USAID
FROM THE AMERICAN PEOPLE

The Bureau for Management, Office of the Chief Information Officer (M/CIO) Knowledge Services Center (KSC) presents:

USAID/Nepal

Schedule

9:00am–9:30am:	**Registration**	
	Refreshments sponsored by PPL/LER	
9:30am:	Exhibitors Hall Opens	
9:30am–10:20am:	**Keynote by Erin Elizabeth McKee, Senior Deputy Assistant Administrator for the Bureau of Policy, Planning and Learning (PPL)**	
10:30am–3:05pm:	**Presentations by Presenters**	
10:30am–11:00am:	Joseph McSpedon and Meg Young	Integrating KM into Business Processes
11:05am–11:35am:	Stephanie Grosser	How to Integrate Knowledge Management into your Daily Work and Decisions
11:40am–12:10pm:	Zachary Baquet	Life in the Village: Using Simulations to Teach
12:15–12:45pm:	Siobhan Green	Historical Datasets, IATI and Open Data: The ICT Inventory
12:50pm–1:20pm:	Tara S. Mohn	Knowledge Management and Project Management, A Powerful Combination
1:25pm–1:55pm:	Zachary Baquet	Transforming Social Media and Learning into Social Learning
2:00pm–2:30pm:	Tom Edwards	Records Management and You
2:35pm–3:05pm:	Zan Larsen	Learning Lab
3:00pm–4:00pm:	**Networking Reception**	
	Refreshments sponsored by PPL/LER	
4:30pm:	**Exhibitors Hall Closes and Expo Ends**	

USAID
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The Bureau for Management, Office of the Chief Information Officer (M/CIO)
Knowledge Services Center (KSC) presents:

USAID/Nepal

Save the Date!

USAID's Knowledge Management Expo will provide an opportunity for staff and contractors to demonstrate how KM tools and practices are used at USAID. Come see how knowledge management is used at USAID by KM practitioners, staff and partners to inform development programs and increase their impact.

Exhibitors will showcase USAID KM-related projects, programs and tools. Presenters will spotlight KM-related projects at USAID, knowledge management topics, trends, strategies and lessons learned. Presentations will be 20 minutes including time for questions.

The KM Expo will be open to USAID staff and the public. If you'd like more information, please contact the KM Team at **ksckmteam@usaid.gov**.

Tuesday, February 26, 2013

9:00am–4:30pm EST

USAID Knowledge Services Center,
Mezzanine Level M17-M18 and KSC Lobby, Ronald Reagan Building,
1300 Pennsylvania Avenue NW, Washington DC 20004

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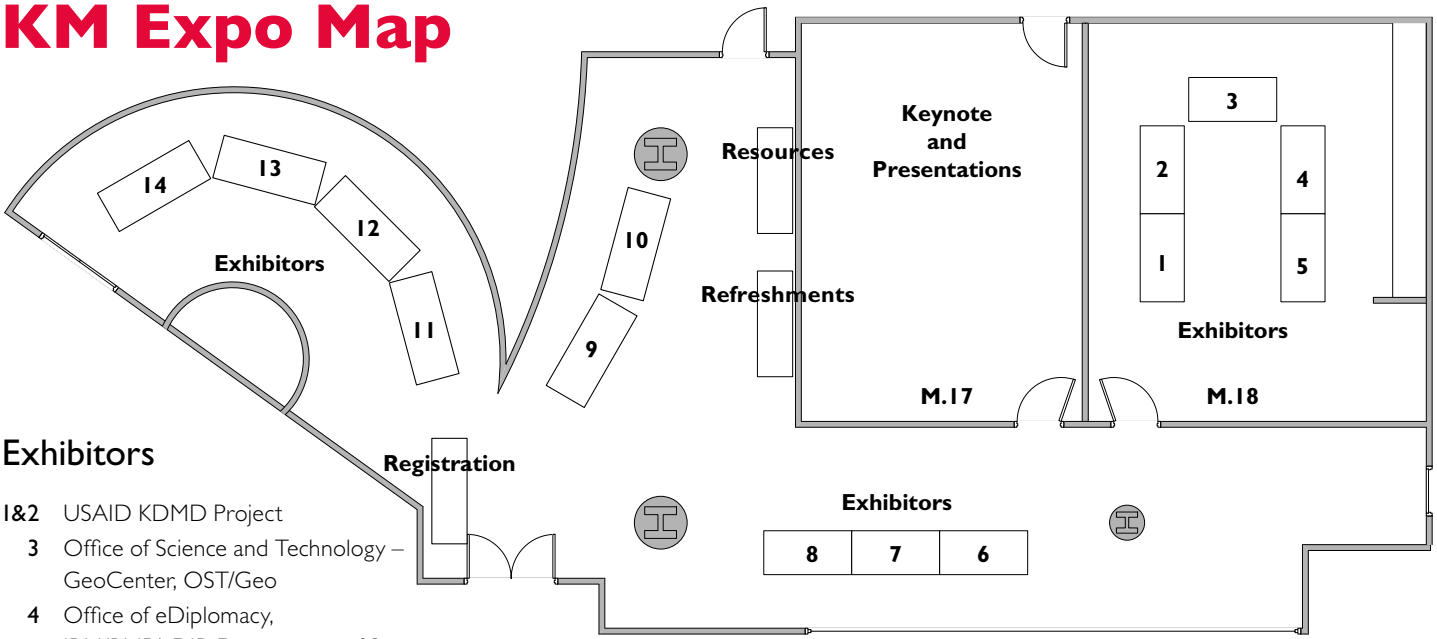
The Bureau for Management, Office of the Chief Information Officer (M/CIO) Knowledge Services Center (KSC) presents:

USAID/Nepal

KM Expo Map



Exhibitors

1&2 USAID KDMD Project
3 Office of Science and Technology – GeoCenter, OST/Geo
4 Office of eDiplomacy, IRM/BMP/eDIP, Department of State
5 Economic Analysis and Data Services (EADS)
6 USAID Washington Learning Center (WLC)
7 USAID Applying Science to Strengthen and Improve Systems (ASSIST) Project
8 PPL/LER: Learning Activities at USAID
9 USAID Knowledge Services Center
10 USAID KSC Knowledge Management Team, USAID Knowledge Management Reference Group
11 DOS Program and Project Management Community of Practice (PPMCoP)
12 K4Health
13 CK2C: FRAMEweb, GeoExplorer and ENRM Learning Gateway
14 Devex Impact – IDEA/GP and Devex

Shelia Jackson
Ask me.
USAID
USA
FROM THE AM

USAID

FROM THE AMERICAN PEOPLE

USAID
UNITED STATES AGENCY
USAID

USAID Knowledge Management Expo
Tuesday, February 26, 2013 9:30-10:20 a.m.
Mezzanine level conference rooms M17and M18, RRB

Senior Deputy Assistant Administrator Erin McKee
Keynote Speech

Good morning everyone! I am pleased to be here and support USAID's Knowledge Management Expo.

Our partners in USAID's Management Bureau have organized a great program for you today. I want to thank you all for being here, as your presence demonstrates your commitment to strengthening USAID as a learning organization, and how best we can collectively – including those from academia, the private sector and non-governmental organizations - utilize knowledge more effectively to improve the lives of millions living in poverty.

As you all know, we live in a data rich, if not intense, world. Walking the halls here in DC and riding the metro, you cannot pass by without seeing someone absorbed in reading information on a smart phone or ipad. Information in the developed world is literally available, 24/7. However, juxtapose this with the reality that so many people live in the developing world that can't even read or have access to technology. (Share story about the Tajikistan school program.)

We know as development professionals that imparting knowledge, such as learning how to read or having access to information, can be truly life changing. Data shows that for those that stay in school, they will increase their individual earnings

by 10% for each year of school completed. In addition, educated mothers are 50% more likely to immunize their children than mothers who are not educated. Through the generosity of the American people, USAID has had the opportunity to help increase literacy rates over the last 25 years by 33 percent worldwide, and see primary school enrollment triple in that same period.

Creating opportunities for learning can have a multiplier effect far beyond the individual, by transforming families, communities, and societies, not just for today, but for generations to come. I've seen this first hand in the countries I've lived and worked in.

None of this would be possible though without people from multiple disciplines and backgrounds, willing to come together, like you today, and share lessons learned and best practices, exchange experiences, and catalyze learning so that communities themselves can take charge of their own development agendas. Our understanding of both development failures and successes are critically important to scaling our impact and solving today's development challenges. This is no small feat and we have not cornered the market on solutions.

A few weeks ago, we heard President Obama outline during his State of the Union address how the United States will strive to eradicate extreme poverty over the next two decades. President Obama said, "not only because it creates new markets, more stable order in certain regions of the world, but also because it's the right thing to do."

USAID is committed to achieving this worthwhile goal and has positioned itself to lead this effort. Back in 2010, Dr. Shah announced an ambitious reform agenda

called USAID Forward. This is an effort to make the Agency more effective by changing the way we partner with others, embracing a spirit of innovation and strengthening the results of our work, saving money and reducing the need for U.S. assistance over time. USAID Forward also included the creation of the Agency's Policy, Planning and Learning Bureau. It is no accident that **Learning** is a part of our name. It is a clear statement of our commitment to elevate and integrate the practice of learning throughout the work being done by USAID and its partners. USAID Forward reforms position us to lead the charge to eradicate extreme poverty in partnership with other country and community leaders and learn from our investments.

As a platform, USAID can supply the tools a country needs to develop themselves. USAID can work to reduce barriers for innovators. In this way, the development community can shift from doing work for people in developing nations to working with people in developing nations. This can be done by sharing financial capital for infrastructure or agriculture projects, human capital in response to crisis, or information capital for the innovators and technologists.

The way we see it, open data and the sharing of information is a compounding factor for development. By sharing our development data openly, it will generate a secondary wave of impact by igniting entrepreneurship, creating jobs, improving education, and increasing transparency, thereby lifting people out of poverty in a local, sustainable and accountable way.

Peter Drucker, the well-known management consultant, educator, and author who coined the term "knowledge worker" said that "knowledge is the source of wealth. Applied to tasks we already know, it becomes productivity. Applied to tasks that

are new, it becomes innovation." To ignite innovation in the development sphere, USAID formed the Higher Education Solutions Network, which will mobilize the wealth of knowledge in academia, in particular science, technology, and engineering, to solve some of the world's most challenging development problems.

USAID also launched the Grand Challenges for Development, which explores the use of incentives or prizes to access untapped solutions and new actors for specific development problems. We also created the Development Innovations Ventures, which funds innovative ideas, utilizing a venture capital approach. We realize that problem solvers are everywhere, but may not have the opportunity to see their ideas come to fruition. USAID can provide a platform of opportunity to generate new knowledge, particularly in the fight against poverty.

As a thought leader, USAID also hosted The Frontiers in Development Conference, the Complexity Evidence Summit, and the Country Systems Strengthening Experience Summit to focus the best minds on the questions we all ask ourselves: How can we create healthier communities, increase access to education and improve livelihoods to eradicate poverty?

USAID Forward is infusing learning into the Agency's DNA. There are a number of efforts that we have undertaken to capitalize on lessons learned and strengthen our knowledge management practices. We are also tapping into networks and forums for getting our learning out to the broader international development community.

Looking at today's agenda, I was excited to note that several of our colleagues are presenting various ways to make these learning activities and behaviors an integral

part of how USAID and our partners do our work. To highlight some of our efforts:

- The Policy, Planning and Learning Bureau or PPL conducted more than 80 interviews with staff to identify and document a very wide range of learning efforts already underway. These are captured in the Discovery Report, which is available on the Learning Lab web site (www.usaidlearninglab.org) and at the PPL booth outside this room.
- Out of this discovery process, PPL convened and supported a community of practice we call SILK. One of our better acronyms – it stands for Sharing Insights, Learning and Knowledge – SILK brings together learning champions from around USAID/Washington to share lessons and learning practices.
- We also bring in expertise from outside the Agency. We host a *Thought Leaders in Learning Speaker Series* to showcase the ideas and work of experts in the field of knowledge and learning for international development. Speakers such as David Cooperrider, Dayna Brown, Sophie Alvarez and have spoken at USAID about key insights we can apply to our development work. Many of these events are open to the public – you can also participate via webinar.

We've also dug into the most fundamental processes that structure how USAID and our partners implement programs. PPL has infused greater discipline in applying a more rigorous, evidence-based and collaborative approach throughout the program cycle.

And the Evaluation Policy that PPL launched two years ago is a prime example of how we're working to restore and build USAID's knowledge base and our

institutional capacity to assess the results and impact of our efforts. We are well on the way to certifying more than 200 high-quality evaluations that have been conducted on USAID programs.

A critical component of the strengthened Program Cycle is the emphasis on collaborating, learning and adapting. For shorthand (and because you know we've never met an acronym we didn't like) we call this approach CLA. CLA is defined by strategic collaboration with other development actors, continuous learning throughout the period of implementation, and iterative adapting as we learn more about new technical approaches that hold promise for development progress and changes in the countries in which we're working.

Through this approach, our efforts will be more transparent and aligned with those of national and local governments and other development stakeholders. For example, USAID/Uganda is using the CLA approach in piloting District Operational Plans to bring together all USAID implementing partners and district government officials to improve coordination, share knowledge and learning, and align interventions to district development plans. One Ugandan official involved in CLA stated that this was the first time he actually knew what USAID was doing in his district. He is now better able to leverage development resources to improve his community.

CLA approaches are now integrated into the work of 16 missions. Some missions are hiring CLA advisors; others are procuring CLA support mechanisms, and several have begun to share what they've learned with other USAID staff at other missions.

We've also put together some tools to help all of you adopt learning approaches:

- The Program Cycle Learning Guide – a kind of CLA handbook – is available on our external USAID Learning Lab web site. This Guide provides specific models, methods and tools to support CLA throughout all components of the program cycle. This Guide is useful for development practitioners, and in some instances, draws substantially on methods our partners have been using for a long time.
- The Learning Lab is a place where USAID and our partners work together to share and refine learning approaches, tap the knowledge of learning experts, support each other through discussion forums, and learn how other development organizations maximize their impact through knowledge exchange and learning. In the coming months, the site will be hosting webinars and discussions – and I hope you will consider participating in those opportunities, or contributing resources you've found helpful to improve the way you integrate learning into your work.
- There are Program Cycle resources available on the Learning Lab that are *specifically designed* for our implementing partners, to help you understand the Program Cycle reforms and what they mean for you. I urge you take a break from your hectic schedules to watch the Program Cycle video, read the Program Cycle Overview for Partners, or even take a Program Cycle Online course.
- I also encourage you to visit the Learning and Adapting page on our internal ProgramNet site for USAID Staff. Here you will find resources and strategies tying learning to the Program Cycle and specific examples of what missions are doing in CLA. We hope you will avail yourself of the opportunities to exchange experiences with other USAID staff.

In the coming months, PPL will also be seeking staff in Washington who are interested in becoming champions and agents of the CLA approach as we'll be launching an online course on CLA in May. So please watch ProgramNet and Learning Lab for more information, or contact Stacey Young or Thom Sinclair in PPL's Learning, Evaluation and Research Office if you're interested. Can both of you please stand and be recognized?

This is an exciting time where data and technology are converging to provide exponential insights and learning to solve development challenges. We will be able to use data to construct better tools to measure outcomes and impacts, and to help us determine what indicators to use to best monitor the progress of our projects. But data is only as good as its accuracy and accessibility – to use data effectively, we must create effective ways to collect, share, analyze and apply it. We have been making real progress toward this vision. Developing the capabilities to quickly identify, capture, analyze, and use new dynamic data streams to develop multidisciplinary solutions and strengthen the evidence base for development is an important part of USAID's work.

I know you are all committed to refining existing practices, innovating new approaches, capturing knowledge, and sharing it with others through state-of-the-art methods. *So* much is being done by *so* many it's created an atmosphere that has given us great momentum to accelerate this work.

I hope you'll participate in the opportunities I've described, and seek out occasions to share data and develop knowledge that can be applied in improving lives. Together, we're able to combine our efforts (and our data) to address the needs of

developing communities around the world in unprecedented ways. So thank you so much for coming today!

I’m happy as time allows to answer any questions you might have or learn more about what you may be doing to solve development challenges.

UNITED
USAID
USAID

2x

A child born to an educated mother is more than **2x as likely** to survive to age five.

50%

Educated mothers are **50% more likely** to immunize their children than mothers without an education.

10 - 30%

Every extra year of school increases productivity **by 10-30%**.

10%

Individual earnings **increase by 10%** for each year of school completed.

“It’s the right thing to do”

USAID
FROM THE AMERICAN PEOPLE
FORWARD
USAID'S REFORM EFFORT

learn. collaborate. share.

THE OPEN DATA MOVEMENT

THE EVOLUTION OF APIs

Increasingly, companies are making their data and inner workings publicly available through the release of APIs, which are used by developers in building new tools—like TweetDeck, based on Twitter's API. Since 2005, more than 3,700 APIs have been launched.

WHAT IS AN API?

An application programming interface is a set of instructions that allows software programs to interact with each other. ProgrammableWeb tracks APIs and "mashups" (new combinations of existing APIs).

PUBLIC DATA AROUND THE WORLD

From education to energy, health to poverty, and finance to demographics, governments and NGOs are opening up their data troves so that anyone can look for patterns and create informal solutions to global challenges.

Open Government Partnership

Launched in July 2011, the OGP secures commitments by governments to promote transparency, increase civic participation, fight corruption and use technology to be more effective and accountable.

Norway

Fingal County led the way in opening its data, which were used at the country's first open data challenge in July 2011. Dublin City will open in September 2011.

Ireland

UK

Data.gov.uk contains more than 7,200 datasets from seven governmental publishers, including 989 from the Department of Health and 784 from the Department for Communities and Local Government.

USA

Launched by Vivek Kundra, the first Chief Information Officer of the United States, Data.gov offers 389,730 datasets.

Mexico

India

Data.gov.in launched in July 2011, modeled after the U.S. and UK sites, but with many datasets restricted to agency access only.

Philippines

Launched in July 2011, the Kenya Open Data Initiative is the first Sub-Saharan national data program and will be used to create infrastructure for human and economic development.

Kenya

Indonesia

Brazil

South Africa

OGP COMMITTEE MEMBER

GOVERNMENT DATA RELEASE

visual.ly

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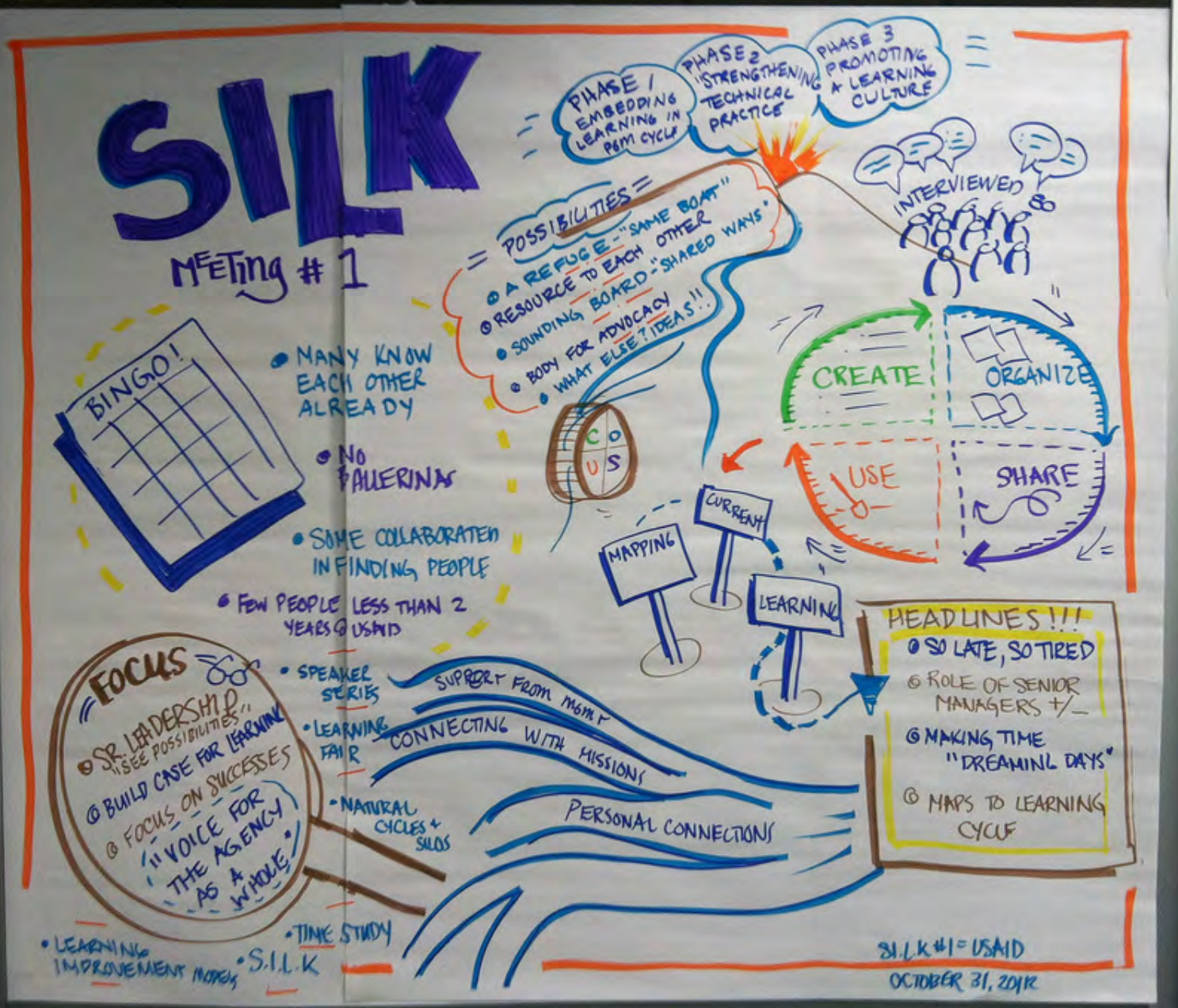
Experience Summit

Washington, DC | November 27-28, 2012

Strengthening Country Systems

The Discovery Process


SILK
MEETING # 1
PHASE 1 EMBEDDING LEARNING IN PDM CYCLE
PHASE 2 "STRENGTHENING TECHNICAL PRACTICE
PHASE 3 PROMOTING A LEARNING CULTURE
INTERVIEWED
POSSIBILITIES
A REFUGE - "SAME BOAT"
RESOURCE TO EACH OTHER
SOUNDING BOARD - "SHARED WAYS"
BODY FOR ADVOCACY
WHAT ELSE? IDEAS!!
BINGO!
MANY KNOW EACH OTHER ALREADY
NO PALLERINAS
SOME COLLABORATED IN FINDING PEOPLE
FEW PEOPLE LESS THAN 2 YEARS @ USAID
CREATE
ORGANIZE
USE
SHARE
CURRENT
MAPPING
LEARNING
HEADLINES!!!
SO LATE, SO TIRED
ROLE OF SENIOR MANAGERS +/-
MAKING TIME "DREAMING DAYS"
MAPS TO LEARNING CYCLE
FOCUS
SR. LEADERSHIP "SEE POSSIBILITIES"
BUILD CASE FOR LEARNING
FOCUS ON SUCCESSES
"VOICE FOR THE AGENCY AS A WHOLE"
SPEAKER SERIES
LEARNING FAIR
NATURAL CYCLES + SILOS
TIME STUDY
LEARNING IMPROVEMENT MODEL
S.I.L.K
SUPPORT FROM MGMT
CONNECTING WITH MISSIONS
PERSONAL CONNECTIONS
SILK #1 = USAID
OCTOBER 31, 2012

