simple method to share expertise with other VS&L practitioners
3. Makes VS&L Practitioners marketable across other countries
4. Facilitates interaction - a two-way process of people getting to know each other within the VS&L Community of Practice
5. Provides cost savings if you are able to get the expertise you need within the organization, instead of paying a consultant to provide the same information
6. Helps develop the career path of VS&L practitioners

The following are potential challenges to be aware of when implementing this practice:

Challenges	Mitigating Actions
Inflexibility	Create flexible guidelines and communicate that these can be modified to suit the local context and/ or donor requirements. Provide sample templates from multiple existing projects, so that practitioners have a choice of versions which can be adapted
If considerable time is requested of the expert, who pays – the expert or the requester?	Agree on guidelines for how much time should be provided for “free” and how to charge for longer periods of work
Will experts be available to assist? What is the incentive for expert to assist?	VS&L Practitioners should be able to opt out if they are not able to commit time to assisting others. There should be an understanding that there is some give and take.

Overview of Implementation Plan Roles and Time Commitment

To successfully to create and implement the “Expert Locator” functionality, the following resources are required to participate:

- Knowledge Manager
- Steering Committee Members
- VS&L Community of Practice (Project Team)
- IT Resource

The following has duration has been determined for end-to-end creation, implementation and measurement of this pilot practice:

Duration: 12 Days (Does not include ongoing support)

See Pilot Implementation Plan for specific implementation tasks and resource requirements, also available on SharePoint at:

<http://edu.care.org/belo/Shared Documents/KS Strategy and Implementation/>

Notification of Knowledge Use

Overview

In order to evaluate knowledge content and use metrics to measure the effectiveness of its usage, it is essential to implement a mechanism for notifying when the content is used by VS&L practitioners.

Benefits / Value to VS&L Community of Practice

Notification mechanisms provide the specific benefits:

1. Ability for VS&L Community of Practice to provide upward feedback on the relevance and usefulness of knowledge content.
2. Ability for EDU and other stakeholders to monitor and measure the effectiveness of content.
3. Improves the VS&L knowledge deliverables, if practitioners all evaluate documents provided and action is taken on the basis of the evaluation
4. Saves time, as the content should be up-to-date and relevant

The following are potential challenges to be aware of when implementing this practice:

Challenges	Mitigating Actions
People may not respond	The EDU Knowledge Manager must champion this effort and communicate it's benefits and value to the VS&L COP

Overview of Implementation Plan Roles and Time Commitment

To successfully to create and implement a mechanism for notifying when information is used in practice, the following resources are required to participate:

- Knowledge Manager
- Steering Committee Members
- VS&L Community of Practice (Project Team)
- IT Resource

The following has duration has been determined for end-to-end creation, implementation and measurement of this pilot practice:

Duration: 12 Days (Does not include ongoing support)

See Pilot Implementation Plan for specific implementation tasks and resource requirements, also available on SharePoint at:

<http://\edu.care.org\belo\Shared Documents\KS Strategy and Implementation\>

Pilot Monitoring & Evaluation Approach

Overview

The Monitoring and Evaluation (M&E) approach focuses on the specific metrics and overall governance structure for the BELO Pilot phase. The approach is built upon leading practices to gain pilot efficiency and maximize communications, hence greater acceptance from the VS&L COP and the broader CARE and Microfinance community.

Balanced Scorecard

A balanced scorecard will facilitate measurement of the BELO Pilot phase. The key metrics presented are disaggregated to show differing performance between the scorecard components. The scorecard will also provide the Knowledge Manager the ability to create and disseminate a single progress report.

Metrics can be captured using application feedback forms and ongoing, scheduled communications to the VS&L COP from the Knowledge Manager. Then, the Knowledge Manager will prepare monthly, then quarterly reports. The report should follow a standard template and focus on the core metrics in the scorecard. Particular better practices and areas of focus should be highlighted, and then elaborated upon for discussion with the EDU Director and steering committee. Any feedback from the steering committee should be assessed, and provide the basis for adjustments to the Pilot implementation plan.

The metrics were created and revised with input from VS&L practitioners during the Regional Workshop. Please note: it is recommended to measure a subset of the metrics in each of the four scorecard areas.

Individual Value Measures:

Metric	Description
Individual Frequency	Profile of individual interaction with KS Application (frequency, # of docs per session, document rankings)
Individual Access	#/% of VS&L practitioners with KS Application access
Frequency / Quality of contribution	Frequency/quality of individual contributions, VS&L COP-wide and / or by document

Innovation Measures:

Metric	Description
Contributions	Number of lessons learned contributions to the VS&L COP (including both programming successes and failures) that resulted in improved outputs
Increased quality	Increase quality from new ideas enabled by BELO KS initiatives <i>Please note: leverage survey for this qualitative data.</i>
VS&L programming performance	Specific VS&L programming innovations that can be traced to BELO KS initiatives
VS&L proposals	#/% of proposals that leverage “best practice” VS&L knowledge content
New VS&L programming	#/% of start-ups VS&L programs that employ “best practice” VS&L practices

Operational Measures (Optional):

Metric	Description
Labor cost / proposal	Decrease labor cost per proposal <i>Please note: requires current estimated benchmark.</i>
Expenses / proposal	Decrease expenses per proposal (e.g., travel costs) <i>Please note: requires current estimated benchmark.</i>
Start-up cost	Decreased VS&L project start-up cost <i>Please note: requires current estimated benchmark.</i>

KS Practice Measures:

Metric	Description
Communications Planning	#/% of BELO Pilot communications that are received without the need for greater clarification from target audience

Metric	Description
Supplementing Individual Operating Plans	#/% of VS&L practitioners with identified KS objectives in their IOPs #/% of VS&L practitioners who have met identified KS objectives in their IOPs
Standard internal documentation templates	#/% of VS&L projects that leverage the standard, internal documentation templates
Expert Locator	#/% of VS&L practitioners that leverage the expert locator
Notification of Knowledge Use	#/% of VS&L practitioners that respond to the utilize the feedback form / respond to EDU requests

Measuring Pilot Engagement

At the mid-term and conclusion of the Pilot phase, anonymous surveys can be leveraged to obtain qualitative data and the level of engagement from the VS&L COP. This is feasible with free, online services such as Survey Monkey.

Recommended Survey Ratings:

- Strongly Disagree
- Moderately Disagree
- Neutral
- Moderately Agree
- Strongly Agree
- Unable to Rate

Recommended Survey Points:

1. The BELO Pilot supports an environment where individual motivation flourishes and staff feel inspired to do their best work
2. I consistently share learning and transfer knowledge to other work groups and functions within the VS&L COP
3. I have a simple and effective process for capturing and accessing lessons learned
4. In CARE, developmental experiences are part of the job rather than additional duties or training simulations

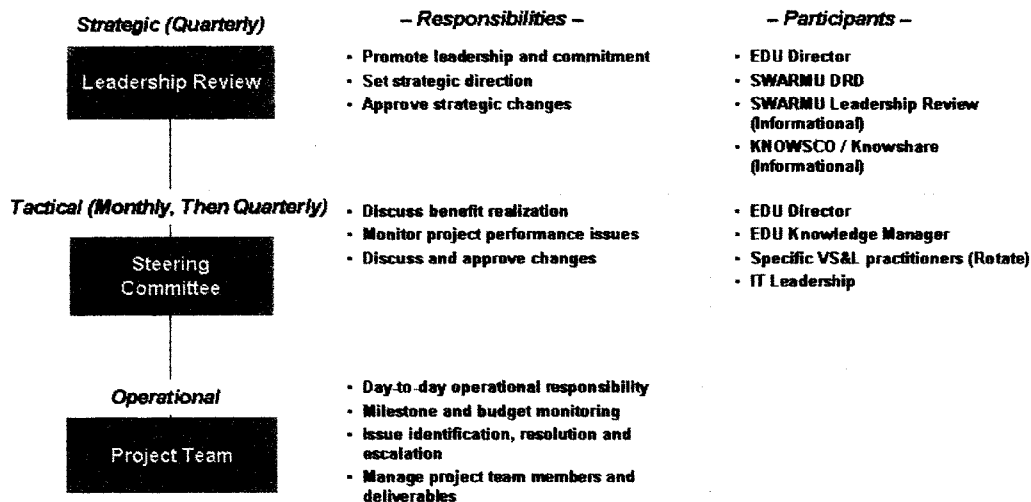
5. Before we make IOP objectives we review time commitments to ensure that the individual can be fully engaged
6. When giving feedback, supervisors consider its impact on the individual and try to make it constructive
7. In CARE, people actively seek out feedback regarding their performance and behavior
8. Immediately following a significant event for VS&L programming (project completion, new target groups, etc.), we identify successes, failures and implications for future improvements
9. We have a systematic process to identify critical future VS&L positions in CARE
10. We effectively engage people nearing retirement to maintain their motivation and sustain their contribution to CARE and VS&L programming
11. We assign our next generation leaders to key VS&L initiatives
12. In CARE, we do an outstanding job of building on VS&L methodology strengths and unique capabilities
13. Given the opportunity, I would tell others great things about participating in the BELO Pilot
14. We have effective methods of communicating VS&L core methodology to partners, the community and participants
15. We have an effective measurement system that reflects the many different things that contribute to VS&L programming performance
16. We regularly improve our VS&L methodology based on careful review of participant and partner organization feedback
17. We have a clear process for soliciting participant feedback
18. We continually challenge, document and share assumptions about the VS&L Methodology
19. CARE remove barriers that impede improvement in VS&L methodology and project performance (e.g. bureaucracy, stress and silo mentality)
20. EDU make decisions that include the needs and interests of VS&L practitioners
21. We continually renew our VS&L methodology to make it even better
22. The BELO Pilot provides effective methods for improving and streamlining our VS&L programming
23. We are flexible in our ability to let go of old patterns, models and successes
24. People contribute innovative ideas and approaches even when they fall outside their job description
25. We are keenly aware of Microfinance trends and opportunities
26. The BELO Pilot encourage staff to stretch and grow personally and professionally
27. EDU provides useful information regarding what is happening in all parts of the organization, relative to VS&L programming

28. EDU seeks the input of those VS&L practitioners whom are closest to day-to-day VS&L programming

Governance Structure

The governance framework facilitates a collaborative relationship among accountable groups based on frequent open communications. Pilot responsibility is clear, following a three-tier system. The EDU Director, along with the SWARMU DRD, Program Director of Private Sector Development, CARE Canada, will have strategic oversight over the entire pilot. The SWARMU Leadership Review and KNOWSCO are also part of this tier from an informational perspective. At the second tier, the EDU Director, EDU Knowledge Manager, IT leadership and specific VS&L practitioners on a rotating-basis will have primary responsibility to steer and monitor the pilot. The VS&L COP, IT coordinator, with EDU represents the third tier, carrying out the activities in the Pilot implementation plan.

