

# Water Sector Communications & Knowledge Management FINAL REPORT AND RESULTS



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**Contract No. EPP-1-00-05-00010-00**

**Task Order No. AID-OAA-TO-12-00002**

Prepared for United States Agency for International Development (USAID) Bureau for Economic Growth, Education, and Environment's Office of Water (E3/W) under Contract No: EPP-1-00-05-00010-00, Task Order No: AID-OAA-TO-12-00002 awarded December 1, 2011, entitled Water Sector Communications & Knowledge Management (WSCKM).

This final report was completed in fulfillment of Section F.2 of the Task Order. The views expressed and opinions contained in this report are those of the WSCKM Task Order Team and are not intended as statements of policy of USAID or the contractor companies or their parent companies.

The results described in this document are based on Task Order Section C (Statement of Work), the approved Annual Work Plans as revised, and discussions with the Water Office. Prepared By: William Wright, Chief of Party, and Amy Gambrell, Senior Technical Specialist with contributions by Task Order team members.

**Implementing Partner:** Mendez England & Associates (ME&A)

*This publication was produced for review by the United States Agency for International Development. It was prepared by Mendez England and Associates (ME&A).*

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# ACRONYMS

<b>CDCS</b>	Country Development Cooperation Strategies
<b>CKM</b>	Communications and knowledge management
<b>CMS</b>	Content management system
<b>COR</b>	Contracting Officer's Representative
<b>COTR</b>	Contracting officer's technical representative
<b>DEC</b>	Development Experience Clearinghouse
<b>DQA</b>	Data quality analysis
<b>E3/W</b>	Bureau for Economic Growth, Education, and Environment's Office of Water
<b>EGAT</b>	Economic Growth, Agriculture, and Trade
<b>F</b>	Office of U.S. Foreign Assistance Resources
<b>FACTS</b>	Foreign Assistance Coordination and Tracking System
<b>FTF</b>	Feed the Future
<b>FTF/WINNER</b>	Feed the Future West/Watershed Initiative for National Natural Environmental Resources
<b>GLOWS</b>	Global Water for Sustainability
<b>HIP</b>	Hygiene Improvement Project
<b>ICT</b>	Information community technology
<b>IQC</b>	Indefinite quantity contract
<b>IT</b>	Information technology
<b>IUWASH</b>	Indonesia Urban Water, Sanitation, and Hygiene
<b>IWRM</b>	Integrated water resources management
<b>KM</b>	Knowledge management
<b>LOE</b>	Level of effort
<b>LPA</b>	Bureau for Legislative Public Affairs
<b>ME&amp;A</b>	Mendez England & Associates
<b>NRM</b>	Natural Resource Management
<b>OFDA</b>	Office of Foreign Disaster Assistance
<b>PSNP</b>	Productive Safety Net Program
<b>RiR</b>	Re-imagine Reporting
<b>RSR</b>	Really Simple Reporting
<b>SID</b>	Society for International Development
<b>SIMI</b>	Smallholder Irrigation Market Initiative
<b>SO</b>	Strategic objective
<b>SUCCESS</b>	Sustainable Coastal Communities and Ecosystems
<b>SUWASA</b>	Sustainable Water Supply and Sanitation in Africa
<b>SWSS</b>	Sustainable Water Supply and Sanitation
<b>TDY</b>	Temporary duty
<b>USAID</b>	United States Agency for International Development
<b>USG</b>	United States Government
<b>WADA</b>	Water and Development Alliance
<b>WASH</b>	Water supply, sanitation, and hygiene
<b>WaterSHED</b>	Water, Sanitation, and Hygiene Enterprise Development
<b>WP</b>	Water productivity
<b>WRM</b>	Water resource management
<b>WSCKM</b>	Water Sector Communication & Knowledge Management

# WSCKM: Final Report and Results

This document is the final report of the WSCKM Program of USAID E3/W. It covers results achieved during the Task Order period of performance from December 1, 2011 through June 30, 2014.

The final report highlights improvements in the process of supporting USAID's E3/W water sector communications and knowledge management (KM). Specifically, the report details progress made during Task Order implementation, and matches accomplishments to the specific paragraphs in the Task Order Statement of Work (Section C).

## I. OVERVIEW OF THE TASK ORDER

The WSCKM Task Order was designed to fill a critical need among USAID staff and external stakeholders for greater understanding of cross-cutting water issues. ME&A's KM activities under the Task Order Work Plan contributed significant value both internally and externally by enhancing collaboration among partners, sharing best practices, and through the application of lessons learned. With strategic KM activities, ME&A has been able to maximize the value of USAID's information and knowledge assets, support its partners and beneficiaries, and improve its effectiveness and impact.

The Water Office is comprised of dedicated individuals with exceptional technical background and expertise in a broad array of water resources disciplines. These individuals provide technical assistance, strategic program planning, capacity building, and leadership for USAID programs, field missions, and at international and intergovernmental forums and initiatives. Water Office members often work individually or in small groups to build their own toolbox of necessary applications and resources. Through this Task Order, ME&A's effective KM activities enabled USAID staff and teams to collectively and systematically create, capture, share, and learn knowledge to better achieve water sector strategic objectives (SOs). This final report articulates ways that ME&A assisted Water Office staff with KM activities for maximum effectiveness of implementation and time.

KM programs resulted in more effective collaboration, improved delivery of technical assistance, and enhanced water program management to address the following key developments and changes across USAID and the Water Office:

- The Water and Development Strategy;
- The role of water in Feed the Future, Global Health, and Global Climate Change Presidential Initiatives;
- A reduction in senior technical staff, combined with an increase in junior- or entry-level staff with less technical or professional experience in the water sector and therefore requiring training and capacity building initiatives for professional development; and
- The need to educate Congress via Hill briefings, etc., and the public on the critical role of integrated water resources management as a central component of the sustainability of all water sector investments.

ME&A's activities under the WSCKM Task Order assisted the extended Water Office by:

- Building a learning organization. ME&A has provided the needed platforms, products, opportunities, and media to reach all audiences with the information they need, when they need it, and how they need it to improve water development outcomes.
- Consolidating publications and knowledge. Water sector activities are included in the portfolios of many organizational units dealing with a broad range of issues and funded by a variety of different mechanisms and initiatives. ME&A maintained a rich external USAID water website and the initial phase of an internal website to address water's crosscutting nature.
- Making water knowledge easier to access. ME&A produced user-friendly interfaces to water information repositories and archives.
- Sharing knowledge and practices. ME&A supported consistent learning and sharing opportunities to foster a knowledge culture at headquarters and across the Missions.

Work Plans under this Task Order presented menus of opportunities to address Water Office and KM challenges in innovative ways to enhance the ability of the Extended Water Office to deliver results.

ME&A analyzed trends in scale, composition, and program funding levels in USAID's water sector programs along with technical direction from the Contracting Officer's Representative (COR) to gain insight into the technical areas that would require KM support and the types of approaches that would be most appropriate. ME&A developed and delivered targeted, comprehensive communications publications, strategic knowledge management activities, and key obligations and data tracking to meet reporting requirements. The staffing and programming changes occurring across USAID required new strategic direction of KM throughout the water sector. It was in this context that USAID E3/W awarded this Task Order to ME&A.

By the end of the Task Order, ME&A's KM activities in the water sector have been well executed, and communications needs in the social media era have been out front for the agency. USAID now has a KM Strategy for water – the first for any sector – that has been replicated by other offices. ME&A also delivered three strategies to meet KM goals – external website content and maintenance, learning events, and social media. ME&A developed concept papers on key KM goals: Information and Communication Technologies (ICTs), thematic groups, and learning events. The rich design and layout of *Global Waters* magazine is now a flagship product of the USAID Water Office and has impacted the design of other publications across the Agency, most notably the Administrator's 2012 letter. Key accomplishments include:

- Three annual Senator Paul Simon Water for the Poor Act reports
- Three annual Safeguarding the World's Water reports
- 10 issues of *Global Waters* magazine
- 12 issues of Water Update internal newsletter
- Eight Real Impact case examples
- More than 150 USAID water project narratives
- Three annual top 25 projects lists by theme
- Water Point internal website with more than 100 webpages
- Thousands of photos in an accessible photo library
- A water wiki archive of past water projects, policy documents, and key facts
- Scores of specialized Internet searches to support trainings, workshops, speeches, briefing books, presentations, and web content
- 14 learning events
- Two water videos
- 18 posters
- A multi-media water exhibit

The remainder of this report provides details of these accomplishments under the Task Order matched against the Statement of Work. It also outlines lessons learned and recommendations for the future to guide future KM programming in the Water Office.

## II. ACCOMPLISHMENTS, LESSONS LEARNED, AND RECOMMENDATIONS FOR THE FUTURE FROM STATEMENT OF WORK

This section of the final report details accomplishments against the requirements laid out in the Statement of Work, as specified in Section F.2 of the Task Order. It also presents lessons learned and recommendations for the future.

### OVERVIEW OF TASKS AND SUBTASKS

The Statement of Work specifies five tasks, each with subtasks.

TASK	SUBTASK
<b>1. USAID Water and Coastal Resources Management Information</b>	
	1.1: Tracking and Reporting
	1.2: Water Activity Funding
	1.3: Water Resources Activity Descriptions and Activity Reporting
	1.4: USAID EGAT/NRM* Program Results**
<b>2. Water Program Information Access and Sharing</b>	
	2.1: Websites
	2.2: Internal USAID EGAT/NRM Technical Information
	2.3: Assist in Accessing Other USAID Water Sector Technical Information and Reports
<b>3. USAID EGAT/NRM Technical Support for Analysis and Reporting</b>	
	3.1: Create Specific Annual Reports
	3.2: Technical Writing Support for EGAT Management Operations*
	3.3: Provide Technical Support for USAID and USAID Counterpart Training, Training Modules, Capacity Building, and Information Dissemination
	3.4: Strategic Framework
	3.5: Specialized Audio Visual and Graphic Technical Support
	3.6: Maintain Pictorial, Photographic, and Audio Visual Collection

<b>4. Selective Assisted Access to Global Technical Information Relating to Water and Coastal Resources</b>	
	4.1: Specialized Internet Searches
	4.2: Create Selective Technical Studies/Reports
<b>5. Knowledge Management</b>	
	5.1: Expansion of USAID Water Program Information Access and Utilization
	5.2: Communications/Information Access
	5.3: Training/Learning
	5.4: Identifying/Documenting/Communicating Best Practices
	5.5: Networking
	5.6: Communities of Interest/Communities of Practice
	5.7: Enhancing USAID's Global Information Participation

\*Economic Growth, Agriculture, and Trade/Natural Resource Management

\*\*Deliverable deleted in the September 30, 2013 Task Order modification No. 3 to amend Section F5

## **A. ACCOMPLISHMENTS FOR TASK I: Water and Coastal Resources Management Information**

Under this task, ME&A was required to “serve as the primary support unit for accessing, interpreting, and communicating information about the Agency’s water and coastal resources management program activities.”

**Task I.1: Tracking and Reporting:** ME&A was tasked to “track and report on USAID’s water and coastal resources management program’s use of funds, types and status of activities (including grant and contract partners and cooperators) and results.”

ME&A provided support related to obligations data tracking and reporting by preparing USAID’s water programming data submission to the Department of State for the FY 2011, FY 2012, and FY 2013 Senator Paul Simon Water for the Poor Act Reports.

ME&A activities included providing support related to obligations data tracking and reporting for preparation of final USAID water programming data to the Department of State for the FY 2011, FY 2012, and FY 2013 Senator Paul Simon Water for the Poor Act Reports and presented the information in a variety of views and tables to best fit the report’s specifications. For each of those fiscal years, ME&A presented the Water Office, Office of U.S. Foreign Assistance Resources (F), and Office of Foreign Disaster Assistance (OFDA) key obligations and data tracking information about the process for delivering accurate funding numbers to the U.S. Department of State. ME&A provided narratives for illustrative FY 2011, FY 2012, and FY 2013 impacts for the Senator Paul Simon Water for the Poor Act Report.

ME&A also provided support related to obligations data tracking and reporting for final USAID water programming data for the Safeguarding the World’s Water report for FY 2011, FY 2012, and FY 2013.

