Joint M&E and KM Task Force Meeting

April 28, 2016 11:00 am – 12:30 pm EST

I. Welcome and Introductions
   - Hosts:
     - Yemisi Songo-Williams, KM Specialist, TOPS
     - Adrienne Todela, KM Coordinator, TOPS
   - Presenters:
     - Shelia Jackson, Senior KM Specialist/Chair of the KM Task Force, TOPS
     - Laurie Starr, Senior M&E Specialist/ Chair of the M&E Task Force, TOPS

This session was planned as a follow up to the first joint M&E/KMTF meeting in November 2015 where we first discussed the need for the M&E and KM functions to collaborate and coordinate better. Today, we are hoping to envision what this potential integration would look like, and what we, as practitioners within these sectors, can do to make this happen.

II. Overview of KM sector

Shelia Jackson, Senior KM Specialist/Chair of the KM Task Force, TOPS

By asking the question "what is knowledge management," Shelia stressed that although there is no one agreed-upon definition for knowledge management, it is more important and easier to focus on the activities that we can do in Knowledge Management. Such as:

- Learning
  A unanimous part of the KM definition that everyone agrees upon.
- Knowledge capture
  "Knowledge" should not to be confused with "information." Knowledge is less tangible than information and it often requires experience.
- Communication
  Communication is an essential element in knowledge management. Without being able to communicate what we learned or do, we cannot facilitate useful exchange of knowledge.
- Knowledge sharing
  Getting people together to share what they know.
- Collaboration
  Collaboration is intentional and formal interaction and sharing.
- Information management
  Helping people find what they need.
- Application
  To apply what we learned.

Shelia then asked the question "Why do we need KM?" The heart of knowledge management is to ensure:

- (Retaining) institutional knowledge walks out the door everyday
- Avoid making the same mistakes
- Move forward
- Improve innovation
- Develop employees

Finally, when thinking of programming or anything else in our organization or our products, we need to put KM in the very beginning and avoid making critical mistakes after the learning phase so that these mistakes don't jeopardize the program.

III. Overview of M&E sector

Laurie Starr, Senior M&E Specialist/ Chair of the M&E Task Force, TOPS

- Within the USAID Program Cycle, M&E's role in each phase is described as follows:
    - Assessment phase: Generate data that can be used by program designers to target appropriately, select most effective activities, and develop TOR for assessment.
    - Design phase: Contribute to the development of the program hypothesis/theory of change/logframe, and make sure it is measurable by determining indicators.
    - Implementation (accountability and learning):
      Guide implementation and track progress by:
        1. Providing continuous feedback on progress towards results and specific targets for pre-selected indicators.
        2. Conducting data quality assessments to validate and/or adjust processes related to collection, analysis, and reporting of data on project results targets.
        3. Establishing complaint and feedback mechanisms
        4. Facilitating collaborative learning.
    - Evaluation phase:
      It varies by institutions, oftentimes it is done by external evaluation teams.
      M&E's role in this phase is to:
        1. Ensure program is accountable to donors and beneficiaries.
        2. Generate data on effectiveness, relevance, and efficiency to help stakeholders make critical programming and resource-allocation decisions.

M&E focuses on monitoring. The types of monitoring we spend most of our time on are:

- Input and output monitoring

- Process monitoring
- Performance outcome monitoring
- Reviewing and improving data quality

How are we involved in evaluation? (This is often done by external team to reduce bias.)

- Develop terms of reference
- Determine appropriate indicators to measure progress and impact
- Determine key questions for evaluation teams so project can understand impact
- Collaborate on baseline, mid-term, and endline tool design
- Ensure sampling strategy is representative

We believe the following types of M&E efforts are the most valuable:

- Ongoing monitoring for learning
- Capturing lessons learned to inform design and implementation of future projects
- Identifying successful strategies for extension, expansion, or replication.