The governance structure was created and revised with input from VS&L practitioners during the Regional Workshop.



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Themes

Overview

Themes are topics for discussion by the VS&L COP. Specific themes have been identified by each participating country, as well as the Regional Workshop participants.

Initial list of Identified Themes:

- Integrating with HIV/AIDS programs
- Operating in an urban or peri-urban setting
- Providing technical assistance to partner organizations
- Making VS&L a nation-wide program
- Creating stand-alone VS&L-focused organizations
- Implementation of VS&L using volunteers and their incentives
- Involving community leaders and / or local government in VS&L
- Building knowledge sharing and learning processes into proposals
- Linking to microfinance or other institutions
- Linking VS&L with Rural Farmers
- Collecting of qualitative M&E data
- Mainstreaming a common MIS tool and best practices
- Local policy and advocacy agendas created for VS&L
- Small business training methodology for VS&L participants
- Conducting VS&L baseline / impact studies
- Linking VS&L with Business Development Services programs

Additional Themes Identified at Regional Workshop:

- VS&L Partnerships
- Incorporating gender planning
- After VS&L, what is next for participants?
- Integrating with OVC programming
- Mechanisms to promote VS&L group cross-learning
- Savings-based versus Credit-based performance indicators
- VS&L impact to orphans

Next Steps

At the Regional Workshop, participants rated the themes on order of importance using the following rating scale:

1. Very unimportant
2. Somewhat unimportant
3. Neither important nor unimportant
4. Somewhat important
5. Very important

Additionally, participants included additional themes, noted in the above section. They also indicated next to each theme if they are interested in facilitating / moderating a discussion on the theme, as well as where they would like to participate.

Going forward, the EDU Knowledge Manager should prioritize the above Themes based on direction from the EDU Director, as well as from the level of interest on the specific theme, by averaging the rating responses on the individual theme worksheets.

Knowledge Content

Overview

Knowledge Content represents tangible assets that are created and leveraged by the VS&L COP. Specific knowledge content has been identified by each participating country, as well as the Regional Workshop participants.

Initial list of Requested Knowledge Content:

- VS&L delivery methodology and templates (includes modifications / additions to training guides)
- VS&L prior proposals and proposal templates
- VS&L project plans / workplans
- VS&L M&E metrics and approaches
- CARE internal-facing lessons learned
- List of current VS&L projects
- Industry news

- Profiles (expertise, areas of focus) of CARE VS&L practitioners
- Profiles of non-CARE VS&L practitioners
- Opportunities / leads relating to VS&L initiatives
- Country profiles with cultural indicators
- Qualitative Data Collection templates
- Case Study templates
- Communicating with impact / business writing and facilitation tips
- Staff Development Strategy examples
- VS&L marketing videos
- List of VS&L training opportunities (Instructor-led or Virtual)
- VS&L impact metrics and approaches
- Human interest stories

Additional Knowledge Content Requested at Regional Workshop:

- Proposals on integrating VS&L with HIV / AIDS programs
- Proposals on integrating VS&L with Market Access and OVC
- Proposals on integrating VS&L with Food Security
- Proposals on integrating VS&L with Water and Sanitation
- Proposals on integrating VS&L with Agriculture
- Lessons learned on each of the above linkages
- Frequently Asked Questions (FAQ) document on VS&L methodology
- Project concept note for VS&L / Agriculture / Women farming
- Impact assessment tools and indicators
- Templates for documenting lessons learned

Additional Knowledge Content Identified to Share at Regional Workshop:

- Documentation on VS&L integration to MFIs
- Status Reporting templates
- Budget templates (w / cost share)
- Project reporting templates (quarterly / semi-annually)
- VS&L baseline tool
- M&E protocol

- Business training manual
- Roles of a VS&L National Steering Committee
- Technical support materials for roll-out of national VS&L program
- Documentation on partnerships and creation of local VS&L-specialized NGOs

Next Steps

At the Regional Workshop, participants provided input to the knowledge content on what they can provide and the specific name of the project

Additionally, participants included additional knowledge content to request and / or share, noted in the above section.

Going forward, the EDU Knowledge Manager should prioritize the above Knowledge Content based on direction from the EDU Director, as well as from the actual content already created, by using the responses on the individual knowledge content worksheets.

Long Term Strategy

Introduction

In addition to the optional roll-out of long-term practices identified by VS&L practitioners and detailed below, EDU can accomplish several additional KS objectives.

EDU can continue VS&L COP discussion around identified themes and translate outputs of those discussions in the form of knowledge content.

After evaluation of the Pilot phase, it is essential to document and communicate these results with all necessary stakeholders and to determine next steps. Furthermore, adjustments to the Pilot Implementation Plan, reflecting actual tasks and durations, should be made for future KS efforts.

Furthermore, EDU can extend the VS&LCOP (supported by the KS Application and processes) beyond SWARMU and the additional countries represented at the Regional Workshop. Specific VS&L practitioners from target countries must be contacted and systematically brought into the VS&L COP. During this process, the additional VS&L practitioners should be asked to identify additional KS capabilities, content and themes that would add value to their specific programming context.

Additional objectives identified in the KS Needs Assessment which require additional stakeholder sponsorship are identified below:

- Further assess cultural challenges that prevent KS activities throughout CARE
- Continue to fund dedicated Knowledge Sharing resources
- Create Human Capital Strategy with KS interventions
- Create recognition program to recognize timely reporting of information use
- Implement KS objectives from the BELO Pilot Phase back into the overall CARE Performance Management Process
- Ensure BELO Pilot Phase as input to overall, comprehensive Knowledge Sharing strategy
- Create additional Knowledge Sharing strategies for remaining Economic Development programming portfolio

Overview of Long Term Practices

In addition to the pilot practices, there are a number of additional practices which meet the needs identified during the assessment. These were prioritized as secondary by VS&L practitioners at the Regional Workshop and are detailed in the below section.

Mentorship Program

Overview

Creating a virtual mentoring program within the VS&L Community of Practice provides a semi-formal communications channel for knowledge sharing amongst participants. The structure is semi-formal in design with flexibility to allow participants to develop their own schedules and set boundaries that are appropriate to individual needs. Protégés are free to discuss with the utmost confidence, any topics that they feel relate to their personal or professional development. Mentors honor commitments made and maintain confidences while acting as trusted counselors and guides who share expertise while allowing protégés to be follow their own direction.

- Participation is optional – mentoring should not be forced
- If feasible, mentors are at level above the protégés current level
- Mentors should be matched with protégés with same language preferences

Benefits / Value to VS&L Community of Practice

Mentor programs provide the specific benefits:

1. Confidential, trusting, give-and-take relationship between mentors and protégés
2. Improves morale, fosters motivations and a sense of community
3. Helps new VS&L practitioners gain insight into CARE

High-level activities with estimated participants and time commitments

The following is a process outlining how to create and implement a VS&L virtual mentoring program.

Number	Activity	Participants and Time Commitments
Create		
1	Create mentorship program guidelines and materials.	EDU Knowledge Manager, 40 HRS
2	Communicate VS&L mentorship program to VS&L Community of Practice.	EDU Knowledge Manager, 4 HRS
3	Maintain personal contact information in VS&L	Participating VS&L Practitioners,

	knowledge sharing tool (website).	10 Minutes, ongoing
4	Sign-up for mentorship program (to be a mentor or a protégés) by completing the VS&L mentorship program form with language preferences, availability, preferred communications method, etc.	Participating VS&L Practitioners, 10 Minutes
5	Match protégés to mentors using forms and send welcome packet to participants. Welcome packet includes: -What is a Mentor -How to be a good Mentor -Getting the Most from your Mentor (Dos and Don'ts)	EDU Knowledge Manager, 1 HR / Week
Implement		
6	Establish communication between mentor and protégés on an on-going basis.	Participating VS&L Practitioners
7	Ongoing evaluation of program using surveys.	EDU Knowledge Manager, 4 HRS / Month
8	Ongoing promotion of VS&L mentorship program to new VS&L practitioners.	All VS&L Practitioners

Project Orientation Checklist

Overview

Standard orientation checklist for new VS&L practitioners / projects. These are shared with all VS&L practitioners and used as a guideline during practitioner / project start-up.