**Lessons Learned:**

- As of FY 2011, Foreign Assistance Coordination and Tracking System (FACTS) extracts could no longer be filtered by key issue when pulled at the program element level, making scrubbing extracts more complicated.
- The process of matching the vague key issue-filtered main extract 3.1 records against the non-filtered extracts for 3.1.8 and 3.1.6.8 requires the most level of effort (LOE).
- The variance in the way the 3.1.8 extract mechanism records are reported requires manual scrubbing in Microsoft Excel.
- Pivot tables keep this manual process as error-free and as transparent as possible. The system began with FY 2011's extracts. The FY 2012 and FY 2013 manual process required less LOE due to experience.
- Use of Microsoft Access speeds up the process of completing the master dataset.
- OFDA handles its data in its own separate database program, and their extracts must be altered to mesh with FACTS.

**Recommendations for the Future:**

- Continue using pivot tables to keep the manual process as error-free and as transparent as possible.
- Allow for about two weeks of LOE to produce the master dataset.

**Task I.2: Water Activity Funding:** ME&A was tasked to “prepare compilations of selected aspects of USAID’s water and coastal resources management funding obligations and planned budgets.”

ME&A compiled selected aspects of USAID’s water and coastal resources management program’s use of funds, type and status of activities, and results for the COR and the Task Activity Manager. ME&A worked closely with the Task Activity Manager to produce various aspects of funding obligations to the Department of State for the FY 2011, FY 2012, and FY 2013 Water for the Poor Act reports. ME&A also provided pie charts and tables for the FY 2011, FY 2012, and FY 2013 Safeguarding the World’s Water reports.

**Lessons Learned:**

- Pie charts are an effective way to visually represent the material.
- Groupings may be different from year to year, resulting in an “apples to oranges” comparison of funding obligations.

**Recommendations for the Future:**

- Start late enough in the fiscal year to have the most complete numbers.
- Do not use too many columns in the Water for the Poor Act reports, as they do not fit and/or are too difficult to read.

**Task I.3: Water Resources Activity Descriptions and Activity Reporting:** ME&A was tasked to “maintain a compilation of USAID water and coastal resources activities, based on both USAID internal operating unit reporting sources and direct communications with USAID operating units. Summary reports (at least two-three per year) shall be prepared on selected aspects of the Agency’s water and coastal resources program.”

The contractor produced more than 150 project narratives for FY 2011, FY 2012, and FY 2013 activities. Each narrative includes the official project name(s), funding level, duration, key words, a general description, and an impact narrative. ME&A created more than 50 project narratives enhanced with contract mechanism information, links to Performance Management Plans (PMPs), and links to lessons learned for inclusion in Water Point.

This ongoing, monthly task enabled USAID staff to reference ongoing activities and ME&A to respond to information requests. Additionally, ME&A produced “top 25” program descriptions for each of the three main themes in Agency water programming for FY 2011, FY 2012, and FY 2013: Water Supply, Sanitation, and Hygiene (WASH), Water Resources Management (WRM), and Water Productivity (WP).

**Lessons Learned:**

- Impact narratives proved difficult to encapsulate in a short paragraph, as some projects are quite long, large in scope, and cover a variety of different focus areas.
- The “top 25” lists convey price tags, but not necessarily the best projects or the ones with the greatest impacts.

**Recommendations for the Future:**

- Project narratives are valuable for a quick search, but impacts that reference page numbers of hyperlinked reports rather than provide summaries of entire projects will prove more accurate and ultimately more helpful.
- Once project narratives are complete, they should be sent to Missions to approve and to post on Water Point themselves to encourage user-generated content without too much burden.

**Task 1.4: USAID EGAT/NRM Program Results:** ME&A was tasked to “gather and summarize USAID water resources program activity results based on utilizing USAID operating unit reports, other ancillary sources of information, and direct communications with USAID operating units.” ME&A could have been asked to assist in data quality analyses (DQA) particularly for Agency reporting of results.

The main deliverable associated with this task was deleted per the September 30, 2013 Task Order modification.

The 250 project descriptions referenced in Task 1.3 above included brief documentation of results for easy reference, including key words, implementing partners, and a bulleted expected results section.

**Lessons Learned:**

- Key words should be wide ranging.
- Many reports are not available on Development Experience Clearinghouse (DEC), making it difficult to document program activity results.

**Recommendations for the Future:**

- Work closely with Mission program staff to capture the impacts and lessons learned in the most up-to-date and accurate way.

## **B. ACCOMPLISHMENTS FOR TASK 2: Water Program Information Access and Sharing**

ME&A was tasked to “collect, organize, and help to provide wide access to USAID Water Resources program information, primarily through website, electronic document and printed reports; necessary electronic database will be established and maintained (based on standard, commercially available systems) to facilitate ready accessibility of descriptive information, results information and budgetary information.”

**Task 2.1: Website(s):** ME&A was tasked to “support the maintenance of internal and external website(s) that will ensure that all internal and external users and customers of USAID’s water and coastal

*resources program have ready access to all relevant information about the Agency's water and coastal resources activities, programs, and funding."*

ME&A provided updates of content for the USAID water external website landing page on a quarterly basis, with key content added before and after World Water Day in 2012, 2013, and 2014. ME&A developed a web page for World Water Day 2012, which explained the significance of the day globally and referred visitors to the Global Health and/or Water landing pages. ME&A prepared existing Internet content for migration to the 2.0 USAID website upgrade. ME&A developed a new webpage on World Water Day 2013 for the Global Water Coordinator's "From the Field" reports. ME&A published and edited 18 dispatches from five priority countries as part of this new, ongoing web feature.

ME&A staff were trained in USAID's content management system (CMS) and worked closely with USAID KM staff under new guidelines for the website redesign to produce new content and a new carousel for the USAID website redesign. ME&A edited content on the transition website and added images to USAID's Photo Library. ME&A also worked with the Water Office to create a third layer of pages on the USAID Water website that comprised information about water supply, sanitation, hygiene, water productivity, rainfed agriculture, and irrigation.

ME&A developed several new pages: a *Global Waters* article main page and article pages, including archived issues of the magazine; pages for the Water and Development Strategy, its launch ceremony, and Water Strategy Implementation Field Guide; a learning and sharing page for event promotion and follow-up; and a "From the Field" column. In November 2013, ME&A developed a strategy for website content development, maintenance, and scheduling. An associated social media strategy was created to push users to the site for new content as it was posted.

Two ME&A staff members obtained security clearances to access USAID's CMS for website updates.

ME&A worked closely with the COR to develop options for an interactive map on USAID's updated external website and the development of the Water Point interactive map as part of the Open Data "Managing for Results" initiative.

Per the Task Order, ME&A sought "*USAID/EGAT (EGAT and M/IRM)[E3] guidance to assure compliance with information system requirements prior to, and during, the execution of work with respect to this subtask.*"

### **Lessons Learned:**

- Creating an internal website requires whole office, as well as management support to gain momentum.
- Create a communications rollout strategy from the very beginning.
- The process for getting security clearance, training in use of personally identifiable information (PII), and an Agency hard or soft token requires extensive LOE.
- Changes to external website content can be easily handled by Office of Water web staff.
- Contractor-managed internal websites are more successful than Agency-managed ones.

### **Recommendations for the Future:**

- Require all trainings to include an introduction and references to Water Point.
- Follow a regular schedule for the water website content.
- Utilize social media (Twitter, Facebook, etc.) and other outreach to push users to visit the site to see new content.
- Work with partners with more flexibility to use social media to promote products and events.

**Task 2.2: Internal USAID EGAT/NRM Technical Information:** ME&A was tasked to “ensure that program information developed by the EGAT Office of Natural Resources Water Team and the Agency Extended Water Team is made readily available and accessible in electronic form (including through internal and external web access), and made available in printed and/or CD form on a selective basis.”

ME&A provided electronic copies of all documents and communication products, mostly posted on the external USAID water website. Some documents were available on USAID servers inside the firewall, including Water Update and other internal documents.

**Lessons Learned:**

- In-house design and branding champions make HTML and PDF development much quicker and utilize less LOE.

**Recommendations for the Future:**

- When on a short timeline, allow more time for the design, editing, 508 compliance, and production process of PDFs and HTMLs.
- Identify a “branding champion” on staff for future Communications & Knowledge Management (CKM) task orders to ensure USAID’s Bureau for Legislative Public Affairs (LPA) rules are followed.

**Task 2.3: Accessing Other USAID Water Sector Technical Information & Reports:**

ME&A was tasked to “track the production of significant technical documents, and a wide array of technical materials and information (including web sites, and selected paper copies, particularly for non-USAID information sources), and provide electronic copies and links to related water and coastal resources websites throughout the Agency’s water and coastal resources program around the world.”

ME&A developed a WaterWiki as an archival tool for technical Internet searches, project narratives, and programming tools. To further this effort, USAID water sector technical information and reports were collected, cataloged, and entered into the internal WaterWiki as an ongoing activity. ME&A coordinated access to the WaterWiki for USAID water and other office staff and worked closely with the IT subcontractor Elucid Solutions to enhance the features to make information and management of the site more user-friendly.

ME&A presented the WaterWiki to Water Office leadership and staff, TetraTech, and Florida International University to coordinate integration with Water Point. ME&A worked closely with the Water Office and Tetra Tech to coordinate development of Water Point to integrate technical and programming content with the archival WaterWiki. As project coordinator, ME&A facilitated focus groups and developed content for Water Point. ME&A also developed work plans and timelines and facilitated weekly meetings with USAID, Tetra Tech, and Sonjara on the development of design, navigation, and content for Water Point.

ME&A also began capturing PDF copies of all water-related pages on Mission websites to preserve their information before they were removed during an Agency redesign of Mission websites.

**Lessons Learned:**

- Collecting and cataloging projects requires regular updating to be effective.
- Utilize a filing program such as Filemaker Pro from the very beginning to ensure easier searches and more thorough database management.

**Recommendations for the Future:**

- Continue to catalogue programs with the assistance of Water Office staff to best understand priority projects and best practices for sharing.

## C. ACCOMPLISHMENTS FOR TASK 3: USAID EGAT/NRM Technical Support for Analysis and Reporting

ME&A was tasked to “provide technical support for technical writing, technical analysis, and technical reporting in support of the EGAT/NRM water and coastal resources reporting responsibilities, particularly relating to Reports to Congress and to collaboration with Department of State for the reporting requirements of the ‘Senator Paul Simon Water for the Poor Act of 2005.’”

**Task 3.1: Specific Annual Reports:** ME&A was tasked to “produce specific technical reports responding to the requirements of Agency reporting and Congressional reporting associated with both the annual Foreign Assistance Appropriations Act and the Senator Paul Simon ‘Water for the Poor Act of 2005’ dealing with aspects of the Agency’s water and coastal resources program.”

In an effort to streamline USAID’s annual reporting, ME&A oversaw a change in the presentation of Safeguarding the World’s Water. ME&A developed a vision document for future iterations of USAID’s Safeguarding the World’s Water annual reports and a rationale describing the creation of the project description collection. After consultations with the COR and members of the Water Office and E3, ME&A developed, designed, and provided content for the FY 2011, FY 2012, and FY 2013 Safeguarding the World’s Water reports. Working with Mission Water Staff for research, project information, and clearance, ME&A produced both online and print versions of the annual reports for the public. For FY 2011-2012, ME&A responded to E3 and LPA for review and approval once the narratives were cleared by Mission and project staff and photos were incorporated.

As stated in Task 1.1, ME&A provided funding information and illustrative project narratives to the Department of State for the FY 2011, FY 2012, and FY 2013 Senator Paul Simon Water for the Poor Act reports.

### **Lessons Learned:**

- The approval and clearance process is long and must be built into the production timeline accordingly.
- Narratives that have already been cleared in *Global Waters*, *Frontlines*, *Water Update*, and talking points use less LOE but may not be the narratives that USAID wants to prioritize in the annual report.
- The earlier the data pulls from FACTS narratives – including Performance Plan and Report (PPR) – the more time to find large impact narratives.

### **Recommendations for the Future:**

- Begin planning the outline for Safeguarding one year ahead to allow for *Global Waters* and *Frontlines* to cover some of the same stories to reduce LOE and to ensure inclusion of best practices.
- Set up quarterly meetings between Water Office and CKM staff to share best projects and recommend inclusion in reports in the future to create a line of communication between program staff and CKM staff.
- Structure the report to reflect the objectives of the Strategy and USAID’s mission.
- Add infographics to reports to show data in a new, more compelling way.

