STATEMENT OF WORK

Background

In 1994, USAID launched the Microenterprise Initiative, which comprises a set of policies, strategies and specific actions designed to make microenterprise development (MED) a prominent part of USAID's economic growth and poverty alleviation strategies.

When it was launched, the initiative focused on a number of overlapping and complementary themes:

- achieving greater outreach and significant scale in microenterprise programs
- strengthening financial and business development services organizations and the markets in which they operate
- supporting local institutional development and long-term viability
- expanding outreach to women and the very poor
- developing systems that provide performance and impact information that focuses on results
- expanding the understanding and application of proven microenterprise approaches and interventions.

In 1995, USAID approved the Microenterprise Innovation Project (MIP) (No. 940-0406), one of the major implementing vehicles of the Microenterprise Initiative. The Microenterprise Development (MD) office has been charged with implementing MIP. This office has developed and implemented a number of programs designed to provide both the financial and operational tools that USAID, its Missions and other partner organizations needed to expand, strengthen and assess the impact of the flow of microenterprise services to the poor. In early 2000, the Microenterprise Development office commissioned a review of the overall MIP strategy, its project components and their impact. While the evaluation concluded that the overall MIP program was achieving significant results, it cautioned that the program was not achieving its full potential. A significant part of the problem revolved around difficulties encountered in *achieving collaboration among program components* and in *determining and applying lessons learned.*

In 2001, the office reorganized itself into three technical teams to deal with microfinance/financial services (FS), business development services (BDS) and the problems with the enabling environment (EE) that both of these technical areas must confront. In 2003, the office launched its Knowledge Management & Communications (KMC) and Training & Administration (TA) programs as part of the AMAP (Accelerated Microenterprise Advancement Project) indefinite quantity contract (IQC).

Since 2003, the office's technical approach has evolved. Its investments in financial services emphasize asset accumulation and protection for the poor (client-level), building client-responsive, sustainable institutions (retail institution-level), and helping microfinance providers exit from donor support (market level). MD's approach to financial services operates at three levels. Investments aimed at the retail level continue to emphasize institutions'

sustainability, but also their commitment to deliver products and services that meet the diverse needs of the poor. Client-level investments aim at deepening access to financial services for marginalized and under-served populations due to reasons grounded in socio-economic status, gender, age, religion, culture or ethnicity, location, or impact of conflict or disaster. Market-level investments encourage microfinance institutions to transition to commercial (rather than donor) sources of capital and to develop productive partnerships with private sector institutions. The goal of these investments is to provide technical information to practitioners and USAID missions on how to design and implement a balanced mix of interventions to achieve financial sectors that include, and address the needs of, poor people.

The Business Development Services area has become Enterprise Development, and emphasizes a value chain approach that links small and very small firms to economic growth opportunities, while ensuring both the incentives for and the capability to compete in and benefit from market participation. To be able to compete, micro and small enterprises (MSEs) need access to supporting markets: finance, business services, technical assistance, and improved inputs. To be able to benefit from market participation, MSEs need knowledge, skills, and bargaining power in the marketplace. The premise of this approach is that enterprise development can create wealth in poor communities and promote economic growth by sustainably linking large numbers of MSEs into international, national, and/or local value chains.

Enabling Environment remains an important area of investment for the MD office in recognition of the fact that a supportive enabling environment includes favorable business and investment climates and is critical to successful, sustainable microenterprise development. USAID supports reform of laws, regulations, and policies to facilitate the creation and operation of microenterprises and to expand access to financial and other services by the underserved poor. This can include helping countries streamline their business registration process, building the capacity of microentrepreneurs to work through independent business associations to advocate for policy reforms, promoting anti-corruption efforts and tax reform, and improving policies and regulations in sectors of particular importance to microenterprises and poorer households.

Likewise, since 2003, coordination of the learning that emerges from these approaches and investments -- in ways that ensure effective communication and learning among team members, their contracting partners, USAID missions, NGO practitioners, other donors, the US Congress and the general public -- has evolved and gained sophistication. Learning is now central to the office's vision, strategy and operations, and this learning is facilitated through a mix of activities, including in-person trainings and seminar with online counterpart activities; a website that houses a library of more than 800 documents, hosts virtual knowledge sharing activities, and has more than 2,000 registered account holders in 90 countries, with many other unregistered users; a monthly electronic newsletter with nearly 6,000 subscribers; and more. The MD office envisions this new procurement, Knowledge-Driven Microenterprise Development (KDMD), as a means of consolidating and deepening the office's learning efforts, expanding its coordination with other US Government (USG) agencies and with USAID missions, and enhancing microenterprise knowledge and application of good practice industry-wide.

Prior to its integration with the Microenterprise Development office, the Poverty Analysis and Social Safety Nets (PASSN) team pursued knowledge generation and knowledge sharing activities aimed at deepening knowledge of the nature of poverty; the dynamics most likely to foster poverty reduction; the role in poverty reduction that is played by workforce development and by safety nets such as food aid, subsidized health care, pensions, etc.; and the specific dynamics of poverty and poverty reduction in conflict and post-conflict settings. While this work will continue, the integration of this work with the three technical areas in which USAID's microenterprise development programs have focused (microfinance, enterprise development and enabling environment) also provides an opportunity to test assumptions about the objectives and strategy of those programs, and about the impact of microenterprise development on poverty reduction.