Benefits / Value to VS&L Community of Practice

Project Orientation Checklist provides the specific benefits:

1. Acts as a training tool
2. Ensures that essential orientation steps are known, reducing errors

High-level activities with estimated participants and time commitments

The following is a process outline of how to create and implement project orientation checklist.

Number	Activity	Participants and Time Commitments
Create		

1.	Select examples of best orientation practices	VS&L Practitioners, 2 HRS
2	Create VS&L project orientation checklist	EDU Knowledge Manager, 20 HRS Specific VS&L Practitioners, 12 HRS
Implement		
3	Follow checklist when performing VS&L project orientation	All VS&L Practitioners

Project Closeout Checklist

Overview

Standard closeout checklist for new VS&L practitioners / projects. These are shared with all VS&L practitioners and used as a guideline during practitioner turn-over/ project completion.

Benefits / Value to VS&L Community of Practice

Project Closeout Checklist provides the specific benefits:

3. Acts as a training tool
4. Ensures that essential project completion steps are taken, reducing knowledge flight

High-level activities with estimated participants and time commitments

The following is a process outline of how to create and implement project closeout checklist.

Number	Activity	Participants and Time Commitments
Create		
1.	Select examples of best closeout practices	VS&L Practitioners, 2 HRS
2	Create VS&L project closeout checklist	EDU Knowledge Manager, 20 HRS Specific VS&L Practitioners, 12 HRS
Implement		
3	Follow checklist when performing VS&L project closeout	All VS&L Practitioners

Business Writing and Presentation Skills Training

Overview

Business writing and presenting are key skills which support knowledge sharing. All members of the VS&L Community of Practice should have a good foundation in these skills to allow them to share information easily.

Benefits / Value to VS&L Community of Practice

Business writing and communication skills training provide the specific benefit:

Information is presented in a format which is easy for the recipient to understand and gain the most important points

High-level activities with estimated participants and time commitments

The following is a process outline of how to create and implement business writing and presentation skills training

Number	Activity	Participants and Time Commitments
Create		
1.	Liaise with HR and Internal Communications department to discover whether there are existing communications and business writing guidelines, training courses or materials	EDU Knowledge Manager, 20 HRS
2	Organize local or virtual training session(s)	EDU Knowledge Manager, 4 HRS
Implement		
3	Sign up for training course	VS&L Participant, 15 Minutes
4	Prepare and run training course	CO Representation, 1 HR / Course
5	Attend training course	VS&L Participant, 1 HR

Appendix

Project Initiation

Workplan and Templates

<http:\\edu.care.org\\belo\\Shared Documents\\Project Initiation and Planning>

Status Reports

<http:\\edu.care.org\\belo\\Shared Documents\\Status Reports>

Knowledge Sharing Needs Assessment

Approach and Templates

<http:\\edu.care.org\\belo\\Shared Documents\\KS Needs Assessment\\Approach and templates>

Summary Assessment Findings

<http:\\edu.care.org\\belo\\Shared Documents\\KS Needs Assessment\\>

CARE Angola

<http:\\edu.care.org\\belo\\Shared Documents\\KS Needs Assessment\\CARE Angola>

CARE Malawi

<http:\\edu.care.org\\belo\\Shared Documents\\KS Needs Assessment\\CARE Malawi>

CARE Mozambique

<http:\\edu.care.org\\belo\\Shared Documents\\KS Needs Assessment\\CARE Mozambique>

CARE SA-Lesotho

<http:\\edu.care.org\\belo\\Shared Documents\\KS Needs Assessment\\CARE SA-Lesotho>

CARE Zambia

<http:\\edu.care.org\\belo\\Shared Documents\\KS Needs Assessment\\CARE Zambia>

CARE Zimbabwe

<http:\\edu.care.org\\belo\\Shared Documents\\KS Needs Assessment\\CARE Zimbabwe>

Regional Workshop

Final Workshop Presentation

<http:\\edu.care.org\\belo\\Shared Documents\\KS Regional Workshop\\Presentation and Agenda>

Day 1 Materials

<http:\\edu.care.org\\belo\\Shared Documents\\KS Regional Workshop\\Day 1 Materials>

Day 2 Materials

<http:\\edu.care.org\\belo\\Shared Documents\\KS Regional Workshop\\Day 2 Materials>

Knowledge Sharing Strategy

Pilot Implementation Plan

Technical Note – KS Processes

Technical Note – KS Application

Technical Note – Communication Planning

Note from the Field

<http:\\edu.care.org\\belo\\Shared Documents\\KS Strategy and Implementation\\>

Templates

<http:\\edu.care.org\\belo\\Shared Documents\\KS Strategy and Implementation\\Templates>

Appendix 9.7. Notes From the Field



Note from Southern Africa



The challenges and opportunities for sharing knowledge across Village Savings and Loans teams in Southern Africa

VS&L Program within Southern Africa

The Village Savings and Loans (VS&L) methodology has proven to be a successful ingredient to CARE's economic development programs. First piloted in Niger in 1991, the methodology has grown to become one of CARE's most significant programs in the area of economic development and livelihood security. The key to its success is found through its simple employment of a self-managed sustainable, member driven microfinance methodology for providing basic financial services to the poor. It has been particularly effective at reaching the rural poor, a constituency which many other microfinance programs struggle to reach.

The basic principles of VS&L is that members of a self-selected group, usually a group of 10-25 individuals in a community, form an association to save money, which is the source of loan capital from which they can borrow. This savings-based approach allows VS&L Associations to be self-managing and autonomous, overcoming the barriers to outreach typically faced by credit-oriented microfinance institutions.

Value of VS&L Programming

CARE's VS&L microfinance methodology now reach over 500,000 people across 18 countries in Africa, and a further 330,000 individuals in India. Over 70% of participants are women. While this degree of outreach is significant, there is tremendous potential both to extend the reach to more poor communities worldwide, and to increase its effectiveness in places where associations are already established. However, Lauren Hendricks, Director of the Economic Development Unit at CARE USA realized that achieving both of these aims would require more effective knowledge sharing (KS) and organizational learning.

Identifying the Need for Greater Knowledge Sharing, Learning, and Collaboration amongst VS&L Practitioners

As a result, CARE launched the Building a More Effective Learning Organization (BELO) VS&L Pilot project to facilitate more rapid, accurate and reiterative knowledge sharing among VS&L microfinance programs.

With funding through the Building a More Effective Learning Organization RFA presented by the Accelerated Microenterprise Advancement Project (AMAP) under USAID's Micro-enterprise Office, Lauren Hendricks brought in a team from Accenture Development Partnerships (ADP)¹ to carry out an assessment of knowledge sharing across the VS&L programs within Southern Africa.

¹ ADP is a not-for-profit unit within Accenture, the global management consultancy, which provides field-based business and technology services to the development sector on a non-profit, cost-recovery basis.



BELO VS&L Project Assessment Team on field visit to Savings Group in Nampula, Mozambique.

The BELO project was designed to be a bottom-up approach to knowledge sharing. The team worked closely with VS&L practitioners within CARE and its partner organizations to understand the current state of knowledge sharing practices and to create a plan of activities to be carried out in a Pilot phase.

Assessments took place at the grassroots level, to understand the challenges and successes of knowledge sharing at CARE Country Offices and sub offices. This allowed the ADP team to design a pilot implementation plan that addressed the needs of VS&L practitioners, and leveraged existing efforts.

Jen Byres, a consultant from the ADP team, explains: "The focus of the knowledge sharing pilot was on six country offices [Angola, South Africa & Lesotho, Malawi, Mozambique, Zambia and Zimbabwe] in Southern Africa where the need for knowledge sharing is high, and where significant barriers to such sharing exist. The goal of the pilot was to identify ways to increase sharing among multiple stakeholders – the CARE programs themselves, the broader microfinance industry in the sub-region and global microfinance knowledge sources."

In addition, the pilot was used to identify leading practices in knowledge management and organizational learning that already existed within the countries. These were then prioritized and can be replicated across the programming portfolio in all of the County Offices.

David Metnick, the ADP project manager elaborates: "One of the main targets of the pilot is to identify knowledge sharing activities which are tangible and bring real results within the pilot timeframe. We wanted to integrate activities into people's everyday work, so that knowledge sharing and collaboration became part of their way of working."

The team spent their first week in Atlanta at the CARE USA office, working with Lauren and other key stakeholders to develop a project plan and team website, leveraging the Microsoft SharePoint collaboration tool. They then traveled to the CARE Southern and Western Africa Regional Unit (SWARMU) office in Johannesburg, South Africa

where they were based for the majority of the initial assessment.



VS&L Groups in Malawi

Conducting the Knowledge Sharing Needs Assessment

A Knowledge Sharing Framework was leveraged to assess the following 9 components, within VS&L programming in the participating countries:

Strategy: The comprehensive plan to be implemented for managing organizational knowledge.

Governance: The structure and systems by which an organization controls and oversees its knowledge processes along best practices and the organization's strategic vision.

Monitoring and Evaluation: The methods to measure ongoing Knowledge Sharing activities and their link to organizational productivity.

Culture and Behaviors: The norms and attitudes toward Knowledge Sharing activities in an organization.

Policy and Incentives: The understanding of what compels Knowledge Sharing behaviors in the organization and the alignment of those behaviors to performance management practices.

Technology / Tools: The enablers of Knowledge Sharing behaviors and activities that accelerate time to competence and productivity within an organization.