**Task 3.2: Technical Writing Support for EGAT Management Operations:** ME&A was tasked to “provide technical writing and compilation support for the Water Team within EGAT/NRM throughout the year, including technical writing support for production of the annual report for the Water Team within EGAT/NRM, and development of analytical priority-setting information (tabular and other) concerning needs and priorities for water and sanitation and other water-related assistance around the world by country and locality.”

The annual report for the Water Team within EGAT/NRM and priority-setting deliverables were deleted according to a September 30, 2013 Task Order modification.

ME&A supported the development of country pages for use on Water Point. They include background information for each Mission, water-specific data in tabular form, country background, national reports and resources links, USAID-specific country resources – including Country Development Cooperation Strategies (CDCS) – and links to USAID-specific case examples, projects, and procurement documents.

**Lessons Learned:**

- A clear, detailed outline for technical projects improves research efforts.
- When priorities are set by the Water Office early on, there is a more coordinated effort.
- Ensure that all resources are USAID-approved and current.

**Recommendations for the Future:**

- Bring back the task of creating country pages to create a catalogue of water programs around the world, open lines of communication between program staff and CKM efforts, and more clearly demonstrate the impact of USAID water programs

**Task 3.3: Technical Support for USAID and USAID Counterpart Training, Training Modules, Capacity Building, and Information Dissemination:** ME&A was tasked to *“develop presentation and course materials based on latest state-of-the art and best practices understanding of selected aspects of water development and provide experts in selected technical subject areas for participation in USAID workshops and training, and provide other support for such activities, either in the US or overseas (example of possible overseas locations Addis Ababa, Ethiopia, Nairobi, Kenya, Cairo, Egypt, Bangkok, Thailand, Accra, Ghana, and others as required).”*

ME&A provided a meeting facilitator for the Water Office for their strategic work planning in July 2012. The facilitator conducted staff interviews for meeting planning purposes. ME&A also provided support to the Water Office retreat in November 2013. To disseminate best practices, ME&A created a USAID Water Sector Successes Briefing Book for the Global Water Coordinator and a USAID Water Sector Successes in the Middle East Briefing Book for the Secretary of State.

ME&A provided a concept paper on learning events to the COR to disseminate information about best practices across Missions. The paper provided a menu of opportunities for multi-media tools and Water Office branding opportunities. ME&A has also provided a paper on best practices for thematic groups in the Water Office.

In December 2012 and again in December 2013, ME&A provided support to the water sessions during the annual USAID infrastructure workshop. In 2012, ME&A supported the panel on sustainability, scale, and impact and had the session videotaped for future use. ME&A also provided assistance in editing a PowerPoint presentation on the water KM strategy for the workshop. In 2013, ME&A presented and trained attendees in Water Point. ME&A developed the materials, user testing scenarios, and follow-up information.

In May 2013, ME&A provided technical and logistical support and information dissemination for the launch of the USAID Water and Development Strategy on Capitol Hill with Administrator Shah. ME&A provided planning support for a water “fair” during the launch of the Water Strategy. ME&A provided technical documents, logistical support for speakers, discussed water technical issues at a table with water materials, and developed follow-up materials sent to attendees.

To further disseminate information and best practices ME&A created takeaways for two learning events in June 2013 – a webinar with FHI 360 on behavior change and an in-person event with Global Water Initiative. These takeaways were sent to all participants and invitees and were posted on the USAID website Learning and Sharing page ME&A created to encourage information sharing.

In July 2013, ME&A trained USAID staff in the use of Water Point and in uploading content onto Water Point. ME&A developed a PowerPoint presentation on Water Point to build the capacity of Water Office and other USAID staff. ME&A also created a one-page fact sheet for Water Point training, consulted with Water Office staff, and provided a final version for use by the Global Water Coordinator.

In August 2013, ME&A trained USAID water office and web staff in the administrative tasks that manage the content and functionality of Water Point. ME&A also prepared table tents, case examples, and one-pagers for United States Government (USG) panels at the 2012 and 2013 annual World Water Weeks in Stockholm. ME&A provided PowerPoint slides and images for regional workshops on the Water and Development Strategy in 2013.

In September 2013, ME&A coordinated planning for a WASH in Schools learning to be associated with Global Handwashing Day and World Toilet Day to be chaired by UNICEF, with panelists from WASH Advocates and Project WET. ME&A coordinated and planned venue space, messaging, invitations, speakers, and webcasting through conference calls, meetings, and email correspondence. This learning event was canceled due to the government shutdown. ME&A also planned a event on nutrition and water in November 2013. ME&A coordinated with 1,000 Days partnership and the Water Office to decide messaging, panelists, and work around the release of the Nutrition Strategy. This event was postponed due to the early release of the Nutrition Strategy for comment. ME&A also provided materials for the WASH and Conservation guidelines presented at World Wildlife Fund.

In March 2014, ME&A assisted with regional environmental officers training in Bangkok by providing PowerPoint slides for use by the COR.

In June 2014, ME&A provided assistance to the Global Water for Sustainability (GLOWS) and Sustainable Coastal Communities and Ecosystems (SUCCESS) programs close-out learning event. ME&A edited and assisted with design of eight posters highlighting USAID water projects, three posters highlighting WASH Advocates partner projects, seven *Global Waters* posters, and six fact sheets.

### **Lessons Learned:**

- Using a “story telling” approach to materials makes them more interesting and easier to digest.
- Branding materials allows users to understand what information to expect from a series.
- Templates for invitations can be limiting, as each event has different goals and different partners.
- Table tents are a great way to gain exposure during large conferences.
- Table tents are small, so the information must be succinct and bulleted for the greatest impact.
- Webcasting allows for many more additional participants to join in different time zones using a variety of learning styles, but AdobeConnect is just as effective as an expensive webcasting company.
- Working with speakers ahead of time individually and as a group creates more cohesive set of presentations.
- On multi-partner invitations, only key point people should provide input to reduce “too many cooks in the kitchen.”
- Always plan for the technology to fail; always have a back-up and do a dry-run at the venue.
- Venues with webcasting and universal access are the most effective.

### **Recommendations for the Future:**

- Continue take-aways, with a target of dissemination one week after the event to all who RSVPed as well as participated.
- Continue branding of water materials for a consistent look and feel.
- Search for partners with event venues to reduce the need to get participants through Ronald Reagan Building security.
- Establish a regular “Water Wise” series so participants see the water sector as thought leaders.

**Task 3.4: Strategic Framework: Technical Support for Strategic Framework/ Intermediate Results/Indicators development and best practices determinations and summaries (and networking to advance best practices application):** ME&A was tasked to “provide technical support to the Water Team within EGAT/NRM [E3/W] for developing and revising strategic frameworks, intermediate results and program indicators, and advancing best practices in the water sector.” Specifically, ME&A was tasked to “support the Water Results Framework development activity.”

ME&A was not asked to provide support for the Water Results Framework development activity during this Task Order. ME&A developed the Water Office’s first-ever Knowledge Management (KM) Strategy. It was developed to work together with the forthcoming Water Strategy. The KM Strategy served as the basis for the second year work plan for WSCKM. ME&A has also developed indicators for activities in the KM Strategy. ME&A also developed a monitoring and evaluation spreadsheet in which to record results of KM indicators.

ME&A continued to gather information for a report on the status of tasks in KM Strategy and began recording metrics on the monitoring and evaluation spreadsheet. Metrics for six learning events were recorded for the Task Activities Manager to analyze best practices for learning event participation.

ME&A provided support to the Water Office on the development of the Water and Development Strategy Intermediate Results. ME&A researched and drafted narratives about USAID water programs to demonstrate best practices that support the Intermediate Results outlined in the Water and Development Strategy.

ME&A created flow charts for the CDCS process as it relates to the Water and Development Strategy. ME&A created an infographic based on a project in a priority country for use in explaining the CDCS process to Members of Congress.

ME&A provided support to the Water Office on the development of the Water and Development Strategy Implementation Field Guide. ME&A checked water directives, indicators, and flow charts. ME&A also edited and supported the development of six annexes contained in the Water and Development Strategy Implementation Field Guide.

ME&A developed a repository of indicators that included information related to F indicators, custom indicators, and contextual indicators. ME&A developed a list of contextual indicators for Water Point. ME&A uploaded sample custom indicators for use on Water Point.

ME&A used its CMS access and clearances to provide regular updates of water website metrics to the COR, but especially before and after major events.

**Lessons Learned:**

- KM requires support at all levels of the Agency to be most effective.
- Social media and internal newsletters are effective ways to push users to sites with newly developed technical materials.

**Recommendations for the Future:**

- There should be a detailed communications plan for all new websites and publications to allow users to learn about new materials.

**Task 3.5: Specialized Audio Visual and Graphic Technical Support:** ME&A was tasked to “provide technical support to EGAT/NRM [E3/W] for PowerPoint preparations, technical materials for speeches; color printed handouts and fact sheets, tabular summaries of budget information, related graphs and pie charts and other computer graphics products.” ME&A was tasked to “make these products available as required on the internet, so they can be readily accessed by all EGAT [E3] staff and other interested parties.”

ME&A produced two videos for the Water Office. In 2012, ME&A developed a three-minute video for use at the USG pavilion during the World Water Forum in Marseille in March 2012. ME&A produced two versions of short water videos to assist with the launch of the Water and Development Strategy in 2013.

ME&A designed two sets of table tents about presentations and panels during World Water Week in Stockholm in 2012 and 2013. ME&A supported and edited a KM Microsoft PowerPoint presentation at the 2012 Infrastructure Workshops for the Task Activity Manager.

ME&A designed eight posters of successful water projects for use to disseminate information about USAID’s integrated water programming and three additional posters on WASH Advocates partner projects. Based on the posters, ME&A designed one-page fact sheets of successful water projects for use to disseminate information about USAID’s integrated water programming, as needed. ME&A also printed seven posters for the USAID Water Office, based on covers of *Global Waters* magazine.

ME&A designed five print-ready *Global Waters* magazines for use at the 2012 and 2013 World Water Weeks in Stockholm, the Water and Development Strategy launch in 2013, the E3 Open House in 2014, and the GLOWS and SUCCESS learning event. ME&A also produced three versions of postcards describing *Global Waters* for distribution at the World Water Forum in 2012 and 2013, the Water and Development Strategy launch, and for distribution at learning events.

ME&A designed and laid out eight, full-color, four-page Real Impact case examples on Sustainable Water Supply and Sanitation (SWSS), Indonesia Urban Water, Sanitation, and Hygiene (IUWASH), Productive Safety Net Program (PSNP) Plus, Hygiene Improvement Project (HIP), Smallholder Irrigation Market Initiative (SIMI), Water and Development Alliance (WADA), Water, Sanitation, and Hygiene Enterprise Development (WaterSHED), and Feed the Future West (FTFW/WINNER).

ME&A designed and laid out the Water and Development Strategy Implementation Field Guide and six annexes. ME&A also created PowerPoint slides on the Strategic Priority Countries, the CDCS process, and Agency policies for water.

ME&A researched and presented Prezi to the KM Specialist for use in upcoming “Strate-Chats.” ME&A mocked up a Prezi presentation on the Water Strategy and Water Point. ME&A designed the invitation for the WASH in schools blended learning event with UNICEF, WASH Advocates, and Project WET.

ME&A created PowerPoint slides and images for several Water and Development Strategy tables, including Priority Countries for SO<sub>1</sub> and SO<sub>2</sub>, the CDCS process, and a country example for CDCS. ME&A also laid out and provided PowerPoint Slides for the COR's use at training for Regional Environment Advisors in Bangkok. ME&A designed the Water and Development Strategy Implementation Field Guide and six annexes, including tables, both in Microsoft Word and in Adobe InDesign for approval, a web version, and a print version.

ME&A assisted with the layout and design of eight posters and six fact sheets for the GLOWS and SUCCESS closeout event. ME&A designed a template for learning event save-the-dates and invitations using the elements from the Water Update banner.