SILK in action

Thought Leaders in LEARNING

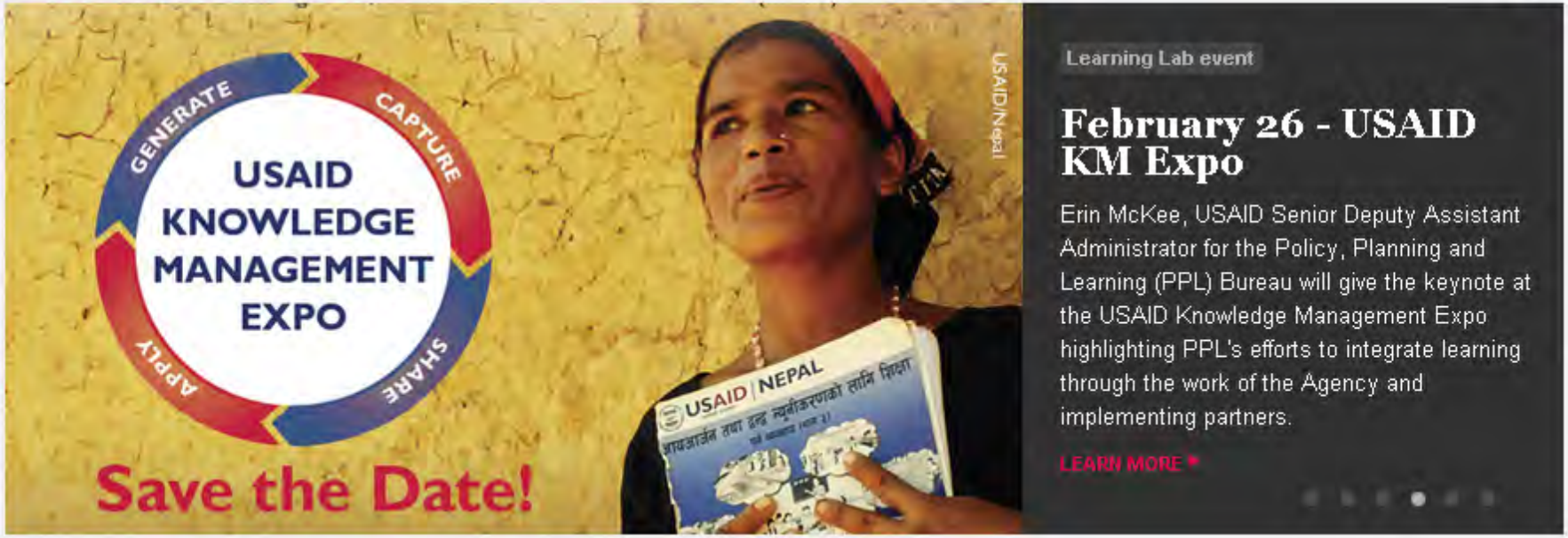
The Program Cycle

Local governance at work in Uganda

LEARNING
AND
ADAPTING
PROJECT DESIGN & IMPLEMENTATION

LEARNING LAB

USAID FROM THE AMERICAN PEOPLE



Learning Lab event

February 26 - USAID KM Expo

Erin McKee, USAID Senior Deputy Assistant Administrator for the Policy, Planning and Learning (PPL) Bureau will give the keynote at the USAID Knowledge Management Expo highlighting PPL's efforts to integrate learning through the work of the Agency and implementing partners.

LEARN MORE ▸

TOUR THE LEARNING LAB

Watch this brief video orientation to help you take advantage of all Learning Lab has to offer

WATCH VIDEO ▸

EXPERT HIGHLIGHT

“ Learning creates effective programming for maximum

NEW ON LEARNING LAB

USAID LEARNING EVENT

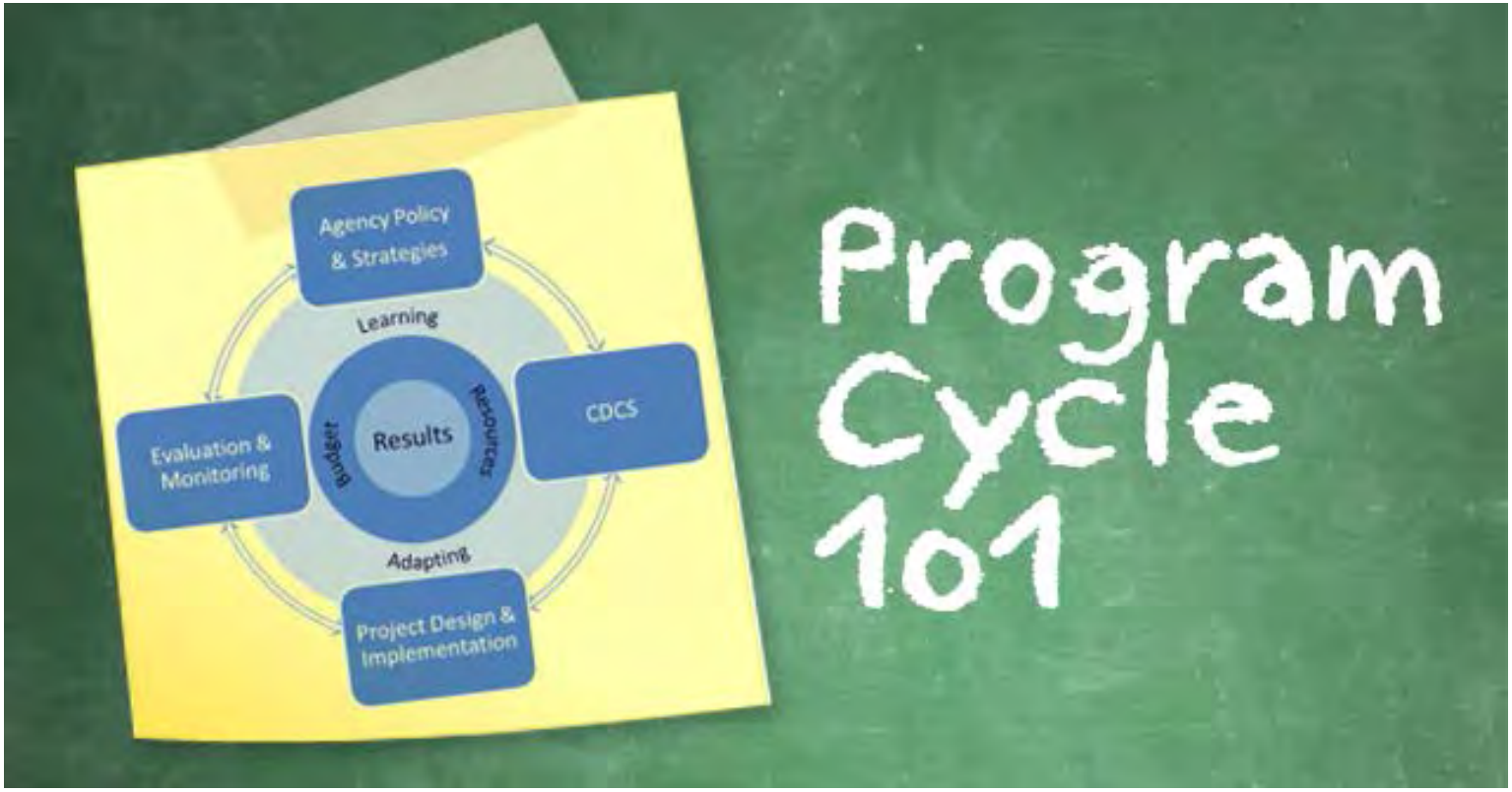
USAID Knowledge Management Expo

OTHER USAID LEARNING-RELATED EVENT | FEB 26, 2013

LIBRARY RESOURCE

Guidance Note #4: Use of Impact Evaluation Results

TECHNICAL RESOURCES | NOV 7, 2012 | David Bonbright


Agency Policy & Strategies
Learning
CDCS
Evaluation & Monitoring
Results
Budget
Resources
Adapting
Project Design & Implementation
Program Cycle 101

USAID FROM THE AMERICAN PEOPLE **ProgramNet**

Logged in: Brian Stout Logout

Program/PDO Conference Page

PROGRAMNET HOME

Welcome to ProgramNet! ProgramNet is USAID's interactive online community devoted to sharing knowledge and promoting learning on implementing the Program Cycle. Currently the site is hosted on an external server - so SBU content is not allowed (though you can upload links to content on the USAID intranet). By November 1, it will be inside the USAID firewall and available for SBU content. For more info about the site, check out the user guide or click on "about us" at the bottom of the page. Click on the Program Cycle graphic below – or the customizable "widget" bar (which provides a shortcut to the site's key features, such as blogs, forums, and events) – at the bottom of the page to get started. Have a question or comment? Start a discussion in a forum!

PROGRAM CYCLE COMPONENT

- Program Cycle
- Agency Policy and Strategies
- CDCS
- Project Design & Implementation
- Monitoring
- Evaluation
- Learning & Adapting
- Budget & Resources

PROGRAM CYCLE SUB-COMPONENT

- Results Framework
- Analysis & Assessment
- Selectivity and Focus
- Donor Engagement
- Activity Portfolio Alignment
- Logical Framework
- IPR
- Performance Indicators

PROGRAM CYCLE TOPICS

- Gender

org
much
different based
FSN
assessments
people
program
support
universities
media
agency
event
system
experience
KM
email
USAID
GH
building
Fast
health
staff
model
everyone
expertise
Focus
GWU
also
uses
working
management
best
adult
every
blog
larger
whole
total
need
workforce
Professional
development
learning
Facilitate
lot
fellowships
country
needed
new
maintain
training
e-Learning
HR
resources
use
locator
expert
Capacity
tasked
like
missions
Really
get
mgt
sector
Health
already
Working
SOTA

Questions?

Using our data for instant learning

Stephanie Grosser, USAID DCA

USAID
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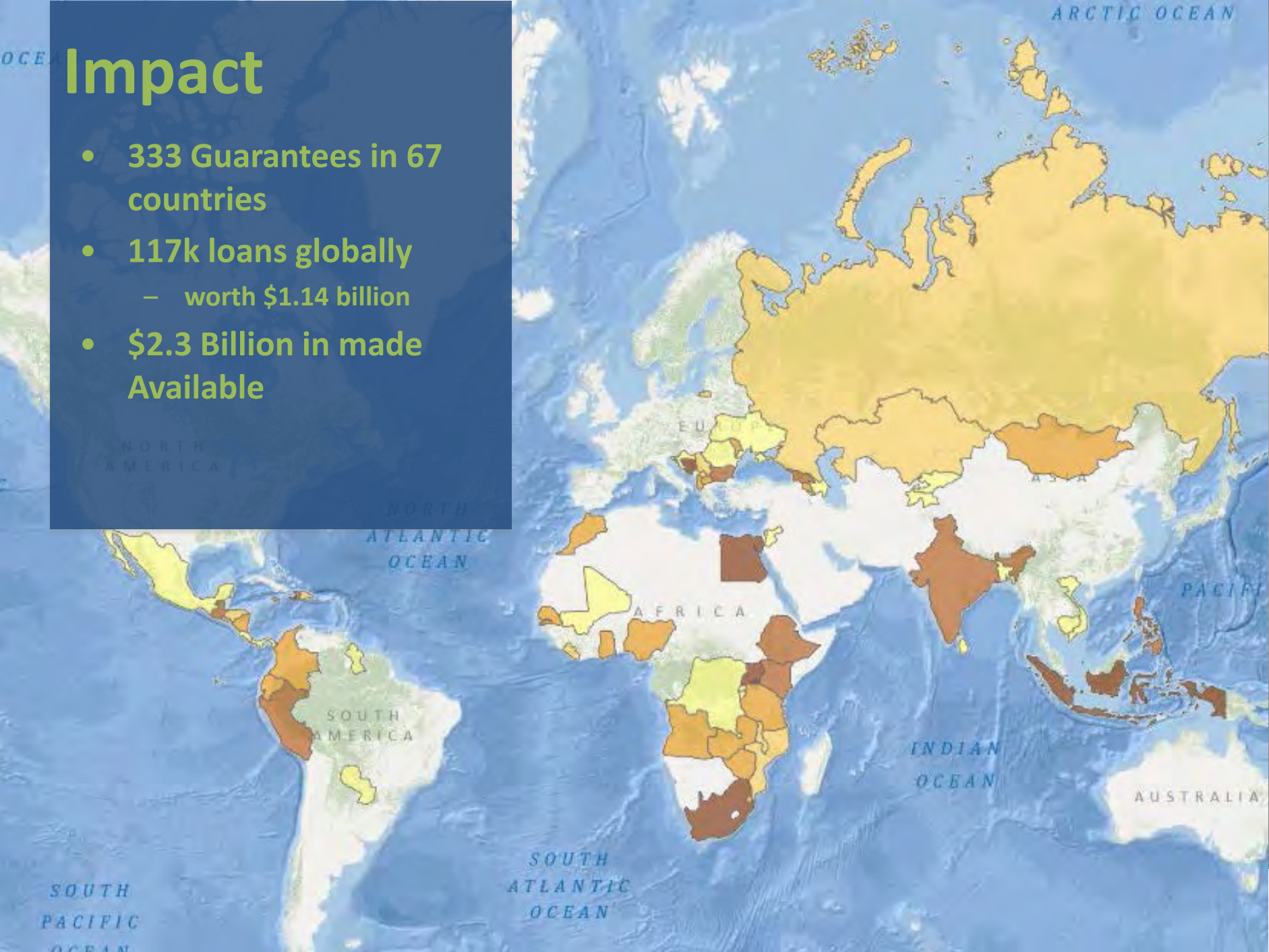
USAID's Development Credit Authority encourages local banks to lend to creditworthy but underserved sectors.

Impact

- 333 Guarantees in 67 countries
- 117k loans globally
  - worth $1.14 billion
- $2.3 Billion in made Available



Why?

> Targeted Lending

> Analyzing Impact

> Better Coordination

> Analysis

PROBLEM:

COUNTRY	LOCATION
Vietnam	Mac Thi Buoi Vinh Tuy Ward, Hai Ba Trung Dist Ha Noi Viet Nam
Haiti	Port au prince
Haiti	Sud

SOLUTION:

COUNTRY	LOCATION	ADM1	PLACENAME
Vietnam	Mac Thi Buoi Vinh Tuy Ward, Hai Ba Trung Dist	Ha Noi	Ha Noi
Haiti	Port au prince	Ouest	Port au prince
Haiti	Sud	Sud	Sud

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The Solution

- USAID Staff
- Contractor
- Crowdsourcing & Partnerships

POLICY ISSUES:

> Use of free labor

> Non-disclosure

> Personally identifiable information

> Information Quality Act

An Official Web Site of the United States Government

DATA.GOV

« Home

You are not currently logged in. Log in.

Rabble: Sign up to help!

You are not

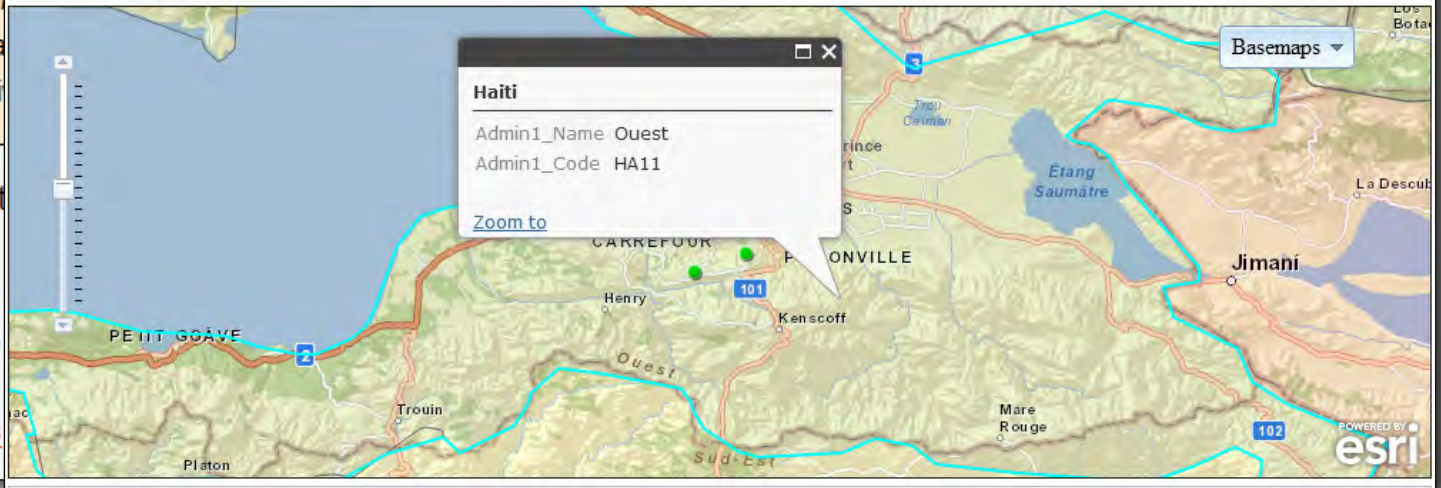
If you don't
site, please

Admin: Status

USAID
FROM THE AMERICAN PEOPLE

USAID Crowdsourcing Tool

Place name or address:
Port au Prince, Haiti
Search



▲ OID	Name	Admin 1	Country	Type	Description	Latitude	Longitude
0	Port-au-Prince	Ouest	Haiti	capital of a political entity	Port-au-Prince, Ouest, Haiti	18.53917	-72.335
1	Port-au-Prince	Ouest	Haiti	third-order admin division	Port-au-Prince, third-order admin division	18.51667	-72.31667

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Assembling the Crowd

855 members globally
Extensive experience in a variety of online mapping projects. Insanely passionate, highly caffeinated.

2,672 members globally
Venerable volunteer group known for their professional expertise in GIS.

Jane & John Q: we wanted to meet them and get them excited about USAID and DCA.

Results

Automated

- 107,000 records processed
- ~67,000 records with added ADM1
- 64% accuracy

Crowdsourced

- ~10,000 records processed
- ~7,000 records with added ADM1
- 85% accuracy
- Completed in 16 hours by 145 volunteers

RESULTS

> 300 volunteers

> 10,000 records

> 16 hrs

> 85% accuracy

“I haven’t felt like this since the soup kitchens and food drives I used to do in college. I love this.”

↑ 20%

↑ 15%

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Lessons

The Social Aspect Matters

- Skype chat helped build community

Crawl- Walk- Run

- Two test runs helped hone the workflow

No Cost Solution

- Budgets are restrained so this was the only solution as it had zero cost

Publically Identifiable Information is not Insurmountable

- A common ID allows for deleting and later merging back columns that cannot be shared

Database Problem

- Anyone with a database that includes a location field should confirm that standardized geographic data is being collected

Understanding Why People Volunteer

- People want to make a difference and connect. This mattered more than disclosing the exact nature of the data ahead of time.

Where USAID Unlocks Lending Around the World

USAID's Development Credit Authority (DCA) works with local financial institutions to design investment alternatives that unlock financing for entrepreneurs in developing countries.

USAID FROM THE AMERICAN PEOPLE

Development Credit Authority
Putting local wealth to work

Guarantees | **Loans Disbursed** | **Available Financing** | **Stories & Evaluations**

View loan summaries for each country with active and expired guarantees. Zoom in to find out where loans have been geographically distributed.

LEGEND

Value of Loans Disbursed per Sub-national Unit

- $1 - $300,000
- $300,001 - $2,500,000
- $2,500,001 - $5,500,000
- $5,500,001 - $12,500,000
- $12,500,001 ...and higher

USAID FROM THE AMERICAN PEOPLE

Where USAID Unlocks Lending Around the World

USAID's Development Credit Authority (DCA) works with local financial institutions to design investment alternatives that unlock financing for entrepreneurs in developing countries.

USAID FROM THE AMERICAN PEOPLE

Development Credit Authority
Putting local wealth to work

Guarantees | Loans Disbursed | Available Financing | Stories & Evaluations

This map shows available financing under active USAID guarantee agreements with private financial institutions.

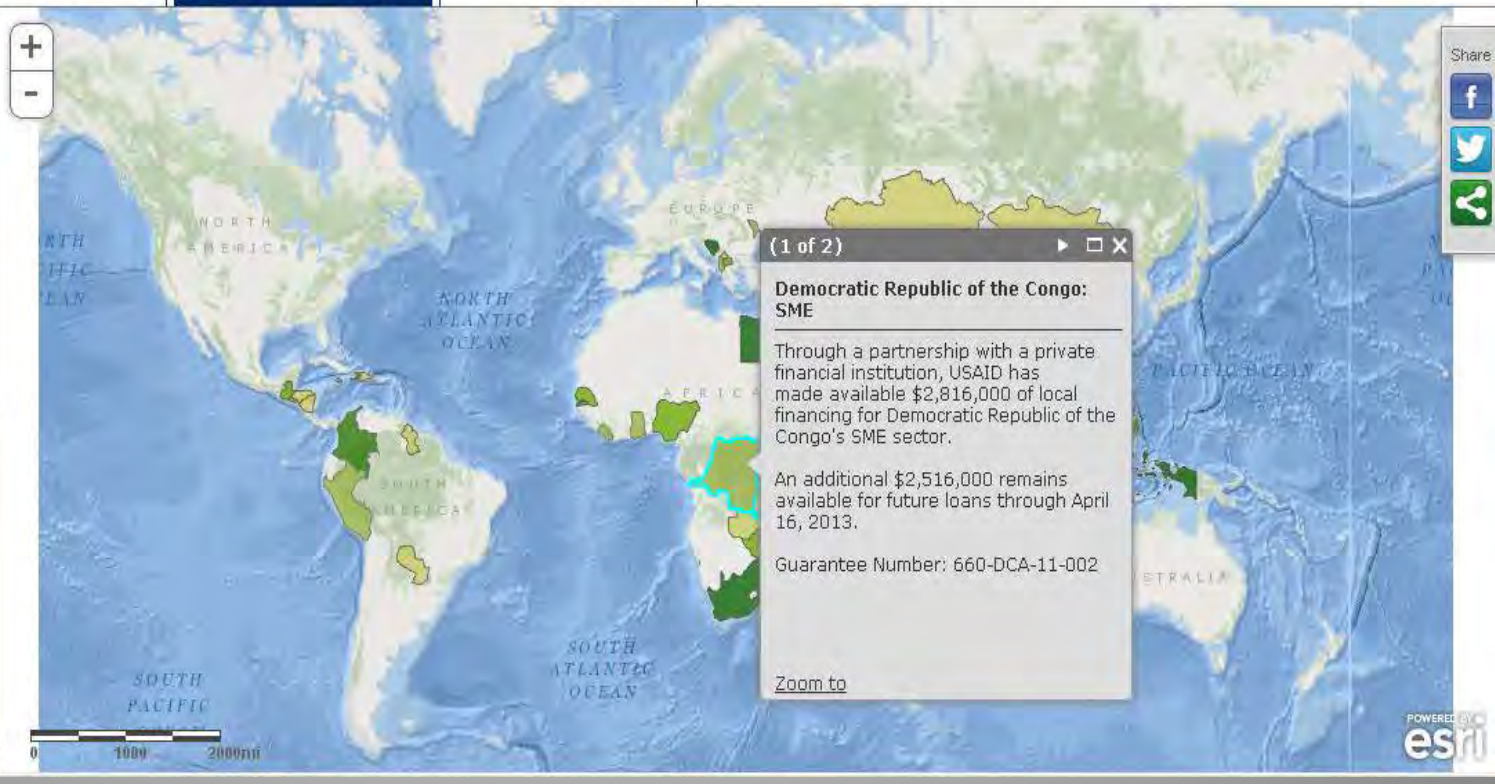
To learn more, email DevelopmentCredit@usaid.gov.