Content: The content architecture and set of standard requirements to enhance content quality in an organization.

Communications: The channels of communication used to deliver and share knowledge in an organization.

Process: The standard work processes to support the systematic sharing and use of knowledge in an organization.

In order to understand the current knowledge sharing situation and desired future state, structured questions within the above 9 framework components were asked to approximately 60 key VS&L stakeholders.

Additionally, multiple field visits occurred across the participating countries.

In-country assessments were conducted in Angola, Malawi, Mozambique, and rural South Africa, as well as virtual workshops over the telephone with Zambia and Zimbabwe. The current knowledge sharing state in each country was assessed and illustrated against baseline knowledge sharing practices.

Ensuring Stakeholder Sponsorship

After completing a 9-week Assessment phase, the team consolidated and analyzed the results, which were presented at a two day regional workshop in Johannesburg. In addition to representation from the six participating countries, CARE representation and VS&L practitioners attended from Burundi, Niger, Rwanda, and Uganda. The purpose of the workshop was to synthesize knowledge sharing practices, VS&L themes for collaboration, and specific content for the Pilot phase.

Traditional presentations took up a small percentage of the workshop, as it was designed with multiple interactive sessions. Participants discussed the findings of the assessment and then worked together in collaborative teams to discuss and prioritize the specific knowledge sharing practices that would further VS&L programming goals.

The workshop was viewed by participants as a great success. One participant, Sophie Chitedze, Program Manager for VS&L in Malawi, stated, "The BELO workshop has brought great insight on the importance of knowledge sharing and learning in organizations. This is a topic that CARE needs to prioritize over the coming years not only in its village savings and loans program but across all sectors".

Tess Bayombong, Assistant Country Director for CARE Zimbabwe, elaborated, "The workshop has provided a broader & deeper understanding of the KS leading practices in relation to the work we do and the way we operate within the organization. It was interesting to note that these practices actually build and strengthen team spirit in the workplace."

Concluding with the Strategy

The team then returned to Atlanta to complete the Knowledge Sharing and Learning Strategy and Implementation Plan for the Pilot.

This initial phase of the BELO effort has resulted in tangible outcomes and a clear way forward for the remainder of the project. As a result of the assessment and workshop, over the next several months, CARE stakeholders agree that the following knowledge sharing activities will be carried out:

- Creation of a **VS&L Community of Practice**, to enable VS&L practitioners to communicate and network with each other on a regular basis
- Establishing core **Knowledge Sharing processes** with an identified **Knowledge Manager** to systematize knowledge sharing behavior
- Setting up a single, online **Knowledge Management Application**, to enable the collection and sharing of relevant knowledge
- **Integrating knowledge sharing objectives** into participating VS&L practitioners' **Individual Operating Plans**, to allow better integration of tangible knowledge sharing actions into an individual's work and to facilitate its measurement
- Creating a VS&L Pilot **Communication Plan** to share required information at timely intervals

The ADP and CARE team have developed project plans as well as a range of tools and templates to help CARE stakeholders carry forward these activities.

There is strong support for the pilot, as Bhekinkosi Madolo, Economic Empowerment, CARE South Africa-Lesotho, explains: "What has been useful to me is to realize that the problems we are experiencing are not unique to South Africa. Knowledge sharing can contribute to better programming and reduce the time spent on project development. Countries may have the same problems but experience them differently. The challenge is then in the adaptation of solutions developed in a context completely different to one's own situation"

The Pilot implementation is ongoing, and the momentum is continuing. David Metnick explains: "One of our observations from the knowledge sharing assessment was the overwhelming desire of people at all levels of CARE and the partner organizations to share knowledge and work collaboratively. In some cases this was already happening, but what was absent was the structure and process in place to facilitate better and ongoing organizational learning for all."

Contact Information

For more detailed information from CARE, please contact Lauren Hendricks at lhendricks@care.org.

To contact the BELO VS&L Accenture Development Partnerships Project Team, please contact David Metnick, Washington, D.C. at david.t.metnick@accenture.com or Jen Byres, London, U.K. at jennifer.a.byres@accenture.com.

Appendix 9.8. Communications Plan

CARE BELO VS&L Communications Plan

Version: 2.0

Document Author: Sybil Chidiac
Date Created: October 2006
Reviewed By: Steering Committee
Authorized By: Knowledge Manager
Distribution: BELO Practitioners

Document Control

Document Holder

Until this document is approved, it is under the control of the author.

Change History

Version	Date	Comment
1.0	September 2006	Document Template
2.0	October 2006	1 st Draft

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Introduction

The BELO project seeks to build on and complement our existing approach to sharing and learning from our Village Savings and Loan programs in Southern Africa and the work of others. As one of the largest NGO-facilitated village savings and loan portfolios in sub-Saharan Africa and having developed a unique methodology for these programs, CARE is well positioned to capitalize on the explicit and tacit knowledge that resides in the program staff. With the current organizational strides to improve global programmatic knowledge management, sharing, and learning processes and the current process of developing a long-term strategy for knowledge management for the wider organization, the BELO project presents viable processes and applications to move the overall agenda forward.

The overall goal of this project is to facilitate more rapid, accurate, and reiterative knowledge exchange among six southern Africa microfinance programs in CARE, between these programs and the broader microfinance industry in the sub-region, and between the southern Africa microfinance community and global knowledge sources. Over the course of the BELO project focus will be emphasized on six countries –Angola, Malawi, Mozambique, South Africa/Lesotho, Zambia, and Zimbabwe.

Background

The purpose of this document is to outline the communications that will be done for the Building More Effective Learning Organizations (BELO) Pilot project throughout its duration. It can be continued as an ongoing document as required.

Objective

The communication plan document defines the approach for effective communication in the project. The objective is to ensure the conveyance of the right message, by appropriate sender(s), to necessary audience(s), through appropriate channels and vehicles. Successful implementation will positively affect the work environment and relationships with sponsoring organizations, employees and other stakeholders. The plan includes communication owners, responsibility definitions, and detailed strategies for execution.

Communication Matrix

Message	Purpose	Vehicle	Audience	Subject Matter	Desired Outcome	Developer/ Content Provider	Approver (s)/Facilitator	Distribution Due Date(s) / Timeframe
Review Team								
Leadership review meetings	To review strategic direction of pilot	Meeting/ Call	EDU Director SWARMU DRD			EDU Knowledge Manager & EDU Director	EDU Director	Quarterly
Steering Committee	To discuss status/issues	Meeting/ Call	EDU Director EDU Knowledge Manager Specific VS&L practitioners (Rotate) IT Leadership	Discuss benefit realization Monitor project performance issues Discuss and approve changes to pilot		EDU Knowledge Manager with input from Specific VS&L practitioners	EDU Director	Monthly, then quarterly
Project Team Meetings	To discuss progress	Virtual meeting	VS&L practitioners EDU Knowledge Manager EDU Director IT Coordinator	Monthly Status		EDU Knowledge Manager	EDU Director	Monthly
VS&L Pilot Communications								
<i>Initial Collection of Knowledge Content</i>	Resource Sharing	BELO site	VS&L practitioners	VS&L delivery methodology and templates	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by November 15 th , 2006
<i>Initial Collection of Knowledge Content</i>	Resource Sharing	BELO site	VS&L practitioners	VS&L prior proposals and proposal templates	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by November 15 th , 2006
<i>Initial Collection of Knowledge Content</i>	Resource Sharing	BELO site	VS&L practitioners	VS&L project plans/ workplans	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by November 15 th , 2006

Message	Purpose	Vehicle	Audience	Subject Matter	Desired Outcome	Developer/ Content Provider	Approver (s)/Facilitator	Distribution Due Date(s) / Timeframe
<i>Initial Collection of Knowledge Content</i>	Resource Sharing	BELO site	VS&L practitioners	VS&L M&E metrics and approaches	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by November 15 st , 2006
<i>Initial Collection of Knowledge Content</i>	Information Knowledge	BELO site	VS&L practitioners	CARE internal-facing lessons learned	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Initial Collection of Knowledge Content</i>	Information Knowledge	BELO site	VS&L practitioners	List of current VS&L projects	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by November 15 st , 2006
<i>Initial Collection of Knowledge Content</i>				Industry News	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by November 15 st , 2006
<i>Initial Collection of Knowledge Content</i>	Resource Sharing	BELO site	VS&L practitioners	Profiles (expertise, areas of focus) of CARE VS&L practitioners	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by October 31 st , 2006
<i>Initial Collection of Knowledge Content</i>	Resource Sharing	BELO site	VS&L practitioners	Profiles of non-CARE VS&L practitioners	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by November 15 st , 2006
<i>Initial Collection of Knowledge Content</i>	Information Sharing	BELO site	VS&L practitioners	Opportunities/leads relating to VS&L initiatives	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Initial Collection of Knowledge Content</i>	Information Knowledge	BELO site	VS&L practitioners	Country profiles with cultural indicators	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Initial Collection of Knowledge Content</i>	Resource Sharing	BELO site	VS&L practitioners	Qualitative data collection templates	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	