Information about the activities associated with the current knowledge management & communications and training programs of the Microenterprise Development office is reflected in its website, www.microlinks.org. Information about the current knowledge management activities undertaken by the PASSN team are reflected in the www.povertyfrontiers.org website. The MD office's approach to knowledge management and learning seeks to combine (and achieve synergies among) in-person and web-based learning activities and vehicles. These include but are not limited to:

- the monthly e-newsletter microLINKS Connections
- the bi-weekly Note From the Field
- the monthly Speaker's Corner online conference
- various communities of practice and learning networks
- the library of documents, briefs, tools and other resources
- the audio learning resources
- the Learning Conference web pages
- Washington-based and regional trainings and workshops for USAID Economic Growth officers and mission staff as well as implementing partners
- training resources including training curricula
- the BDS Breakfast Seminar Series and the Financial Services After Hours Seminar Series
- and others

The current KMC activities also include an Assessing & Learning (A&L) component designed to collect and analyze quantitative data (ranging from website registered users, webpage hits, e-newsletter subscribers, and COP and Speaker's Corner participation to dollar amounts invested in MED, number of missions with MED projects, number of implementing partners, and results data collected through Microenterprise Results Reporting) as well as qualitative data (feedback from online surveys of website users, training evaluations, phone interviews, etc.) to determine who is being reached by these efforts, what value they receive, how these efforts influence their application of good microenterprise development efforts, and so on. The A&L component functions as a feedback loop such that findings regarding the effectiveness of various training and learning activities can be assessed and changes in direction and emphasis in the various aspects of the knowledge sharing/learning, training and communications activities can be made accordingly.

The MD office's approach to knowledge-driven microenterprise development is to maximize the impact of its knowledge generation efforts through a coordinated program of knowledge and information management, knowledge sharing and collaboration. Acknowledging that impact derives from replicating and scaling up the innovations that are fostered through strategic knowledge generation, the emphasis in the office's knowledge sharing program is on connecting USAID staff to the knowledge that will help them design effective MED programs, and on connecting practitioners to the knowledge that will enable them to increase the breadth, depth and intensity of their impact, adapt innovations to their local contexts, achieve scale in their operations, and spread their learning well beyond their own institution.

The KDMD Contract

The current activities and those that will be implemented through the KDMD contract seek to maximize the impact of the office's investments in the overarching areas of poverty analysis and poverty reduction, as well as in the technical areas of financial services, enterprise development, enabling environment, and social protection, and to make appropriate and effective contributions to the overall USG transformational development framework and in relation to other key actors in that framework (e.g., the State Department, the Department of Defense, and others).

One crucial distinction between the current TA and KMC activities undertaken by the MD office and the PASSN team, and the new activities to be covered in the KDMD contract, is that current activities pertain to the AMAP portion of the office's portfolio, while the KDMD activities will involve implementation of strategies/processes for coordinating learning and knowledge sharing across the full range of Microenterprise Development office investments and activities, including but not limited to FIELD-Support LWA, Implementation Grant Program, AMAP Grants Under Contract rounds, other AMAP activities, and activities undertaken by any mechanisms created or used by the MD office during the course of this contract.

Required Professional Skills

The contractor will provide personnel with expertise, capability and experience necessary to achieve the objectives of the envisioned contract. Key Personnel must include Chief of Party (Activity Manager - Prime Contractor) and Activity Managers for any major subcontractors (a subcontractor that does 20% or more of the work). In addition, the offeror should propose other key personnel, as necessary, so that together the Key Personnel possess the skills and experience needed for this contract in training and adult learning, communications, information technology, monitoring and evaluation, microenterprise development and poverty analysis.

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The QED Team's KDMD approach builds on four years of successful collaboration with MD and PASSN and reflects the integration, cohesion, and synergy QED fostered throughout QED's implementation of AMAP. As outlined in *Figure 1*, QED's five, interrelated, **Knowledge-Driven Learning (KDL)** components (including content; collaboration; planning, assessing and learning; upgraded technology, and adult learning) will be applied to expand USAID staff and practitioners' knowledge of MED and social protection best practices. KDMD will move beyond increased outreach to achieve the adoption and application of knowledge and learning to **positively impact microenterprises and vulnerable populations.**