### **Lessons Learned:**

- The approval process should be planned early on in video production, as it is difficult to make major changes in later stages.
- The USAID print shop is an efficient and cost-effective way to print posters, table tents, magazines, etc.
- InDesign is the proper program for large, printed documents.
- Water branding can be as simple as use of light blues and greys.
- PowerPoint can be limiting for development of graphics from web to print, but it is useful and simple for universal editing.
- Save graphics in multiple formats (JPEG, GIF, TIFF, PNG) when possible to allow for multi-platform use and easy web-to-print transitions.
- Updated web-based presentation platforms, such as Prezi, are more interesting than PowerPoint and extremely user-friendly.
- For design and branding purposes, keep the length of the entire case example standard (at 1,500 words), but allow for variation in length of individual sections.
- Photos can be scaled according to the length of the piece or the section to allow for consistent design.
- Visually interesting and high-quality images were key to the increased interest in the case examples, as the design caught the eye of potential users.
- Branding of the Real Impact series was key, as readers knew what to expect from other projects in the series.
- Make photo requests at the beginning of the research process to avoid being held up.
- Always ask for more photos than you think you need.
- Using an internal management tool like basecamp is the best way to keep track of clearance process.
- Taking time to develop the template for information to be included in technical pieces streamlines the process for future pieces.
- Branding provided continuity across water materials.

### **Recommendations for the Future:**

- Create short podcasts on elements of the Water and Development Strategy.
- Conduct green room interviews of panelists from events for use as short sharing tools.
- Use up-to-date, web-based presentation tools to increase sharing potential or partner with organizations that have more flexibility to use a variety of social media platforms.
- Consider interactive capabilities whenever creating technical documents for more transparent displays of data.
- Consider infographics to display data in a more engaging and visual way.

**Task 3.6: Pictorial, Photographic and Audio-Visual Collection:** ME&A was tasked to *“maintain a collection of pictorial, photographic, elective key video productions as a selective audio-visual collection for use in support of EGAT/NRM [E3/W] staff and technical presentations, PowerPoint presentations, and EGAT [E3] technical reports and publications.”*

Over the course of the Task Order, ME&A collected and managed photos in two online databases for use by the Water Office to augment the design of their communications products. This regular, ongoing task labeled, established rights, and clearly explained content of photos for easier searches of high quality photographs to tell USAID's story. ME&A also maintained a collection of USAID-produced videos related to water programming from YouTube, the program offices, and the projects themselves. ME&A responded to requests for photos for use in invitations and PowerPoint presentations. Over the course of the Task Order, thousands of photos were catalogued.

ME&A maintained an online photo contest to generate interest in sharing USAID's best photos.

***Lessons Learned:***

- Locating usable USAID photos can be a great constraint for all publications and web content.
- Cataloguing photos on Flickr is difficult and time-consuming.
- Flickr has more photos to offer now than it has in the past.
- Whenever working with the Mission on clearance and research, ask for many photos at the beginning of the process and request captions and credits.
- The quality of the photo depends on the quality of the camera or phone.
- Blackberries and flip phones take poor quality photos.

***Recommendations for the Future:***

- Provide a short photo training session for all staff on TDY.
- Provide cameras and require photos from staff on TDY be provided to the contractor.
- Create Standard Operating Procedures for USAID staff on TDY for the uploading of photos from USAID project site visits.

## D. ACCOMPLISHMENTS FOR TASK 4: Selective Assisted Access to Global Technical Information Relating to Water and Coastal Resources

ME&A was tasked to “provide assistance with accessing a wide range of technical information from around the world (particularly through the internet) relating to water and coastal resources management, primarily for the EGAT/NRM Water Team [E3/W] and its primary clients within USAID/Washington and overseas.”

**Task 4.1: Specialized Internet Searches:** ME&A was tasked to “provide specialized technical internet search assistance to EGAT/NRM/W [E3/W] staff in response to requests processed through the EGAT/NRM/W COTR [E3/W COR].”

ME&A provided responses to requests from the COR, Global Water Coordinator, and Water Office Staff throughout the Task Order. Topics included Information Communication Technologies (ICTs), gender, education, partnerships, transparency, resilience, KM strategies, best practices, illustrative project examples, and much more in the Water Sector. ME&A also responded to requests for success stories for the 2012 and 2013 Paul Simon Water for the Poor Reports, meetings with the Department of State and Members of Congress, and briefing books.

ME&A provided responses to requests for illustrative projects for inclusion in USAID’s Water and Development Strategy. ME&A researched examples of Water for Food and Water for Health to improve knowledge of the SOs.

ME&A provided three lists of USAID’s top-funded 75 projects for Fiscal Years 2011, 2012, and 2013 upon the request of the Global Water Coordinator.

### **Lessons Learned:**

- Wikis, DEC, and other USAID databases (i.e., FACTS) are the most effective way to research general Internet requests and how to use those structures.
- Compiling and storing that information makes for quicker responses.
- It is important for staff to dedicate time to weekly research.
- Understand relevant websites and stay current with their content.
- Very specific photo requests are the most difficult to fulfill, given USAID’s limited photo database.

### **Recommendations for the Future:**

- Ask Missions to assist with country pages, reports on key projects, and other water information by populating it themselves on Water Point.

**Task 4.2: Selective Technical Studies/Reports (Topical White Papers, Concept Papers, etc.):** ME&A was tasked to “be prepared to respond, either through core staff or through short-term consultants, to selective requests processed through the EGAT/NRM/W COTR [E3/W COR], from the Water Team in EGAT/NRM [E3], for specialized technical studies and reports on particular water and coastal resources-related topics.”

ME&A prepared a concept paper and proposed outline for a Real Impact series of case examples in the Water Office. ME&A also researched and wrote concept papers on thematic groups, ICTs, learning events, Re-imagine Reporting (RiR), and Really Simple Reporting (RSR). ME&A worked closely with the Water Office, Mission Staff, LPA, Global Health, and Feed the Future to research, interview staff and beneficiaries, and provide drafts for eight Real Impact case examples: Four

on Water for Health and Four on Water for Food. Water for Health included SWSS in Afghanistan, HIP in Ethiopia, WaterSHED, WADA in Senegal, and IUWASH in Indonesia. Water for Food included FTFW/WINNER in Haiti, SIMI in Nepal, PSNP Plus in Ethiopia, and SM-CRSP in Mali. ME&A incorporated edits and feedback to the case examples, worked with the KM specialist to undertake the review process with LPA, made print-ready versions of the series and print-ready versions of one-pagers for use in events.

ME&A worked with the Global Water Coordinator to edit 18 “From the Field” dispatches from five priority countries: nine from Haiti, one from Ethiopia, one from Kenya, three from Indonesia, and three from Liberia. ME&A researched the highlighted projects, edited the content, and worked to present them on the public water website.

### **Lessons Learned:**

- The prioritized list of projects provided by the Water Office was a very effective way of getting the Real Impact series finished.
- For the most thorough research and most appropriate products, projects should be less than five years old, ideally less than three years old.
- Projects should be close to completion to ensure greater impacts.
- Mission buy-in for technical papers facilitates the research and clearance processes.
- Mission input is necessary for completion of the lessons learned section to determine priority.
- If the clearance process is protracted, an additional round of fact checking may be required to address any updated reports.
- Hyperlinks should be the last item added because they often break, so extra care should be given to that before posting online.
- Developing longer pieces allowed for marketing in different ways, i.e., posters and fact sheets.

### **Recommendations for the Future:**

- Get a prioritized list for the Real Impact series at the beginning of each fiscal year (or even quarterly) based on Water Office staff TDY and relationships to the Water and Development Strategy.
- Request larger print runs for laid out documents, as they run out quickly and they were requested regularly.
- Utilize resource-rich and well-formatted layouts to draw wider audiences for technical pieces.

### **Task 4.3: Website Links: Selective water and coastal Information Website Links**

**Identification:** ME&A was tasked to “maintain a selective series of specialized technical links to useful sites that are judged likely to be used by EGAT/INRM/W [E3/W] staff and other USAID staff in Washington and overseas involved in water and coastal resources activities.” ME&A was tasked to “make these links accessible through the USAID web site, and update the array regularly based upon levels of staff use and user satisfaction.”

ME&A maintained a compilation of USAID water and coastal resources activities in a WaterWiki. Management and use of the wiki was an ongoing activity until development of Water Point. The WaterWiki served as an archive of selective specialized technical links to useful sites for the Water Office Staff. ME&A provided information about the WaterWiki for the purposes of integrating it with Water Point.

*(See 5.2 and 2.3 for additional information)*

**Lessons Learned:**

- Technical links need to be updated regularly.
- A facts and resources page allows all USAID publications to align around key statistics currently in use by the Agency for consistency.

**Recommendations for the Future:**

- Keep a calendar of when key publications will be released each year, (e.g., JMP, UNICEF, GLAAS) and anticipate posting new links accordingly and updating information in publication under development.
- ME&A recommends a facts and resources page of hyperlinks on the external water website.

**Task 4.4: Geospatial Links: Selective Maintenance of Web links to water and coastal Geospatial Information Sources:** ME&A was tasked to “*maintain selective Web links to water and coastal geospatial information sources that will include accessible GIS systems, satellite image sites, and mapping systems.*”

(See 2.1 website work with transitional map and USAID map)

**Lessons Learned:**

- Sub-regional geo-tag information for projects, especially for new projects, is not always consistent or available.
- Relying on Agency-wide maps will not always provide effective coverage of water-specific impact.
- USAID has a number of tools that don't talk to each other, i.e. Servir, FEWS NET.

**Recommendations for the Future:**

- Mission coordination is key for the most accurate information.
- Training contractors in GIS tools will enhance knowledge base.

**Task 4.5: Institutional Links: Selective Maintenance of web links to water and coastal Institutions/Organizations (including USAID grant and contract partner organizations):** ME&A was tasked to “*maintain selective web links to water and coastal institutions and organizations around the world on the USAID internal web site after consultation with the LPA and CIO offices for use by EGAT/NRM/W [E3/W] and other USAID staff worldwide.*”

ME&A maintained a master contacts database for water and coastal institutions and organizations. The database includes information from meetings with USAID staff, learning events, webinars, and other water-related events.

**Lessons Learned:**

- LinkedIn, Twitter, networking, RSVP lists are key places to mine for organizational data.
- Regular maintenance is required; Information becomes out-of-date quickly.

**Recommendations for the Future:**

- A human element is needed to maintain notes in active databases to better understand navigation of particular organizations.

## E. ACCOMPLISHMENTS FOR TASK 5: Knowledge Management

ME&A was tasked to “perform Knowledge Management functions utilizing all the information sources concerning the USAID water sector program to which access is provided, including staff, implementing partners, budgets, narrative information and other priority stakeholders, legacy documents, systems, and data.”

### **Task 5.1: Expansion of USAID Water Program Information Access and Utilization:**

ME&A was tasked to “package and make available internally within USAID information about the USAID water sector and stimulate use of that information to improve understanding and promote more well-informed programming in the sector throughout the Agency.”

ME&A produced 12 editions of the Water Update internal newsletter for distribution to the extended Water Team. Water Update included 10 categories of information:

1. In the Field – Spotlight: Short biography of a foreign service national at USAID;
2. Agency News: Legislative and policy updates from Congress and USAID;
3. Field Support and Mechanisms: GDAs, projects, etc.;
4. Education and Outreach: Training opportunities and working group information;
5. Leadership and Coordination: Multi-donor initiatives, international networks;
6. Elsewhere on the Waterfront: Non-USAID happenings in the water sector;
7. Recent Events;
8. Upcoming Events/Calendar: Conferences, trainings, and celebrations;
9. Resource Center: Publications, videos, and reports; and
10. Water Team Worldwide – Coming and Goings: Staff TDYs and changes.

ME&A researched topics and incorporated entries from Water Office staff. ME&A worked closely with the COR to send reminders for new content for each issue. ME&A developed a survey to learn how to make the newsletter more useful for Water Office staff and reported its findings.

ME&A migrated access to Water Update submissions to Water Point for ease of reading and submission of items, including a comments section.

#### **Lessons Learned:**

- Very short entries with heavy hyperlink resources is the best way to keep the readers’ attention.
- Users are more likely to read an HTML format than a PDF attachment.

#### **Recommendations for the Future:**

- A more frequent, shorter newsletter could be a very effective way to disseminate key information, such as the special Water Strategy implementation edition in May 2014.

**Task 5.2: Communications/Information Access:** ME&A was tasked to “provide enhanced communication and easier access to information through a central routing point.” ME&A was tasked to “diagnose, assess, and recommend to USAID how best to integrate water content and assist with gaining internal web site and external web access to make that content available, and carry out work requested by the COTR [COR].”

ME&A provided a Research Analyst/Social Media Specialist on an ongoing basis for the purpose of serving as a central routing point for information and communication related to water programming.

