KM4Dev Futures: scenarios expressing values, composition and organization

by

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Executive Summary (see the Table of Contents below).

As a lively and long-lived community with a steady growth trajectory, this is the time of KM4Dev² to reflect on its values, composition, and organization. It is fortunate that a reflection process has been aided by a grant from IFAD. That grant led to several studies that have been summarized and been discussed over the last year. The present report builds on that work and lays out a framework for thinking about the future, perhaps even to "a plan" or a "business plan". Its purpose is to frame the issues so that such plans could logically follow the values, composition and aspiration of the community, not the other way around.

The report aims to enable KM4Dev leaders and members to adopt a critical distance from KM4Dev looking back and forward. It gathers and combines factual information with observations and comments from people who have been involved over many years as well as some who have just connected with KM4Dev. It focuses on the diverse, tacit and deep values that hold KM4Dev together. If it helps promote an informed, reflective and value driven debate about the future of KM4Dev it will have served its purpose.

The report uses an endogenous scenarios approach to sorting out KM4Dev's present and future. An exogenous approach would look externally to consider threats or opportunities. Instead, this endogenous approach looks inward and asks, "Who are we, what do we want, and how do we connect?" Clearly this inward looking approach reflects the environment and the work that KM4Dev members do all over the world in many different settings.

The endogenous scenarios are constructed along two dimensions that emerged in the several studies, questionnaires, and projects that were undertaken during the past year. The first dimension has to do with the nature of knowledge and therefore of knowledge management. The dominant belief in KM4Dev seems to be that human interaction is fundamental to knowledge generation so that knowledge management focuses on understanding and supporting human interaction in productive ways. A contrasting view foregrounds expertise and focuses on its representation, availability, and dissemination. The second dimension has to do with the kind

¹ http://learningalliances.net. This work was supported by a grant from IFAD. Many, many people in the KM4Dev community contributed directly or indirectly to this report. Notable contributions are gratefully acknowledged from Pete Cranston, Howard Silverman, the KM4Dev Core Group, the IFAD mini-grant recipients, and all the respondents to a questionnaire about people's experience in KM4Dev. As the goal of this report is to stimulate people to consider and acknowledge their own observations and feelings about the development of KM4Dev, the author offers his own observations and intuitions freely.

² KM4Dev is an abbreviation of “knowledge management for development”.

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and amount of organization that is necessary to accomplish KM4Dev’s purpose(s). The dominant belief in KM4Dev has been that informality and a minimum of organizational structure is the most open and flexible approach. A contrasting view argues that more organization is needed to make KM4Dev sustainable.

1. In the “current identity”, contribution and participation are guided by individual need and awareness. The community is based on self-organized knowledge facilitation and learning. A recurring question is “Who knows how-to do X?” Regular episodes of face-to-face meetings and ad hoc organizing punctuate the ongoing flow of informal discussion. As suggested above, the contrasting views are part of the mix, but the current emphasis is on interaction as fundamental to knowledge generation, including informal discussions about formal expertise. In this scenario efforts to organize KM4Dev as a whole are secondary to interaction, and minimal organization is either “best” or “all we have.” The report shows how the prevailing emphasis on interaction aligns with KM4Dev’s informal structure: the interaction that is necessary to maintain that informality is a way to generate knowledge, which is what KM4Dev is all about. The uniqueness of KM4Dev suggests how this current scenario or identity might be out of alignment with the views and practices of some organizations in the international development sector.

2. In a more “focused future”, there is more organization but it is subservient to interaction: there are more focused conversations and organized projects. KM4Dev explores new topics and audiences and greater organization allows for advocacy about knowledge management (“KM”) or international development.

3. In a “faceted future”, KM4Dev would become a loose coalition of experts who work and exert their influence in the informal public venue that KM4Dev provides. KM4Dev would become a marketplace for services and might take on loosely organized classes and other activities that generate revenue: these would help make KM expertise visible and apply it in the international development sector. Individual and collective needs and offers would coexist without a highly organized framework.

4. In a “funded future”, a KM4Dev organization would serve the development and propagation of KM expertise. A formal secretariat with a budget and clear agenda would serve various membership levels and meet the needs of the organization’s funders.