KDL is more than just building websites, storing information, and using technology: it is about bridging the gap between research and practice, and using adult-learning techniques to ensure that information is understood, ~~retained, and applied. The concepts of KM and adult learning are increasingly~~ being deployed by the private and public sectors to enhance learning, increase efficiency, spur collaboration and innovation, and spark the adoption of good practice. While the development community has been slower to adopt KDL approaches, there is an increasing understanding that knowledge drives good development through peer-to-peer learning, sharing, and exchange. QED will build on QED's momentum to keep MD and PASSN at the forefront of USAID's initial KDL efforts.
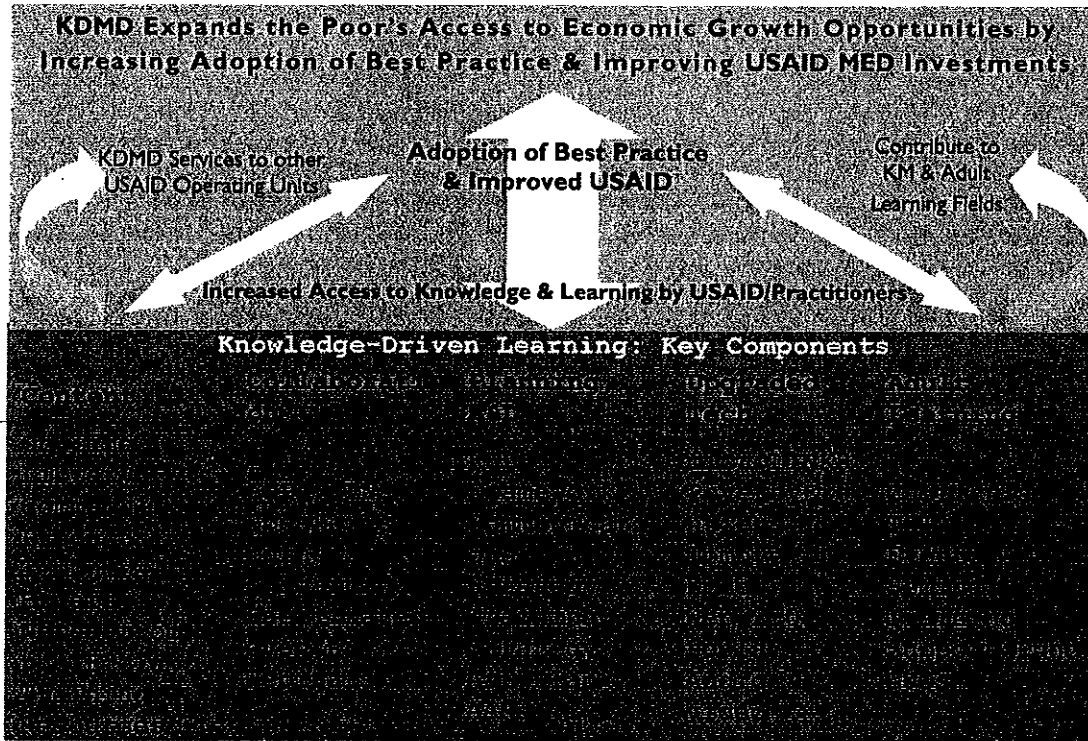
We have presented detailed activities that address each of the thirteen KDMD objectives. While each objective is presented separately, the successful adoption and application of knowledge will be achieved through the synergy of QED's five KDL components and the strategic bundling of products and services. QED's understanding, approach, and commitment to integration is reflected throughout the statement of work and underscored through specific examples such as opportunities for joint MD/PASSN collaboration; the incorporation of adult-learning principles into each KDMD activity; the use of upgraded technology such as Web 2.0 tools; and the strategic use of Grants Under Contract (GUCs) and the Training Support Fund.

We will consistently assess and learn from KDMD implementation by tracking qualitative and quantitative indicators; soliciting periodic feedback from USAID and practitioners through surveys, focus groups, and After-Action-Reviews (AARs); and benchmarking KDMD in relation to the broader international development community. QED's approach will give us real-time feedback and will result in refinements to products and services, or adjustments to project implementation. QED's A&L Plan (Section III) will track progress toward life of project targets and the impact on MED investments.

We will continue to move beyond disseminating knowledge generated exclusively by AMAP activities to foster, capture, and share knowledge across the MD and PASSN portfolios such as FIELD-Support, Implementation Grants Program (IGP), Practitioner Learning Program (PLP), and Strategies and Analysis for Growth and Access (SAGA). QED will also continue to actively contribute to the broader fields of KM and adult learning; remain current on state-of-the-art KDL initiatives; and incorporate these new approaches into KDMD. The KDMD Implementation Plan is located in **Attachment 1.**

Figure 1: Impact on Microenterprises and Vulnerable Populations through KDL Services

KDMD Expands the Poor's Access to Economic Growth Opportunities by Increasing Adoption of Best Practice & Improving USAID MED Investments

KDMD Services to other USAID Operating Units

Adoption of Best Practice & Improved USAID

Contribute to KM & Adult Learning Fields

Increased Access to Knowledge & Learning by USAID/Practitioners

Knowledge-Driven Learning: Key Components

Objective 1: Extend understanding of and contribution to Poverty

Ms. Anne Speca will continue to lead QED's Team's efforts to assist PASSN in furthering the understanding of poverty and social protection issues and the application of these concepts into USAID programming in the five objectives of the foreign assistance framework. QED will continue to maintain PovertyFrontiers (PF); fund poverty analysis research; compile and disseminate analytical studies; and organize learning events. QED will assist MD and PASSN to identify opportunities for collaboration and demonstrate the link between MED and poverty alleviation. Potential cross-cutting topics include gender, conflict/post-conflict, and environmental issues.