LEGEND

Countries with Lending Available

- $ 0 - $ 7 million
- $ 7 - $15 million
- $15 - $25 million
- $25 - $50 million
- > $50 million

The boundaries and names used on this map do not imply official endorsement or acceptance by the U.S. Government



(1 of 2)

Democratic Republic of the Congo: SME

Through a partnership with a private financial institution, USAID has made available $2,816,000 of local financing for Democratic Republic of the Congo's SME sector.

An additional $2,516,000 remains available for future loans through April 16, 2013.

Guarantee Number: 660-DCA-11-002

Zoom to

Crowdsourcing to Geocode Development Credit Authority Data: A Case Study

DATA.GOV
EMPOWERING PEOPLE

HOME | INTERACTIVE DATASETS | RAW DATA | APPS | GEODATA | COMMUNITY | METRICS | OPEN DATA SITES | GALLERY | WHAT'S NEW

USAID Development Credit Authority Guarantee Data: Utilization and Claims

USAID's Development Credit Authority (DCA) works with investors, local financial institutions, and development organizations to design and deliver

Find in this Dataset

Manage | More Views | Filter | Visualize | Export | Discuss | Embed | About

	Fiscal Year	Guarantee Number	Guaranteed Percentage	Country	Guarantee Start Date	Guarantee End Date	Final Date for P
1	1999	49299G001	30%	Philippines	09/15/1999	09/30/2014	09/30/2008
2	1999	674-A99-DCA-001	50%	South Africa	09/30/1999	09/26/2006	03/30/2006
3	1999	674A99DCA02	50%	South Africa	09/30/1999	06/30/2004	01/02/2004
4	2000	5200425DCA01(Terminated)	50%	Guatemala	03/01/2000	09/20/2007	03/24/2007
5	2000	DCAG00000000100	50%	Bulgaria	11/24/1999	09/30/2010	06/30/2010
6	2001	115C-00-01-00025	50%	Kazakhstan	08/10/2001	08/16/2005	02/17/2005
7	2001	183-2000-02A	50%	Bulgaria	09/10/2001	09/10/2008	03/14/2008
8	2001	523DCAA00010001000	50%	Mexico	02/21/2001	06/11/2004	12/14/2003
9	2001	523DCAA00010001100	50%	Mexico	02/21/2001	02/21/2004	08/25/2003
10	2001	688DCAE205974	50%	Mali	09/27/2001	09/30/2009	03/31/2009
11	2002	121-DCA-00-02-00011-00	50%	Ukraine	09/27/2002	09/27/2007	03/31/2007
12	2002	386DCA-02-0547	50%	India	02/04/2002	12/20/2017	06/23/2017
13	2002	522-DCA-2002-001	50%	Honduras	08/29/2002	08/29/2009	03/02/2009

Export

To start accessing this dataset programmatically, use the API endpoint provided below. For more information and examples on how to use the Socrata Open Data API, reference our Developer Documentation.

API Access Endpoint:

http://explore.data.gov/api/views

Column IDs:

Fiscal Year	11623734
Guarantee Number	11623735
Guaranteed Percentage	11623736
Country	11623737

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USAID Development Credit Authority loans

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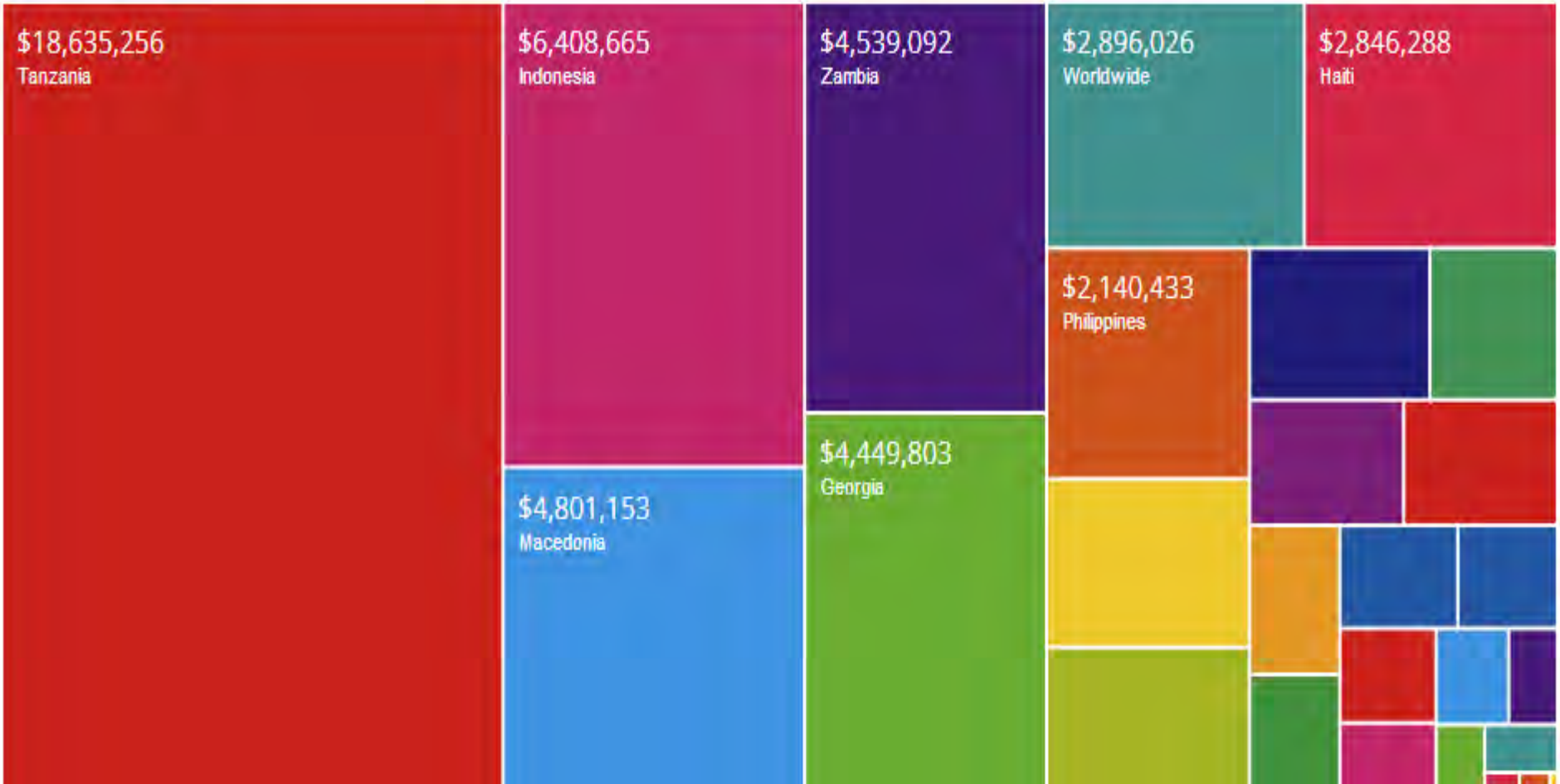
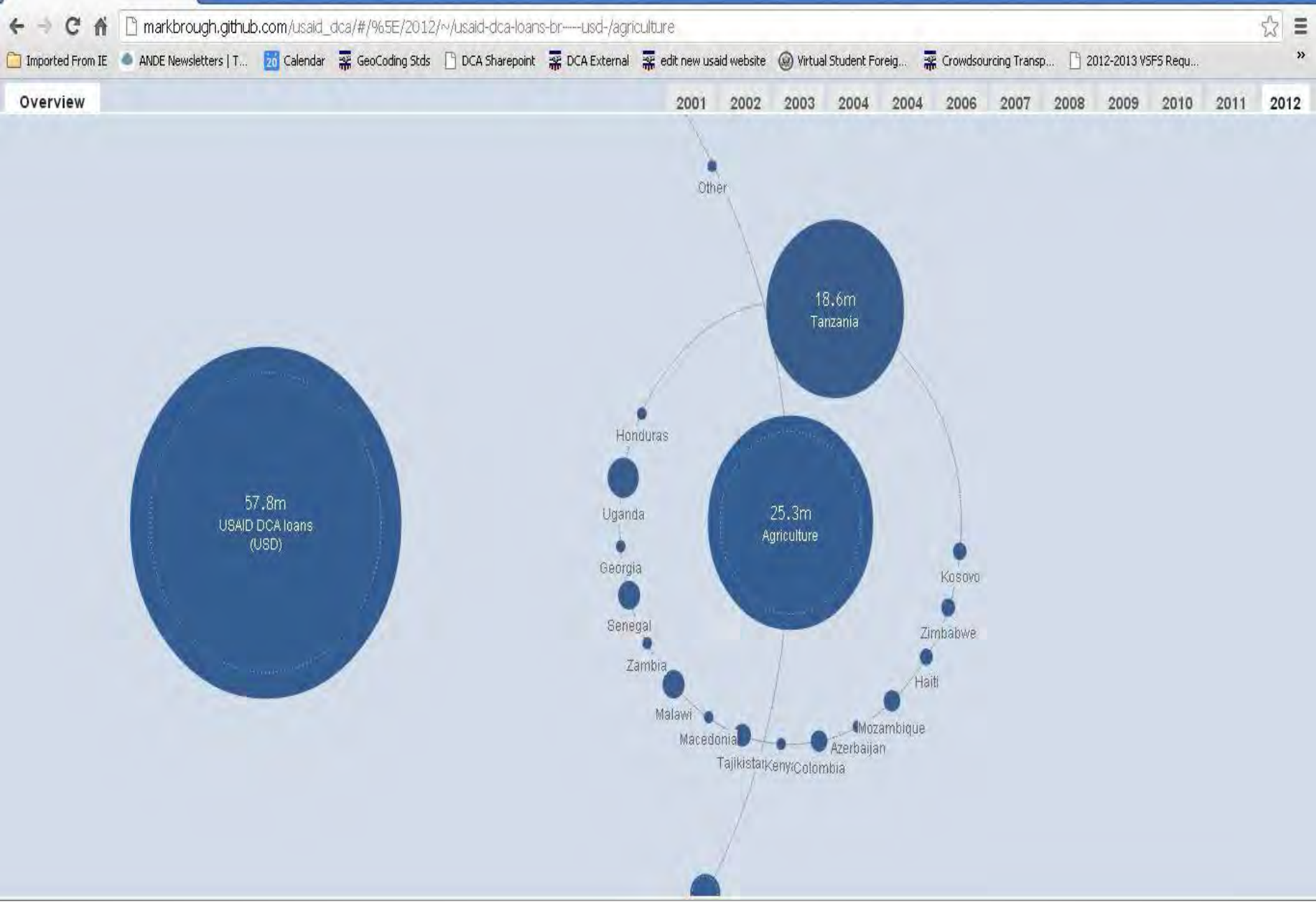
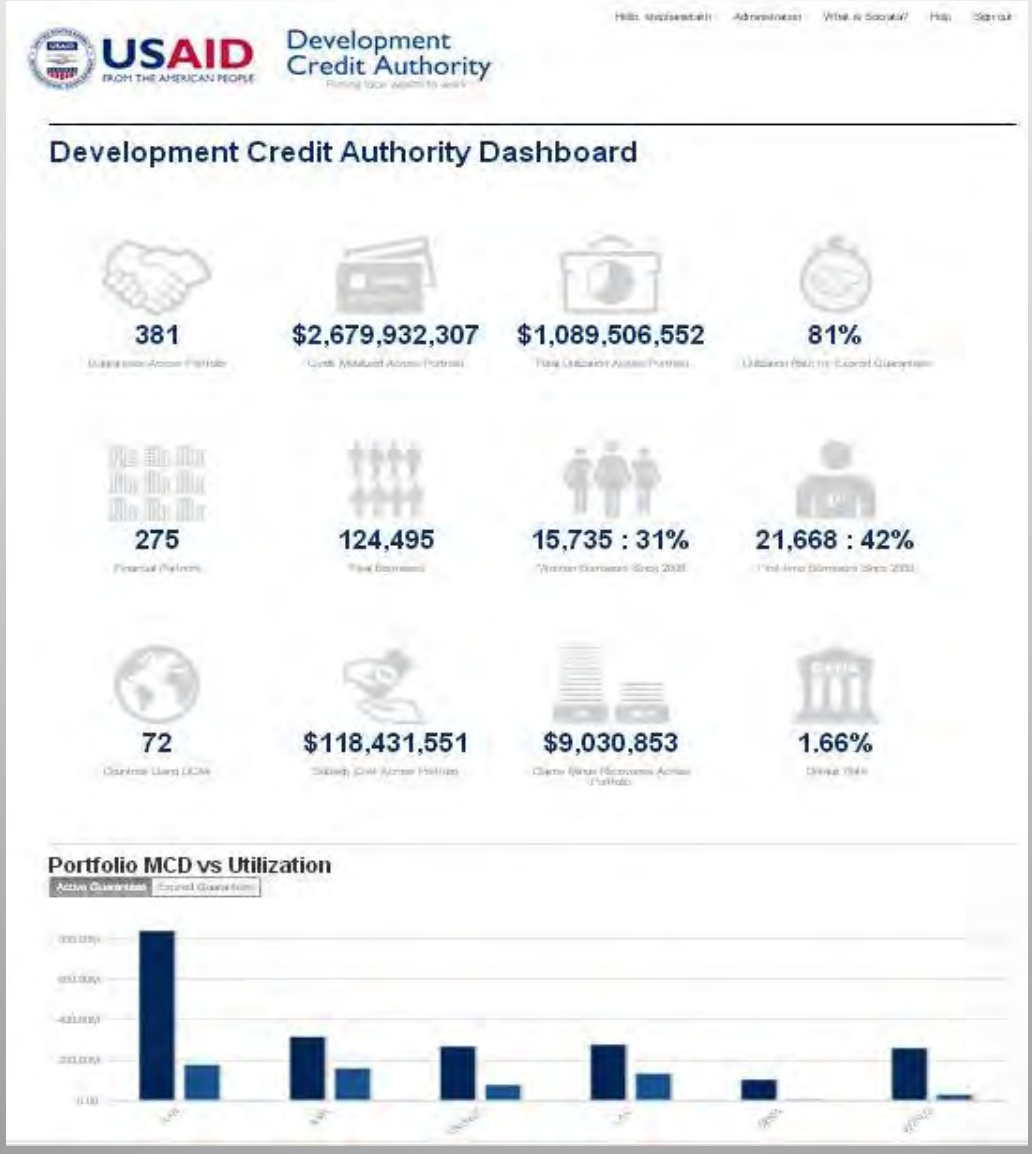



markbrough.github.com/usaid_dca/#/%5E/2012/~/usaid-dca-loans-br-----usd-/agriculture
Imported From IE
ANDE Newsletters | T...
Calendar
GeoCoding Stds
DCA Sharepoint
DCA External
edit new usaid website
Virtual Student Foreig...
Crowdsourcing Transp...
2012-2013 VSFS Requ...
Overview
2001
2002
2003
2004
2004
2006
2007
2008
2009
2010
2011
2012
Other
18.6m
Tanzania
Honduras
Uganda
Georgia
Senegal
Zambia
Malawi
Macedonia
Tajikistan
Kenya
Colombia
Azerbaijan
Mozambique
Haiti
Zimbabwe
Kosovo
57.8m
USAID DCA loans
(USD)
25.3m
Agriculture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Development
Credit Authority
Development Credit Authority Dashboard
381
$2,679,932,307
$1,089,506,552
81%
275
124,495
15,735 : 31%
21,668 : 42%
72
$118,431,551
$9,030,853
1.66%
Portfolio MCD vs Utilization

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FY 2013 Project Development Pipeline Entry Form

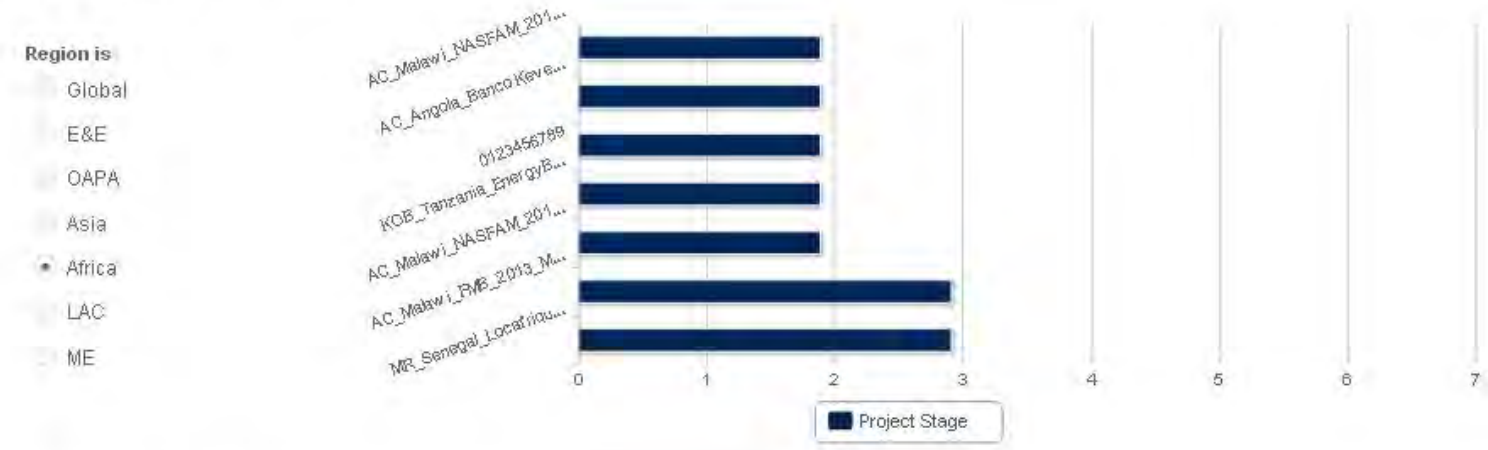
* Fields marked with an asterisks are required.

Guarantee Summary

Fiscal Year of Transaction	(Blank) *
Guarantee Number	*
Guarantee Nickname	
Project Status	(Blank) *
Investment Officer or FIO Lead	(Blank) *
MCD	*
In Portfolio	(Blank)
Region	(Blank)
Country	(Blank)
Required Location for Guaranteed Loans	
DCA Priority Country	☐
STG Deal	☐
Financial Partner	(Blank)

Add new financial partner

Deal Status



Deals by Region

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Development Credit Authority Dashboard
Region: Asia
39
Guarantees Across Region
$351,413,002
Credit Mobilized Across Region
$178,603,816
Total Utilization Across Region
46%
Utilization Rate for Expired Guarantees
Portfolio MCD vs Utilization
Active Guarantees
Expired Guarantees
100.00M
80.00M
60.00M
40.00M
20.00M
0.00
Maximum Cumulative Disbursements
Cumulative Utilization

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Development Credit Authority Dashboard : South Africa

13	$364,166,543	$59,719,656	87%
Guarantees Across Country	Credit Mobilized Across Country	Total Utilization Across Country	Utilization Rate for Expired Guarantees

Location of Loans

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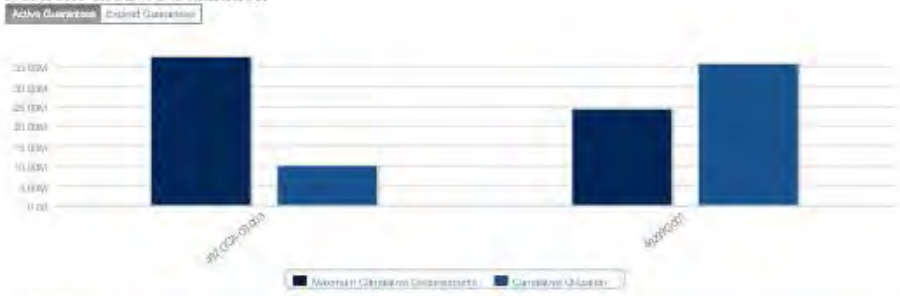
Development Credit Authority

Development Credit Authority Dashboard

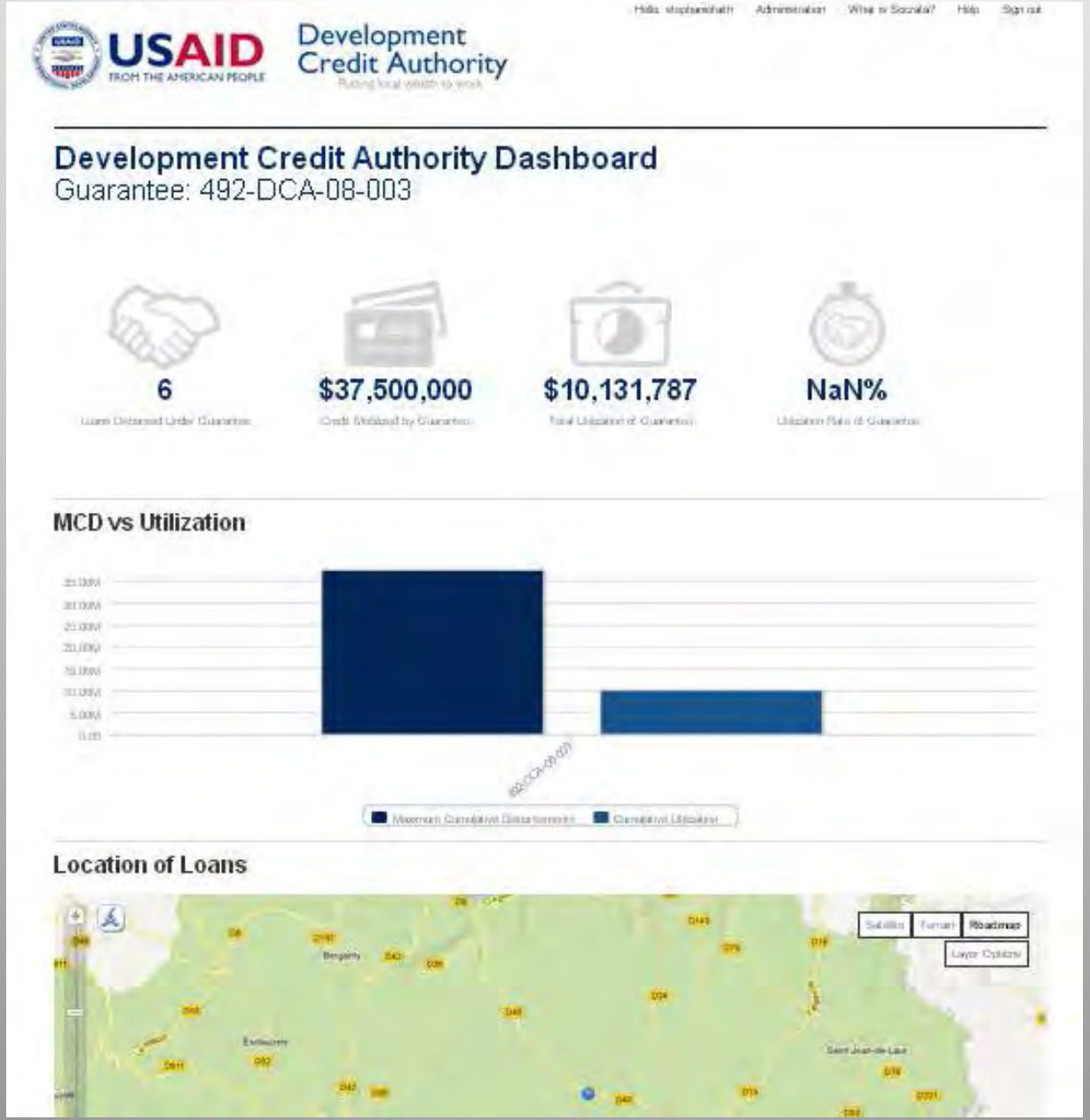
Partner: LGUGC

2	$61,953,000	$45,839,102	NaN%

Portfolio MCD vs Utilization



Location of Loans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Development
Credit Authority
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Development Credit Authority Dashboard
Guarantee: 492-DCA-08-003
6
$37,500,000
$10,131,787
NaN%
MCD vs Utilization
Location of Loans
Satellite
Terrain
Roadmap
Layer Options

FY 2013 Project Development Pipeline Entry Form

* Fields marked with an asterisks are required.