ME&A maintained a compilation of USAID water and coastal resources activities in a WaterWiki. Management and use of the wiki was an ongoing activity until development of Water Point. The WaterWiki served as an archive from which to draw information used in the execution of other tasks under the Task Order.

ME&A provided information about the WaterWiki for the purposes of integrating it with Water Point to create a one-stop shop for water office information.

ME&A coordinated the development of Water Point. Working with Tetra Tech and Sonjara, ME&A recommended content, provided input into the structure of the site, how information is displayed and accessed, and added the links for additional information. ME&A facilitated all meetings associated with this effort. ME&A also presented Water Point and its tools to various training groups at the USAID infrastructure workshop in December 2014.

ME&A coordinated several rounds beta tests and subsequent feedback integration. ME&A responded to requests to update the landing page based on comments and feedback from the Water Office to meet their needs and to address new Water Strategy implementation technical information.

### **Lessons Learned:**

- A central repository of information should be contractor maintained to keep information up-to-date
- Having an archive (good filing system or a wiki or something more sophisticated) is key to information access.
- Conducting general research on the latest events and resources in the Water Sector is important to be able to diagnose needs for information access.

### **Recommendations for the Future:**

- Develop interactive opportunities for sharing information.
- Promote Water Point in all trainings.
- Develop a good system for what information needs to be catalogued on Water Point and how to best to catalogue it.
- Ask for regular input at in-person meetings with Water Office staff to avoid reactions too late in the design/development process.

**Task 5.3: Training/Learning:** ME&A was tasked to “*enhance training and learning activities (initially with Africa, but eventually within and across regions undertaken by the Water Team [Office], other USAID staff, bureaus, missions and contractors/grantees for the development of water program capacity building, and provide lead-up, execution and follow-through/follow-up support.*” ME&A was tasked to include possible “*additional activities: 1) recommending possible water learning/training for future execution and support; 2) recommending partnership support with key learning organizations and training institutions; 3) recommending partnership support with key research organizations and activities to promote innovation; 4) enhancing learning through active communications efforts through electronic media or other means (such as launching a ‘Seminar’ or ‘Speaker’s’ series); and, 5) developing specialized water topic or KM-specific Water training modules, and using similar active capacity-building techniques.*”

ME&A assisted with 14 learning events over the course of Task Order. The learning events covered ICTs with the World Bank, water quality, women’s entrepreneurship and leadership with Gemma Bulos, Sustainable Water and Sanitation in Africa (SUWASA), hygiene behaviors with FHI 360, IWRM and agriculture with the Global Water Initiative, WASH in Schools, KM for the 2012 Infrastructure Workshop, Water Point for the 2013 Infrastructure Workshop, agriculture and nutrition, WASH in

Haiti, Water Strategy Overview at SID, GLOWS/SUCCESS closeout, and WASH-Nutrition at the E3 Open House. Four events were ultimately cancelled: water quality, WASH in Schools, agriculture and nutrition, and WASH in Haiti. ME&A developed a spreadsheet of the training activities undertaken by the Water Office, including numbers of attendees (see *Appendix B*).

In 2011 and 2012, ME&A assisted the Water Office and the World Bank with planning and coordination of a learning event/training on ICTs for the Water Sector during the World Bank's Sustainable Development Network workshop in February 2012 for more than 150 USG and World Bank staff. ME&A was responsible for identifying and inviting experts from the Department of State, the World Bank, industry partners, and leading non-governmental organizations (NGOs) to share how innovative mapping and mobile solutions could support development goals and introduce new standards for transparency and accountability in water programs. Through weekly meetings with USAID and the World Bank, ME&A set the agenda for the event around two panels, moderators, and key discussion topics. ME&A was also responsible for the development of all materials, email blasts, logistics, and videoconference participation.

ME&A coordinated and invited industry experts for small-group clinics after the panel presentations so participants could learn how to better take advantage of mobile phones, mobile internet access, and social media tools for improved water resource management and citizen engagement. This event was an activity under the USG-World Bank Memorandum of Understanding (MOU) on Water, signed on World Water Day, March 22, 2011, by Secretary Clinton and President Zoellick.

ME&A also prepared recommendations for speakers and topics for an ICT session during World Water Week in Stockholm in 2012.

ME&A facilitated a Water Office one-day learning on workflow management and office roles and reached out to provide AIDConnect assistance for a Water Quality workshop. ME&A also provided information about Missions with water quality projects.

ME&A facilitated breakout sessions on KM and provided survey questions for a needs assessment on KM during USAID's water session at the infrastructure workshop in December 2012. ME&A developed lessons learned from the events held at the workshop and developed a timeline and list of best practices for potential future learning events.

ME&A provided logistical support, materials, and invitations for learning events on SUWASA and gender in April and May 2013. ME&A assisted with four Water Strategy chats called "Strate-Chats." One was a blended learning event (in-person meeting and webcast) at FHI 360 on hygiene behaviors with logistics, materials, preparation of speakers, and writing take-aways for participants in June 2013. The second was a learning event with Global Water Initiative (including CARE, CRS, and International Institute for Environment and Development) on IWRM with logistics, materials, preparation of speakers, and writing take-aways for participants in June 2013. The third provided logistical support, materials, and invitations for a WASH in Schools "Strate-Chat" with Project WET, UNICEF, WASH Advocates, and WASHplus that was cancelled in October 2013 due to the government shutdown. The fourth provided initial agenda support for a "Strate-Chat" with 1,000 Days on agriculture and nutrition in late 2013, but the event was postponed.

ME&A developed a 12-month learning event strategy that included messaging, potential partners and panelists, linkages to the Water Strategy SOs, and timing.

ME&A provided initial logistical and agenda support to a WASH event in Haiti that was canceled in January 2014. ME&A provided support to the Global Water Coordinator at the Society for

International Development (SID) in April 2014 at SID headquarters with more than 100 attendees. ME&A provided support to the University of Rhode Island (URI) and Florida International University (FIU) on an all-day learning event on the GLOWS and SUCCESS programs in June 2014. ME&A provided initial logistical support to the Global Health Office for an E3 learning event on WASH-nutrition to take place in July 2014.

### **Lessons Learned:**

- Learning events should be regular and coordinated with TDY schedule.
- Ask for PowerPoint slides in advance of the event to prevent technical difficulties and to measure whether a speaker is going to speak too long or repeat another speaker's presentation.
- Coordinate with partners to find the best space with easy access and enough room.
- Blended events reach the greatest number of participants.
- The best events included storytelling by the speakers, rather than long PowerPoint presentations.
- Work with the venue ahead of time to ensure technical set-up.
- Ronald Reagan Building rooms can be very difficult to find, so adding flyers with directions is very effective.

### **Recommendations for the Future:**

- Develop a regular "Water Wise" learning event series to promote the Water Office's best practices and be a leader in learning and sharing for the Agency.
- Make all learning events blended to include Mission staff and allow for a webcast to be viewed any time.
- Vary the venues to include a variety of partners – including Missions, not just Washington, DC.
- Revisit and refine the learning event strategy to gain Water Office support and input for future events.
- Set up a quarterly CKM meeting with Water Office staff to get ideas for learning events and learn about and capitalize on TDY schedules of Mission staff visiting Washington, DC.

**Task 5.4: Identifying/Documenting/Communicating Best Practices:** ME&A was tasked to *"identify water sector needs/opportunities for best practices identification, documentation and communication in sub-sectors of the USAID water portfolio and seek to advance those efforts within the Agency and among USAID partners."*

ME&A published 10 editions of the quarterly online magazine, *Global Waters*, highlighting the Agency's field activities, editorials on current water issues, USAID-sponsored and partner events, water-related resources, water-related publications, and partner pages. With more than 2,900 subscribers as of July 2014, *Global Waters* was in the top five most subscribed USAID publications out of 150 recorded by the Agency. One special edition was produced for World Water Day 2012 and included content focused on the 2012 United Nations theme of water and food security. For each edition, ME&A researched potential feature story topics, ideas for editorials and authors, partners doing water work, and provided ideas to the COR. After consultation with the COR, ME&A researched the stories and sections through document review and interviews. ME&A included beneficiary quotes and other on-the-ground information in all of the stories featured in *Global Waters*. ME&A worked hard to get high-quality photos from the Mission and at times from photo-sharing sites. ME&A worked closely with the Missions, the Water Office, E3, and LPA for clearance of story content. For eight of the editions, ME&A worked closely with subcontractor to design the rich format with hyperlinks, visually interesting layouts, and compelling photographs and graphics for an eye-catching layout. For two editions, ME&A used its own in-house graphic designer to design the layout with excellent results. ME&A utilized the Issuu format for the first eight editions of the magazine, but discontinued the process after bandwidth issues were raised by readers in the Missions. ME&A carefully designed the magazine according to USAID's branding guidelines and graphical standards. ME&A printed two issues of *Global Waters* magazine for World Water Week 2012 and World Water Day

2013. ME&A developed a QR code to assist readers with the subscription process and access to content. ME&A worked closely with E3's webmaster to create a *Global Waters* landing page and archive. All *Global Waters* articles are individually searchable and all articles are available in HTML format, in addition to downloadable and printable PDFs.

ME&A provided a proposal for themes, messages, interviews, and a matrix of 8-10 story ideas on water and agriculture for the March 2013 edition of USAID's *Frontlines* magazine that had a water theme. ME&A also researched and wrote a short article on the Cereal Systems Initiative for South Asia project for inclusion in the March 2013 edition of USAID's *Frontlines* magazine. ME&A researched and wrote a separate proposal on water and resilience for the April 2013 *Frontlines* edition on resiliency.

ME&A conducted a mid-term evaluation of the SUWASA program. A four-member team of international consultants traveled to Kenya, and split into two teams to travel to Nigeria and South Sudan to gather information on the project activities in those areas. ME&A produced a thorough report that was posted on DEC.

### **Lessons Learned:**

- Issue required too much bandwidth for many USAID Missions.
- Branding requirements don't necessarily hinder innovative design.
- Promotion of magazines must include social media and cross-posting from partners and other sectors to increase readership.
- Printing using the USAID print shop was free and successful.
- When printed, *Global Waters* was very valuable and desired at conferences and other events.
- When *Global Waters* was printed, it bumped the online readership.
- Always tweet about the articles, even in between issues—it drives people to the magazine.
- The more USAID can provide the points of contact for articles, the better and smoother the process for researching and writing the articles.
- ME&A was able to move graphic design in-house, making the magazine development more flexible, cost-effective, and quick.
- Having a graphic designer who is familiar with USAID, water issues, and the process leads to fewer errors and better branding.
- Coordinate review schedules and calendars early on and throughout the publication process to keep to a strict timeline.
- Printing at the USAID print shop requires a few weeks extra time.

### **Recommendations for the Future:**

- Publish more frequent content with similar layout.
- Dedicate a Facebook page and/or Twitter account to *Global Waters* magazine.
- Ask Missions to promote articles using their own Facebook and Twitter accounts to promote international readership.
- Add guest writers from the Missions to the "From the Field" reports.

**Task 5.5: Networking:** ME&A was tasked to "facilitate network building through the promotion of internal collaboration within, and across, work teams and working groups." ME&A was tasked to "carry this out through such approaches and techniques as the identification of priority needs of key water-related working groups and the support for collaboration-based platforms (focused on groups associated with Africa water program development, the Sanitation Working Group, and others)." ME&A was tasked to "coordinate with USAID's Knowledge Management Development Experience Clearinghouse."

ME&A coordinated and promoted a networking event during USAID 2012 infrastructure workshop to encourage networking for 150 members of the water community.

ME&A attended USAID's KM Expo to learn more about KM expansion opportunities available at USAID, including the DEC and USAID's AllNet portal. In addition, ME&A met to discuss KM with USAID staff and implementing partners, including a member of USAID's Education KM team and staff from USAID's WASHplus project. ME&A's Research Analyst was trained in how to submit resources to DEC.

To learn about best practices for running events that combine in-person presentations with webinars, ME&A met with other implementing partners that are involved with other KM tools and platforms (FRAMEweb and Agrilinks, for example), including the management of the Africa Biodiversity Collaborative Group. ME&A also met with other implementing partners that are involved with water (WASH Advocates, WASHplus, UNICEF's Carol Bellamy). ME&A talked with Summit Webcasting to learn about best practices in running events that combine in-person presentations with webinars.

ME&A has worked to ensure that its public materials published during the WSCKM Task Order have been posted on DEC. ME&A provided a DEC contact to the U.S. Water Partnership (USWP) to coordinate knowledge sharing.