1. PovertyFrontiers will continue to be the central KDL tool for the office's work in poverty analysis and safety nets. PF will house analytical and research documents and multimedia and collaborative tools such as, communities of practice (COPs), Speaker's Corners, e-conferences, webcasts, podcasts, and audio interviews.
2. Fund innovative research and organize events that expand access to cutting-edge knowledge on poverty reduction best practices and lessons learned. QED will continue to support leading organizations such as Cornell University, DIW Berlin, and HiCN to generate knowledge on topics such as coping strategies, livelihoods, migration and displacement, and post-conflict development. QED will compile and disseminate the links between poverty reduction and MED; and the linkages between poverty reduction and Transformational Diplomacy.
3. Assess and design KDL tools and techniques to complement and amplify the research agenda from the outset of the contract. When international

institutions and academics unfamiliar with USAID are involved in developing content, QED will work with them to ensure their analytical work is appropriate for and accessible by a USAID audience. QED will create at least 15 targeted communications products with PASSN's partners and disseminate them to appropriate audiences including USAID, other USG agencies, practitioners, and other donors.

4. We will organize at least 50 monthly seminars and three regional workshops to broaden the interest in poverty reduction and promote linkages between poverty and "Investments in People," including education, health, and social protection.

Objective 2: Delineate the state of the art in KM, learning and collaboration

The QED Team will build on existing collaborative processes to tap KM and learning resources, assets, and experience beyond KDMD, and create a permanent feedback loop as part of QED's A&L plan to continually infuse QED's staff and MD with new ideas, approaches, and information. QED will offer a suite of "strategically bundled" KDL products; identify and apply new technologies, techniques, and approaches to KDL; and help MD partners improve their reach and adoption of knowledge through targeted learning and dissemination strategies. Ms. Powers and Mr. Pryor will lead these efforts.

1. Upgrade QED's existing **KDL COP**, enabling us to record, refine, and initiate new products and services. QED will leverage other tools, including a **KDL wiki** to serve as a real-time, A&L mechanism, to simultaneously build and share QED's own best practice, and promote a collaborative tool, internally and externally. QED will annually update the **KM Benchmarking Study**, an additional A&L tool used to benchmark MD's KDL practices in relation to the broader development field.

2. Continue to build relationships and energize internal and external networks through active participation in communities and discussion forums; attend leading conferences, workshops and events; and continue to test, enhance, and refine QED's knowledge-sharing tools.

3. Enhance QED's existing KDL process to design and support collaborative strategies with MD partners.

4. Explore interest in forming a **KDL MED Working Group** and a **KDL Development Professionals Group** to include MED and international development professionals to share approaches, address common challenges, improve outreach, and create learning opportunities.

5. Annually review and re-organize website content and the suite of KDL products offered for each MD technical area based on the learning strategies outlined in Objective 6, analysis of the data collected on the A&L indicators, feedback from practitioners, and interviews with MD/PASSN staff. Increase accessibility to promising and innovative, web-based resources such as blogs, screencasts, wikis, social bookmarking, and e-learning solutions.

Objective 3: Maintain, upgrade, and expand the KM websites and infrastructure

Our experienced IT staff will continue to successfully maintain, upgrade, and expand the features of the technology platform that runs microLINKS (mL) and PF.

1. Expand and improve the **technological infrastructure** and upgrade mL and PF. QED will upgrade to a platform of USAID's choice based on options presented. One option includes the migration of both sites to Tomoye Ecco from the current Tomoye Simplify platform to capitalize on new collaborative, social networking, and user-feedback features. QED will also continue to add web 2.0 capabilities, such as geospatial mapping, wikis, and other applets to enhance each site's capacity.
2. **Improve existing functionalities.** The QED Team successfully added new functionalities annually under AMAP, including a website design refresh, customized search fields, and a low-bandwidth option. QED will continue to add new features such as tagging and value ranking to make it easier for visitors to rate and access quality content, and the reinstatement of the "business card" feature to support social networking. QED will take advantage of the future platform's cross-site publishing capabilities streamlining the posting and managing of content across mL and PF.
3. ~~Expand QED's existing technology to accommodate improved dissemination~~ techniques such as e-learning, video, podcasting, and other multimedia formats with a streaming video and audio server.

Objective 4: Develop, adapt, and disseminate information

MD generates knowledge through numerous mechanisms including AMAP, FIELD-Support, IGPs, GUCs, PLPs, and other mechanisms. The QED Team has also collaborated with many of MD's partners over the last four years to adapt the knowledge generated and to disseminate the information to appropriate audiences through various media and forums. For example, the popular *microLINKS Connections* monthly e-newsletter reaches more than 6,000 USAID staff and practitioners and highlights best practices, leading trends, and events.