There are clearly other important dimensions that are not treated extensively, including changes in the field of knowledge management, in the organizations in the international development sector and in the sector itself. How KM4Dev is connected to funders and development organizations, the balance between people from the global north relative to the global south, and technology infrastructure are also very important issues, as are the differences between people who are very engaged in KM4Dev compared with those who have not been involved in the past.

To stimulate conversations that metabolize or digest the choices embedded in the scenarios in this report, several strategies or activities are suggested:
Clarify KM4Dev values -- what should be preserved and what discarded?
Clarify linkages, sponsorship, and the neighborhood -- how is KM4Dev connected?
Clarify governance, self-organization, leadership and coordination
Making it personal and individual and sharing it back

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KM4Dev background, report purpose, and methodology

KM4Dev continues to grow and evolve since it began in 2000

The rich email discussions on the KM4Dev list have been going on since 2000, punctuated by regular face-to-face meetings. Figure 1 is a group photo from a face-to-face meeting in 2008.

![The KM4Dev group at the annual meeting in Almada, 2008](image)

Figure 1. This photo is from a blog post by Ewen Le Borgne titled “A tribute to KM4Dev: how transformed my life and how I hope to share the magic.” All the photos in the Learning & Monitoring Baseline Survey 2012 were from the Almada conference as well, suggesting that it was an iconic as well as photogenic event. Photo by Peter J Bury [CC]

In a way, 2008 was a banner year for KM4Dev. Knowledge Management was still relatively new or just a technology fix for many organizations³ and its human implications were not fully understood. “Social media” was a big new thing in most organizations. Discussions and events pretty much had to be self-organized and that had the virtue of illustrating how involvement was the whole point of knowledge management (so KM4Dev organization was “walking the talk”). The introduction of new platforms, a wiki and a Ning site around the beginning of 2009 led to greater complexity but also enabled new kinds of interaction and group memory⁴. Figure 2 shows a bit of how the community connects online.

³ Many private sector organizations had adopted the idea in the ‘90’s and the World Bank had proposed to become a “knowledge bank” in the mid-90’s.
Figure 2. The level of activity in the KM4Dev email list (Dgroups) varies a great deal from month to month. The number of registrations on the Wiki and the Ning sites is a completely different measure and is juxtaposed here to suggest how registrations have grown even though the email list continues to be the main point of interaction. (The dotted line represents the number of registrations and the solid line represents the number of registered individuals who log back in after registering.)

Purpose and context of this report

During the fall of 2013, it becomes clear in conversations in and around KM4Dev that many people regard KM4Dev as an amazing success story. Others see challenges on the horizon that KM4Dev, both at a community level and at a leadership level (e.g., its Core Group), needs to consider and address. The several challenges which are unpacked and explored in this report are a result of a variety of factors, including growth in membership, increasing member diversity, the addition of technology elements, and changes in the environment itself. A previous study, titled “KM4Dev: IFAD Funded Studies Synthesis report,” describes the community’s growth and composition in greater depth. Whether these challenges really are “problems” or opportunities, this report looks toward the future, where growth and change will be partly intentional and partly not.
There are several issues that frame this look into KM4Dev’s possible futures. As described in the previous study, KM4Dev is very diverse. One member suggests that there are several KM4Devs:

*There is not one KM4DEV, there are several KM4DEVs. One is the KM4DEV of the members who participate on the discussions on the electronic Boards. And there is several groups, geographical groups, language groups, groups related to organizations, groups related to several understanding of what is Development or their understanding, and what is KM or their understanding.* - Muzard

And that diversity, or even fragmentation, is seen as a strength:

*KM4Dev is fragmented which is our strength.* - Pels

The Core Group, among others in KM4Dev, has been concerned about its future and whether it has lost its way. For example:

*We are often talking about the exact same things (KM wise) that we talked about 6 years ago, which makes you wonder whether the KM field (or we as a group) haven't evolved at all. We used to have the finger on what's new, what's emerging (e.g. in the Web 2.0 debate), but right now I am not seeing that so much. These days it's a bit more about bringing newbies up to speed with known tools and methodologies.* - Schunter

One concern involves the structure and function of the KM4Dev core group. A participant in the Seattle KM4Dev meeting in 2013 reported:

*The worst experience of the event was the meeting about the future of KM4Dev which was actually an "advertising" event for core-group membership.... [As a result of that event] I was more aware of the core group as a separate entity to the overall community that had "higher" stakes in KM4Dev.* - anonymous respondent