- Guarantee Summary
- Structure
- Status
- Funding
- Development Indicators

Expected Number of Sub-loans	
Expected Average Sub-loan Size (in USD)	
Expected Number of Beneficiaries	
Current Percentage of Bank's Portfolio Going to Target Sector	%
Current Perecentage of Lending to Target Sector Countrywide	%
Current Average Interest Rate Charged by Bank to Target Sector	%
Current Average Percentage Collateral Required by Lender for the Target Sector	%
Current Average Loan Tenor to Borrowers in Target Sector	years

- Risk
- Post Obligation

FY 2013 Portfolio Management Contact Update Form

Date (Month) (Day) (Year)

Guarantee Number

Contact Method (Blank)

Purpose (Blank)

Purpose Notes

Intervention (Blank)

Intervention Notes

Current Percentage of Bank's Portfolio Going to Target Sector %

Current Percentage of Lending to Target Sector Country Wide %

Current Average Interest Rate Charged by Bank to Target Sector %

Current Average Percentage Collateral Required by Lender for the Target Sector %

Current Average Loan Tenor to Borrowers in Target Sector years

Submit

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FY13 DCA Guarantees Approved by CRB

Project Development and Risk Data for Development Credit

Find in this Dataset

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	Date of CRB	Fiscal Ye	Financial Partner	Country	DCA Prio	Sector	Type	MCD
1	01/01/1999 12:00:0	2013	BanCafe	Belize	✓	Agriculture	LG	
2		2013	Northern Lights Cap	India		Energy	LG	
3		2013				Agriculture		
4		2013	Velifin	Mexico		Multi-Sector		
5		2013	Locafrique	Senegal		Agriculture		
6		2013		Mexico		Energy	LG	$
7		2013	Rural Finance Corp	Moldova		Energy	LPG	
8		2013	Banco Keve	Angola		Multi-Sector	LPG	
9		2013		Malawi		Agriculture	LPG	
10		2013	National Building So	Malawi		Agriculture	LG	
11		2013		Afghanistan		Multi-Sector	LPG	
12		2013	Idepro	Bolivia		Environment	LPG	
13		2013	Ecobank Malawi	Malawi		Agriculture		
14		2013		Bangladesh	✓	Agriculture	LPG	
15		2013	Kenya Commercial I	Kenya	✓	Health		
16		2013	Banco Fie	Bolivia		Environment	LPG	
17		2013		Guatemala	✓	Agriculture		
18		2013		Georgia		Multi-Sector	LG	

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FY 2013 Project Development an...
2 weeks ago by mlouie
Project Development and Risk Data for

Project Development and Risk D...
3 weeks ago by mlouie
Project Development and Risk Data for

Project Development and Risk D...
Last month by mlouie
Project Development and Risk Data for

FY13 DCA Guarantees Approved...
5 days ago by stephaniefaith
Project Development and Risk Data for

Region Chart - Number
Last month by Clare
Project Development and Risk Data for

Pipeline Breakdown Data
3 weeks ago by Clare
Project Development and Risk Data for

Partner Type - Number

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AND OUR CUMULATIVE EXPERIENCE

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OTI Activity Database

Launch OTI Activity Database

Field Guide Updates

Action Research Model
Updated on: 22 Feb, 2013

Systems Built for Change
Updated on: 22 Feb, 2013

Program Performance and Management and M&E (new)
Updated on: 22 Feb, 2013

Lessons Learned from Working in Complex Environments
Updated on: 22 Feb, 2013

Working in Political Transitions
Updated on: 22 Feb, 2013

1 of 44 »

Online Training Links

OTI Activity Compliance Online Course

OTI Working in Transitions Online Course

My Bookmarks

Title	Replies	
Program Performance Management Processes / PPMP...		Unbookmark this
eRoom Application & Webmail Guide for PSC...		Unbookmark this
The (In)Significance of the First Activities	1	Unbookmark this

Field Guide Comments

Member Activity

Louisa Ssennyonga | Feb 25, 2013
Uploaded a File
Budget

Knowledge Network Quick View

Karma Lively | Feb 22,2013
Posted a Blog in SLT Connection
ImplementingPartner Deep...

Karma Lively | Feb 22,2013
Uploaded a Video in SLT Connection
OTI History - Rob Jenkins...

Chad Lawlis | Feb 21,2013
Posted a Blog in Technology Innovation
February 15th, 2013 GIU...

Lauren Sweeney | Feb 20,2013
Started a Discussion in Monitoring and Evaluation Network
The 2013 USAID/OTI Monitoring...

Lindsay Miesko | Feb 16,2013
Uploaded a Video in SLT Connection
Rob's Video Blog - February...

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Field and Operations Guidance

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My OTI » Field-Guide Book » Startup » Assessment Phase » Assessment » Assess Security

Assess Security

View Edit Outline Revisions

A key component to the assessment is security. As one of the four engagement criteria, a sufficiently stable operating environment in which OTI and its IPs will operate is essential. The Assessment Team needs to determine what is sufficiently stable and how the country's security environment impacts the RFTOP, program design and activities, and OTI and IP operations. All this should be reflected in the assessment report.

Requirements:

Requirement Task	Assigned to	Program Timeline
Analyze the security situation on the ground.	FPD - Assessment Team	3 months before startup
Propose a security posture considering both 1) physical security of OTI and IP personnel and property, both in the capital city and elsewhere in the country where OTI may undertake program activities; and 2) communications and information security of OTI and IP data and equipment.	FPD - Assessment Team	3 months before startup

Best Practice:

The Assessment Team should:

- clarify the security regulations that all personnel under Chief of Mission authority must follow;
- outline how these regulations could impact co-location with, and transportation to and from, the Implementing Partner's office;

Field Guide

- Startup
  - Assessment Phase
    - Assessment
      - **Assess Security**
      - Human Resources/In-Country Support Services
      - Agreements
    - Assessment Report
    - Go/No-Go Decision And Memo
  - Pre-Entry/Pre-Award Phase
  - Post-Award/Field Start-Up Phase
- Program Implementation and Management
- Closeout
- GIU Resources
- Public Outreach Products and Functions

Give us your Feedback!

Help them integrate field wisdom, DC direction, and innovative application. Post a comment or email the Editor to share an experience, a question, or an alternate approach.

Hilary Dittemore
Transition Specialist
United States

Country Work Spaces

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General Inform	2		hdittemore	Jun 07, 2012
OTI - Internal	1		hdittemore	Jan 23, 2013
Outreach and	1		sperkinson	Jan 23, 2013
Program Information	7		hdittemore	Jul 13, 2012

Knowledge Networks

Monitoring and Evaluation Network

Audio Video My membership

Welcome to the M&E Knowledge Network!

Because every OTI country program is different, so are our Monitoring and Evaluation practices and needs. This Knowledge Network is designed to inform on current OTI M&E guidelines and changes to those guidelines, provide applicable best practices from inside and outside of OTI, highlight exceptional M&E efforts from individual country programs, and foster debate on a wide variety of topics through blog posts and discussions. We will be looking at everything from individual M&E methods all the way up to the big picture issues within OTI's Program Performance Management Processes.

This is also a place where you can request assistance on specific M&E conundrums facing your program as it evolves and shifts, and provide input to the network moderator on any particular issues you would like to see researched, discussed, or compare/contrasted. This is, above all, an open forum meant to foster lively discussions and productive information-sharing. Enjoy!

All Activity | Discussions | Blogs | Resources

The 2013 USAID/OTI Monitoring and Evaluation Training
As some of you may have heard, OTI will be having our Worldwide M&E Training
Discussion Posted by Lauren Sweeney | Feb 20, 2013 04:06 | 2 Comments

A Randomized Control Trial of War-Affected Children in Sierra Leone
Yesterday I attended a presentation by Dr. Theresa Betancourt from the Harvard University
Blog Posted by George Wilson | Feb 14, 2013 04:58

M+E Working Group meeting notes, Feb. 8
(This post contains SBU information so please use judgement before blabbing about
Blog Posted by George Wilson | Feb 13, 2013 07:14

2012 OTI Monitoring and Evaluation (M&E) Inventory
This matrix is an inventory summarizing OTI country program monitoring and evaluation
Document Posted by Leah Werchick | Jan 31, 2013 06:18

Monitoring and Evaluation at OTI Presentation

Key Resources

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KN Facilitators

Lauren Sweeney & George Wilson

Knowledge Network Facilitators keep content fresh and relevant, while connecting members and hosting opportunities for knowledge exchanges, mentoring, and other opportunities to share best practices, news, resources, and items of interest to Network members.

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Uganda final evaluation
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OTI Lebanon Monitoring and Evaluation System 2007-2010 SWIFT II
Origination Date: Dec 28, 2012

Lebanon M&E Guide SWIFT III
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INTERACTIVE PROGRAM MAP

Information Display

- STM036: 747 Points of Light for St Marc
- PAP021: Community Stabilisation Payroll Support
- STM056: STTA in Program and Community Engagement in St Marc
- PAP095: STTA for Project Engineer to Support Infrastructure Rehabilitation
- STM052: Revitalization of Portail des Guepes neighborhood school for community stability
- STM019: Rehabilitation of the St Nicolas Hospital Grounds in St Marc
- STM002: STTA Internet Hardware Equipment/Connectivity Specialist for St Marc

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NORD-EST
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Mao
Santiago de los Cab
San
La Vega
ARTIBONITE
Hinche
CENTRE
Comendador
Constanza
Anse-à-G
Vallejuelo
PORT-AU-PRINCE
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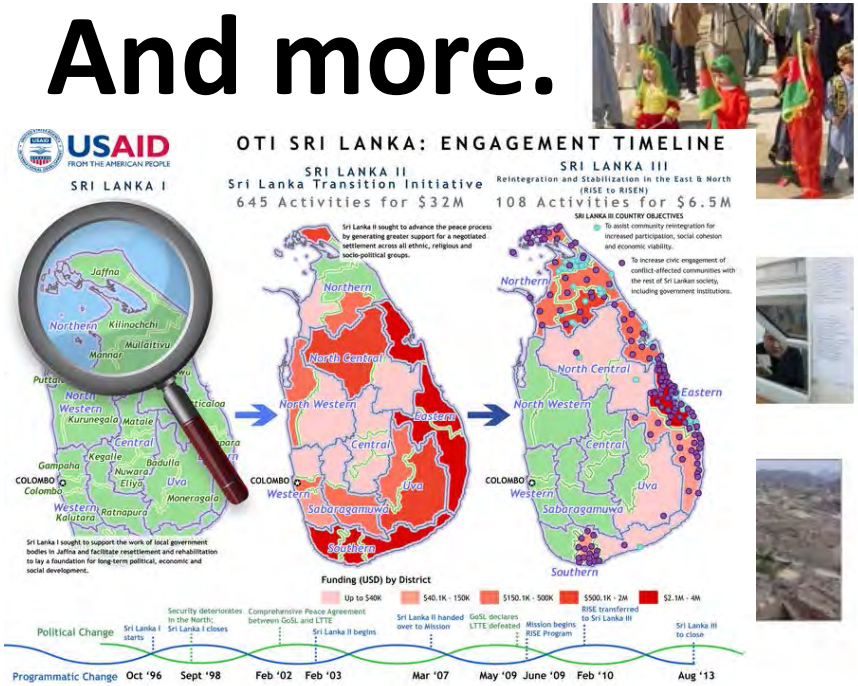

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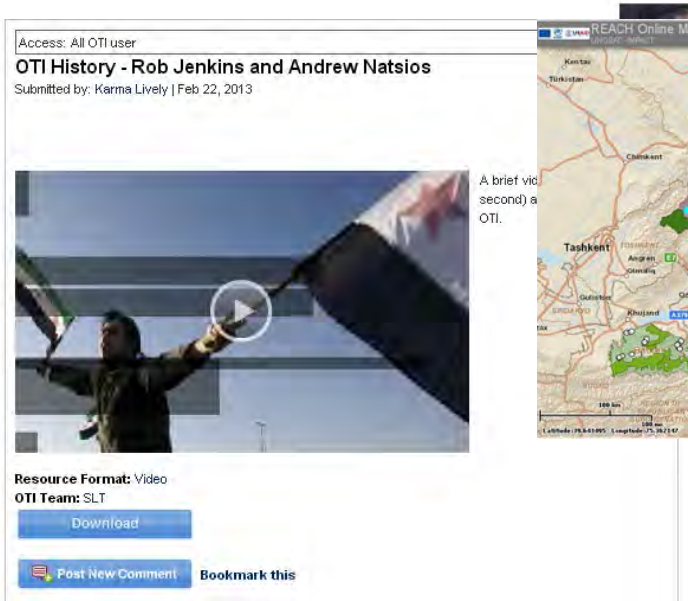

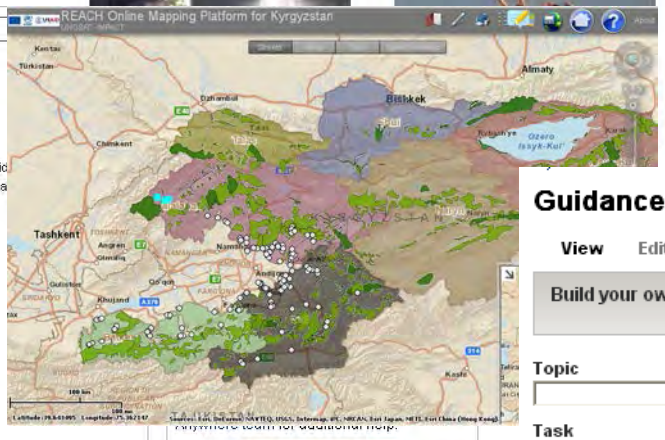

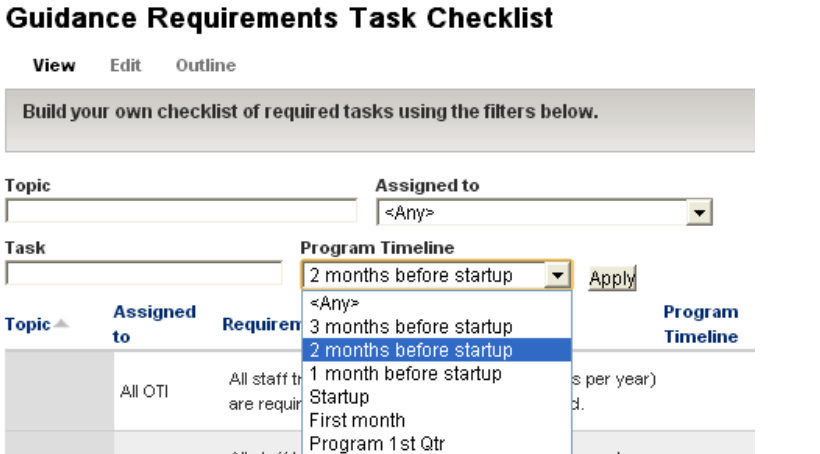

INTEGRATION CHALLENGES

OBSTACLES, CRITICAL EVENTS, AND CULTURE SHIFTS

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TACKLING THE OCEAN OF ACTIVITY DATA

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ICT Inventory
Reboot

Historical Datasets, IATI and Open Data: The ICT Inventory

By Siobhan Green

Sonjara, Inc.

Siobhan Green
Presenter

ICT@USAID

ICT Inventory Reboot

Sonjara, Inc.

Summary

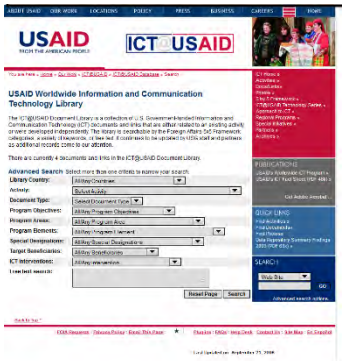
- **ICT Inventory Reboot experience…**
- **What is IATI?**
- **Dataset 101: key concepts and questions**
- **Lessons learned… to date**
- **Open/Linked data resources**

ICT Inventory Reboot

Sonjara, Inc.

ICT Inventory: Background

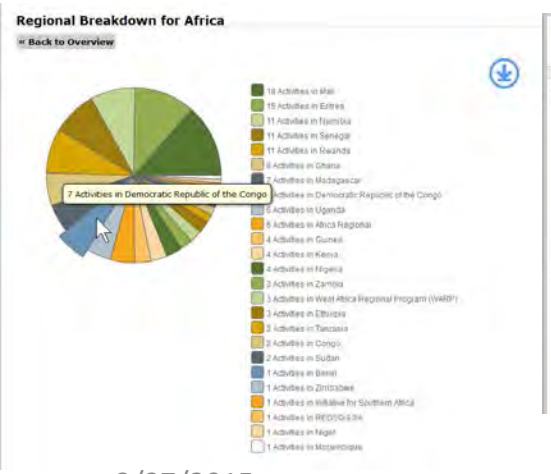
- 2003 survey of all Missions for ICT4D
- Report to Congress 2004
- 2006 published as web application
  - Activities
  - Photo Gallery
  - Document library

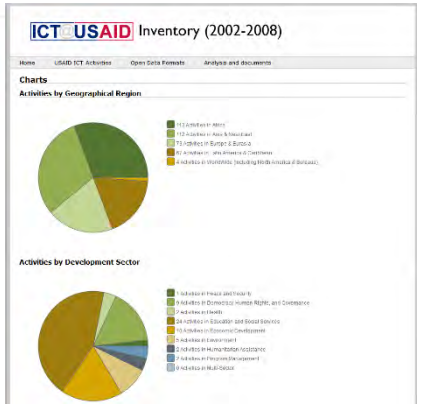


- 2009 taken down due to funding cuts
- 2012 ICT Inventory LIVES!