The QED Team's **KDMD Knowledge Capture and Transfer Approach** (presented in **Attachment 2 below**) demonstrates how KDMD will scale up best practice and help facilitate its adoption by increasing access to knowledge and learning. Led by Ms. Powers, QED will continue to enhance the office's work through the proactive identification of topics, coordination of activities, and a strategy for effective dissemination of generated knowledge to targeted audiences. QED will plan collaborative milestones from the outset, review progress at mid-stream, and encourage real-time feedback for works-in-progress to ensure that information is appropriately developed, adapted and disseminated.

1. Finalize a comprehensive **MD Communications Strategy** during year one, update it annually, and implement it over the life of the project. The strategy will build on the KDMD-facilitated MD and PASSN KDL Framework (objective 8) and the MD Training Strategy (objective 6).
2. Continue to provide effective dissemination mechanisms and improve upon them, including the publication and distribution of *microLINKS Connections*, voice-over-PowerPoints, audio, video, and integrated multimedia content associated with trainings and events.
3. Develop **"MED in a box"** resources on basic MED concepts, principles and best practices and make them accessible for new entrants into the field including USAID Missions, State, DOD, MCC, and other USG agency personnel.
4. Design tools and applicable resources and make them accessible to USAID Mission personnel. Investigate forming a **Mission Advisory Group (MAG)** from
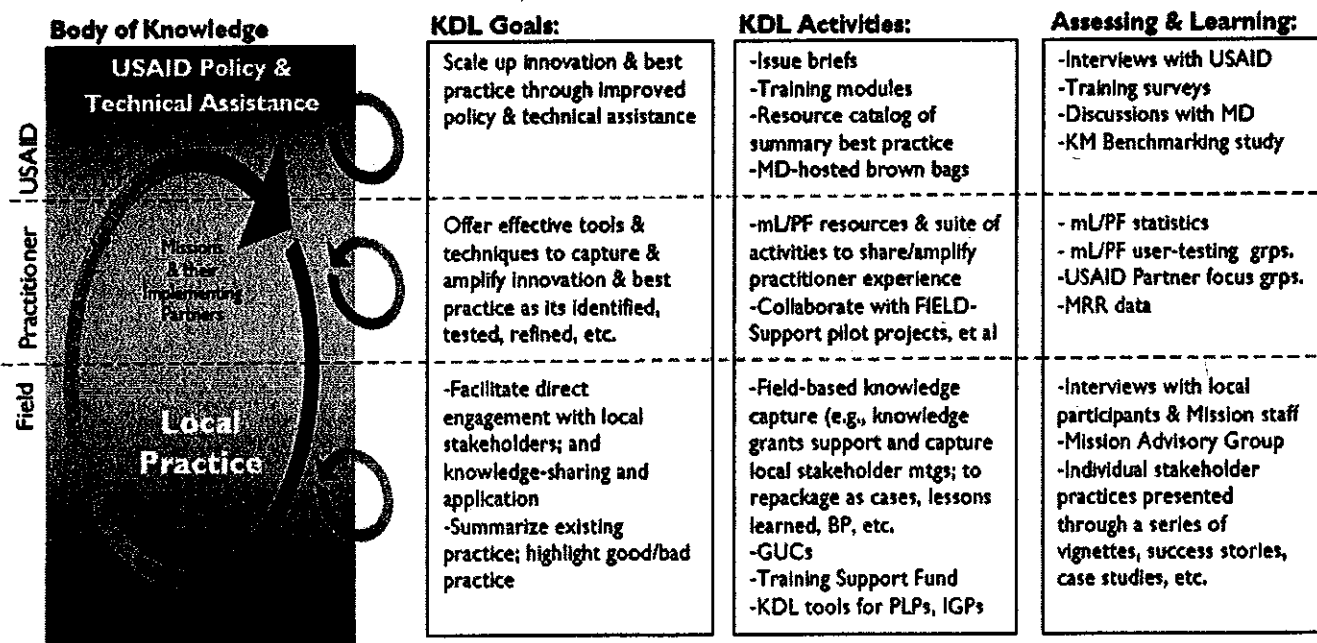
Mission personnel interested in MED and poverty analysis issues. The MAG could serve as a sounding board for KDMD providing input on topics, tools, resources, and dissemination approaches applicable for Mission staff.

5. Add a limited access **"Mission Resources" page** to both mL and PF to include sample scopes of work, assessments, evaluations, diagnostic tools, and other Mission-specific information.

6. Prepare at least 25 **Good Practice Briefs** using KDMD resources on topics of interest to the MD technical teams and adapt longer reports to a more digestible and user-friendly format.

7. Prepare or participate in the development of training curricula, train the trainer, and web-based, "build-your-own training" activities.

8. Expand the **mL library** of over 2,200 resources and increase the accessibility of these resources. Annually review and update the website taxonomy for each technical area with MD and PASSN. Implement tagging of documents to more efficiently place and search for documents.