**Lessons Learned:**

- Regular networking improves contractor ability to reach out to partners on key USAID projects.
- Networking increases technical knowledge by contractors.

**Recommendations for the Future:**

- Increased travel to key annual events would enhance the promotion of Water Office publications.
- Require all water reports to be posted on DEC with appropriate tagging.

**Task 5.6: Communities of Interest/Communities of Practice:** ME&A was tasked to *“identify and recommend provision of and provide support for the coordination of water-related communities of interest and communities of practice among USAID staff and/or USAID partners through stimulation/creation and the cultivation of Water Team presence in priority regional and thematic networks.”* ME&A was tasked to *“provide support for information-sharing and network coordination among select groups of USAID's implementing partners.”*

ME&A met with individuals from the Sanitation Working Group, USAID's Global Health KM team, USAID's Bureau of Food Security KM team, the Education KM program, and USAID staff and implementing partners working on communities of practice. After these consultations, ME&A provided a concept paper on best practices for thematic groups in the water sector.

**Lessons Learned:**

- Communities of practice require a champion within the Agency who is well respected and willing to dedicate time to developing the group.
- Creating communities of practice around a topic would be improved with contractor support to help with research and communication.

**Recommendations for the Future:**

- Encourage online participation in Water Point's thematic groups

**Task 5.7: Enhancing USAID’s Global Information Participation:** ME&A was tasked to “generally promote the alignment of USAID efforts in the water sector to the thrust of the Global Development Commons efforts, and, when requested, [to] assist in support for USAID water sector data and reporting inputs to the G8, OECD, and other donor-related international information aggregation efforts of high priority to USAID and State.”

ME&A developed communication materials (i.e., banners, interactive “low-tech to high-tech” installations, and computer stations) that promoted active engagement by World Water Forum 2012 participants in learning about USAID water programming. Additionally, the contractor provided staff to interact with forum participants, as well as the set-up/take-down of the display components.

The contractor supported USAID and EPA’s 2012 and 2013 Earth Day 6K Walks for Water with statistics on current water issues for use on signs during the event. The contractor also created a press release for the USAID Administrator participation in the Sanitation and Water for All meeting.

ME&A developed and implemented a strategy and social media blitz around the 2012 and 2013 World Water Weeks in Stockholm and printed *Global Waters* magazine for distribution to water practitioners at the World Water Week in Stockholm.

ME&A developed and implemented a social media strategy and blitz around 2012 and 2013 Global Handwashing Day, World Toilet Day, and the U.N. Year of Water Cooperation and U.N. Year of Water-Food-Energy Nexus. ME&A organized and executed a water “mixer” for WASH partners, USAID staff, and implementing partners to share information about key successful water programs in December 2012. *Global Waters* magazine was distributed during the water “mixer.” ME&A researched possible events to take place on World Water Day 2013 and 2014 and potential innovative ideas involving the media. In addition, ME&A met with individuals from the Sanitation Working Group, USAID’s Global Health KM team, USAID’s Bureau of Food Security KM team, and USAID staff and implementing partners working on communities of practice.

ME&A developed and implemented a social media strategy and blitz around World Wetlands Day, International Women’s Day, and World Water Day. ME&A captured the indicators related to these tweets, including the number of retweets and number of people who clicked on the tweet, following each of these events and after the release of the tweets celebrating the beginning of the Year of Water Cooperation. ME&A developed a list of tweets for an AgChat held by USAID’s Agrilinks program on World Water Day and attended the AgChat event to analyze the logistics of coordinating a Twitter Chat for potential use at a future date.

ME&A developed and implemented a social media blitz around Earth Day, the launch of USAID’s Water and Development Strategy, and for “Strate-Chat” learning events. ME&A captured the indicators related to these tweets, including the number of retweets and comments, following each of these events. ME&A developed a long-term social media strategy to be applied to 2013-2014. It covered media, impact, audiences, and how to make social media platforms work together and improve each other.

ME&A developed and implemented a social media blitz around the 2014 UN theme of Water and Energy, World Water Day, “From the Field” reports, and *Global Waters* magazine. ME&A edited and prepared a USAID Impact Blog on the USAID main landing page for the Global Water Coordinator on his recent visits to five priority countries – Haiti, Ethiopia, Indonesia, Liberia, and Kenya in support of the Water Strategy. ME&A created tweets to drive readers to the Impact Blog and each “From the Field” report.

### **Lessons Learned:**

- Regular tweeting enhances online readership.
- A Water Office Twitter/Facebook/general social media contact is necessary for a successful social media presence.
- Rollouts should be carefully planned across social media platforms for the greatest impact.
- Social media presence/blitz leading up to an event increases interest.
- #USAIDwater is a more useful hash tag than #water.
- Consistent use of hashtags allows for monitoring and collecting of metrics.
- Using too many hashtags is counterproductive; Use as many as two hashtags.
- Use ow.ly to shorten and protect hyperlinks.
- Hoot Suite is a useful monitoring tool for ow.ly links.

### **Recommendations for the Future:**

- Social media should be used more widely.
- Dedicate a social media account with regular postings would be an effective way to reach out to partners and the water sector.
- Cross promote partner events and Mission accomplishments; social media is most effective when used for sharing and engaging in a two-way discussion.

## III. FINAL DELIVERABLES

In addition to the requirements set forth for the submission of reports in IQC Sections F.7, in accordance with the Task Order Section F.5, and AIDAR clause 752.242-70, Periodic Progress Reports, and in addition to the requirements set forth for reports in Section C.4, ME&A submitted reports, deliverables, and outputs as described below. All reports and other deliverables were in the English language, as specified by the COR.

1. ME&A provided an initial work core work plan to the COR. Annual work plans were delivered in mid-December each year thereafter. The core work plan described and estimated the LOE for normal ongoing core activities, separately from any additional LOE based on technical direction from the USAID COR for specifically requested activities from those indicated in the Statement of Work.
2. The E3/W Internal and External websites were established, maintained, and supported throughout the period of performance, as directed by the COR. A website content development, schedule, and maintenance strategy was delivered.
3. WSCKM Activity Funding Reports. ME&A delivered the annual USAID Safeguarding the World's Water report on water sector activities and programming covering USAID work in FY 2011, FY 2012, and FY 2013, with copies provided to the COR and on the USAID website. ME&A worked closely with E3/W to provide master dataset inputs and large impact data into the Senator Paul Simon Water for the Poor Act Annual Report to Congress for FY 2011, FY 2012, and FY 2013.
4. ME&A provided eight specialized technical case studies (four on water for health and four on water for food), three concept papers (transparency, ICTs, thematic groups), and four strategies (KM, learning event, website content, and social media) as directed by the USAID COR.

5. ME&A produced more than 150 WSCKM Activity Description Reports and Knowledge Management summaries and descriptions, varying in length and complexity by utilizing available WSCKM information).
6. ME&A maintained a collection of thousands of photos and videos on Flickr.
7. As requested via technical direction from the COR, ME&A delivered scores of specialized Internet searches, conducted selective special studies and reports as directed, and provided frequent and regular workshop/conference/presentation support were provided over the course of the Task Order on time and with the available budget.

# ANNEXES

- ANNEX A:** KM Strategy
- ANNEX B:** KM Performance Monitoring Table
- ANNEX C:** Learning Event Strategy
- ANNEX D:** Learning Event Statistics



Bureau for Economic Growth, Education and Environment (E3)  
Water Office

# KNOWLEDGE MANAGEMENT STRATEGY

FY2013-FY2017



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## ACRONYMS

E3	Bureau for Economic Growth, Education, and Environment
DOS	Department of State
FACTS	Foreign Assistance Coordination and Tracking System
GLOWS	Global Water for Sustainability
KM	Knowledge Management
NASA	National Aeronautics and Space Administration
NOAA	National Oceanic and Atmospheric Administration
SUWASA	Sustainable Water and Sanitation in Africa
UNICEF	United National Children’s Fund
USAID	United States Agency for International Development
USGS	U.S. Geological Survey
WASH	Water, Sanitation, and Hygiene
WHO	World Health Organization

## I. EXECUTIVE SUMMARY

Knowledge Management (KM) encompasses getting the right knowledge to the right people at the right time. This KM strategy presents the goals, objectives, and activities through which USAID’s Water Office will capture knowledge that is critical to the Agency, constantly improve it, and make it available in the most effective manner to those who need it. If supported by USAID’s management and leadership and implemented systemically, KM contributes significant value both internally and externally through collaboration among partners and application of lessons learned. It will ensure that USAID maximizes the value of its information and knowledge, supports its partners and beneficiaries, and leads to improved effectiveness and impact. KM enables individuals, teams, and all of USAID to collectively and systematically create, capture, share, and learn knowledge to better achieve water sector strategic objectives. It should be an integral part of every USAID Water Office member’s daily responsibilities.

USAID’s Water Office KM strategy has four goals: 1) knowledge creation – turning data into useable information; 2) knowledge capture – collecting and cataloguing data and information; 3) knowledge sharing – disseminating and promoting knowledge products while fostering a knowledge sharing culture<sup>1</sup>; and 4) knowledge learning – applying good practices and lessons learned to future activities. Through this strategy, USAID’s Water Office has the opportunity to be a thought leader on KM best practices.

<sup>1</sup> Communications will not be treated separately in this strategy; instead it will be a key component to any and all KM activities presented here.

## II. BACKGROUND

According to the World Health Organization (WHO) and the United Nations Children’s Fund (UNICEF), more than 780 million people do not have access to improved sources of drinking water, and over three times that many – 2.5 billion – do not have access to improved sanitation.<sup>2</sup> Global demand for water is doubling every 20 years, and two-thirds of the world’s population could be living under water-stressed conditions by 2025. Catchments and aquatic ecosystems are under increasing pressure from a broad range of human activities, including urban growth, agricultural and industrial development, inadequate land use planning and management, land-based pollution, climate change, and poorly managed and overexploited fisheries and other aquatic resources. Creating successful programs under these circumstances requires knowledge of successes, failures, useful new technologies, and good practices across the globe.

According to USAID, KM is defined as “systematic approaches to help information and knowledge emerge and flow to the right people, at the right time to create value.”<sup>3</sup> The KM strategy and its activities are a collective effort which will engage both internal (including Regional Bureaus, Bureau for Global Health, Bureau for Food Security, Development Credit Authority, Office of Science & Technology, United States Government partners, etc.) and external audiences (including the private sector, academia, donors, the American Public, Congress, etc.). The importance of retaining and making available both explicit and tacit knowledge will not only reduce duplication of effort, but it will allow for more effective programming and decision making as water is integrated across sectors.

## III. USAID WATER OFFICE

USAID’s Water Office has five key roles: knowledge management and outreach of USAID water-related programming; global partnership; technical leadership; monitoring & evaluation; and field support.

The mission of USAID’s Water Office is to play a catalytic and technical leadership role to promote broad-based and equitable access to, and sustainable management of, water resources and related services for security, prosperity, and ecosystem and human health.

### USAID Water Strategy

The KM strategy aligns closely with the Water Strategy implementation guidance and supports its goals and strategic objectives. *[Additional information to be provided upon release.]*

## IV. FRAMEWORK

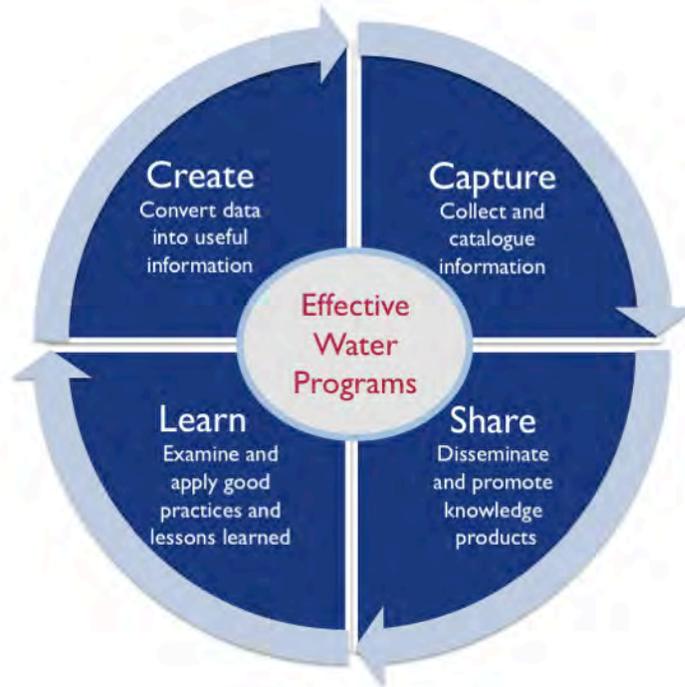
This KM Strategy will be implemented according to a framework of four key goals: create, capture, share, and learn. Knowledge is created through activities that transform data into applicable information through improved access and analysis. Knowledge is captured through activities that collect and catalogue USAID’s good practices, failures, lessons learned, research topics, and impact through various tools. Knowledge is shared through the dissemination and promotion of knowledge products, while fostering a knowledge sharing culture. And, knowledge is learned through the examination and application of good practices and lessons learned.