Message	Purpose	Vehicle	Audience	Subject Matter	Desired Outcome	Developer/ Content Provider	Approver (s)/Facilitator	Distribution Due Date(s) / Timeframe
<i>Initial Collection of Knowledge Content</i>	Resource Sharing	BELO site	VS&L practitioners	Case Study Templates	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Staff Development/ Capacity Building</i>	Resource Sharing	BELO site	VS&L practitioners	Communicating with Impact/ Business writing and facilitation tips	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Staff Development/ Capacity Building</i>	Resource Sharing	BELO site	VS&L practitioners	Staff Development Strategy Examples	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Initial Collection of Knowledge Content</i>	Information Sharing	BELO site	VS&L practitioners	VS&L marketing videos	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Staff Development/ Capacity Building</i>	Resource Sharing	BELO site	VS&L practitioners	List of VS&L training opportunities (Instructor-led or Virtual)	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Monitoring and Evaluation</i>	Resource Sharing	BELO site	VS&L practitioners	VS&L impact metrics and approaches	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Public Relations/ Marketing documents</i>	Information Sharing	BELO site	VS&L practitioners	Human interest stories	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Knowledge Content</i>	Resource Sharing	BELO site	VS&L practitioners	Documentation on VS&L integration to MFIs	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by October 31 st , 2006
<i>Knowledge Content Template</i>	Resource Sharing	BELO site	VS&L practitioners	Status Reporting templates	Content uploaded and available	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by October 31 st ,

Message	Purpose	Vehicle	Audience	Subject Matter	Desired Outcome	Developer/ Content Provider	Approver (s)/Facilitator	Distribution Due Date(s) / Timeframe
					on site			2006
<i>Knowledge Content Template</i>	Resource Sharing	BELO site	VS&L practitioners	Budget Templates (w/ cost share)	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by October 31 st , 2006
<i>Knowledge Content Template</i>	Resource Sharing	BELO site	VS&L practitioners	Project reporting templates (quarterly/ semi-annually)	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by October 31 st , 2006
<i>VS&L Tool</i>	Resource Sharing	BELO site	VS&L practitioners	VS&L Baseline Tool	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by October 31 st , 2006
<i>VS&L Tool</i>	Resource Sharing	BELO site	VS&L practitioners	M&E protocol	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by October 31 st , 2006
<i>Cross Sectoral Proposals</i>	Resource Sharing	BELO site	VS&L practitioners	Proposals on integrating VS&L with HIV/AIDS programs	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Cross Sectoral Proposals</i>	Resource Sharing	BELO site	VS&L practitioners	Proposals on integrating VS&L with Market Access and OVC	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Cross Sectoral Proposals</i>	Resource Sharing	BELO site	VS&L practitioners	Proposals on integrating VS&L with Food Security	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Cross Sectoral Proposals</i>	Resource Sharing	BELO site	VS&L practitioners	Proposals on integrating VS&L with Water and Sanitation	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Cross Sectoral Proposals</i>	Resource Sharing	BELO site	VS&L practitioners	Proposals on integrating VS&L with Agriculture	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	

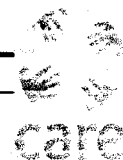
Message	Purpose	Vehicle	Audience	Subject Matter	Desired Outcome	Developer/ Content Provider	Approver (s)/Facilitator	Distribution Due Date(s) / Timeframe
<i>Cross Sectoral Documentation</i>	Knowledge Dissemination	BELO site	VS&L practitioners	Lessons learned on various cross sectoral linkages	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Knowledge Sharing Resource</i>	Knowledge Dissemination	BELO site	VS&L practitioners	Frequently Asked Questions document on VS&L methodology	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Cross Sectoral Proposals</i>	Knowledge Dissemination	BELO site	VS&L practitioners	Project concept note for VS&L/ Agriculture/ Women farming	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>VS&L Tool</i>	Knowledge Dissemination	BELO site	VS&L practitioners	Impact Assessment tools and indicators	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>Knowledge Content Template</i>	Knowledge Dissemination	BELO site	VS&L practitioners	Templates for documenting lessons learned	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	
<i>VS&L Tool</i>	Knowledge Dissemination	BELO site	VS&L practitioners	Business Training Manual	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by October 31 st , 2006
<i>Knowledge Sharing Resource</i>	Knowledge Dissemination	BELO site	VS&L practitioners	Roles of VS&L National Steering Committee	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by October 31 st , 2006
<i>Knowledge Sharing Resource</i>	Knowledge Dissemination	BELO site	VS&L practitioners	Technical Support materials for roll out of national VS&L program	Content uploaded and available on site	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by October 31 st , 2006
<i>Knowledge Sharing Resource</i>	Knowledge Dissemination	BELO site	VS&L practitioners	Documentation on partnerships and creation of	Content uploaded and available	BELO VS&L Practitioners	EDU Knowledge Manager	Content needs to be sent to Sybil Chidiac by October 31 st , 2006

Message	Purpose	Vehicle	Audience	Subject Matter	Desired Outcome	Developer/ Content Provider	Approver (s)/Facilitator	Distribution Due Date(s) / Timeframe
				local VS&L – specialized NGOs	on site			2006
Input required from EDU/ SWARMU/ ER								
<i>Message 1</i>								
<i>Message 2</i>								

Revision History

Date	Version	Description	Author

Appendix 9.9. Knowledge Sharing Processes



Technical Note

VS&L Community of Practice: Knowledge Sharing Processes

Overview

In order to more effectively support VS&L knowledge content sharing, baseline knowledge sharing (KS) processes should be in place. Each high-level process can be expanded upon and integrated into EDU and VS&L practitioner practice during the BELO Pilot phase.

This technical note will highlight the following for each process:

- Name of Process
- Process Definition
- Example

Please note: detailed steps for implementation are included in the implementation plan.

Process Table

The following table outlines recommended VS&L knowledge sharing processes (process number, name, definition, and examples) to implement during the BELO VS&L Pilot phase.

Number	Name	Definition	Examples
1.0	Contribute VS&L Content & Expertise	Add tacit and explicit knowledge to the VS&L Knowledge Management Tool (website) via contributions, discussion participation, and request responses	<ul style="list-style-type: none"> • Publish M&E Reports • Respond to discussion topic about VS&L themes
2.0	Accept Knowledge Contributions	Review knowledge contributions for data integrity, clarity and relevant content	<ul style="list-style-type: none"> • Work with VS&L practitioner to clarify title and abstract for better searches
3.0	Locate Knowledge	Find desired knowledge within the system	<ul style="list-style-type: none"> • Search site for all recent material on MFI-linking in library, discussions, and requests • Browse all knowledge relevant to Streamlined MIS in document library • Follow links to external Microfinance sites for latest updates

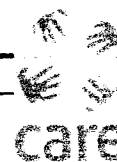
Number	Name	Definition	Examples
4.0	Request Information	Log a request for new data or other EDU, Regional or other expert assistance	<ul style="list-style-type: none"> Request other country M&E data Request supporting material for new proposal
5.0	Route Requests for Information	Send requests to appropriate VS&L practitioner – “expert”	<ul style="list-style-type: none"> EDU Knowledge Manager to forward request to specific VS&L practitioner who operates in an Urban context
6.0	Maintain Knowledge	Review EDU knowledge base across all areas for data integrity and consistent content	<ul style="list-style-type: none"> EDU Knowledge Manager to identify and resolve folder redundancies
7.0	Moderate Discussion	Review discussion updates to clarify and respond as appropriate	<ul style="list-style-type: none"> EDU Knowledge Manager to alert expert to respond to posted topic/question in discussion
8.0	Execute Metrics, Measures & Reporting	Establish, design and analyze measurements to determine knowledge system and organization effectiveness	<ul style="list-style-type: none"> EDU Knowledge Manager to reward people who use the knowledge system effectively EDU Knowledge Manager to discuss design improvement initiatives based on analysis of metrics
9.0	Maintain Taxonomy and Categorization	Collect input and design updates to form and folder categorization	<ul style="list-style-type: none"> EDU Knowledge Manager to create new category to support new VS&L theme to be studied and analyzed for benefits
10.0	Archive Knowledge	Review and monitor expired knowledge contributions to move to archival ‘holding’ area	<ul style="list-style-type: none"> EDU Knowledge Manager to fulfill requests for retrieving archived items
11.0	Retire Knowledge	Remove outdated material from knowledge system	<ul style="list-style-type: none"> EDU Knowledge Manager to allow searches to be streamlined to only include current material

Change History

Version #	Date	Author	Comments
1.0	09.19.2006	BELO Assessment Team	Initial Version

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Appendix 9.10. Knowledge Sharing Application



Technical Note

VS&L Community of Practice: Knowledge Sharing Application

Overview

In order to more effectively support the Village Savings and Loans (VS&L) Building an Effective Learning Organization (BELO) Pilot, a standard Knowledge Sharing (KS) application can be in place.

This technical note will highlight the following areas:

- Benefits / value of standard KS application
- Goals of the standard KS application
- Navigation pane
- Contributing Knowledge
- Finding Knowledge
- Requesting Knowledge
- Retiring Knowledge
- Soliciting Feedback
- Creating Orientation / Tutorial
- Clearly defined Application / Technical Support
- KS Application Roles

Please note: detailed steps for implementation are included in the implementation plan.

About the future KS Application

The CARE Economic Development Unit (EDU) KS Application can provide a single entry to knowledge assets that CARE, partner organization and external VS&L and microfinance practitioners use to design and implement VS&L programs. The KS Application shall be as a "one-stop-shop" for VS&L practitioner knowledge needs, whether they need templates to help craft a project proposal with VS&L components, information about the streamlined VS&L MIS, sample workplans for planning a project, contact information for key VS&L practitioners in a specific context or practice area and other tools that can help VS&L practitioners effectively do their work.