9. Update the MED and PASSN USAID.gov webpages semi-annually with fresh content. Write Morning Glory stories for the USAID intranet.

10. **Conduct audio interviews** with current and former MD and PASSN staff, as well as leading practitioners and researchers. The QED Team will conduct at least 40 interviews which will be edited and posted on mL and PF.

Attachment 2 – KDMD Knowledge Capture & Transfer Flows

This chart illustrates how KDMD will help catalyze and facilitate knowledge capture and transfer to take stock of local practice, determine, refine, and adapt good practice, and scale up best practice through improved policy and technical assistance. Working in coordination with missions, QED will facilitate field-based opportunities to gather and share local knowledge. Working in partnership with USAID's practitioner community, QED will offer knowledge- sharing opportunities through proven KDL tools and techniques. Finally, QED will support MD in designing effective communication products to convey key messages and technical knowledge to USAID staff and fellow

Body of Knowledge	KDL Goals:	KDL Activities:	Assessing & Learning:
USAID Policy & Technical Assistance	Scale up innovation & best practice through improved policy & technical assistance	-Issue briefs -Training modules -Resource catalog of summary best practice -MD-hosted brown bags	-Interviews with USAID -Training surveys -Discussions with MD -KM Benchmarking study
	Offer effective tools & techniques to capture & amplify innovation & best practice as its identified, tested, refined, etc.	-mL/PF resources & suite of activities to share/amplify practitioner experience -Collaborate with FIELD-Support pilot projects, et al	- mL/PF statistics - mL/PF user-testing grps. -USAID Partner focus grps. -MRR data
Local Practice	-Facilitate direct engagement with local stakeholders; and knowledge-sharing and application -Summarize existing practice; highlight good/bad practice	-Field-based knowledge capture (e.g., knowledge grants support and capture local stakeholder mtgs; to repackage as cases, lessons learned, BP, etc. -GUCs -Training Support Fund -KDL tools for PLPs, IGPs	-Interviews with local participants & Mission staff -Mission Advisory Group -Individual stakeholder practices presented through a series of vignettes, success stories, case studies, etc.

practitioners.

Objective 5: Promote collaboration among practitioners to speed innovation and adoption

KDMD affords us the opportunity to make significant upgrades to QED's existing suite of collaborative KDL activities and services including COPs, Learning Networks (LNs), seminars, workshops, and conferences.

We recognize that many of the initial COPs did not meet the intended objectives due to insufficient planning, lack of a champion, and an over-reliance on technology rather than in-person dialogue. As a result of AARs and a workshop with KM specialists and community builders, QED have developed and will apply QED's Community and Network Support Strategy, described in the accompanying text box, to capitalize on the full potential of current and future COPs and LNs. Ms. Powers will lead QED's team's efforts to facilitate a thoughtful planning process with COP and LN organizers. QED will design an interactive tool that illustrates the opportunities, benefits, and limitations of COPs and LNs, set realistic expectations, and secure the essential ingredients that thriving communities require. Together with MD and PASSN, QED will quickly identify partner needs and recommend appropriate tools and approaches.

1. Convene, administer, and facilitate **LNs and COPs** for the Financial Services and Enterprise Development IGPs; the GUC Learning Organization recipients, and the Global Value Chain network. Establish additional LNs and COPs for future IGPs, PLPs, and GUCs; MED training institutes and programs; and around prioritized MED and social protection topics, as agreed upon with USAID.
2. Facilitate three-day, on-line, collaborative **Speaker's Corners** hosted by a leading expert or practitioner on topical MED, and poverty analysis issues.
3. Organize at least 150 **monthly seminars** including the popular Breakfast Seminar Series and After Hours Series, as well as a new seminar series on social protection. QED will work with MD and PASSN to develop a pipeline of topics; identify and secure appropriate speakers; advise the speakers on appropriate message delivery techniques; organize the seminars; refine, format, and brand the presentations; advertise the events to appropriate audiences; record the seminars; and post a voice-over-PowerPoint of the event. Approximately 75 percent of the seminars will occur at QED's HQ office, only a half-mile from the Ronald Reagan Building. The seminars will be organized with improved accessibility and participation through teleconferencing; blogging; presenter discussion forums; and video feeds (webinars).
4. Organize at least 10 **regional workshops** and two **conferences** on MED and social protection topics. QED will build on the experience and success of the three regional Value Chain workshops and the *MED in a Globalizing World Learning Conference* to organize future regional Value Chain workshops as well as workshops and conferences on new topics such as value chain finance; MED and social protection in conflict/post-conflict environments; and an entry-level MED course. QED will collaborate with MD and PASSN to develop the agenda and content; and arrange all logistics.

Objective 6: Develop, implement, and disseminate training to increase MED knowledge

USAID is among the key donor agencies and institutions developing, offering, and disseminating trainings to MED practitioners. Mr. Tom Sinclair will continue to lead QED's efforts in assisting MD to define its comparative advantage in training, recognizing that the strategies and approaches will depend on the technical area. For example, the financial services team shapes existing content and supports leading institutions, while enterprise development is in the process of developing original training resources. KDMD will develop a plan to strategically support the industry to increase knowledge in the field and work with partner institutions to identify areas of mutual interest and benefit.