This KM strategy is a living document. It may change as the Water Office works with both internal and external stakeholders to identify additional KM activities. Ongoing needs assessments will inform the prioritization of activities, the approach chosen, and the audience (whether external or internal) targeted to achieve the activities recommended in this strategy. The strength of the strategy will lie in the systematic organization of information, the facilitation of learning, and the promotion of a knowledge sharing culture.

<sup>2</sup> WHO/UNICEF Joint Monitoring Programme for Water Supply and Sanitation. Progress on Sanitation and Drinking-water: 2012 Update, available at [http://whqlibdoc.who.int/publications/2012/9789280646320\\_eng\\_full\\_text.pdf](http://whqlibdoc.who.int/publications/2012/9789280646320_eng_full_text.pdf)

<sup>3</sup> USAID Knowledge Management Strategic Plan 2008-2012, available at [www.hipnet.org/sites/default/files/resources/KMStrategicPlan.doc](http://www.hipnet.org/sites/default/files/resources/KMStrategicPlan.doc)

The USAID Water Office is cognizant that the implementation of this KM Strategy requires a dedicated investment of time, effort, and funding. This KM strategy requires leadership and management support to be successful. In order to reap the full benefits of that investment, KM goals will be considered in the near and long term. For this reason, the Water Office is committed to providing the financial and human resources for its KM activities to ensure their ongoing success and long-term sustainability.



## V. KM PURPOSE STATEMENT

The purpose of the USAID Water KM program is to build connections among members of the water community that will successfully transfer knowledge from those who have it to those who need it to achieve the Agency's Mission.

## VI. GOALS, OBJECTIVES, AND ACTIVITIES

**Goal 1: To create knowledge by improving access to data and the ability to transform it into useful information.** Implementation of this goal includes increasing transparency of data and converting data into information through analysis and refinement to support the Water Office's evidence-based programming goals.

**Objective 1:** Improve understanding of water sector activity data.

**Activities Include:**

1. Investigate open source data sharing platforms to enhance access to data.
2. Develop synthesis tables and guidance based on FACTS reporting in order to better understand water programming.
3. Appropriately tag and post water sector data available on a variety of platforms including the USAID Water website and publications.

**Objective 2:** Support and generate evidence-based programming in the Water Office.

**Activities Include:**

1. Evaluate water projects (e.g., SUWASA) to assist with overall technical direction of water programming.

2. Track best practices and lessons learned through evaluations to improve existing water-related programming implemented by the Agency.
3. Analyze captured water programming results worldwide to ensure knowledge is reflected in the programming cycle.

**Goal 2: To capture tacit and explicit knowledge of the Agency's water programs.**

Implementation of this goal includes the collection, storing, and cataloguing of information and data.

**Objective 1:** Archive and improve access to water information.

**Activities Include:**

1. Review existing document libraries and systematically migrate content into user-friendly platforms.
2. Increase utilization of technical resources through proper tagging and availability on several platforms.
3. Capture tacit knowledge from transitioning or retiring employees to serve as institutional memory and a resource for new employees.
4. Align Water Office's research agenda with technical gaps to promote thought leadership.

**Objective 2:** Identify and collect new resources for use in water programming activities.

**Activities Include:**

1. Conduct specialized technical Internet searches to identify resources to inform water activities. (e.g., Research Roundup).
2. Catalogue resources created by USAID's Water Office and partners with appropriate tagging within the Agency's databases.

**Goal 3: To share knowledge to enhance water programming and outcomes.** Implementation of this goal will foster a culture of knowledge sharing within the water community and demonstrate technical leadership through knowledge exchange and targeted publications.

**Objective 1:** To facilitate knowledge exchange and communication among USAID headquarters, Mission offices, USG (including DOS, NASA, USGS, Army Corps of Engineers, NOA, etc.), and the water community to decrease duplication of effort and improve problem solving.

**Activities Include:**

1. Develop active sharing spaces for both internal and external audiences (e.g., thematic groups), including collaborative technologies (e.g., Water Wiki, USAID intranet site, video conference, podcasts, and videos), brown bag lunches, and other venues for knowledge exchange.
2. Use e-newsletters (e.g., *Water Update*) to share information from USAID's Water Office about water sector activities and developments.
3. Provide incentives for internal and external knowledge exchange (e.g., photo contest, staff recognition, co-sponsored learning events).

**Objective 2:** To inform the American public, the water community, Congress, and other stakeholders including academia, private sector, and donors on key program impacts.

**Activities Include:**

1. Increase visibility of USAID's water program results through websites (e.g., USAID main page and Water website), magazines (e.g., *Global Waters*), publications (e.g., *Real Impact Series*, *Frontlines*), and events (e.g., World Water Forum, World Water Week).
2. Publishing funding and program information (e.g., Paul Simon Water for the Poor Act Annual Report).
3. Utilize social media outlets to promote key messages (e.g., Agency and mission Facebook, Twitter, and LinkedIn groups).
4. Create, maintain, and share knowledge management tools to the public through the U.S. Water Partnership.

**Goal 4: To learn new tools, approaches, and methodologies for more effective, sustainable, and innovative water programming.** Implementation of this goal actively transfers key knowledge through examination and application of successes, lessons learned, and innovations in the field in order to improve program outcomes and mitigate the repetition of errors.

**Objective 1:** To provide multiple learning tools to meet a variety of learning styles and country circumstances.

**Activities Include:**

1. Conduct learning events around lessons learned, good practices, and innovations in the field (e.g. WASH Learning Initiative).
2. Distribute case examples of integrated approaches and tools in the water sector (e.g., *Real Impact Series*).
3. Create self-paced e-learning tools (e.g. *Water Guide*), including videos, podcasts, and webinars.
4. Publish good practices and lessons learned through evaluations to improve subsequent water-related programming implemented by the Agency (e.g. *Global Waters, Real Impact Series*).

**Objective 2:** To make information about USAID methodologies, good practices, and key lessons learned available in an easily accessible location for interested parties.

**Activities Include:**

1. Increase visibility of USAID’s water program’s knowledge products and presence across USAID, including websites (e.g., USAID water website), publications (e.g., *Real Impact Series*), and events (e.g., thematic group learning events).
2. Produce tools for demonstrating impact, including annual reports (e.g., Paul Simon Water for the Poor Act Annual Report), and interactive maps (e.g., “clickable maps”).
3. Develop Intranet tools for internal USAID use.

**Objective 3:** To gain a greater understanding of approaches and innovations from the broader Agency and the water community to achieve water program goals.

**Activities Include:**

1. Host brown bag presentations, learning events, and webinars with internal and external partners.
2. Engage cross-cutting thematic groups to advance learning agenda on water programs.
3. Engage in sharing with other Federal Agencies, private sector, academia, and donors.

## VII. CONCLUSION

KM comprises a range of practices used by USAID to capture, create, share, and learn knowledge that, if followed systematically and applied methodically, will enable the water community to collectively better achieve water objectives. Most water program activities or tasks are not one-time events. Whether drilling a well, setting up a water user association, or installing a wastewater treatment plant, USAID’s water sector works to replicate success. Our philosophy should be fairly simple: every time we do something again, we should do it better than the last time. Strategic KM is the vehicle to attain this.

**Water Office KM Strategy  
MONITORING AND EVALUATION PLAN  
Report: July 30, 2014**

Objective				
<p>I: Improve access and understanding of water sector activity data</p>	<p>Investigate transparent reporting practices</p>			<p>Concept paper on Transparency (RiR and RSR) 8/12</p>
	<p>Develop guidelines for FACTS reporting by the mission and regional offices; Create clear messaging and guidelines around evaluation data including information on its understood meaning, methodology, and how to rectify errors</p>	<p># Errors/Omissions found</p>	<p>Decline in total # of errors</p>	<p>Draft recommendations for the Master Dataset scrubbing process submitted 6/13</p>
	<p>Appropriately tag and post water sector data on a variety of platforms including the Water Office website and publications</p>	<p># Platforms containing data from USAID's Water Office</p>	<p>Increase in knowledge about USAID water programming within broader water sector</p>	<p>Created a list of 37 keywords for the Water Point tagging process</p>
<p>2: Support evidence-based programming</p>	<p>Conduct evaluations of key programs and tie to research questions</p>			<p>SUWASA Mid-Term Evaluation 8/13</p>

	Publish and track successes and lessons learned through evaluations			SUWASA Mid-Term Evaluation 8/13 posted on DEC
I: Archive and improve access to existing water information	Capture tacit knowledge from transitioning/ retiring employees and making it accessible to serve as a resource for employees	# Individuals identified and interviewed, # Interviews viewed/downloaded	An increase in HQ staff and Mission staff's ability to locate resources needed to carry out their role, as reported through focus groups. (Source: A baseline assessment will be conducted at start of implementation using a focus group with individuals representative of the activity's target audience. A follow-up will be conducted at end of first year.)	Water Wiki, Phase I has 157+ pages of Water Point resources
	Review existing document libraries and systematically migrate content into limited number of platforms			Phase I of Water Point website
	Increase utilization of technical resources through proper tagging and availability on several platforms	# Staff downloading technical resources and publications		Development of indicators to assess KM implementation progress in KM Strategy (this document)
	Align with research agenda			Water Wiki, 157+ pages of Water Point resources
2: Identify and collect new resources for use in water programs	Conduct specialized technical Internet searches to identify resources to Water Office activities (i.e. 'Research Roundup')			Regular 'Research Roundups' by Research Analyst; Scores of specialized technical Internet searches, e.g., WRM, gender, Rotary International, Middle East impacts, ICTs, RSR & RiR, etc.

	Catalogue of evaluations	% Evaluations catalogued		Addition of SUWASA Evaluation to DEC
	Maintain and expand a photo library	# Contributions to photo library	Better visual expressions of water program impacts	Photo library with over 2,600 photos
1: Facilitate knowledge exchange and communication	Develop active sharing spaces	# Thematic groups launched, # Active participants	# Staff at HQ and Missions reporting greater connectedness and knowledge culture with freer flow of information among Agency staff for improved water programming ( <i>from focus group</i> )	Concept paper on thematic groups, development of sharing space on Phase I of Water Point website
	Use of e-newsletters	# Submissions		12 issues of Water Update; More than 5 requests for projects to be included in 10 issues of Global Waters
	Provide incentives for knowledge sharing	# Submissions		Photo Contest, Certificate of Recognition Program
2: Inform American Public	Increase visibility of knowledge products ( <i>repeat activity from Goal 2; Obj. 2</i> )	# Users to wiki, # Subscribers to <i>Global Waters</i> , # Participants in thematic groups, # Participants attending learning events	Increase in HQ staff and Mission staff's use of resources in programming. ( <i>From focus group</i> )	More than 3,000 Global Waters subscribers (Top 5 USAID newsletter circulation), 755 attendees at Learning events
	Publishing funding and program information to Congress			3 Safeguarding the World's Water Reports and 3 Paul Simon Water for the Poor Act Reports for FY2011, FY2012, FY 2013; Prepared 3 sets of briefing materials for Congress (ICTs, Middle East, Water Strategy)
	Utilize social media to promote key messages	# Tweets used by LPA, # Retweets; # Facebook Posts		Social Media Strategy; Social Media blitzes around each issue of <i>Global Waters</i> magazine (one tweet per day for 9 days for each issue), <i>From the Field</i> report (one tweet per day for 5 days per

				report), World Water Day activities (one tweet per day leading up to event), World Water Week (one tweet per day leading up to World Water Week and one tweet per day during World Water Week), and around key water events (5 tweets for World Handwashing Day; Day of the Women; UN Year of Cooperation; UN Year of Water and Energy)
I: Provide Multiple Learning tools to meet variety of learning styles and country circumstances	Conduct learning events	# Participants attending in learning events	# Individuals citing increased efficacy in carrying out the activity post-training (from focus group)	755 participants at 11 learning events (average of 68 participants per event)
	Distribute <i>Real Impact</i> series	# Downloads	Greater integration of water pillars in programs; Improved programming in line with Water Strategy	Published 7 <i>Real Impact</i> case examples on USAID Water Website Water Strategy page; Distributed 150 copies of each at events
	Publish and track successes and lessons learned through evaluations		Increase in HQ staff and Mission staff's capacity to reduce errors and time needed to identify solutions in water programs.	Planned 11 learning events, including 3 webinars; Distributed key take-aways for 5 events; Established Learning and Sharing page on USAID Water Website
	Develop technical publications highlighting success, lessons learned, best practices, and innovations in the field	A baseline assessment will be conducted at start of implementation using a focus group with individuals representative of this activity's target audience. A follow up will be conducted at end of first year.		Investigated and published 8 <i>Real Impact</i> case examples with challenge, approach, impact, and lessons learned sections; Added innovation section to FY11, FY12, and FY13 Safeguarding reports; Published 10 issues of <i>Global Waters</i> , including one on innovation