IV. Recap – Why do we need each other?

Yemisi Songo-Williams, KM Specialist, TOPS

Last November, we completed a series of exercises to try and uncover what the advantages of a highly coordinated and fully functioning synergy between knowledge management and M&E would be. And there were several recurring points across various groups:

1. Stronger programming impact:
    a. M&E and KM planning would be done together; both would be considered across all stages of the project.
    b. Both are seen as equally necessary to the project and are therefore adequately resourced and planned for from the get go.
2. A stronger synergy between the two sectors would also help to develop a truly responsive organization, one that is able to provide accurate and timely information on impact
    a. There would be increased coordination between the two sectors; reporting tools, relevant software and indicators would be developed or selected in collaboration, so both teams can work together and share information easily and thus carry similar, evidence-based messaging about a project and its impact;.In short, there would be better dissemination and use of data.
    b. A successful collaboration between the two would also help to reduce redundancy in work and duplication of effort.
3. It ensures that we are both monitoring for accountability via M&E, and monitoring for learning/program improvement.

Laurie: If we can identify the sequence of events, we can figure out the best point to start effort. (Theory of Change)

V. Exercise 1 – How do we begin to collaborate effectively? (2-3 bullet points of clear and concise actions that can start this theory of change in motion)

Group 1 (led by Shelia):

Presenter: Ellen Piepgras

- The need to require coordination:
  Conversation needs to take place at managerial and/or leadership level.
- Clear division of roles:
  Make sure there are no duplicated responsibilities and identify opportunities to work together at the planning stage by identifying where within the program cycle we can work together (an what we can do) as reference.
- Talk to the donors about why we are coordinating and the importance of it.

Group 2:

Presenter: Natalie Abel

- If can't have specified KM personnel, add learning component to M&E staff description.
- Pull KM tasks into the logframe:
  1. Ensure that KM processes feed into project management systems. For example, collection of data from M&E team is written up by KM and included in program management meetings and/decision making cycle.
  2. Hold regular coordination meetings between KM and M&E to discuss what works and what doesn't work.
  3. Build KM concepts into job descriptions (Project Managers, M&E, KM)
  4. Have Director oversight of KM- this help to ensure that it's considered in decision making process.
  5. Include KM in organizational structures.

VI. Exercise 2 – What can I do to move this along?

Group 1:

- The importance of learning from each other

1. KM learns more about M&E by developing a data use plan to help determine a project/ organization information needs.
2. M&E learns best practices of KM
3. Two sectors partner together to develop a pilot opportunity and look at activities and see where we fit into each other's activities.

- Awareness of the other tech area:
  1. Not be so technical and help to incorporate each other from the beginning.
  2. Incorporate quantitative methods with qualitative aspects.

Group 2:

- When new projects come up, in the design phase, champion the importance of KM to management and finance. Being the person who is always bringing it up. Talk about KM in a positive way. Stress how it will improve our programming. For example: Incremental assessment tool? How do we know we are successful? What are the indicators? Successful if teams are incorporating KM on their own without reminders.
- Use USAID FFP requirements as an example of value and use them to promote the value of KM.
- Make leadership aware of the distinction and how we can adapt our existing staffing structure to be more intentional at using both sectors. Having a formal presentation to the appropriate leadership.
- Talk to ME people as well about how KM can help them learn and also understand more about roles and activities of ME staff.
- Learn more about KM to better understand critical leverage points, and timing of coordination.

VII. Next Steps

- Have some sort of presentation from reps of both streams of work?
- Have some sort of diagrams or flowchart about the ways that ME and KM overlap, where the distinct differences are, and what communication channels or feedback loops may be needed between the two to make the integration work.
- Develop some guidelines on the touchpoints across the program cycle where we can collaborate and how, would be helpful.
- How can both TFs communicate? Do we need to be part of each other's TF
- There could be some difference with how this practically happens at different levels in the organization-project specific, country levels in the organization-project specific, country level, and HQ level- what are those differences
- Inputs are essential.

VIII. Close

Thank you for your time and ideas. If anyone is interested in any of tasks we identified today, graphics, please let us know. Relevant materials will be posted to the event web page and a notification sent out when ready.