ICT Inventory Reboot

ICT Inventory Reboot



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     installation of four relay stations in Lubumbashi, Mbuji May, Butembo, and Mancono. The station's local language (Lingala, Swahili, Tu
     and resettlement (DDRRR). As part of the grant,OTI is supporting a trained radio producer to develop objective programming to su
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   <lessons/>
   <success/>
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   <status>Published</status>
   <last_edited_by>0</last_edited_by>
```

ICT@USAID

ICT Inventory Reboot

Sonjara, Inc.

ICT Inventory: Rebirth Steps

- Analyze dataset – 2 hours
  - Find database files and other files (docs, etc)
- Migrate data to new format – 2 hrs
  - Already in normalized, relational structure
- Build software front end – 5 hrs
  - Platform offers XML, JSON, CSV by default
- Data cleanup - 20 hours + ongoing
  - Cruft creeps in/sector definitions change
- IATI Cross Walk – 5 hours + ongoing

IATI Cross Walk

- IATI structure is simple
- Cross-walking data is not – it is a taxonomy issue, not a technology one
  - Activity (award level) vs. subaward level
  - Sector definitions (whose?)
  - Extra data? What to do with?

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ICT Inventory Reboot

Sonjara, Inc.

IATI: What is this

- XML format
  - Identification of record source/record
  - Activity Information
  - Participating Organizations
  - GeoPolitical info
  - Classifications
  - Transactions
  - Related documents (website, PDFs, other activities)
  - Performance

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ICT Inventory Reboot

Sonjara, Inc.

Dataset 101: Key Concepts

Open data:

- Available for use for whatever purposes

Linked data

- Structured data that can be interlinked with other data sets by computer programs

Machine-readable:

- Doesn't *require* a human to aggregate, compare, or manage individual records

ICT Inventory Reboot

Examples of machine and human readable

	A	B	C	D
1	Activity Name	Countries	Audiences	Technology
2	AMORE - Alliance for Mindanao Off-Grid Rene	Philippines	Rural	Cellular, Computer/ Internet Access, Geographi
3	ANRT - Human Resource Master Plan	Morocco	Urban	Technical Support, Technical Training
4	APEP - Agricultural Productivity Enhancement I	Uganda		
5	Budgeting and Accounting Systems for Central	Ethiopia	Not Applicable	Business Services, Computer/ Internet Access
6	Building Capacity for Integrated Coastal Mana	Vietnam	Not Applicable	Geographic Information System (GIS)
7	Cisco Networking Academy	Madagascar	Not Applicable	Computer/ Internet Access
8	Cisco Systems Inc. and EDS provide Computer	Uganda	Not Applicable	Technical Support, Technical Training
9	College John Mabuidi Computers	Congo, Democratic Republic of the C	Youth	Computer/ Internet Access, Website Developm
10	Communications Commission Assistance	Nigeria	Not Applicable	Fixed Line
11	Communications Law	Madagascar	Not Applicable	Other Mass Media
12	Community Learning Telecenter	Congo, Democratic Republic of the C	Rural	Computer/ Internet Access
13	Community Radio	Senegal	Rural	Computer/ Internet Access, Radio
14	Community Radio Committee	Mali	Not Applicable	Radio
15	Community Radio in Haiti	Haiti	Rural	Computer/ Internet Access, Radio, Technical Su

ICT Inventory List

Activity Name	Country	Audience	Technology
AMORE – Alliance for Mindanao Off-Grid Renewable Energy	Philippines	Rural	Cellular, Computer/ Internet Access, Geographic Information System (GIS), Wireless
APEP – Agricultural Productivity Enhancement Program	Uganda		
Building Capacity for Integrated Coastal Management	Vietnam	Not Applicable	Geographic Information System (GIS)
Cisco Systems Inc. and EDS provide Computer Training to Ugandan Students	Uganda	Not Applicable	Technical Support, Technical Training
Communications Commission Assistance	Nigeria	Not Applicable	Fixed Line

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ICT Inventory Reboot

Sonjara, Inc.

Dataset 101: key concepts and questions

Before any project starts, answer the

- WHAT
- HOW
- WHERE
- WHEN
- WHO

Of the data

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ICT Inventory Reboot

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WHAT is the data?

- Activity Descriptions
- M&E
- Development or economic data
- Other (social media and databases about data)

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HOW is the data?

- Formatted
- Structured
- Validated

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WHERE is the data?

- Captured and collected
- Shared with and reporting to
- Maintained/stored/housed
- Accessible

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WHEN (and how often) is the data?

- captured
- updated
- And what are the start and end dates of data validity?

WHO has access?

- General public, US G Employees, IPs
- Copyright or IP issues
- Privacy/security requirements
- Which users need what format to access it?

Lessons learned so far

- Software goes obsolete – but your data shouldn't
  - Format and structure of underlying db important
- Classification info changes
  - Sectors
  - USAID offices
  - Target audiences
- Data cleanup is always the most costly part

More Lessons Learned

- Documents and data are useful for analysis
  - In ICT4D, not as much as changed as one would expect
- No planning for data storage = no data storage
  - Unless you are a data freak like me
- We predicted open data in 2008
  - Didn’t call it that
  - Good planning now, makes for great resources later

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ICT Inventory Reboot

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Open and linked data resources

- Iatistandard.org
- data.gov
- niem.gov
- aidtransparency.org
- foreignassistance.gov
- www.sonjara.com/data_sets

Tara S. Mohn, PMP, CKM
Knowledge Manager,
U.S. Department of State
Program & Project Management Community of Practice

A Powerful Combination

KNOWLEDGE MANAGEMENT AND PROJECT MANAGEMENT

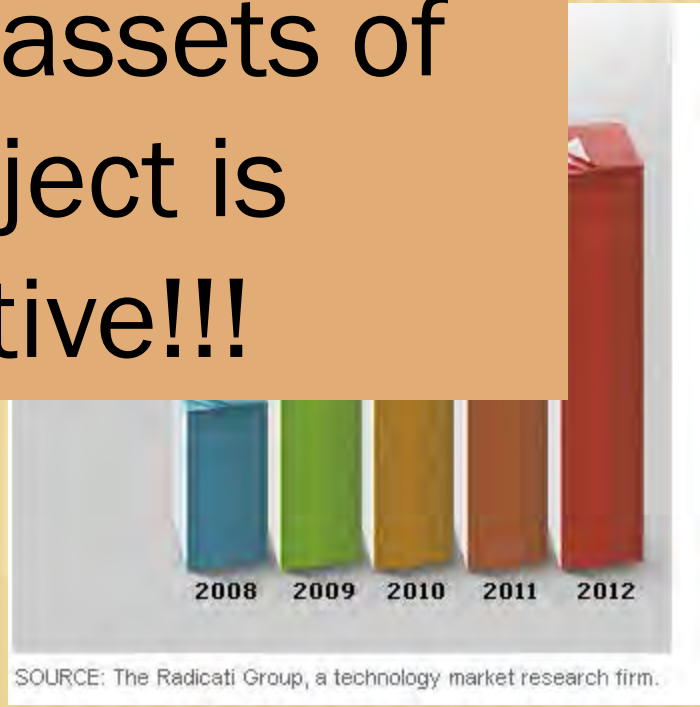
Tara S. Mohn
Presenter

THE KNOWLEDGE MANAGEMENT IMPERATIVE

Knowledge Overload

- Digita
  unpre

Managing the knowledge assets of your project is imperative!!!



PROJECT MANAGEMENT

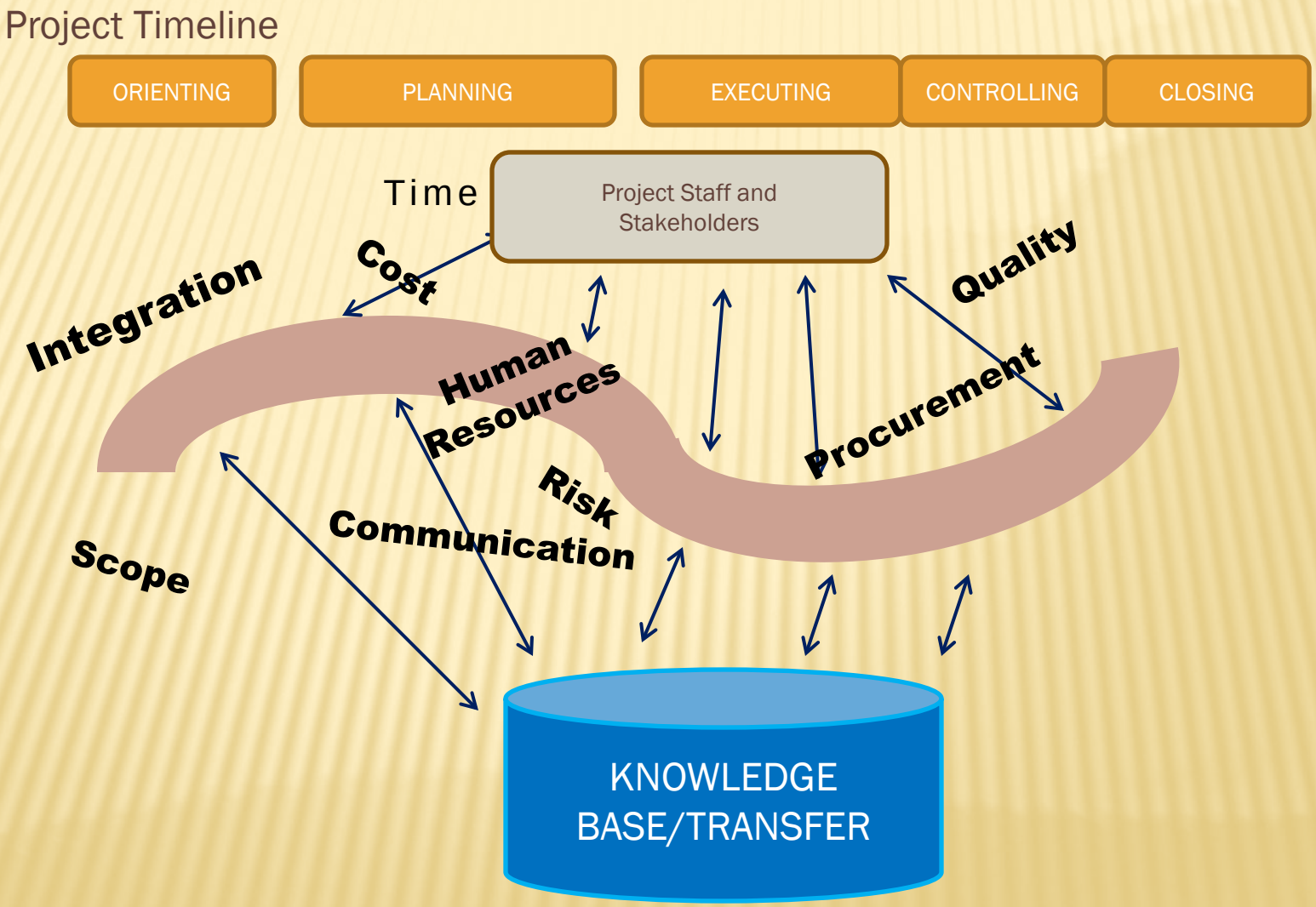
- **Project management** is the application of knowledge, skills and techniques to execute projects effectively and efficiently. It's a strategic competency for organizations, enabling them to tie project results to business goals — and thus, better compete in their markets.
- Project management *processes:*
  - Initiating , Planning , Executing, Monitoring and Controlling, Closing
- Project management *knowledge* areas:
  - Integration, Scope ,Time, Cost, Quality, HR, Communication, Risk and Procurement,
- **Project management imposes a unique organization that frames Knowledge Management.**

KNOWLEDGE MANAGEMENT

- **Knowledge Management** is the Implementing and managing an infrastructure of **processes** governing the creation, modification, storage, enrichment, sharing and disposition of knowledge assets
- while instilling a **culture** of collaboration and innovation
- and using state-of-the-art **technology** to produce, maintain and share rich, usable knowledge-bases
- Knowledge Management practices serve to enhance Project Management by ensuring thorough Knowledge Asset documentation.
- **Knowledge assets such as Lessons Learned improve the probability for successful projects in the future.**

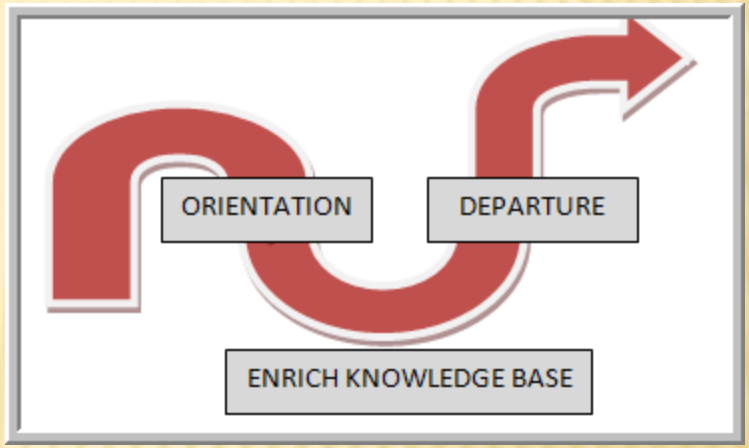
A POWERFUL COMBINATION

THE KNOWLEDGE FLOW OF PROJECTS



KM TIPS

Knowledge Touch Points – times during the project where there is purposeful Knowledge Transfer activities.



Project Managers should encourage staff to

- Excavate Before You Create!
- If It's Not Found, Write it Down!
- If Something's There, Enrich with Care!
- Dare to Share

KM AND PM: A SYNERGY

Knowledge Touch Points and Rules	*Initiating*	*Planning*	*Execution*	*Controlling*	*Closing*
Creating KA	Look in Knowledge Base for examples to start with. Create new if necessary	Look in Knowledge Base for examples to start with. Create new if necessary	Look in Knowledge Base for examples to start with. Create new if necessary	Look in Knowledge Base for examples to start with. Create new if necessary	Look in Knowledge Base for examples to start with. Create new if necessary
Orientation/new project Staff	Orient project staff to new project, the objectives and their role in the project	Orient project staff to new project, the objectives and their role in the project	Orient project staff to new project, the objectives and their role in the project	Orient project staff to new project, the objectives and their role in the project	Orient project staff to new project, the objectives and their role in the project