The proposed CARE EDU KS Application, leveraging Microsoft SharePoint technology (MSS 2.0) is an evolution of the EDU Technical Resource Center, located at www.care.ca/libraries/edu. It can continue to grow after initial roll-out, not only in the functionality it offers, but in the wealth of knowledge it contains.

EDU expects the KS Application to become an intrinsic part of the way VS&L practitioners work.

The following are goals of the EDU KS Application:

- Enable VS&L practitioners to quickly find information they need
- Help VS&L practitioners achieve project goals more efficiently
- Bring together VS&L Community of Practice to discuss common themes
- Relevant information stored in one central location
- Ability to locate other VS&L practitioners
- Enable VS&L practitioners to display program successes to a broader audience

Setting-up the Navigation Pane

The navigation pane of the EDU KS Application should provide a simple-to-use, clear list of topics. A list of topic page categories is listed. When you click one of the categories, users can be taken to a 'menu' page which further breaks down the category.

Suggested Navigation Pane:

Content in the EDU KS Application can be organized into multiple practice areas, whereas VS&L is one of the practice areas:

Practice Areas:

- VS&L
- Capital Markets
- Additional practice areas

Within each of the practice areas, the content is further categorized by topics and related sub-topics. The following is an example for the VS&L practice area:

- Practice Area - VS&L

Restricted Links

- Topic – VS&L Project Lifecycle
 - Subtopic – Proposal Phase
 - Subtopic – Project Delivery Methodology and Templates
 - Subtopic – Training Manuals
 - Subtopic – Monitoring and Evaluation and MIS Tool
 - Subtopic – Ongoing Project Management (Project Plans, Templates)
- Topic – Project Profiles (List of VS&L projects within countries)
- Topic – Lessons Learned Documents
- Topic – Staff Development (IOP Supplementing, etc.)
- Topic – Training (Documents and Links to CARE Academy)
- Topic – COP Contact Lists (to maintain preferred consultants, vendors, etc.)
- Topic – COP Discussions

Unrestricted Links

- Topic – VS&L Partner Organizations (List of partner organizations within countries or globally)
- Topic – External News / Content
- Topic – External Publications
 - Subtopic – Industry News
 - Subtopic – Case Studies
 - Subtopic – Marketing Collateral (Videos, Brochures, etc.)
- Topic – External Links
- Topic – COP Expert Locator
- Topic – COP Calendar

This structure is carried throughout the entire EDU KS Application. Users can use it to navigate through the application, to structure contributions and discussions, and more. The topic structure lets users easily find CARE and external knowledge capital.

For each topic and subtopic, an Archive folder will exist, whereas the EDU Knowledge Manager can archive files based on a set of pre-defined rules.

In addition to specific topic and subtopic links that direct users to file management sections of the KS Application, the application can link to other areas for use by the VS&L COP:

COP – Discussions

Access to a managed set of discussions where VS&L practitioners can participate in ongoing discussions and browse earlier ones.

COP – Contact Lists

Access to a managed set of contacts for CARE VS&L practitioners to obtain preferred consultants, vendors, etc.

COP – Expert Locator

Access to specific, personal information of other VS&L practitioners. It is the ongoing responsibility of VS&L practitioners to update their personal information, as well as those of practitioners in the same office without access to the KS Application.

Suggested Expert Profile Fields

- *Name (Text box)
- *Country (Drop-down list box)
- *Language Preference (Drop-down list box)

- *Email (Text box)
- Phone (Text box)
- Education / Areas of Study (Text box)
- VS&L Project Name (Text box)
- VS&L Context (Rural, Urban, etc.) (Drop-down list box)
- Program Linkage (HIV / AIDS, Agriculture, etc.) (Drop-down list box)

*=Required Fields

COP – Calendar

Access to calendar function, which provides a single resource to ongoing VS&L events (i.e. local training, workshops, specific pilot activities, etc.).

Contributing Knowledge

The types of knowledge must be clearly defined by the EDU Knowledge Manager for inclusion in the KS Application and communicated to the VS&L COP. The following questions should be clearly answered for application users:

- What can VS&L practitioners contribute?
- When can VS&L practitioners contribute?
- How can VS&L practitioners contribute?

If content has been identified by a user to be contributed, the user can use the upload function in the document management portion of the site. Users should also have the ongoing option to email the EDU Knowledge Manager with the attachment and required fields.

Suggested Contribution Form Information

- Title (Text box)
- Contribution Type (Drop-down list box)
- Brief Description (Text box)
- Usage Restrictions (Drop-down list box)
- Additional Comments (Text box)
- Attachment (Text box)
- Contacts (Text box)
- Project Name (Text box)
- Country (Drop-down list box)
- Created By (Text box)
- Language (Drop-down list box)

Suggested Usage Restrictions Labels

- Unrestricted Use
- Restricted: Contact Approval Required Before Use
- CARE Internal Use Only

Finding VS&L Knowledge

Standard Search Capability

The search function can be utilized to find relevant content in the KS Application. In MSS 2.0, search capabilities are fairly limited, however users can search based on key words classified in the properties function of each uploaded file. For example, users can enter specific themes, contexts, or countries. Upon returning search results, the user has the ability to click on the link and navigate to the specific file.

Browsing the System

Access to the list of topics / subtopics on the KS Application landing page. When you click one of the categories, users can be taken to a 'menu' page which further breaks down the category.

Requesting VS&L Knowledge

A "Request Knowledge" button or hyperlink at the top of the page can be created and leveraged. This can route the user to complete a simple form. The EDU Knowledge Manager can assess the request and respond to the VS&L practitioner as soon as possible.

Suggested Form Fields

- Name (Text box)
- Country (Drop-down list box)
- Request Details (Text box)

Removing VS&L Knowledge

If content has been identified by a user to be removed, a "Remove Knowledge" button or hyperlink at the top of the page can be leveraged. This can route the user to complete a simple form. The EDU Knowledge Manager can assess the request and respond as soon as possible. Note, documents should only be deleted by dedicated EDU personnel.

Suggested Form Fields

- Name (Text box)
- Country (Drop-down list box)
- File Name (Text box)
- Request Details (Text box)

Soliciting Feedback

A "Provide Feedback" button or hyperlink, as well as explicit instructions to let EDU know how it can make the application more useful to practitioners can be available.

Example of hyperlink: <mailto:EDU-KS@care.org>

Example of message: "Please let us know how we can make the EDU KS Application more useful to you. Email us at EDU-KS@care.org."

Creating a KS Application Orientation / Tutorial

An orientation / tutorial on sharing knowledge sharing within EDU and an overview of the EDU KS Application can be created with the following learning goals:

- Understand the importance of knowledge sharing to VS&L practice
- Learn what knowledge sharing resources are available via the EDU KS Application and how to find and use them

This can be accomplished by following a simple set of rules:

- Leverage existing Web-based training (WBT) templates from L&OD unit.
- Create low-density WBT using HTML or PPT.
- Ensure all screen images of KS application are compressed to minimize file size.
- For each page on the KS Application, highlight key components and include simple-to-follow directions.

Clearly Defined Application / Technical Support

It is important to clearly define and market the following KS Application technical support areas:

- New account creation
- Password reset
- Application maintenance hours (identified system down-time)
- Access to KS Application via HTTP (higher-fidelity)
- Access to KS Application via FTP (lower-fidelity)
- File Size limitations
- Specified contact / help-desk information for technical support issues

Version #	Date	Author	Comments
1.0	09.19.2006	BELO Assessment Team	Initial Version

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Appendix 9.11. Rules and Responsibilities for CoP

Building a More Effective Learning Organization (BELO)

Community of Practice Roles and Responsibilities

Introduction

The BELO project seeks to build on and complement our existing approach to sharing and learning from our Village Savings and Loan programs in Southern Africa and the work of others. As one of the largest NGO-facilitated village savings and loan portfolios in sub-Saharan Africa and having developed a unique methodology for these programs, CARE is well positioned to capitalize on the explicit and tacit knowledge that resides in the program staff. With the current organizational strides to improve global programmatic knowledge management, sharing, and learning processes and the current process of developing a long-term strategy for knowledge management for the wider organization, the BELO project presents viable processes and applications to move the overall agenda forward.

The overall goal of this project is to facilitate more rapid, accurate, and reiterative knowledge exchange among six southern Africa microfinance programs in CARE, between these programs and the broader microfinance industry in the sub-region, and between the southern Africa microfinance community and global knowledge sources. Over the course of the BELO project focus will be emphasized on six countries –Angola, Malawi, Mozambique, South Africa/Lesotho, Zambia, and Zimbabwe.