1. Annually update and implement the learning strategies for the MD office and the four technical teams. The learning strategies will be developed using the MED Training Strategy currently under development, extending learning beyond formal events and strategic bundling into each KDMD activity at the outset. The strategy will be updated annually including an inventory of MED learning and training resources. QED will develop a pipeline for each seminar series; develop curricula; organize regional workshops; and explore blended and e-learning.
2. Enhance the capacity of **non-USAID training institutions** such as ILO's Boulder Microfinance Program (in Turin), SNHU's Microenterprise Development Institute, Bankacademie, Microfin, CEE/NIS Microfinance Centre, and Springfield Centre through collaborated design or refinement of course curricula; and increased accessibility and learning through e-learning and KM tools.
3. Continue to manage a **multi-disciplinary Training Support Fund (TSF)**. The TSF will be flexible, targeting resources to areas of collaboration and learning for maximum impact and added value. TSF may fund scholarships to leading MED Training Institutes; fund travel enabling practitioners to present at conferences, workshops, and seminars; and fund support to assist institutions to develop relevant curricula, learning materials, and increase on-line collaboration.
4. Refine current courses and materials to develop an **entry-level MED course** for USAID personnel, other USG staff, and new entrants to the field including EG Officers, Food for Peace, PEPFAR, the Development Credit Authority, State, and DOD.
5. Upgrade and maintain the **Training Resource page** on mL and develop a similar page on PF offering information and advice to practitioners on adult-learning approaches, downloadable and adaptable training modules, links to relevant training resources, and updates on upcoming trainings and events.
6. Provide technical support and training forums including material development, dry-runs and de-briefs with subject matter experts and trainers on content and delivery, and training-of-trainers courses.
7. Facilitate in-person and on-line learning through workshops, e-learning, study tours with peer-to-peer assistance, and other adult-learning techniques.
8. Identify applicable training opportunities and resources for MD and PASSN staff and maintain a closed-access, **MD/PASSN Training Resources COP** to post resources, events, and other opportunities, and encourage team members to report key lessons learned.

**Objective 7:   Implement a communications strategy to promote MED
adoption & best practice**

Siren and Project Design will continue to design and deliver informative print
and digital communication products, as defined by PASSN and MD's communication
strategies. Key elements of the communications strategy will identify and
assess target audiences, information needs, knowledge capture opportunities
and challenges, dissemination mechanisms, key messages, and A&L methods.
1. **Refine the MD communications strategy** annually, and augment it with the
   delivery of a comprehensive **outreach strategy** to foster relationship-
   building and collaborative activities. QED will conduct a stakeholder and
   audience analysis to better understand the enabling environment and improve
   communications, outreach, and collaboration.
2. ~~Publish communication products showcasing innovation.   The QED Team will~~
   advise on and help design and develop communication products that will be
   tailored for specific audiences to easily access, digest, and apply
   knowledge resources. QED will minimize reliance on paper products, and
   maintain mL as the communications hub, creating engaging digital products,
   including multimedia, video, and audio, with downloadable print products.
   Foundation materials will be used strategically to increase awareness and
   promote mL resources, and support MD staff on travel.

**Objective 8:   Integrate knowledge sharing and learning across entire
MD portfolio**

Mr. Steve Joyce (TRG) will facilitate a KDMD start-up retreat to develop a
strategic **KDL Framework** (to be updated annually). The Framework will serve as
both a foundation and driver of many KDMD objectives, and strategically link
the Training, Communications, Outreach, and KM strategies across the
portfolios to ensure integration and synergy. This Framework will be reviewed
and updated annually. Key outputs will include a **KDMD Knowledge Map** of key
resources available and identify knowledge-capture opportunities to maximize
knowledge sharing across teams. Key elements in the Agenda will include:
annual KDL goals, target stakeholders, opportunities/challenges/gaps analyses,
and a summary of best practice in each technical area to set a baseline for
the A&L plan. Special sessions will be designed to facilitate organizational
partnerships and increase opportunities for intra-office linkages and
collaboration (see text box on page four: *PASSN and MD Integration & Synergy*).

To further aid the office in integration QED will **customize and launch an
online Webkit** during year one to improve coordination and leverage activities
and events across MD, its partners, and KDMD. The QED Team will assist MD in
selecting tools for the Webkit, which may initially include a shared calendar;
a social bookmarking tool; an upgraded Basecamp site for collaborative project
management; Skype conferencing; RSS feeds from mL and PF; and other tools
designed to meet specific office needs.

**Objective 9: Monitor performance, assess impact, and adjust
activities accordingly**

QED will build on its core competency in monitoring and evaluation to finalize and implement the A&L Plan outlined in Section III, document lessons learned, identify areas of improvement, make appropriate adjustments to implementation, and report on progress and results. Upgrades to the mL and PF platforms will enable us to more comprehensively, consistently, and accurately track statistics on content, use, and membership; and enhance QED's capacity to conduct on-line surveys and questionnaires.