	Create database of water program information			Developed Phase I of Water Point internal website with archival Water Wiki database
2: Make info about USAID easily accessible	Increase visibility of knowledge products	# non-Water Office staff requesting water products	Greater understanding of USAID water activities	Made Water Wiki archive available on Water Point, added SUWASA evaluation to RM Portal; Created learning and sharing page and <i>From the Field</i> reports on USAID Water Website
	Create tools for demonstrating impact	# Downloads	Increased discussion of change in discourse from “outputs” to “impacts”	Published FY11, FY12, and FY13 Safeguarding reports, created one water video, published 10 one-page fact sheets, designed 16 posters, designed one large World Water Forum exhibit; published 7 <i>Real Impact</i> case examples; published 18 <i>From the Field</i> reports from 5 countries; published 10 issues of <i>Global Waters Magazine</i>
3: Introduce new approaches and innovation	Host brown bag presentations, learning events and webinars	# Attending events, # Viewing archived presentation, diversity of those attending.	Increased participation in approach discussions; USAID Water Office perceived as hub for knowledge	Planned 11 learning events, including 3 webinars; Distributed key take-aways for 5 events; Established Learning and Sharing page on USAID Water Website (See metrics in Appendix F)
	Engage in cross-cutting thematic groups to achieve synergy		Innovation and new approaches for more effective water programming	Promoted sharing spaces in Phase I of Water Point
	Engage in sharing with stakeholders including USG, private sector, NGOs, academia, etc.	# Attending events # Collaborative & co-sponsored events	Increased participation in technical discussions	Planned 9 learning events for USG, private sector, NGOs, and academia, of which 3 were webcast for a broader audience

# Learning Event Strategy

## I. Objectives

Knowledge Management (KM) encompasses getting the right knowledge to the right people at the right time. Under the USAID Water Office’s KM strategy sharing goal, learning events will contribute significant value both internally and externally to enhance collaboration among partners and application of lessons learned. USAID’s water learning events should be specific, measurable, relevant, and timely. They will lead to improved effectiveness and impact and ensure USAID maximizes the value of its information and knowledge assets, and supports its partners and beneficiaries.

USAID Water Office’s KM Strategy fosters an open-based learning environment that improves the technical and programmatic capacity of USAID, implementing partners, host country counterpart staff, and the water community. A central provision of creating this learning environment will be access to innovative ideas, key global water leaders, and learning resources. Under the Water Strategy, ME&A will continue to brand USAID’s water learning events as part of a “Strate-Chat” series and provide logistics for webinars, in-person events, and blended events.

Objective 1:	Increase the sharing of knowledge, internally and externally, and aid in the development of communities of practice to decrease duplication of effort and improve problem solving.
Objective 2:	Support the new strategic objectives (SOs) outlined in the Water and Development Strategy.
Objective 3:	Inform the American public, the water community, Congress, and other stakeholders including academia, private sector, and donors on key program impacts.
Objective 4:	Provide multiple learning tools to meet a variety of learning styles and country circumstances.

## 2. Audience

Segment	Description	Objective
Target Audience 1:	USAID HQ and Mission Staff Water and Water Related Sectors	Improve program outcomes and mitigate the repetition of errors.
Target Audience 2:	Water Community	Provide discussion points around water issues and inform on work by USAID and its partners.
Target Audience 3:	Other Partners	Engage in sharing on cross-cutting issues to advance the learning agenda for water programs.

## 3. Learning Tools and Techniques

With the use of a variety of learning tools we will transfer key knowledge through examination and application of successes, lessons learned, and innovations in the field in order to improve program outcomes and mitigate the repetition of errors. To do this ME&A will provide multiple learning techniques to meet a variety of learning styles – auditory, visual, and kinesthetic – as well as country circumstances.

Tool	Technique
<i>In-person events</i>	Multidisciplinary events with informal presentations given by experts in the field to raise awareness and instruct on changes in the field that has broad organizational or agency impact.
<i>Blended events</i>	A combination of in-person and web-based presentations made by water practitioners from inside and outside USAID based on a number of water-related themes, including technical approaches and/or ongoing programs.

Webinars	Highlight technical approaches and use new tools for communication, organizational learning and training, as well as collaboration with speakers and participants around the world in real time through web-based presentations
Podcasts/Videos	Informal or formal interviews with active and retiring water programming staff members to capture knowledge and experience, and/or video archived from in-person learning events and Webinars.

**4. Logistics**

Successful learning events require support and services for each group involved in the planning and participation. ME&A will work with USAID and partners to find the best time and location for each event, and publicize them using USAID branding. We will also offer participants guidance to focus the messages of their presentations to fit into tight time parameters and conduct a dry run prior to the event to assure there are no technical issues for either a live or online audience. We will also explore using social media platforms to widen the conversation around events and to crowd-source content quickly and cost effectively.

**5. 2014 Potential Topics, Partners\*, and Schedule**

If possible, two training sessions each quarter is recommended. Because of the strong emphasis on WASH trainings in 2013, it is suggested trainings during first half of 2014 have an emphasis on water for food. These sessions would allow for explanation and exploration of how food security relates to water and the significant role food plays in the Water and Development Strategy. This would include issues such as nutrition, agriculture, climate change, and others. There is also crossover with WASH that can be explored through sessions on issues such as WASH and conservation.

First Quarter		
Topics	Potential Partners	Potential Audience/Objective
Water and Food Security / Nutrition	<a href="#">CGIAR</a> <a href="#">Save the Children</a> <a href="#">CARE</a> <a href="#">USDA Foreign Agricultural Service</a> (USDA FAS) <a href="#">FAO</a> <a href="#">Mercy Corps</a> <a href="#">Food for the Hungry</a> <a href="#">ACDI VOCA</a> <a href="#">1,000 Days**</a> <a href="#">Agrilinks</a> Contact: Zachary Baquet, PhD Knowledge Management Specialist USAID Bureau for Food Security	This purpose of this session would be to focus the SO2 and the central role water plays in food security. It would explore water with relationship to agriculture and nutrition and how improvements in these areas impact the personal health and local economies of beneficiaries. It will also explore how innovations like GIS can help better inform programming in this area and what it can tell us about the impact of previous work.  Audience would include: USAID Mission staff, those dealing with water, agricultural and food programming as well as science and innovation. The Water community and other NGOs and implementing partners working in these areas.
Conservation and WASH	<a href="#">TNC**</a> <a href="#">CI**</a> <a href="#">MWA**</a>	
Food-Water-Energy Nexus March 2014 – World Water Day	<a href="#">USDA FAS</a>	
Behavior Change in Agriculture	<a href="#">MCC</a> <a href="#">State Department</a> <a href="#">JICA</a>	Behavior changes for small Holder Farmers New water usage and agricultural

	<a href="#">Food for the Hungry</a>	practices Innovations in irrigation “More Crop Per Drop” Look at Rainfed agriculture/Soil management
Financing Water Utilities	<a href="#">Japanese International Cooperation Agency (JICA)</a>	
<b>Second Quarter</b>		
<b>Topics</b>	<b>Potential Partners</b>	<b>Potential Audience/Objective</b>
MUS	<a href="#">Winrock International</a> <a href="#">MWA</a>	
Sustainability	<a href="#">Water for People</a> , Ned Breslin **	
Climate Change Integration/ Resilience	<a href="#">CAADP</a> <a href="#">Harvest Choice</a> (GIS)	Look at GIS and the role in can play in planning and preparation for greater resilience.
HIV/AIDS	<a href="#">IRC</a> <a href="#">WASHplus</a>	
Water Strategy—April 16	<a href="#">SID/Environment Working Group</a>	NGO and private sector partners to understand what’s new under the Water Strategy.
Ridge to Reef & WASH service delivery—June 18	<a href="#">FIU</a>	NGO and implementing partners; USAID staff; evaluate and share impact of GLOWS and SUCCESS programs
<b>Third Quarter</b>		
<b>Topics</b>	<b>Potential Partners</b>	<b>Potential Audience/Objective</b>
Urban	<a href="#">WaterLinks</a>	
Land Tenure	<a href="#">Global Water Initiative</a>	
Sanitation Marketing	<a href="#">WaterSHED</a>	
ICT follow up – Lessons Learned	<a href="#">World Bank</a> <a href="#">Pacific Institute</a>	
South-South Knowledge Transfer	<a href="#">WaterLinks</a>	
<b>Fourth Quarter</b>		
<b>Topics</b>	<b>Potential Partners</b>	<b>Potential Audience/Objective</b>
Governance	<a href="#">Environmental Law Institute</a>	
WASH in Schools October 15, 2014 Global Handwashing Day	<a href="#">WASH Advocates</a> <a href="#">Project WET</a>	
Gender	Looking for potential partners at conferences in June and July	
Hygiene	<a href="#">World Vision</a> <a href="#">Catholic Relief Services</a>	

\* Unassigned Potential Partners:  
[UNICEF](#), [InterAction](#), [Water and Sanitation Program](#), [Sanitation and Water for All](#)

\*\* Potential Partners who have approached USAID.

Potential Partner Venues:

1. CI HQ: 2011 Crystal Drive, Suite 500, Arlington, VA 22202
2. TNC HQ: 4245 North Fairfax Drive, Suite 100, Arlington, VA 22203-1606
3. Grameen Foundation (SID headquarters): Grameen Foundation, 1101 15th St. NW, 3rd Floor, Washington, DC 20005
4. IRG/Engility conference room: 1211 Connecticut Ave., NW Suite 700, Washington, DC 20036
5. Millennium Challenge Corporation, 875 15th St NW, Washington, DC 20005

**USAID E3/W****WSCKM Learning Event and Training Metrics**

Average Attendance: Approximately 60 people per event.

ICTs for Water	2/12	USAID, World Bank	Jenny Dato	150
Water Office KM Strategy Infrastructure Workshop & Partner Mixer	12/12	USAID Mission staff	Jenny Dato	125
SUWASA	4/13	USAID, Implementing partners	Heather Skilling	44
Water Strategy Launch	5/13	USAID, USG, Congress, water community	Clay Doherty	84
Women's Leadership	6/13	USAID, Implementing partners	Jenny Dato	33
Behavior Change <ul style="list-style-type: none"> <li>• In-person</li> <li>• Webcast</li> </ul>	6/13	USAID, Implementing partners	Merri Weinger/ Jenny Dato	31 63
Integrating Water & Food	6/13	USAID, water community	Jenny Dato	25
Water Point Infrastructure Workshop	12/13	USAID Mission staff	David Kahler	20
Water Strategy Implementation	4/14	USAID, SID members	Ranta Russell	60
GLOWS/SUCCESS Closeout	6/14	USAID, Implementing Partners	Richard Volk	70
WASH-Nutrition	7/14	USAID, Implementing Partners	Helen Petach	50

\*Three Learning Events were cancelled: *WASH in Schools* (sequestration), *Agriculture & Nutrition*, *WASH in Haiti***Training:**

Water Office Retreat	7/12	USAID Water Office	Judith Light	9
Water Point Introduction	7/13	USAID E3	Amy Gambrill	12
Water Point Administration	8/13	USAID Water Office	Cydney Gumann	7



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