

LESSONS LEARNED FOR EFFECTIVE KNOWLEDGE MANAGEMENT: THE CASE OF USAID CLIMATELINKS

Part One: Strategic Planning for Effectiveness and Using Data for Decision-Making

Introduction

Knowledge management (KM) is the act of curating and sharing knowledge to create value or support decision-making in context for the users of the knowledge.¹ KM is an essential component of knowledge-sharing that often translates to more effective programming by enabling evidence-based decision-making.



What do we mean by knowledge? Knowledge can take many forms, from less formal learning events to more complex products that inspire learning. Knowledge-sharing opportunities may include lessons learned, program evaluations and research publications, technical briefs and fact sheets, conferences and other events, and webinars.

The USAID Climatelinks KM Approach

Climatelinks is the United States Agency for International Development's (USAID) external knowledge-sharing platform for climate and development practitioners, where the flow and type of content is designed to build community through knowledge-sharing. The site houses a rich repository of publicly available USAID climate resources, including project and subject matter blogs, country-level data, project reports, climate events, photos, and the new Agency-wide Climate Strategy.

In collaboration with the USAID Sharing Environment and Energy Knowledge (SEEK) project, USAID generated several lessons learned and key insights in effective KM to be shared to support future programming. To capture these learnings, the Climatelinks team created a series of two learning briefs that explore these lessons learned, providing tangible examples of how Climatelinks operationalized them on the site. Lessons revolve around four main concepts: strategic planning for effectiveness, using data for decision-making, using intentional systems and processes, and collaboration and partnerships for greater reach. This first learning brief focuses on strategic planning for effectiveness and using data for decision-making.



STRATEGIC PLANNING FOR EFFECTIVENESS

Good KM outcomes result from a holistic approach to strategic planning.

Effective KM stems from thoughtful planning that integrates known trends about the intended audience with best practices for making information accessible. On Climatelinks, USAID and SEEK counterparts embodied this approach, working under the assumption that users would not merely stumble upon new or relevant content or visit the landing page of the site to look for new material. Instead, the team's approach was to intentionally determine **what content to share, in what form, and how, and to use data to anticipate what will be useful to intended audiences** at a given time. To achieve this understanding, the team used surveys, key informant interviews, and focus groups. This approach allowed site management staff to proactively develop engagement and rollout plans as well as campaigns to reach the target audiences with relevant, in-demand content.

To achieve the best KM outcomes, SEEK took a **holistic approach to strategic planning** for all major site activities. When using the generate-capture-share-apply framework for KM, efforts across workstreams become naturally intertwined. Under SEEK, the team saw a natural progression of integrated communications, KM, and training efforts that built in complementary processes for developing campaigns, themes, international observances, and annual photo contests. Comprehensive, holistic strategic plans provided a clear framework, stepwise processes, timelines, and roles and responsibilities for successfully achieving the highest impact, whether for a single announcement or a long-term campaign.

¹ This definition of KM is drawn from the draft [USAID Knowledge Management and Organizational Learning \(KMOL\) Policy](#).

Strategic Plans and Feedback Loops

Sometimes communications and KM strategies sit on a shelf or get lost in a folder, but the SEEK team challenged this tendency, relying on strategic plans to serve as the roadmap for activities. SEEK set up feedback loops and learning opportunities that led to improvements and adjustments for the next effort. With this process, each activity could inform the next, leveraging lessons learned from past approaches to determine what worked and what could be changed. Climatelinks regularly tested and adjusted timelines and prioritized identifying which points of contact are most helpful, as well as where gaps may exist for effective implementation. Incorporating these lessons, SEEK's strategic plans increasingly prioritized collaboration to cultivate strong partnerships with USAID, implementing partners, and the community of climate and development practitioners over time.

Building User Engagement

In addition to the day-to-day management of the Climatelinks site, the SEEK team kept long-term goals front and center by iteratively revisiting its engagement strategies. Each strategy helped the team set and track progress towards targets and reflect on the success of efforts to meet them.

Through a collaborative process engaging all project partners, SEEK conducted a thorough review of Climatelinks operations; reviewed existing website and social media analytics to better understand user behavior; conducted in-depth qualitative and quantitative research like interviews, surveys, and focus groups to better understand audience needs;

and crafted calls to action to engage new users. The team reviewed analytics and key informant interviews to identify whether site use aligned with team assumptions, including which resources were most useful in the field and how to better reach target audiences such as USAID staff, implementing partners, and field-based climate and development practitioners.

Mid-project, the site underwent a redesign as part of a major Drupal migration. To spread awareness of and build engagement on the new Climatelinks site, SEEK developed a detailed dissemination plan, which included an Agency notice, announcements, and blogs crafted for each of USAID's Links sites; a social media toolkit; and a special edition of the monthly newsletter. Most importantly, the site relaunch was effectively planned and seamlessly timed with the U.S. Government's announcement that it was rejoining the Paris Climate Accord. The Climatelinks team was able to work closely across task areas and USAID to dovetail its dissemination efforts with the State Department. The week of the relaunch showed high levels of interest and engagement, **with the site experiencing a 67 percent increase in traffic compared to typical weekly traffic in 2020**, due to a well-placed tweet about Climatelinks by U.S. Climate Envoy John Kerry.

Outreach and Dissemination

In 2021, USAID requested Climatelinks serve as a knowledge hub for the 2022-2030 Climate Strategy implementation resources, technical guidance, translations, sector-specific tools, and webinar series. To support this effort, the Climatelinks team developed a detailed dissemination strategy to ensure all the pieces would fit together and effectively reach intended audiences. Careful to track progress and work with key USAID sectoral points of contact, the team updated language, compiled curated sectoral resources to meet user needs, and created a new dashboard and pathways to help new users find the information they would need.