1. Prepare and distribute **a semi-monthly, Work-in-Progress (WIP) list** and **a monthly-tracking report**. QED will continue to convene WIP meetings with MD/PASSN semi-monthly to keep MD/PASSN up-to-date on KDMD activities, including achievements, ongoing work, and upcoming events. Distribute a monthly **Assessing & Learning Dashboard** (presented in **Attachment 3**) to provide a quick overview of activities and results.
2. Prepare **semi-annual reports** and an **end of project final report** outlining achievements, progress towards life-of-project results, and work-plan recommendations. Other lessons-learned products will be prepared at the direction of the CTO.
3. Conduct surveys, focus groups, and informal discussions to solicit feedback and evaluate activities. Conduct **After-Action-Reviews** after critical activities and events using a technique QED have refined under AMAP to review results, identify lessons learned, and make adjustments to future activities.

Objective 10: Contribute lessons learned to the broader fields of KM and adult learning

Currently, The QED Team, MD, and PASSN are at the forefront of using KM and training techniques within USAID. Under KDMD, QED will extend ongoing initiatives that include the drafting of a White Paper on KM best practice; the KM Benchmarking Study; attendance at KM conferences, events, and trainings; and ongoing participation in KM communities of practice.

1. Maintain the **KDL COP** to continue to share and test ideas.
2. Actively participate in KM and adult-learning communities, discussion forums, conferences, workshops, events, and professional associations to contribute QED's lessons from KDMD implementation and advance QED's understanding of trends and emerging approaches.
3. Organize a quarterly **KDL Brown Bag Series** to highlight and share tools and techniques. Potential topics include the use of wikis; COPs; the use of Web 2.0 tools; and Section 508 compliance. These events will be live web casts when available, and recorded and archived on mL as a learning series.
4. Devote an open-access section of mL to showcase KDL tools and techniques, with links to customized Web 2.0 tools such as a KDL wiki, thematic blogs, tagged web resources, social bookmarking sites, and other tools, as identified.
5. Produce a dossier on KDL tools, success stories, and quantifiable results to engage missions and other USAID staff and encourage them to follow MD's lead, buy into KDMD opportunities through Activity 11, and adopt KDL techniques. The dossier will serve as a portable "roadshow," for MD staff going on travel or to off-site events, and help make the "business case" for KDL investments.
6. Continue interaction with the USAID I/CIO staff as well as other donors through KM4dev.

Objective 11:   Extend KM infrastructure, features & activities to other operating units

As a result of MD/PASSN's KM success, several USAID operating units are now planning similar KM activities and have approached the MD office for support, guidance, and access to KDL services. KM is increasingly being built into new USAID programs as a central way to achieve development impact. The QED Team, bolstered by the leadership and experience of Mr. Pryor, is uniquely positioned to educate other operating units on the developmental benefits of KDL and to aid in the design and implementation of cost-effective solutions.

1. Provide KDL services to other USAID operating units through buy-ins.   QED will create awareness and interest and raise understanding of the benefits of KDL through organizing informational meetings. QED will work with interested offices to develop and implement a KDL strategy. A menu of services will be developed during year one and include the activities outlined in the Statement of Work. QED will work with each office to identify the objectives for the buy-in and collaboratively develop a SOW, timeline, and budget. Upon execution of the buy-in, QED will deliver services assigned by the participating operating unit and approved by the KDMD CTO.

Objective 12:   Logistical and other assistance to aid the MD office

Since 2003, QED has provided support services to MD and PASSN. Ms. Powers will work with the KDMD CTO to determine the best use of KDMD resources when ad-hoc support is requested.

1. Provide general support, as directed by the CTO, which can include, but is not limited to, logistical and administrative support; preparation for the MD Annual Partners Meeting and SEEP conference; updating the EGAT calendar and EGAT intranet; and supporting MD and PASSN to design and deliver public presentations.

Objective 13:   Administer Grants under Contract (GUC) component

The implementation of the GUC mechanism through KDMD will enable MD and PASSN to integrate a KDL strategy into each GUC award from the outset. The GUCs will also be used to support organizations with limited KDL resources or augment the resources currently available. This will be done through a series of small-scale Knowledge Grants. Additional GUCs will be used to test hypotheses, pilot innovations, conduct research, and generate knowledge.

1. Draft and receive approval for a compliant grants manual by the end of the second quarter.
2. Administer $2.5 million in GUCs over the life of the contract. Identify topics collaboratively with the KDMD CTO and the technical teams to design and issue RFAs for the purpose of exchange visits; short-term technical assistance; innovative KDL activities, support of learning organizations;

knowledge generation; and pilot activities to test hypotheses in MED and social protection.

3. Participate in the design of a KDL strategy with each GUC recipient at the outset of each award.
4. Manage each award technically, administratively, and financially and report on results in accordance with the KDMD A&L plan.

[END OF SECTION C]