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

Part Two: Using Intentional Systems and Processes, and Collaboration and Partnerships for Greater Reach

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 explores 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 second learning brief focuses on using intentional systems and processes, and collaboration and partnerships for greater reach.

USING INTENTIONAL SYSTEMS AND PROCESSES

Using, tracking, and intentionally following a generate-capture-share-apply framework drives insight, innovation, and greater effectiveness.

Systems and processes that support the regular push-pull of all knowledge management activities on Climatelinks were instrumental to the successes of the site under SEEK. SEEK was able to put ideas into action through its master tracker, social media planner, Governance Manual, scoping tool, dissemination plan template, and team check-ins. These tools and processes ensured the steady drumbeat of information that flows to support a generate-capture-share-apply knowledge framework.

A central system that drove successes for Climatelinks was an Excel-based master tracker. This one-stop shop tracked priorities in a range of ways. Initially it served as an editorial calendar that provided a way to track content, campaigns, and observances planned for a given month. Over time, the tracker eventually included much more, such as the planning for site themes, ensuring content was planned with adequate time for clearances before the

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

anticipated publication date, and prompting collaboration with key USAID points of contact and the broader Climatelinks community. The team used the master tracker to track blog submissions, content uploads of all kinds, bimonthly thematic outreach efforts, existing and potential project pages, and key points of contact across sectors and implementing partners.

The master tracker also supported the annual Climatelinks photo contest planning. By using a centralized tool to log all photo submissions, the eventual list of finalists, and captions and attribution, the team saved time and readily identified gaps in key information that could slow the process. Keeping all of these resources in one place also allowed the team to streamline collaboration and delivery.

Establishing a "roles and responsibilities matrix" for using this master tracker has been critical for ensuring success of the process. Each SEEK team member managed specific elements of the master tracker, allowing USAID and the team to check in on updates for any given task. Instead of reaching out for an update, the team could merely check the relevant tab.

Templates

Templatizing tools and processes was a key to efficiency. For instance, SEEK used dissemination plans[2] to outline a clear process for deliverables, closely track progress, and promote efforts. The team carefully drafted dissemination plans early in the planning stage of any given deliverable, resulting in an outline of all major steps – from ideation to implementation. These plans always included a high level of detail and were regularly updated as the work unfolded.

Box 1. Climate Risk Management Dissemination

SEEK developed a plan with USAID to add climate risk management portals to relevant Links sites in 2019. The detailed plan included detailed timelines, points of contact, and updates regarding development, coordination, publication, and outreach.

In the first year of the project, the SEEK team developed a template for dissemination plans that standardized the steps, ensured a thorough thought process, pre-populated common channels, and allowed each effort to build on the last. Templates were also helpful as team members and activity managers changed over the life of the project, eliminating duplication of efforts and reinvention of processes.

Governance Manual

As a best practice for juggling the many components of running Climatelinks, the SEEK team regularly referenced and updated a central Governance Manual. The team regularly added details on the background, principles, purpose, and intended audiences for adding content to the site as well as roles for team members. The SEEK team carefully updated the Governance Manual during the 2019 site redesign, with explanations of how to identify and upload various content types, guidance on USAID and Climatelinks branding and style, and summaries of engagement strategies leveraged across email campaigns and social media. The Governance Manual has been critical in maintaining stability across shifting teams and activity managers and their changing needs. It also enabled seamless handovers between team members and provided clarity on specific details required for nuanced tasks, particularly as the site transitions from the SEEK project to the Advancing Capacity for the Environment (ACE) program.

Climatelinks Gmail

SEEK inherited a Climatelinks Gmail account from the Environmental Communication, Learning, and Outreach project, which has made it easier for partners to reach the site managers and teams over the five years. During SEEK, USAID created a similar USAID email address for Climatelinks that can be used by future activity managers. These accounts have minimized confusion for partners submitting content to the site and disruptions during team transitions and contract handover.

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[2]   See first brief for greater detail.

COLLABORATION AND PARTNERSHIPS FOR GREATER REACH

Collaborative partnerships are key to achieving cross-cutting, far-reaching results.

Collaboration has been key in driving many of SEEK's Climatelinks successes, and it is embedded in many of the site practices and guiding documents. Climatelinks secured buy-in to elevate the impact and reach of the site through close partnership with USAID leadership, collaborating with implementing partners and across task areas on SEEK, aligning resources with USAID priorities, sparking innovative ideas, and more.

Building an ongoing, strong, and strategic foundation of partnerships amplified SEEK's success and impact. These partnerships advanced to a higher level through consistent and nuanced collaboration. Climatelinks developed and nurtured strong relationships across many USAID offices, sectors, projects, implementing partners, and the family of Links sites.

Links Community

Over the five years of SEEK implementation, Climatelinks often played host to the "Links Lunch" meetings of Links site representatives. Before the pandemic, the group met in person. The Climatelinks team was sure to participate, lead discussions, and share lessons. These relationships bloomed into partnerships, contributing to the regular sharing and reposting of relevant blogs from other Links sites, such as Agrilinks and BiodiversityLinks, along with posting original Climatelinks blogs directly to other Links sites. These efforts enabled the cross-promotion that reaches new, cross-sectoral audiences.

Climate Strategy

USAID's 2022-2030 Climate Strategy uses a "whole-of-Agency" approach to tackling the climate crisis. By maintaining frequent contact with a strong network of partners across the Agency, Climatelinks leveraged those connections to achieve higher engagement. Utilizing cross-sectoral relationships has been especially important. As such, the team undertook coordinated collaboration with the entire family of Links sites to position the new Climate Strategy knowledge hub with sectors that might not previously have interacted with climate. This involved meeting with representatives from each Links site to gain a better understanding of the interests and needs of their audiences and better build customized Strategy landing pages for them.

Box 2. Climatelinks Photo Contests Generate Critical Resources

Over the life of the project, three annual Climatelinks photo contests helped establish a set of publicly available **images for the community to use to help tell their stories.** The extensive planning, tracking, and coordination with the Climatelinks audience as well as close collaboration with sector leads, Mission champions, and the USAID team led to a rich set of climate photos, a new resource type on the site.

The strong relationships built throughout the duration of SEEK were evident through the successful launch of USAID's Climate Strategy, which entailed **coordination with 16 sectoral points of contact and 11 Links sites.** The Climatelinks team aimed to meet users where they were – in this instance, on other sector Links sites. In the end, the other Links' Climate Strategy landing pages inform users about the high-level targets of the Strategy, highlight the importance of incorporating climate action across sectors, and demonstrate that climate integration across all sectors is the key to successfully implementing the Agency's strategy.

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 ACE 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.*

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.