Share	Make sure relevant KAs are accessible to all stakeholders	Make sure relevant KAs are accessible to all stakeholders	Make sure relevant KAs are accessible to all stakeholders	Make sure relevant KAs are accessible to all stakeholders	Make sure relevant KAs are accessible to all stakeholders
Knowledge Asset Enrichment	Improve existing KAs in Knowledge Base : Charter, Preliminary Scope Statement	All project staff must enrich the existing KAs: Project Management Plan, Scope Plan, Scope Definition WBS,Schedule, cost estimate and budget, HR plan, Risk Management plan, Quality Plan, Acquisition Plan.	All project staff must enrich the existing KAs: Project progress reports, change re4uquests, Quality and Risk reports, manage ment artifacts and meeting documentation.	All project staff must enrich the existing KAs: Scope Verification, Schedule Control, Cost Control, Quality Control, Team management, Stakeholder Management, Contract Administration	All project staff must enrich the existing KAs: Project Close documentation, Contract termination, Lessons Learned
Departure/ Transfer	When project staff depart the project during this phase, ensure critical knowledge transfer	When project staff depart the project during this phase, ensure critical knowledge transfer	When project staff depart the project during this phase, ensure critical knowledge transfer	When project staff depart the project during this phase, ensure critical knowledge transfer	When project staff depart the project during this phase, ensure critical knowledge transfer
	*KA = Knowledge Asset				

Knowledge Base/Human Capital Enrichment Level					

KNOWLEDGE MANAGEMENT RESOURCES

- Knowledge Management Institute
- KMWorld.com
- The Federal Knowledge Management Working Group
- APQC.org (State is a member, so you can set up an account with your State ID)
- Diplopedia Knowledge Management Category page
- State Kmers Corridor Group
- Using SharePoint for Project Management
- *Knowledge Management is like Herding Cats.*

PROJECT MANAGEMENT RESOURCES

- The Program and Project Management Community of Practice (PPMCOP)
- Project Management Training at FSI
- State Project Services Office (PSO)
- Project Server at State
- Project Management Institute (PMI)

Any Questions?

Thank you for your time!

BridgeLogiQ:
Records Management & You

FEBRUARY 26, 2013

TOM EDWARDS

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Records Management and You

Good Governance Requires Good Recordkeeping

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What is Records Management?

Records Management

"systematic control of the creation, maintenance, use, and disposition of records"

Government Records Management

"the planning, controlling, directing, organizing, training, promoting, and other managerial activities involved in records creation, maintenance and use, and disposition in order to achieve adequate and proper documentation of the policies and transactions of the Federal Government and effective and economical management of agency operations"

(44 U.S.C. 2901)

Records Management

✔ Get It In

- Creation
- Declaration
- Categorization
- Classification

✔ Manage It

- Active Use
- Retention Period

✔ Get It Out

- Final Disposition

Why do we care about records?

Presidential Memorandum

"Records provide the prism through which future generations will understand and learn from our actions and decisions."

The White House

Office of the Press Secretary

For Immediate Release

November 28, 2011

Presidential Memorandum -- Managing Government Records

MEMORANDUM FOR THE HEADS OF EXECUTIVE DEPARTMENTS AND AGENCIES

SUBJECT: Managing Government Records

Section 1. Pur

Records Administration (NARA) provide the prism through which future generations will understand and learn from our actions and decisions. Modernized records management will also help executive departments and agencies (agencies) minimize costs and operate more efficiently. Improved records management thus builds on Executive Order 13589 of November 9, 2011 (Promoting Efficient Spending), which directed agencies to reduce spending and focus on mission critical functions.

Authorities/Regulations

DoD 5015.2

SEC

HIPAA

IRS

FERPA

44 U.S.C. 2904

44 U.S.C. 2901

FRA 1950

ISO 15489

International Organization for Standardization

Full Revision Date: 11/26/2012
Responsible Office: M/MS/IRD
File Name: 502_112612

What are records?

Records

Search Documents
Twitter
XLS
FLIGHT RECORDER DO NOT OPEN
Physical Records
ISSUES.docx
Fish cable.pptx
DXS-A.pptx
DATA (D:)
projects (\\192.251.93.6) (X:)
share (\\LS-CHL729) (Y:)
ChatLog Managing Your Emails as Records ...
Rich Text Format

What Do Records Have to do with Me?

Records Management and Me

Make and keep records of your work.

- **Create records needed to:**
  - **-Perform the Business of the Agency**
  - **-Record Decisions and Actions**
  - **-Document Activities**
- **Ensure that records can be found when needed**
- **Dispose of records in accordance with records schedules**

Information Workers/Records Managers

Declare!

Review!

Disposition Identification!

Metrics!

Dispose!

Event Notification!

Categorize!

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Records Management Universe

Accountability to the Stakeholders/Governed

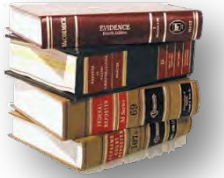
IT Policies

Everyday Operations

Records Management

Legal Decisions

Continuity of Operations



Laws and Regulations

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How do We Know How to Manage Records?

IT
s)

This schedule provi
worldwide. These r
instructions apply to
or working files at a

nizational levels,
ups. The disposal
decentralized files,

ITEM NO.		DISPOSITION
41010	Acti the p be a here File docu cust	the close of the office for 3 er to off-site years. Then the records to D for retirement. activity closes you would retain ace until Then, on you would off-site storage 009. Finally, on the records

ADS Chapter 502

The USAID Records Management Program

Automated Directives System Chapter 502 – RECORDS MANAGEMENT
Records Disposition Schedule – Agency-Wide (USAID/W and Missions)

USAID MISSION DISPOSITION SCHEDULE
CHAPTER 37 PERSONNEL RECORDS

ITEM NO.	DESCRIPTION OF RECORDS	AUTHORIZED DISPOSITION
37240	**Training Records** a. Training Aids. 1) Record copy of each manual, syllabus, textbook, and other training aid developed for Agency specific training.	**Permanent.** Transfer to NARA in 5 yr. blocks when most recent record is 10 yrs. old. **Temporary**. Destroy when superseded.

Automated Directives System Chapter 502 – RECORDS MANAGEMENT
Records Disposition Schedule – Agency-Wide (USAID/W and Missions)
Section 41 - Strategic Objective Document Disposition Schedule

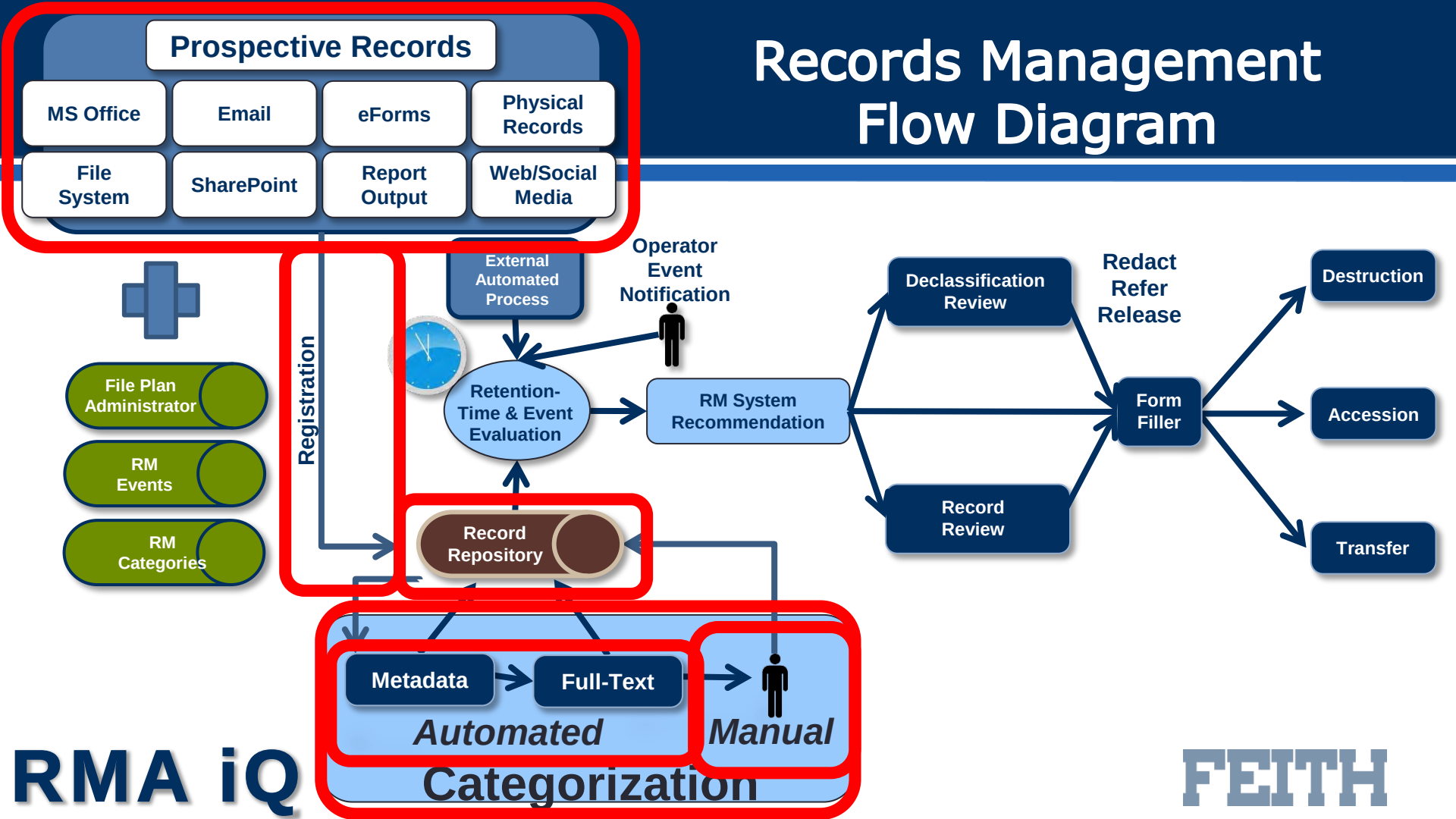
This schedule provides disposal authorization for the official strategic objective records in USAID at all organizational levels, worldwide. These records are described as precisely as possible to permit easy identification within file groups. The disposal instructions apply to all records of the type described regardless of their physical location, e.g., central files, decentralized files, or working files at an individual's desk.

ITEM NO.	DESCRIPTION OF RECORDS	AUTHORIZED DISPOSITION
41030	**Correspondence Files** – These documents contain general information about the activity. They do not contain the decision-making, change or revision of the activity. They usually only indicate conversations or thoughts that occur about the activity and are needed only for the life cycle of the activity. Files include cables (incoming and outgoing), letters, memoranda, e-mails, minutes of meetings, briefings, statutory checklists, and strategic objective team documents.	**Temporary**. After the close of the activity, hold in the office for 3 years. Then transfer to off-site storage for an additional 6 years, 3 months, and then destroy. For example, if an activity closes October 31, 2000, you would retain the files in office space until October 31, 2003. Then, on November 1, 2003, you would transfer the files to off-site storage until January 31, 2010. Then destroy these records.

How Can We Possibly Manage all These Records?

Automation

Records Management Flow Diagram



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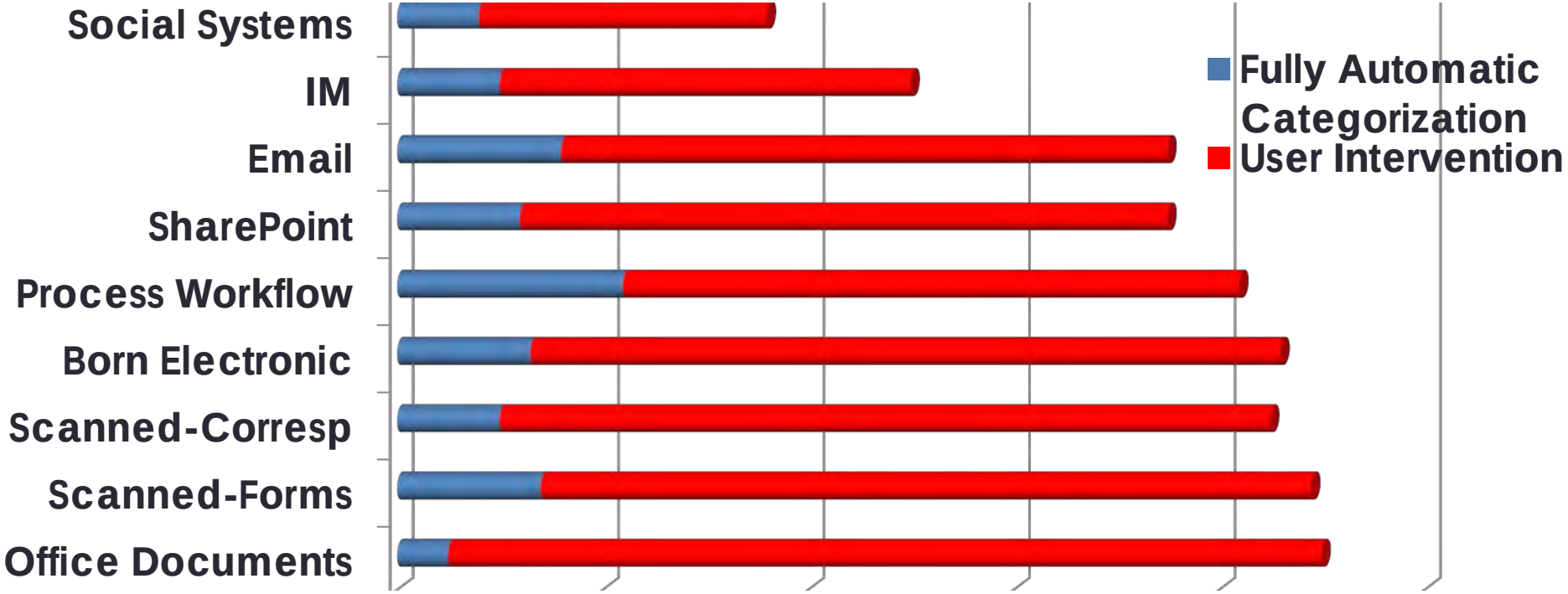
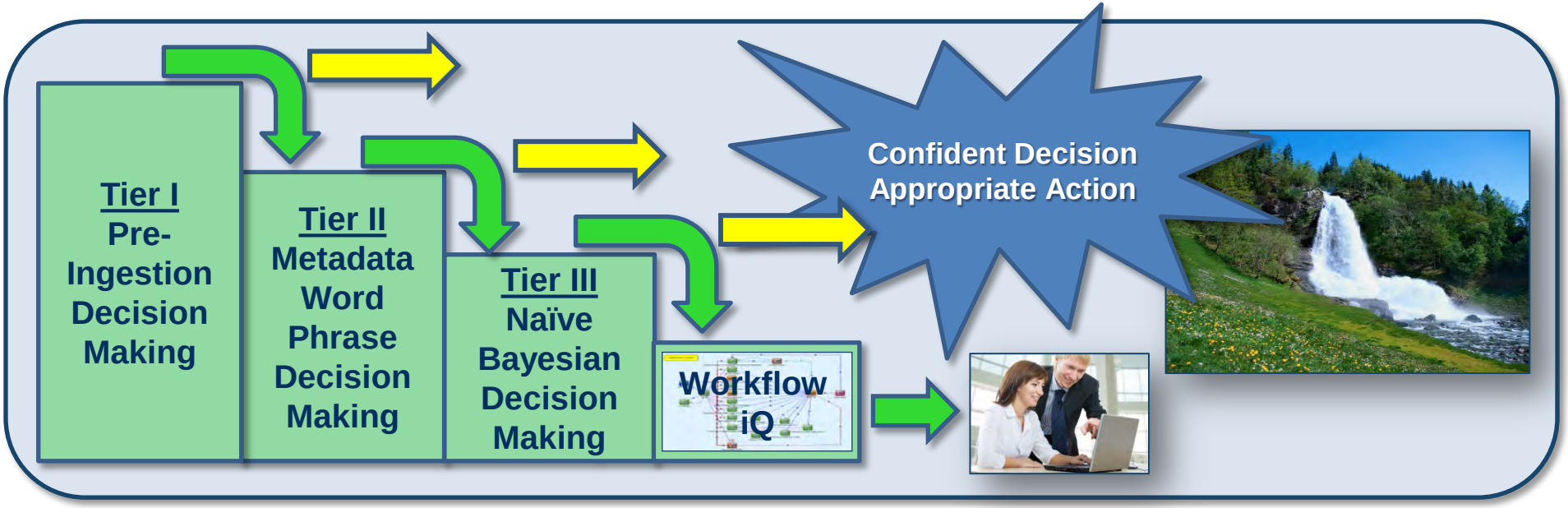
Auto-Categorization Today

How are We Doing?

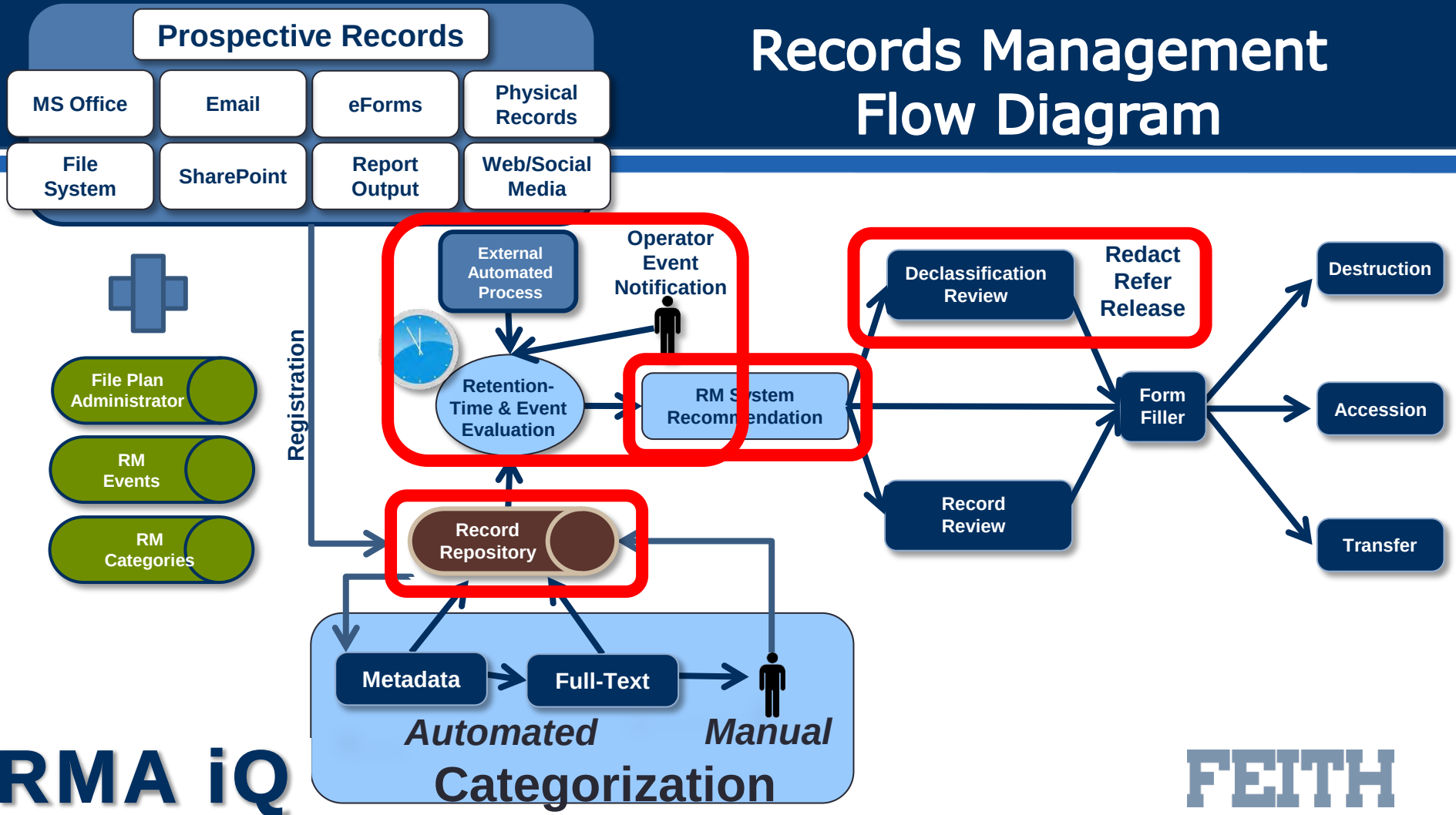


Adapted from © AIIM 2011-AIIM Market Intelligence-Doug Miles

Waterfall Categorization



Records Management Flow Diagram



RMA iQ

FEITH

Feith Document Database - [fdd@fdd_mpo-test: 34567]

File Edit View Admin Index! Search Page Notes Magnify Rotate Help

Classified | 0 Signatures | 0 Document Notes | 4 Page Notes 4 Here | UTR Views

Delete Note | Classified by fdd (Feith Systems) on 7/20/2012 | Show All | Add Page | Delete Page | Route To | Reindex | Reorder

- fdd_mpo-test
  - Bookmarks
  - Bins - All
  - File Cabinets - Favorites
    - AiQ__Training
    - AiQ_Training
    - Audit_Trail