Key Desired Outcomes of the BELO Project

The broad, strategic outcomes that this initiative will target are:

1. Improvement of cross-program contact and coordination, both within CARE and between CARE, its partners, and the wider microfinance community of practitioners;
2. Identification and dissemination of best practice standards in microfinance in the sub-region, particularly those relating to intersectoral approaches for the purposes of enhancing livelihood security of the poor;
3. Creation of broader learning pathways – both vertical and horizontal -- in CARE and a formative evaluation of their effectiveness, establishing for the first time in the organization an objective set of indicators and criteria for assessing the quality, speed, cost-effectiveness, and strategic importance of these efforts

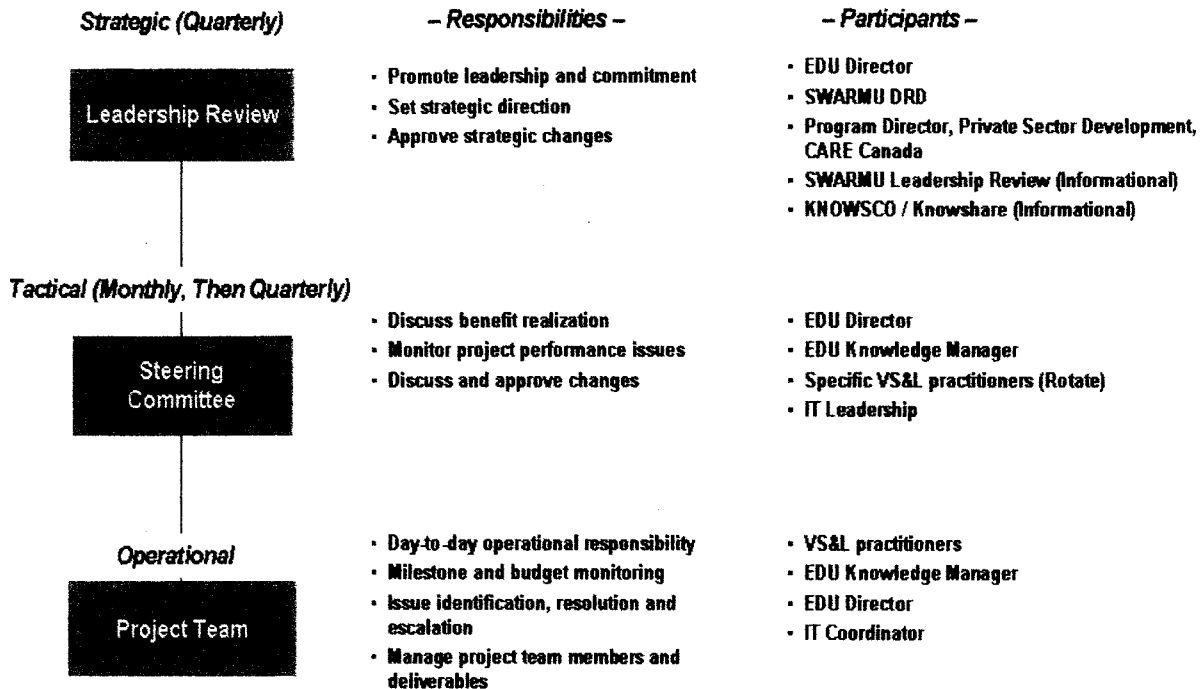
More concretely and specifically, this 12 month learning and knowledge management project will result in:

- Improved capacity to learn from field operations and to incorporate that learning into operations in other countries both in CARE and partner organizations
- Enhanced and sustainable capacity in CARE and partner organizations to integrate industry learning and innovation into program designs
- Improved ability to document and replicate innovations in program design
- Better ability to present data about program successes and impacts that are otherwise unavailable to CARE but also the wider microfinance community
- Increased ability to document lessons learned in ways that others can easily grasp

- Enhanced competence in CARE and its local partners in six technologically marginalized southern African countries to share best practices with the microfinance industry.

Overall Governance Structure for BELO Project

The governance framework facilitates a collaborative relationship among accountable groups based on frequent and open communications.



Role of the BELO Community of Practice Members

The role of the Community of Practice members (or project team as noted above in the governance diagram) is to contribute knowledge deemed necessary for the advancement of Village Savings and Loan programming.

Responsibilities of the BELO Community of Practice Members

The responsibilities of the Community of Practice members are to share concerns, problems, documents, deliverables and a passion about the Savings Led Microfinance methodology through four building blocks.

1. Establishment of VS&L Community of Practice (CoP)
2. Establishment of Knowledge Sharing Processes
3. Establishment of Knowledge Sharing Application (VS&L site edu.care.org)
4. Establishment of Knowledge Manager

- Share ongoing written information and practical experience regarding VS&L (by providing content as identified on the communications plan/ calendar and contributing perspectives to discussion forums)
- Assist fellow CoP members to resolve problems
- Champion knowledge sharing practices in respective country offices/ programs/ projects
- Demonstrate how knowledge resources are being leveraged
- Define format of e-conferences
- Coordinate, mainstream and synergize program innovations or lessons learned across countries

Membership

The Community of Practice will be comprised of VS&L practitioners of the BELO project officially representing 6 Southern African countries: Angola, Malawi, Mozambique, Zambia and Zimbabwe. New members to the VS&L programming in these countries should be added onto the Community of Practice and be formally introduced to the rest of the CoP. Specific guidelines on how to introduce new members will be provided in the near future. In addition to the practitioners from the 6 country offices, other countries may join the pilot as deemed by the Steering Committee. Burundi, Niger, Rwanda and Uganda are countries that were added to the CoP from the Johannesburg workshop.

Duration of Community of Practice

The Community of Practice will be a ongoing and ever growing community. The committee will last through the duration of the project and plans to expand after the project period.

Key Project Contacts

Sybil Chidiac
BELO Project Knowledge Manager and Economic Development Unit Technical Advisor of
Knowledge Sharing and Learning
schidiac@care.org

Lauren Hendricks
Economic Development Unit Director
lhendricks@care.org

Appendix 9.12. Rules and Responsibilities for SC

Steering Committee Roles and Responsibilities

Building a More Effective Learning Organization (BELO)

Introduction

The BELO project seeks to build on and complement our existing approach to sharing and learning from our Village Savings and Loan programs in Southern Africa and the work of others. As one of the largest NGO-facilitated village savings and loan portfolios in sub-Saharan Africa and having developed a unique methodology for these programs, CARE is well positioned to capitalize on the explicit and tacit knowledge that resides in the program staff. With the current organizational strides to improve global programmatic knowledge management, sharing, and learning processes and the current process of developing a long-term strategy for knowledge management for the wider organization, the BELO project presents viable processes and applications to move the overall agenda forward.

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Key Desired Outcomes of the BELO Project

The broad, strategic outcomes that this initiative will target are:

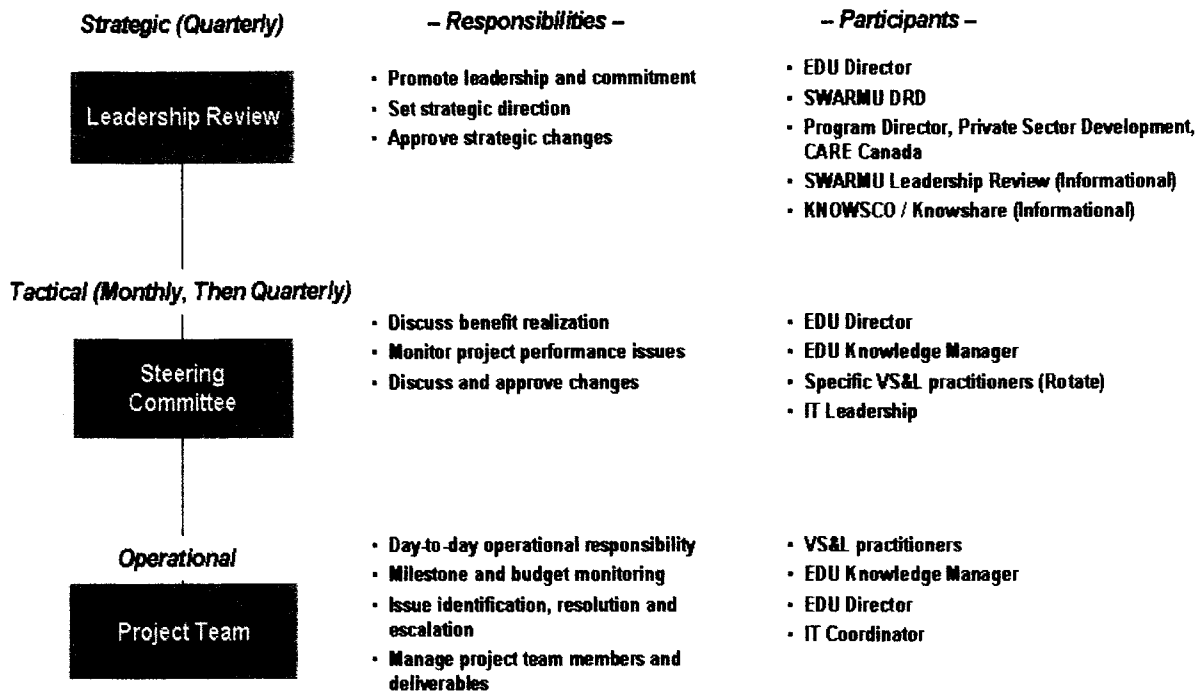
1. Improvement of cross-program contact and coordination, both within CARE and between CARE, its partners, and the wider microfinance community of practitioners;
2. Identification and dissemination of best practice standards in microfinance in the sub-region, particularly those relating to intersectoral approaches for the purposes of enhancing livelihood security of the poor;
3. Creation of broader learning pathways – both vertical and horizontal -- in CARE and a formative evaluation of their effectiveness, establishing for the first time in the organization an objective set of indicators and criteria for assessing the quality, speed, cost-effectiveness, and strategic importance of these efforts

More concretely and specifically, this 12 month learning and knowledge management project will result in:

- Improved capacity to learn from field operations and to incorporate that learning into operations in other countries both in CARE and partner organizations
- Enhanced and sustainable capacity in CARE and partner organizations to integrate industry learning and innovation into program designs
- Improved ability to document and replicate innovations in program design
- Better ability to present data about program successes and impacts that are otherwise unavailable to CARE but also the wider microfinance community
- Increased ability to document lessons learned in ways that others can easily grasp
- Enhanced competence in CARE and its local partners in six technologically marginalized southern African countries to share best practices with the microfinance industry.