Ultimately, however, achieving greater reach relied on collaboration across all Links sites. As a result of SEEK planning, every Links site was able to host a Climate Strategy page that linked users back to the dynamic hub on Climatelinks for the Strategy launch. This collaboration meant USAID was able to meet users where they would already go for information by bringing the Climate Strategy to them. This cross-Links effort also included promoting content to each site's audiences using internal and external channels.

Box 1. Strategic Planning in Action: Climatelinks Annual Photo Contest and Calendar

Over the life of the project, USAID developed **three photo contests** under SEEK to generate more imagery to tell the climate story. Through this activity, strategic plans were tested then adapted for future planning. After Action Reviews conducted for each contest led to **better understanding of timing, timelines for submissions, tactics for best reaching targeted programs, and strategic support from points of contact** for outreach and judging. The impact of this activity to date has been great, eventually inspiring the USAID Energy Sector and Biodiversity photo contests.





USING DATA FOR DECISION-MAKING

Make using data for decision-making a regular habit so it becomes business as usual.

Putting strategies into practice is essential, but it also is critical to track results to measure their effectiveness. This is where leveraging data plays a large role in KM. At the start of the SEEK project, Climatelinks was a data-aware site (i.e., data reporting was not standardized).

Through the implementation of strategic plans around engagement, site redesign, and dissemination coupled with regular, tailored analytics reporting and discussions, Climatelinks has become a data-savvy site (meaning data-based decisions drive key initiatives across the site).

Over the life of the SEEK project, the team carefully reviewed and integrated month-over-month and year-over-year analytics of the site and all social media channels to track and discuss short- and long-term trends and better understand user journeys. Tracking and discussing data has been **crucial to understanding what content is most relevant to users over time**, which allows USAID and the team to make informed decisions to support audience needs.

By leveraging data to better understand target audiences, SEEK curated content and made it easier for users to quickly find resources most relevant and useful to their work. Leveraging the role of data enabled the team to anticipate what content will be most useful to climate and development practitioners and drive conversations to support action.

A/B Testing

A valuable tactic used to gain insights into target audiences was building a foundation for tracking marketing and newsletter performance. In the first year of the project, as part of the Climatelinks newsletter redesign, SEEK implemented A/B testing (a user experience research methodology) to learn which format was favored by users. Resulting efforts included updating the newsletter layout to separate content into clearly defined sections such as fresh blogs, new resources, and upcoming opportunities. A/B testing informed the team that users prefer quality over quantity, which has resulted in highly curated newsletters rather than a lengthy list of all new site content. Newsletter data informed the Climatelinks team of what content was most useful to target audiences, which resulted in enhanced curation of highlighted content.

Redesign Strategy

The Climatelinks site redesign included a design discovery workshop with key stakeholders to gather critical information about website goals, audiences, and design opportunities. Feedback surrounding website goals and current gaps in functionality and user experience for specific pages drove design decisions and validated design quality as the redesign progressed. With this new data, the team restructured the site map to show a clearer hierarchy designed with audience needs in mind.

The team overhauled the content model to help accomplish user and website goals more effectively. An example of this redesign was seen through the elevation of project pages. These pages were previously hidden on the site but elevating them to the main navigation brought higher visibility to marked successes. Project pages have since become some of the most popular content types across the site. Additionally, wireframes depicted new page templates, style guidelines, and navigational elements, which ensured consistent style and branding and led to streamlined maintenance of the site and an easy-to-follow content management system that leveraged Drupal's open-source platform and ensured efficiency of content uploads.



A Look at the Earth Day Special Edition Climatelinks Newsletter

Total # of Recipients	17,085
Total # of Unique Opens	3,635
Total # of Unique Clicks	572



*This special edition had a **21.3%** open rate*

Focus Groups

Over the course of SEEK, the team supported several focus groups to ensure Climatelinks remained user-centric. The primary audiences for these focus groups were USAID, the international development community, and researchers/academia. Some key findings from these focus groups include gaining a better understanding of how Climatelinks has been leveraged as a tool for USAID staff to share, archive, and explore curated climate-related content, as well as providing an avenue for the public to engage with USAID staff and program experts.



CONCLUSION

In working collaboratively with the USAID SEEK project, the USAID Climate and Cross-Sectoral Strategies Branch identified the following lessons learned and best practices for supporting KM that are relevant for future implementers, including the Advancing Capacity for the Environment program team. By incorporating these lessons into their own KM practices, USAID and implementing partners can contribute to effective KM for improved knowledge-sharing.

- *Good KM outcomes result from a holistic approach to strategic planning.*
- *Make using data for decision-making a regular habit so it becomes business as usual.*
- *Using, tracking, and intentionally following a generate-capture-share-apply framework drives insight, innovation, and greater effectiveness.*
- *Collaborative partnerships are key to achieving cross-cutting, far-reaching results.*

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About SEEK: The USAID Sharing Environment and Energy Knowledge Project supports USAID's Bureau for Development, Democracy, and Innovation (DDI) and the Water Center under the Bureau for Resilience and Food Security (RFS) in building effective processes and strategies for training, communication, knowledge management, and organizational development. Under DDI, SEEK works directly with the Forestry and Sustainable Landscapes team and Biodiversity Division under the Natural Environment branch, the Energy team and Engineering team under the Built Environment branch, and the Climate and Cross-Sectoral Strategies branch. Under RFS, SEEK works directly with the Water Center.