    - Collections
    - Complaints
    - Contracts
    - Declassification
    - examplefc
    - Feith Drive
    - Inquiries
    - Inquiries_AIQ
    - LifeCycle
    - MailiQArchive
    - MITS
    - PATENTS
    - PersonalProperty
    - PERSONNEL
    - PROJECTCASES
    - Records
    - Redaction
      - 34567, (63)

CLASSIFIED

INVOICE 76802

CUSTOMER NO. F881

P.O.
Centre
(215) 27
Fax (215)

BIL . TO:

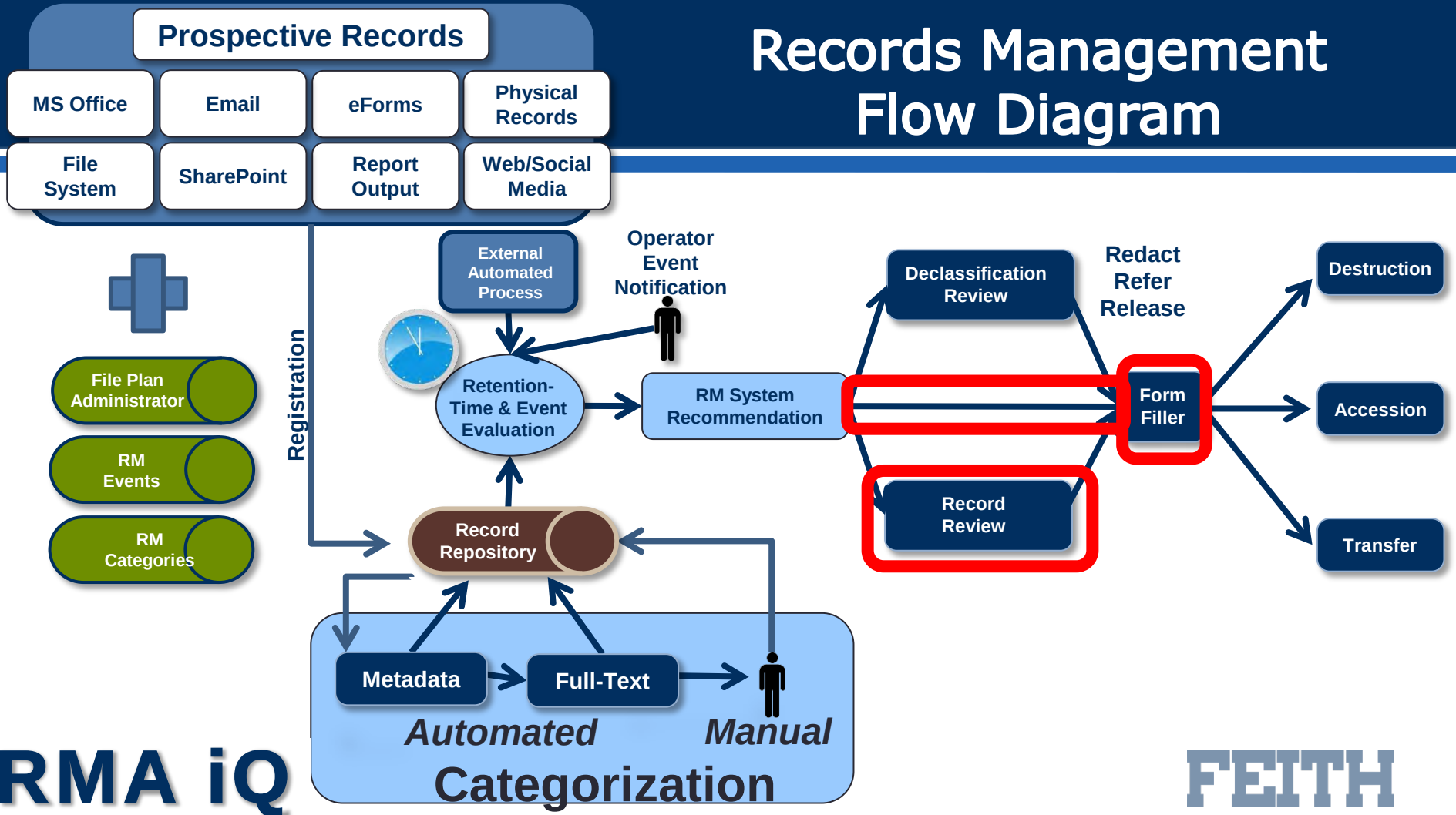
SSIFIED

Feit
425 Mary
Fort Washington

CLASSIFIED

ALL INVOICES 30 DAYS PAST DUE OR OVER ARE SUBJECT TO A SERVICE CHARGE OF 1½% PER MONTH OR 18% PER ANNUM.

Records Management Flow Diagram



RMA iQ

FEITH

Auto-Filled Forms

RECORDS TRANSMITTAL AND RECEIPT

Complete and send original and two copies of this form to the appropriate Federal Records Center for approval prior to shipment of records. See specific instructions on reverse.

PAGE 1 OF PAGES

1. TO (Complete the address for the records center serving your area as shown in 36 CFR 1228.150.)

Federal Records Center

5. FROM (Enter the name and complete mailing address of the office retiring the records. The signed receipt of this form will be sent to this address)

2. AGENCY TRANSFER AUTHORIZATION — TRANSFERRING AGENCY OFFICIAL (Signature and title) — DATE

3. AGENCY CONTACT — TRANSFERRING AGENCY LIAISON OFFICIAL (Name, office and telephone No.)

4. RECORDS CENTER RECEIPT — RECORDS RECEIVED BY (Signature and title) — DATE

Fold Line

6. **RECORDS DATA**

ACCESSION NUMBER										COMPLETED BY RECORDS CENTER			
RG	FY	NUMBER	VOLUME (cu. ft.)	AGENCY BOX NUMBERS	SERIES DESCRIPTION (With inclusive dates of records)	RESTRICTION	DISPOSAL AUTHORITY (Schedule and item number)	DISPOSAL DATE	LOCATION	SHELF PLAN	CONT TYPE	AUTO DISP
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)	(l)	(m)

NSN 7540-00-634-4093 — 135-107 — Standard Form 135 (Rev. 7-85) Prescribed by NARA 36 CFR 1228.152

AUTHORIZED FOR LOCAL REPRODUCTION

AGREEMENT TO TRANSFER RECORDS TO THE NATIONAL ARCHIVES OF THE UNITED STATES

1. INTERIM CONTROL NO. (NARA Use Only)

TERMS OF AGREEMENT

The records described below and on the attached 1 pages are deposited in the National Archives of the United States in accordance with 44 U.S.C. 2107. The transferring agency certifies that any restrictions on the use of these records are in conformance with the requirements of 5 U.S.C. 552.

In accordance with 44 U.S.C. 2108, custody of these records becomes the responsibility of the Archivist of the United States at the time of transfer of the records. It is agreed that these records will be administered in accordance with the provisions of 44 U.S.C. Chapter 21, 36 CFR XII, 36 CFR Part 1256 and such other rules and regulations as may be prescribed by the Archivist of the United States (the Archivist). Unless specified and justified below, no restrictions of the use of these records will be imposed other than the general and specific restrictions on the use of records in the National Archives of the United States that have been published in 36 CFR Part 1256 or in the Guide to the National Archives of the United States. The Archivist may destroy, donate, or otherwise dispose of any containers, duplicate copies, unused forms, blank stationery, non-archival printed or processed material, or other non-recorded material in any manner authorized by law or regulation. Without further consent, the Archivist may destroy deteriorating or damaged documents after they have been copied in a form that retains all of the information in the original document. The Archivist will use the General Records Schedule and any applicable records disposition schedule (SF 115) of the transferring agency to dispose of non-archival materials contained in this deposit.

3A. AGENCY APPROVAL — Signature _____ Date _____

3A. NARA APPROVAL — Signature _____ Date _____

3B. NAME, TITLE, MAILING ADDRESS

Department of Efficiency
1000 Constitution Ave, Washington DC 10000

3B. NAME, TITLE, MAILING ADDRESS

RECORDS INFORMATION

4A. RECORDS SERIES TITLE
Records Created by Advisory Commissions, Committees, Councils, Boards and Other Groups Established under the

4B. DATE SPAN OF SERIES 01/01/2010 (Attach any additional description.)

5A. AGENCY OR ESTABLISHMENT
Department of Efficiency

5B. AGENCY MAJOR SUBDIVISION
Headquarters Directorate

5C. AGENCY MINOR SUBDIVISION

5D. UNIT THAT CREATED RECORD

5E. AGENCY PERSON WITH WHOM TO CONFER ABOUT THE RECORDS
Name Ronald Recordo
Telephone Number (202) 555-1212

6. DISPOSITION AUTHORITY:
GRS 26-02

7. IS SECURITY CLASSIFIED INFORMATION PRESENT? [X] NO [ ] YES
LEVEL: [ ] Confidential [ ] Secret [ ] Top Secret
SPECIAL MARKINGS: [ ] RD/FRD [ ] SCI [ ] NATO [ ] Other
INFORMATION STATUS: [ ] Segregated [ ] Declassified

8. CURRENT LOCATION OF RECORDS
X Agency (Complete 8A only)
___ Federal Records Center (Complete 8B only)

8A. ADDRESS
1000 Constitution Ave, Washington DC 10000

8B. FRC ACCESSION NUMBER — CONTAINER NUMBER(S) — FRC LOCATION

9. PHYSICAL FORMS
[ ] Paper Documents [ ] Posters
[ ] Paper Publications [ ] Maps and Charts
[ ] Microfilm/Microfiche [ ] Arch / Eng Drawings
[X] Electronic Records [ ] Motion / sound / Video
[ ] Photographs [ ] Other (specify): _____

10. VOLUME: Cu. Mtr. ____ (Cu. Ft. ____) CONTAINERS: Number ____ Type ____

11. DATE RECORDS ELIGIBLE FOR TRANSFER TO THE ARCHIVES
03/31/2012

12. ARE RECORDS FULLY AVAILABLE FOR PUBLIC USE?
[X] YES [ ] NO (If no, attach briefs on use and justification.)

13. ARE RECORDS SUBJECT TO THE PRIVACY ACT?
[ ] YES [X] NO (If yes, cite Agency system Number and Federal Register volume and page number of most recent notice and attach a copy of this notice.)

14. ATTACHMENTS
[ ] Agency Manual Excerpt [ ] Listing of Records Transferred
[ ] Additional Description [ ] NA from 14097 or Equivalent
[ ] Privacy Act Notice [ ] Microform Inspection Report
[ ] Other (specify): [ ] SF(s) 135

NARA PROVIDES

15. SHIPPING INSTRUCTIONS TO AGENCIES/REMARKS REGARDING DISPOSITION — RG

16. RECORDS ACCEPTED INTO THE NATIONAL ARCHIVES OF THE UNITED STATES — Signature _____ Date _____

17. NATIONAL ARCHIVES ACCESSION NO.

NATIONAL ARCHIVES AND RECORDS ADMINISTRATION — SF 258 (9/95) Prescribed by NARA 36 CFR 1228

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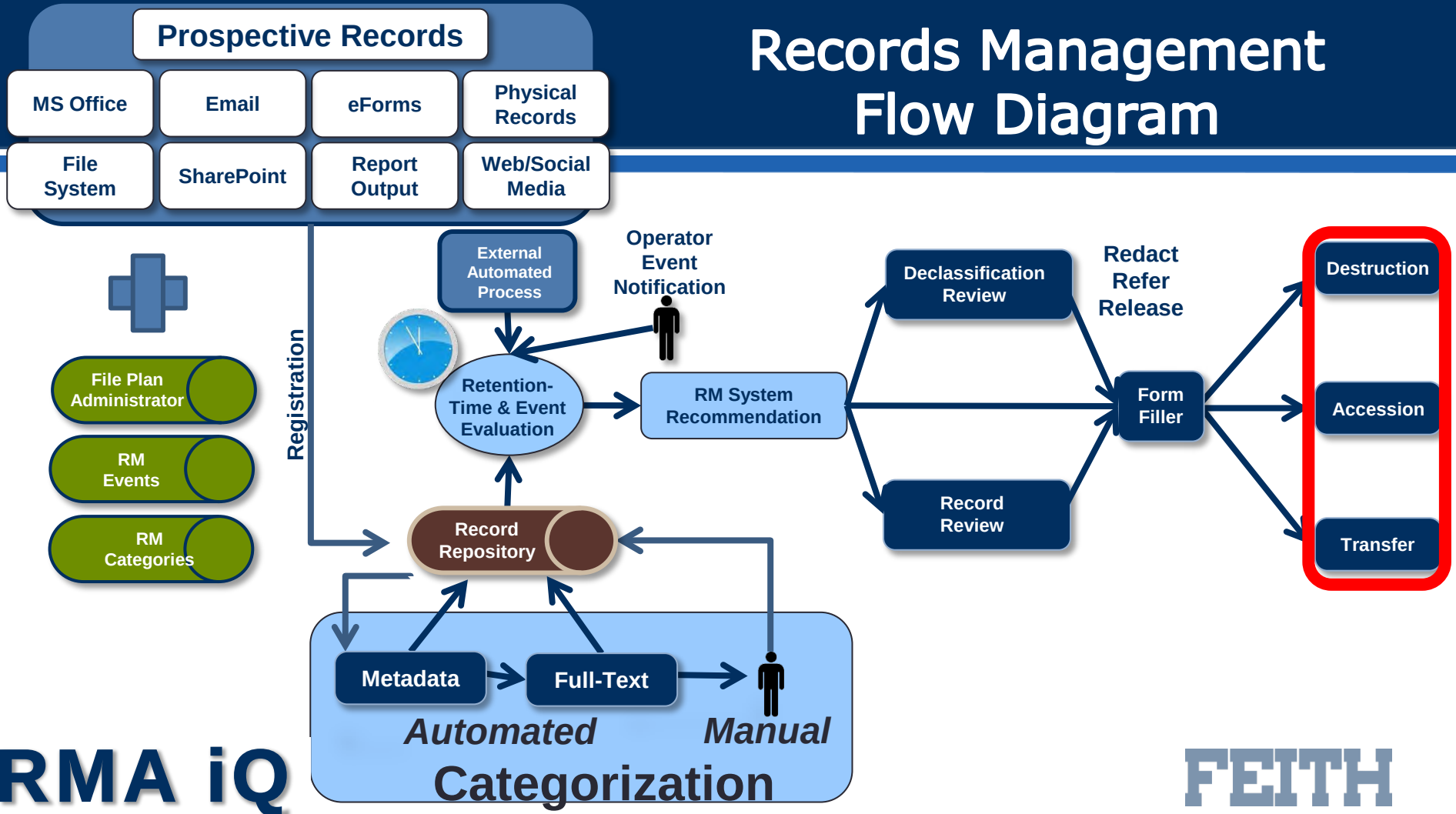
Records Management Flow Diagram



RMA iQ

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Long Term Storage

Information

Resources

Management

National Archives

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Conclusion:

- You have Records
- You have to Maintain Records
- You have to Survive in Your Regular Job!
- You need Automation to Help!

BridgeLogiQ:
Records Management & You

FEBRUARY 26, 2013

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We Want To Hear From You

QUESTIONS & ANSWERS

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Life in the Village: Using Simulations to Learn

Zachary Baquet
Knowledge Management Specialist
USAID

USAID

Overview

I. Definitions
II. Background
III. Overview of play
IV. Evolution and tips
V. Where do we go from here?

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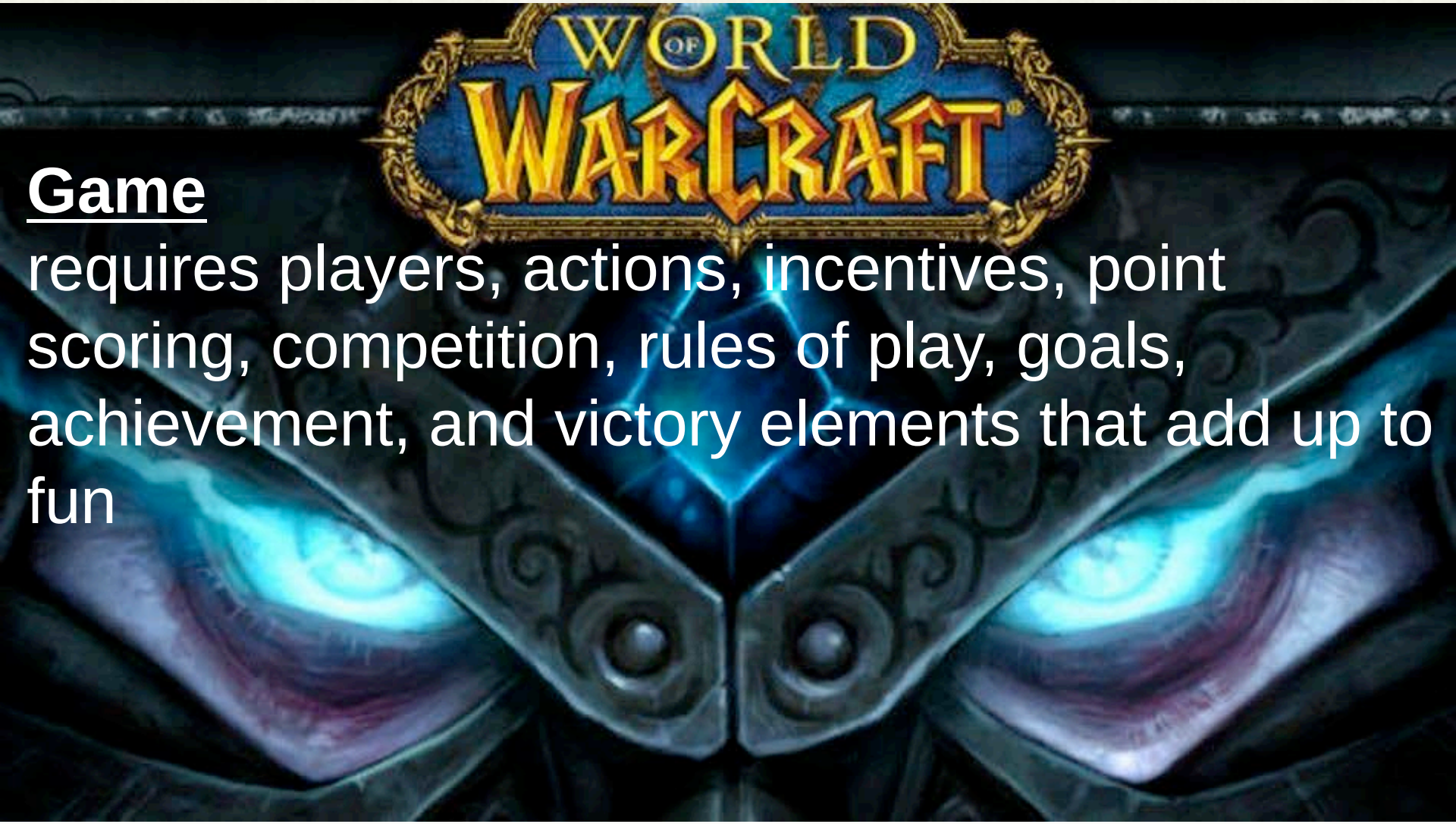
Simulation vs. Gamification



<u>Game</u>

requires players, actions, incentives, point scoring, competition, rules of play, goals, achievement, and victory elements that add up to fun

Gamification

Integration of typical mechanics of game play into another activity

Simulation

modeling a real world environment so as to help a learner develop an understanding of the key concepts

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Background

Developed for the first Agricultural Core Course in December 2010
By Lena Heron and Anicca Jansen

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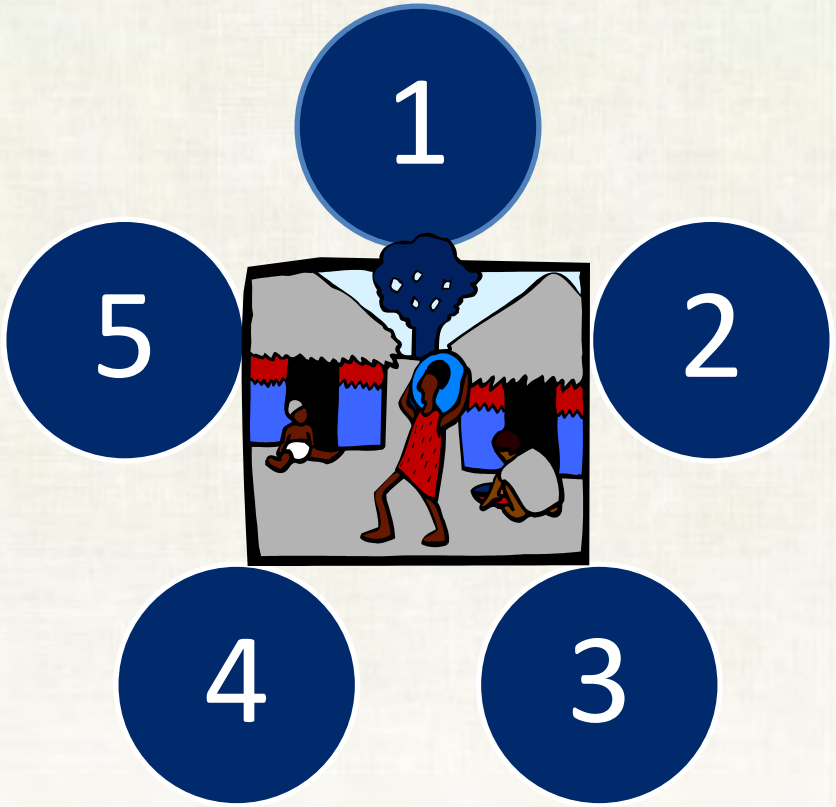
Overview of play



- Participant a member of one of five households
- Each household had three children
- Each household had certain amount of assets
- Played two seasons

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Overview of play

Year 0		***Year 1***		***Year 2***	
Income	120 Sh	**Income**	120 Sh	**Income**	
Expenses		**Expenses**		**Expenses**	
Seed:	30 Sh	Seed:		Seed:	
Food:	60 Sh	Food:		Food:	
School Fees:	30 Sh	School Fees:		School Fees:	
Other:	-	Other:		Other:	
Year End Balance	0	**Year End Balance**		**Year End Balance**	

Evolution & Things to think about

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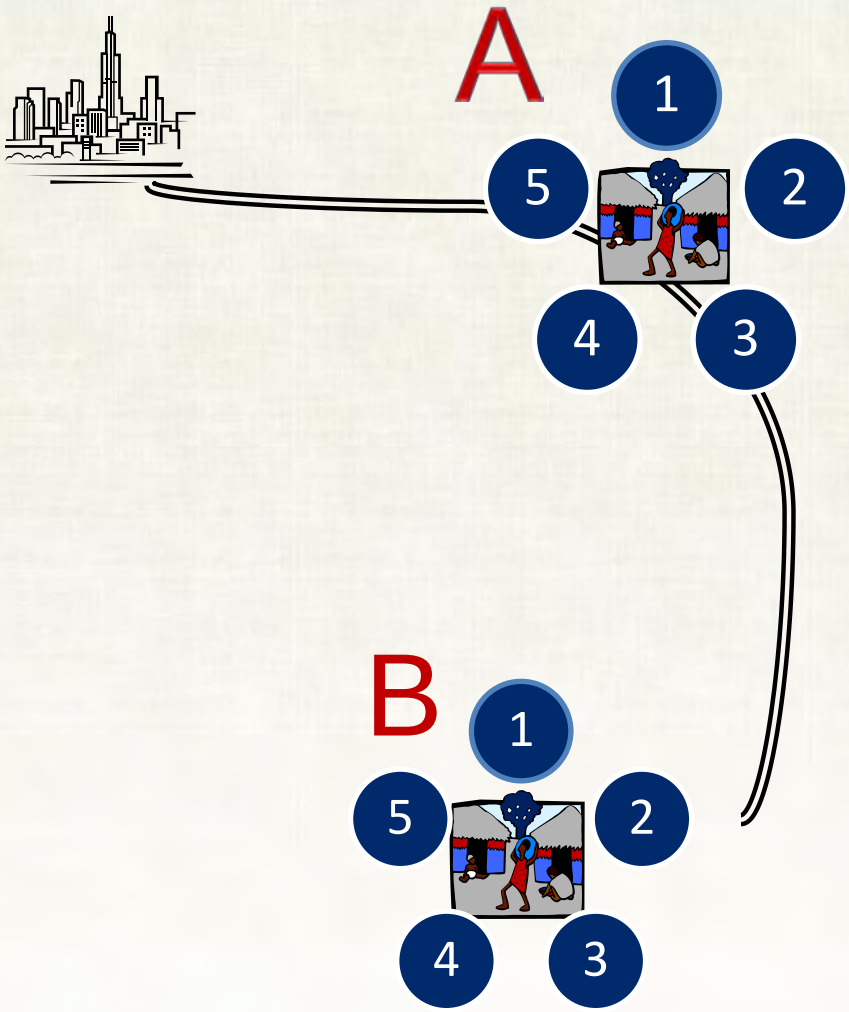
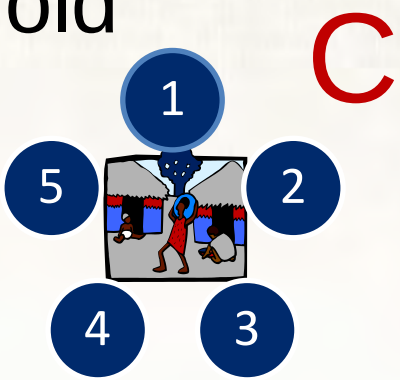
Stylized vs. Realistic

Complex vs. Simple



- 3 villages with different stories
- 5 households each village
- 3 children per household



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Complex vs. Simple

VILLAGE B - HOUSEHOLD 1	Year 0 Round 0	Year 1 Round 1	Year 2 Round 2	Year 3 Round 3	Year 4 Round 4
INCOME					
cash savings from previous year	0	10			
Income from staple crop	120	120			
Income from egg sale	0				