Overall Governance Structure for BELO Project

The governance framework facilitates a collaborative relationship among accountable groups based on frequent and open communications.



Role of the Steering Committee Members

The role of the steering committee members is to provide authoritative support to the BELO project through the review of key communications, processes and the VS&L SharePoint site. The steering committee members will provide this support, review and validate to the BELO Knowledge Manager.

Responsibilities of the Steering Committee Members

The responsibilities of the steering committee members are captured in the following points:

- Assess the impact of key program issues uncovered through the communication process
- Provide authoritative support for key communication initiatives
- Review and approve key action items resulting from program communication effectiveness assessments
- Seek program synergy by validating the projects and program deliver consistent, well-timed program messages and results.
- Review the VS&L SharePoint site
- Assess, monitor and validate relevant content for VS&L SharePoint site

- Assess, monitor and validate the relevant knowledge content themes for VS&L SharePoint site.
- Attend virtual meetings on a monthly basis

Number of Members

The Steering Committee will be comprised of seven members. Three of the members will remain throughout the duration of the committee: EDU Director, EDU Knowledge Manager and IT Leadership. The remaining four members will be comprised of participating BELO pilot project Country Offices.

Key Principles of Committee Composition

The Steering Committee seeks to accurately represent the VS&L practitioners of the BELO project. When possible, equal male and female members will be elected to serve on the committee. Practitioners will be nominated or should self select themselves to the committee when their experiences meet the relevance of the project's current focus.

Frequency of Committee Virtual Meetings

The Steering Committee will meet virtually (through MSN chat, Skype or conference call) once a month. Three will be the minimum number of rotating members that need to be present at every monthly meeting to constitute quorum. If two or more rotating members are unable to attend the meeting, the meeting will need to be rescheduled at the committee's earliest convenience.

Duration of Committee

The Steering Committee will be a rotating committee. The committee will last through the duration of the project. The term of each committee member will last for four months except for the initial two months where two members will serve two months. Every two months, two new members will be added to the committee. Practitioners will not be able to serve two consecutive terms.

Key Project Contacts

Sybil Chidiac

BELO Project Knowledge Manager and Economic Development Unit Technical Advisor of Knowledge Sharing and Learning
schidiac@care.org

Lauren Hendricks

Economic Development Unit Director
lhendricks@care.org

Appendix 9.13. Snapshot of Knowledge Sharing Resource Center Website

Appendix 9.13. Snapshot of Knowledge Sharing Resource Center Website



Home - Economic Development Unit - Windows Internet Explorer

http://edu.care.org/default.aspx

Google Go Bookmarks 6 blocked Check AutoLink Send to Settings


Home - Economic Development Unit

Page Tools



Economic Development Unit

Home Documents and Lists Create Site Settings Help

 Economic Development Unit Home

Sign In

Quick Launch

BELO Project Pilot underway! 10/23/2006 2:07 PM
by Sybil Chidiac
The Building More Effective Learning Organization project seeks to build on and complement our existing approach to sharing and learning from our Village Savings and Loan Programs in Southern Africa and the work of others.
The...
■ Add new announcement

There are currently no upcoming events. To add a new event, click "Add new event" below.

■ Add new event

Consumer Code of Conduct 10/23/2006 2:33 PM
by Sybil Chidiac

South Asia Tsunami Microfinance Investment Fund 10/23/2006 2:13 PM
by Sybil Chidiac

Savings-Led Financial Services Working Group 10/23/2006 2:12 PM
by Sybil Chidiac

Building a More Effective Learning Organization 10/23/2006 2:12 PM
by Sybil Chidiac
■ Add new announcement

Subject


Posted By

Babel Fish Sentence Translator
BELO Project Assessment Site - Restricted Access
Village Savings and Loan BELO Project Working Site
http://www.care.org
■ Add new link

There are currently no upcoming events. To add a new event, click "Add new event" below.

■ Add new event

To translate this page, click a flag!



start

Home - Economic Dev...

Local intranet 100% 10:30 AM

Appendix 9.14. Snapshot of Expert Locator Tool

VS&L Expert Locator

VS&L Experts List - Windows Internet Explorer

http://edu.care.org/vsl/Lists/Contacts/AllItems.aspx

Go Google | C | Go | Bookmarks | 7 blocked | Check | AutoLink | Send to | Settings

Notes from the Field: MicroLi... VS&L Experts List | Blackboard Academic Suite | SEEP

care

Economic
Development
Unit

Home Documents and Lists Create Site Settings Help

Village Savings and Loan
VS&L Experts List

Select a View

This list details the contact information for VS&L practitioners inside and outside of CARE. Please feel free to add consultants you use remembering to detail their country or region of experience!

[New Item](#) | [Filter](#) | [Edit in Datasheet](#) | [Link to Outlook](#) | [Import Contacts](#)

First Name	Last Name	Country/ Region	Job Title	E-mail Address	Business Phone	Mobile Phone	Fax Number	Sky
Judith	Aguga	Uganda	Economic Development Sector Manager	Agugaacon@careuganda.org				
Hugh	Allen	Global	VS&L Consultant	hugh@vsla.net	49 (0)212 247 2435		49 (0)212 818091	
Maria Tess	Bayombong	Zimbabwe	Assistant Country Director	Tessba@carezimbabwe.org				
Michelle Denise	Carter	Mozambique	Assistant Country Director	mcarter@care.org.mz	+(258) 82 9650930			

Local intranet 100%

Start | Sent Items - Microsoft | 2 Windows Explorer | 4 Microsoft Office | VS&L Experts List - W | 4:55 PM

Appendix 9.15. Monitoring Plan

Monitoring Plan – CARE Knowledge Resource Center

Sybil Chidiac

Project Outputs	Indicators	Data source	Method of data collection	Person Responsible	Time frame
Meetings with IT staff and Consultants	#/ frequency of knowledge manager interaction with IT staff and consultants	Knowledge Manager Outlook calendar	Microsoft Outlook calendar events	Knowledge Manager	1 st Quarter
Needs Assessment	Strategy of project implementation defined	Strategy document	Findings consolidated at Johannesburg workshop	Knowledge Manager	1 st Quarter
Creation of resource center site	Resource center site accessible on WWW	Resource center site	Type in http://edu.care.org on WWW	Knowledge Manager and IT	1 st Quarter
Launch of resource center site	Login, password information and instructions disseminated	Resource center site	Accessed Instruction posted on website	Knowledge Manager and IT	1 st Quarter
Facilitation of resource center use	Creation of knowledge manager	Human resources approved job description, project budget	Responses to Questionnaire or short survey	Knowledge Manager	1 st Quarter
Increased knowledge of CARE VS&L programs	Profile of individual interaction with KS application (frequency, # of docs per session, document rankings)	Resource center site	Survey on Resource Center Site	Knowledge Manager	2 nd – 4 th Quarter
Increased skills built around VS&L programming CARE-wide	Specific VS&L programming innovations that can be traced to project knowledge sharing initiatives	Practitioner emails	Collection of new VS&L proposals and other internally produced documents or files – saved on resource center site	Knowledge Manager	2 nd – 4 th Quarter
	#/ % of proposals that leverage best practice VS&L knowledge content	Proposals			
Creation of a knowledge sharing culture among VS&L practitioners	#/% of VS&L practitioners with identified knowledge sharing objectives in their IOPs	Practitioner IOPs	Submission of Electronic files of Practitioner IOPs and emails	Knowledge Manager	2 nd – 4 th Quarter
	#/% of VS&L practitioners who have met identified knowledge sharing objectives in their IOPs				
Improvement of cross program contact and coordination pathways	#/% of VS&L practitioners with KS application	Resource Center Site	Survey, Documented processes from Resource Center site	Knowledge Manager	2 nd – 4 th Quarters
	#/% of project communications that are received	Email Communications			
CARE VS&L practitioners actively access and share information on site	#/% of VS&L projects that leverage the standard, internal documentation templates	Resource Center site	Submission of documents on standard internal documentation templates to resource center site	Knowledge Manager	3 rd – 4 th Quarters
Higher number of winning bids	Frequency/ quality of individual contributions, VS&L CoP-wide and/or by document	Resource Center Site	Survey, Documented processes from Resource Center site	Knowledge Manager, VS&L practitioners and Competitive Bids Unit	4 th Quarter
	Decrease labor cost per proposal	Email Communications			
	Decrease expenses per proposal				

Monitoring Plan – CARE Knowledge Resource Center

Sybil Chidiac

<p>Quality VS&L project design and implementation</p>	<p>Decreased VS&L project start up costs</p> <p># of lessons learned contributions to the VS&L CoP that resulted in improved outputs</p> <p>Increased quality from new ideas enabled by BELO KS initiatives</p> <p>#/% of proposals that leverage best practice VS&L knowledge content</p> <p>#/% of start up VS&L programs that employ best practice VS&L practices</p>	<p>Resource Center Site</p> <p>Email Communications</p>	<p>Observation, Survey, Documented proposals received on Resource Center site</p>	<p>Knowledge Manager, VS&L Project Managers, EDU Director</p>	<p>4th Quarter</p>
<p>CARE's VS&L resource site contains knowledge readily accessible by CARE practitioners</p>	<p>#/% of VS&L practitioners with KS application access</p> <p>#/% of VS&L practitioners that respond and utilize the feedback form and respond to EDU requests</p> <p>#/% of VS&L practitioners that leverage the expert locator</p>			<p>Knowledge Manager, VS&L practitioners</p>	