Income from sale of chicken(s)	0				
remittances from relatives	20	20			
other (list)					
Total Cash Available (savings + income)	140	150			
EXPENSES					
seeds - staple crop	30				
fertilizer					
support to family members					
food	80				
school fees (10 per child)	20				
other (list)					
Total Expenses	130				
Net (add to savings for next round/season)	10				

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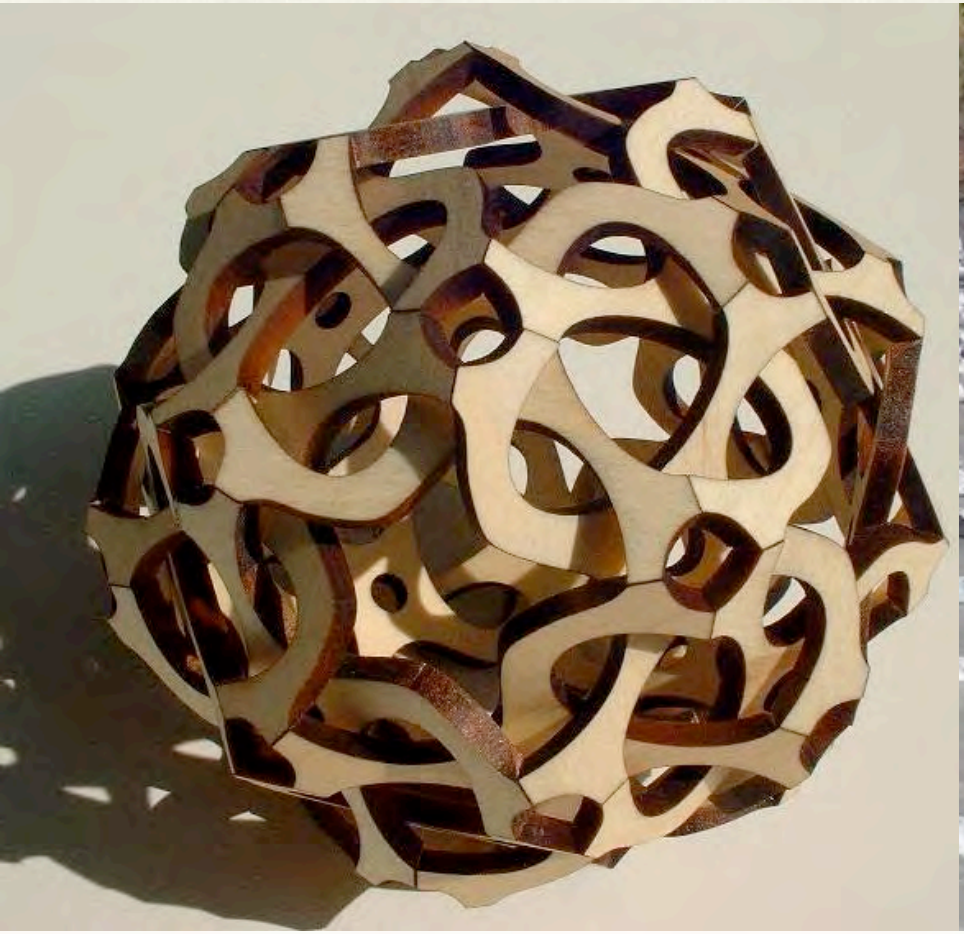
Structured vs. Open



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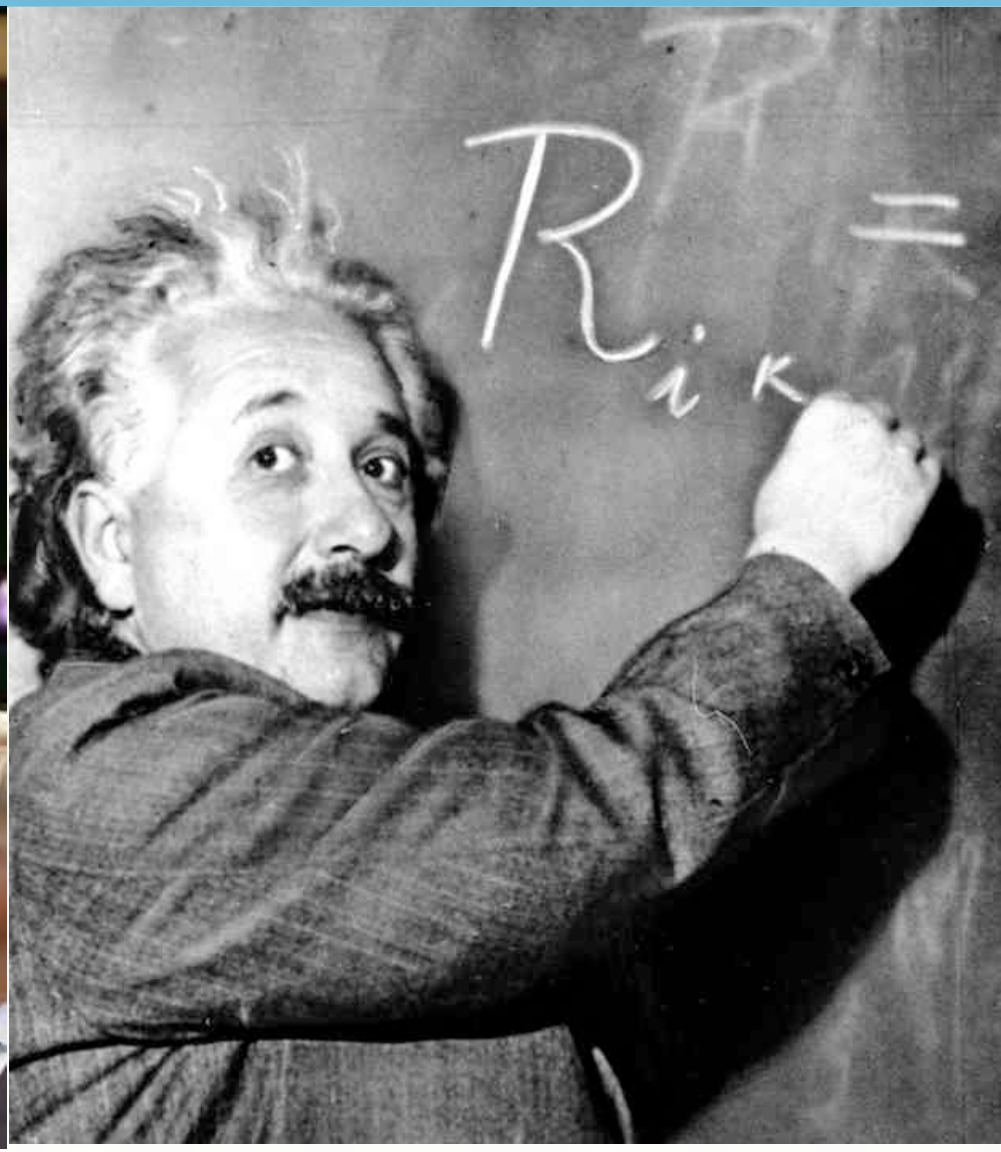
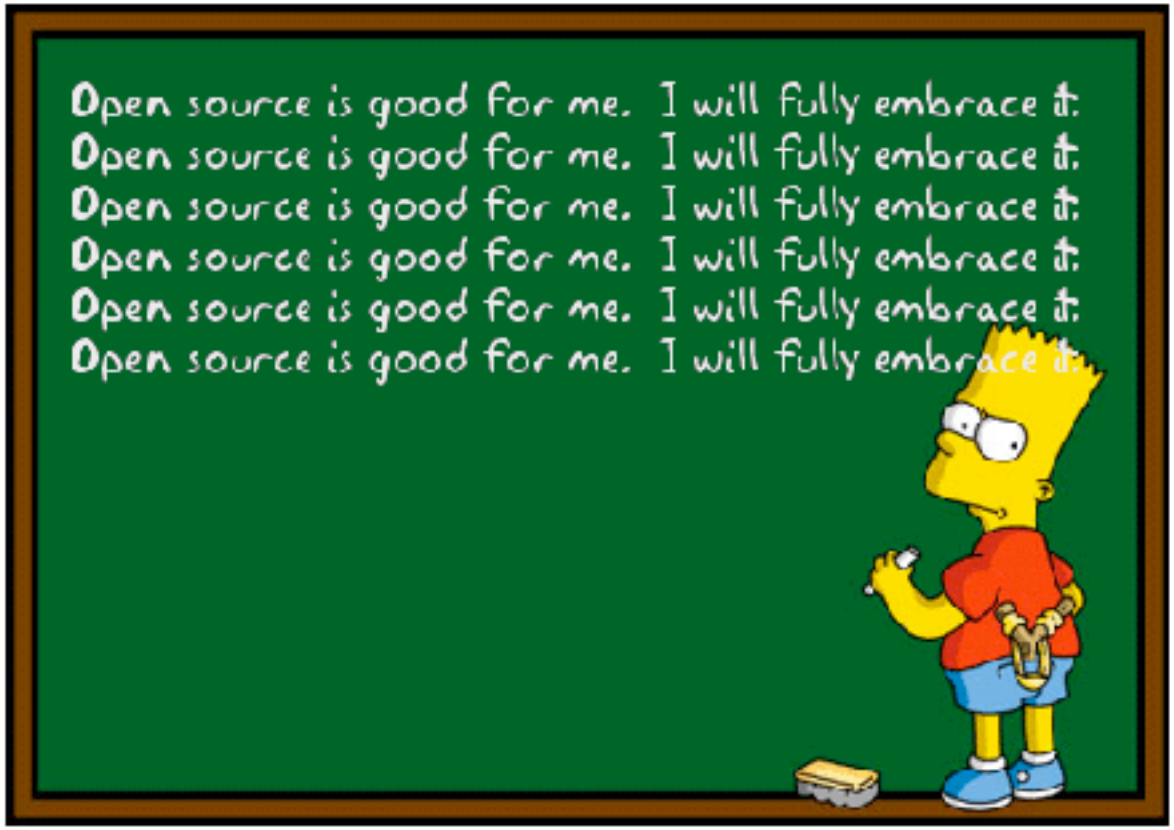
Winning vs. Understanding



Where do we go from here?

Open Source Simulations



"Life in the Village" Simulation Activity

Comments (0)

Institution(s): United States Agency for International Development

Date Published: November 26, 2012

"Life in the Village" is a simulation activity originally created by Anicca Jansen and Lena Heron of the USAID Bureau for Food Security for use in an agriculture training course for USAID staff. After play-testing the simulation in several different contexts, the Agrilinks team is excited to release the tool for use. If you have any questions about how to implement the activity, or if you have implemented it and are willing to share your experience, please contact us and let us know. We are always looking for feedback to make the tool better.

The purpose of "Life in the Village" is to teach participants about the difficult decisions faced by vulnerable populations in underdeveloped nations, and how certain types of interventions may or may not make a difference. It is best played with ten participants, split into five households of two people each. The participants can sit around a large table, in a circle of chairs, or on the floor. Each household receives a paper balance sheet and a handout listing income parameters for the village (the "rules" within they must operare). The households will simulate four years of decision-making in the face of unexpected shocks and newly-offered financial services.

Download the **Facilitator's Guide** at right for more detailed instructions on how

RESOURCES

- Facilitator's Guide
- Household Balance Sheets
- Village Income Parameters
- Playing Cards

Submit a Library Resource

Contribute your own resources to our growing library. Learn how in the FAQ section.

267 RESOURCES

+ RESOURCE

Recent Resources

ICT Applications for Agricultural Input Supply Companies

JAN 22, 2013 | Event Material

Integrating Very Poor Producers into Value Chains Field Guide

JAN 22, 2013 | Guidance Document

aWhere Weather: Weather Data at the Click of a Mouse

JAN 21, 2013 | Tool

Interactive Radio for Agricultural Development Projects

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Encouraging & Supporting Others

<u>Exchange: An Agricultural Market Simulation</u>
Monday, March 4, 2013, 2-4pm
Location: Ronald Reagan Building, Room 2.9D/E

On Monday, March 4th, the USAID Enabling Agricultural Trade (EAT) project will facilitate Exchange, an agricultural market simulation. In the game, you will assume the role of an actor in a commodity value chain, such as a producer, trader, or exporter, and be faced with real-world policy changes. Your responses to these changes will help you understand the impact of policy on the day-to-day decisions of agribusinesses and shed light on a new way to think about agricultural markets.

Space is limited. To register, please email Amy D'Angelo at adangelo@fintrac.com

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Acknowledgements

USAID	KDMD
Lena Heron	Meaghan Murphy
Anicca Jansen	Julie MacCartee
Evan Meyers	Bethel Alemu
Shawn Wozniak	Veronica Letelier
Katherine Beagle	Brandon Szabo

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Transforming Social Media & Learning into Social Learning

Zachary Baquet
Knowledge Management Specialist
USAID

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Overview

I. Definition for Social Media
II. Why use for learning?
III. Platforms and experiences
IV. 4 points to help the transformation
V. What do we want to achieve?

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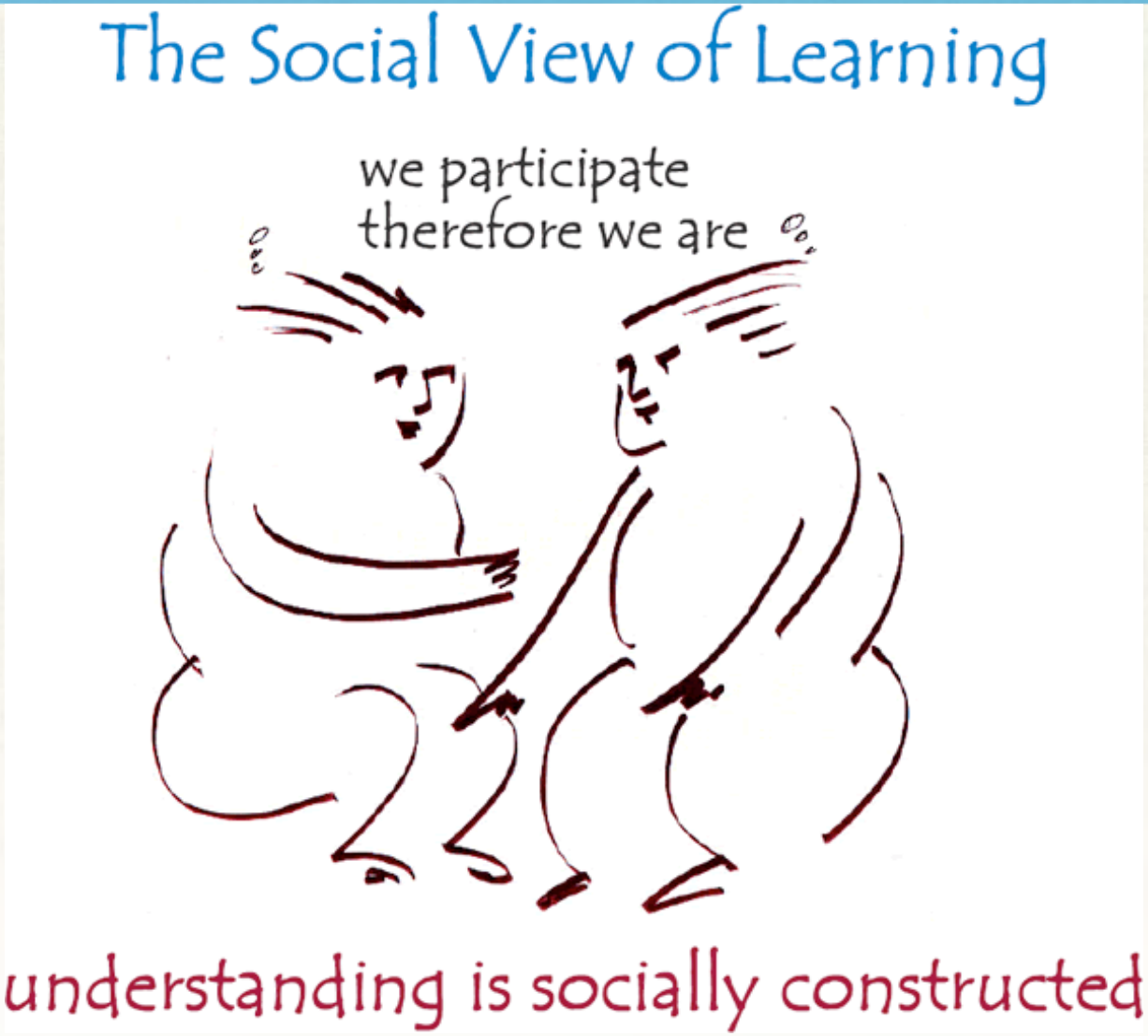
Definition of Social Media

online means of communication used by people to share information and to develop, strengthen and maintain social and professional networks

Why use Social Media for Learning?



From John Seely Brown and Richard P Adler, *Minds on Fire*

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Basic Starts and Stats

Agrilinks Blogs

- Started April 2011
- 248 posts

Ag Sector Council Seminar Series

- Started March 2010 GoToWebinar
- Switched to Adobe Connect March 2012
- 31 webinars
- 1801 online participants

#AskAg Twitter Chats

- Started April 2012
- 6 Chats

4 Things that help transform social media into social learning

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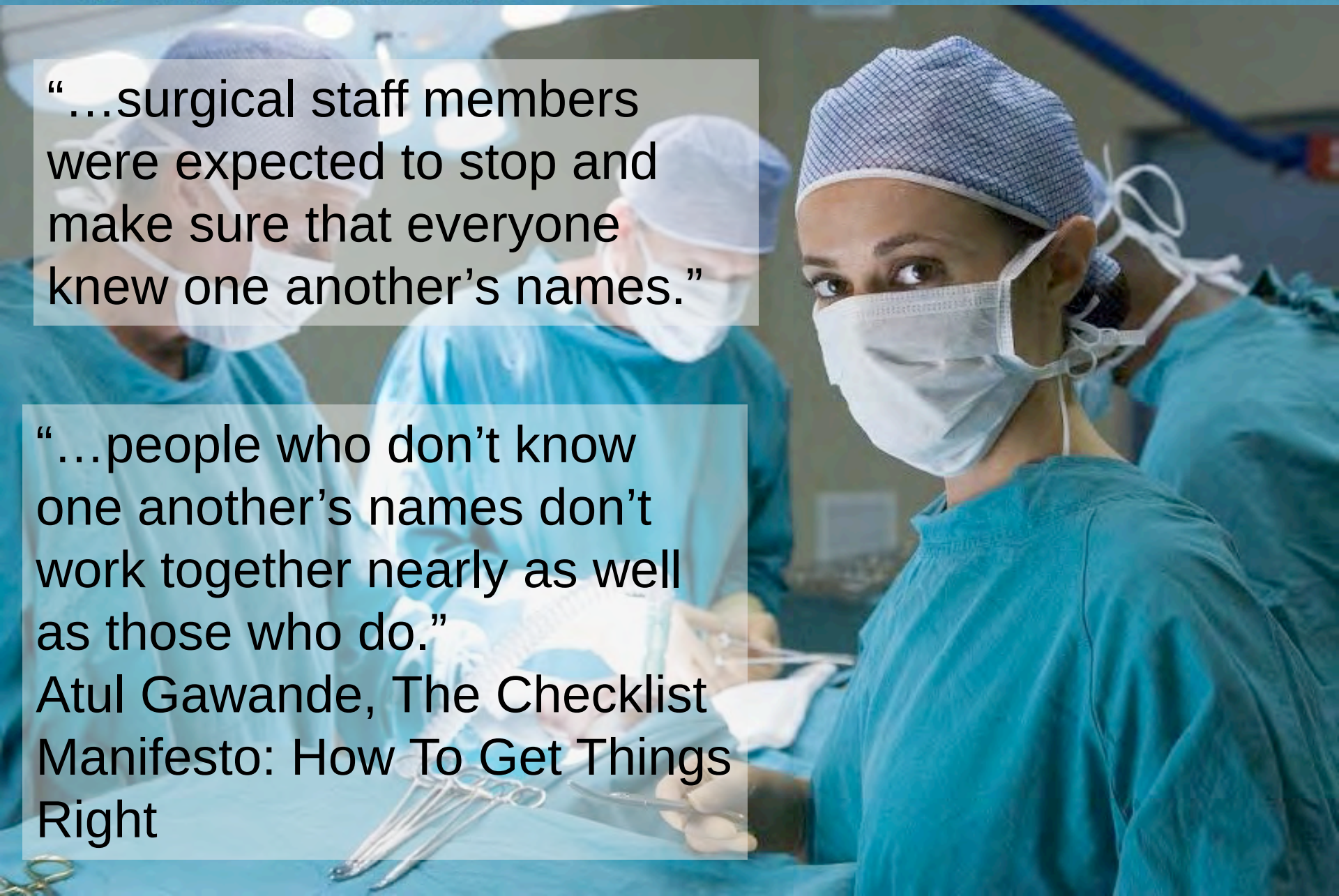
Introductions



"…surgical staff members were expected to stop and make sure that everyone knew one another's names."

"…people who don't know one another's names don't work together nearly as well as those who do."
Atul Gawande, The Checklist Manifesto: How To Get Things Right

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Recognition/Validation

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Q&A

Follow-Up

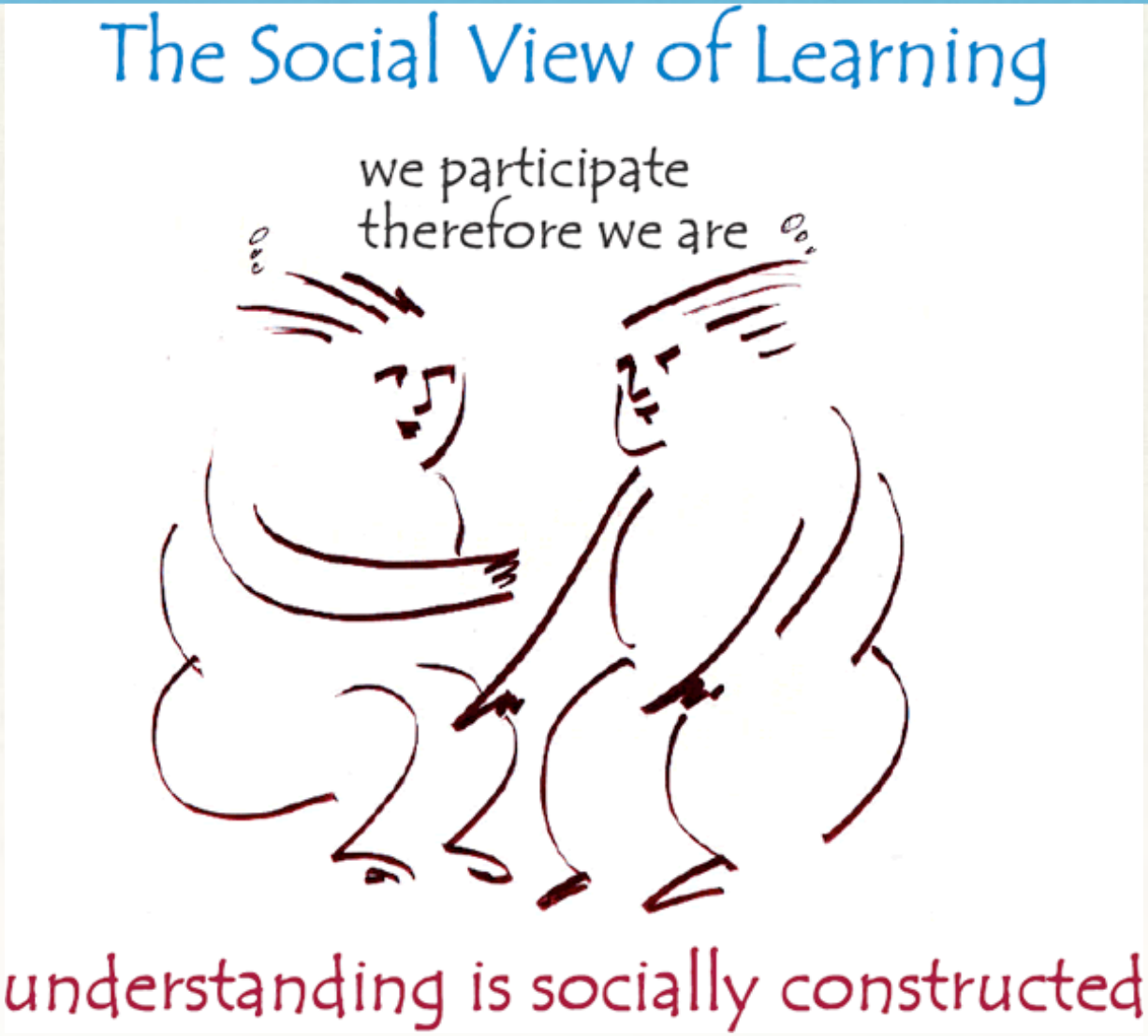
Facilitation?

Well duh!

What do we want to achieve?

1 to n

Why use Social Media for Learning?



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What do we want to achieve?

1 to 1 1 1 1 1 1 1 1 1 1 1 1 1

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What do we want to achieve?

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Acknowledgements

USAID

Stacey Young
Stephanie Grosser
Jennifer Cupp

KDMD

Meaghan Murphy
Dar Maxwell
Julie MacCartee
Lindsay Levin
Maciej Chmielewski

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Online Collaborative Learning Spaces & Program Cycle Capacity Building

USAID

Objectives

- Support **change management** across the agency to implement the Program Cycle

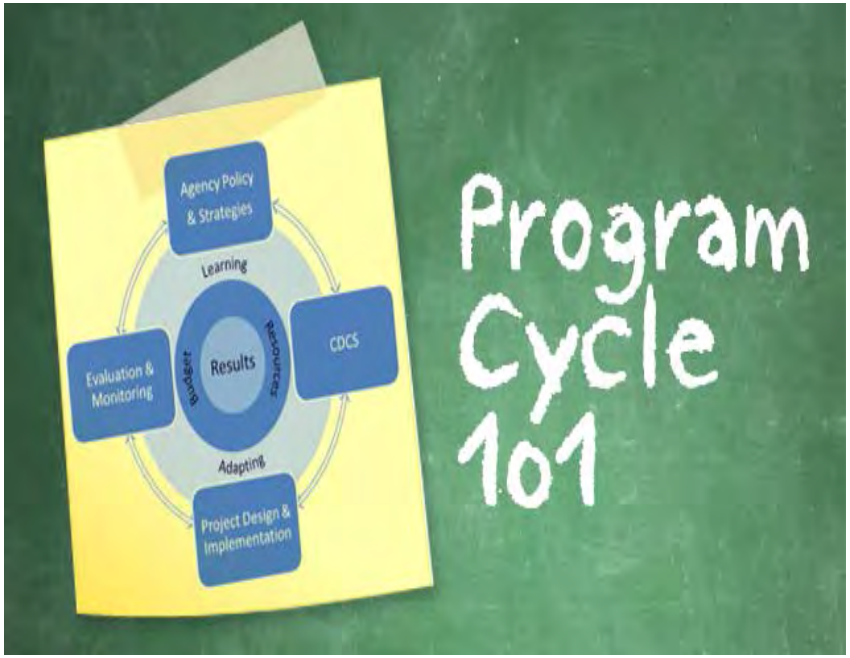
- Develop and leverage **knowledge, skills and abilities** of staff

- Foster a culture of **continual learning** throughout the Agency

Policy Changes

These past few years have seen a series of changes and reforms at USAID. As these policies are implemented a strong dialogue between practitioners in the field, USAID partners, Mission staff and technical staff in Washington will enrich how these policies are realized and take shape.

- In response to this need, ProgramNet and Learning Lab were designed as sister-sites working together to build capacity of both USAID staff and our partners
- Though independent websites, the functionality that each offer compliments the other in providing a web-based platform for specific audiences and topical foci



Enhancing Collaboration

- ProgramNet facilitates knowledge sharing and collaboration on the Program Cycle **inside USAID** -- between USAID/Washington and the field, and among USAID Missions

- Learning Lab extends the dialogue to engage our partners and features key tools and learning approaches for **USAID staff and partners** to share their experiences and support each other's efforts to develop a more dynamic approach to programs

ProgramNet

ProgramNet is an interactive online community for **USAID staff** located behind the firewall providing a space best used to:

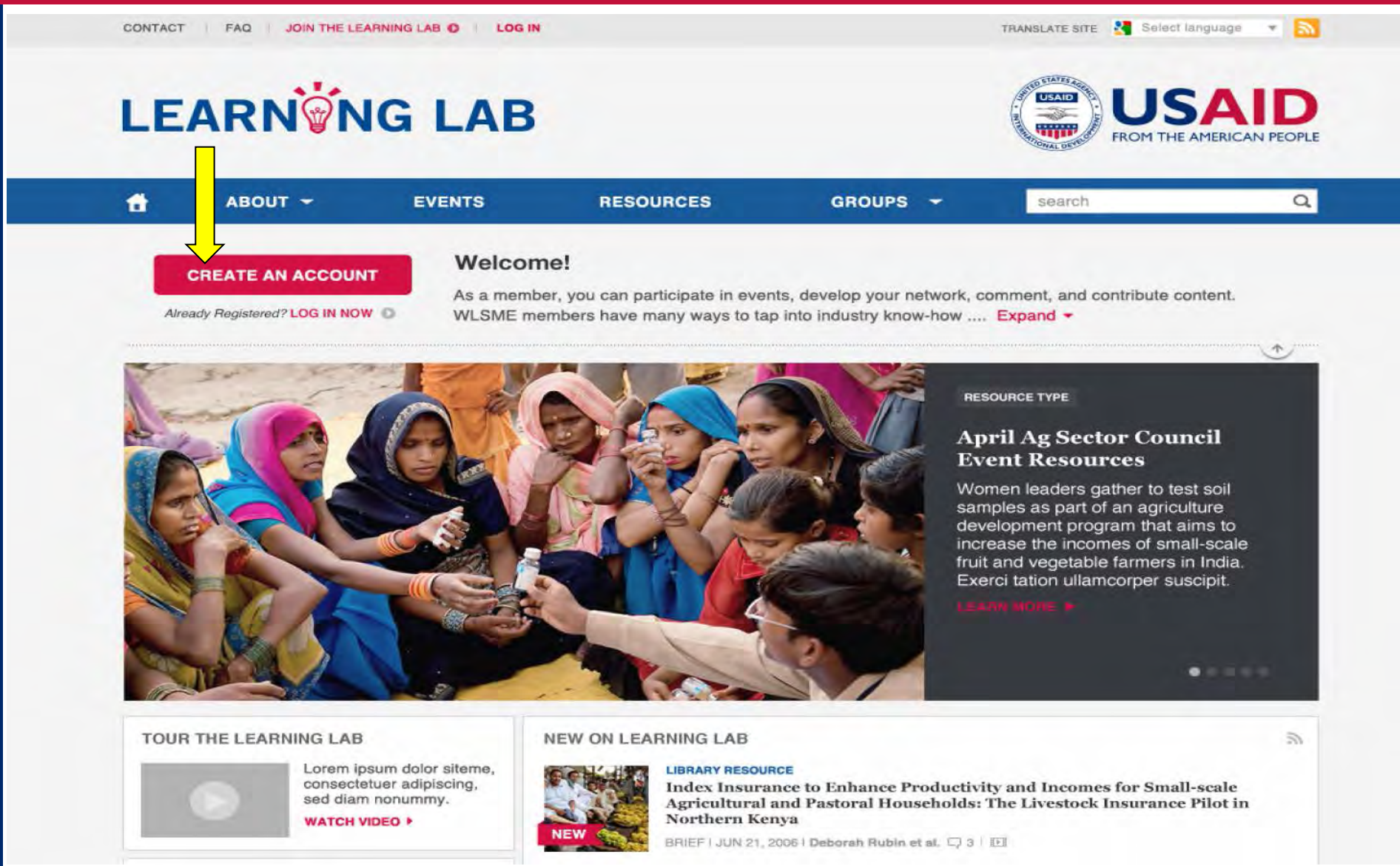
- Host webinars and other web-based events on topics specifically applicable to the needs of USAID staff
- Share resources for guidance on internal strategies, policies and procedures.
- Discuss sensitive topics such as procurement, project design before approval for public distribution, etc.
- Identify working groups of USAID staff from missions and Washington to collaborate on shared interests or challenges

USAIDLearningLab.org

Learning Lab is a collaborative learning community for USAID and external partners located outside the firewall providing a space best used to:

- Gather broad-based ideas, input and resources to build best practices for joint implementation of the Program Cycle
- Exchange models which support a learning approach to development
- Generate collective learning to ground our programs in evidence and adapt quickly to changing contexts
- Connect with a growing number of development practitioners using learning approaches
- Host events and discussions on topics which call for the perspectives of both USAID and our partners

Learning Lab usaidlearninglab.org



- Connect & Collaborate
- Contribute & Participate
- Access Resources
- Register for Updates

Site Tours

Any other Q&A?

Come visit our booth to…

- Visit both sites
- Set up profiles
- Ask Web Support teams for help

For follow up information please contact:
info@usaidlearninglab.org