As suggested in the Learning and Monitoring Baseline Survey of 2013, there are calls for more formality and for a more formal organizational structure at the same time as opposing views are offered:

*Honestly I don't see the advantage of switching to a legal entity. Which is that one project that you would like to execute today that you cannot under the current framework? If capturing and managing some resources is really a strong need, then I think that what we need to find is philanthropist that could host an account in his own foundation.* - Villa

All of these concerns and developments provide a backdrop for the issues considered in this report.
Scenario construction as a heuristic

The “what was your experience?” survey of key participants highlighted and gave voice to ongoing debates within KM4Dev\(^5\). To many, these debates will be familiar from previous reports.\(^6\) The debates concern questions of worldviews, activities, growth in membership, and organization. There are various understandings of how KM4Dev functions now. There are also diverse observations, needs, hopes, and visions that shape that understanding. That diversity affects people’s thinking about how KM4Dev might better function in the future, with respect to the challenges and opportunities of both knowledge management and development.

In order to develop narratives that coherently organize and fairly represent the variety of understandings and perceptions about KM4Dev, this report adopts a systemic scenario framework. This framework is inspired by the “purposeful futures” process developed by Pattern Labs (a consultancy based in Portland, Oregon USA) and by conversations with Howard Silverman, one of the principals in the firm.\(^7\)

We begin by examining the survey and aforementioned reports for cross-cutting themes that will help us to understand and describe KM4Dev in its current state -- to describe KM4Dev as a system with a particular set of internal logics, or a particular “identity.” The characterization of a system’s identity includes its implied worldviews, social structures, and prevailing technologies. This approach to characterizing systems and their identities can be traced back (at minimum) to the 1970 Reith Lecture by Donald Schö

“The system always contains at least three elements or dimensions which are locked into one another: a social structure — which is a set of related roles and authority relationships — a technology and a theory. And by a theory I don’t mean an academic or sociological theory about the system: I mean what it is that’s believed that causes people in the system to do what they do. The theory consists of the views which are held within the system that determine pictures of the environment, of what our competition is, of what our future is, of what we are heading towards, and of the ways in which we are to cope with it. Both the structure and the theory reflect the prevailing technology. ... These dimensions all hang together. They cannot be broken apart.”

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\(^5\) Quotations from that survey are used extensively to illustrate the discussion in this report. Members of several specific groups participated in an extended reflection process that makes up in depth for relatively small numbers (N=28).

\(^6\) Previous reports include:
- [http://wiki.km4dev.org/IFAD_synthesis_project:_Phase_One_Report](http://wiki.km4dev.org/IFAD_synthesis_project:_Phase_One_Report)
- [http://wiki.km4dev.org/IFAD_synthesis_project:_Augmenting_Strategy_Options](http://wiki.km4dev.org/IFAD_synthesis_project:_Augmenting_Strategy_Options)

\(^7\) This Pattern Labs process is based on a complexity-resilience framework for conceptualizing stability and change in systems of interest. In brief, this process involves (1) characterizing the identity of the system, (2) envisioning scenario alternatives to the current system, and (3) developing action pathways for progress toward the desired scenario.

\(^8\) Donald Schö
"Lecture 2: Dynamic Conservatism", Change and Industrial Society.
The identification of cross-cutting themes will also help us to situate the current understanding of KM4Dev within a framework of alternative identities or pathways. We select two of these themes as the most significant for KM4Dev, and use these two to create a 2x2 matrix with four quadrants. Each quadrant will represent a potential identity or scenario for KM4Dev. This matrix of four quadrants will serve as a framework for this report.

Exploring cross-cutting themes

Among the cross-cutting themes that emerged from the interviews and reports, we find these two to be most significant for describing KM4Dev and its potential pathways forward:

1. **Knowledge Orientation**: views and beliefs about knowledge production and management as a domain.
   - Relevant questions include: What counts as knowledge? How it is produced? What is the role of expertise in knowledge production? How inclusive and interactive is the management of KM4Dev interactions and activities? How do participants in KM4Dev develop their competencies?
   - As a result, we would ask: How might knowledge management and knowledge sharing be most effective in the development sector?

2. **Organizational Structure**: views and beliefs about KM4Dev structure and organization as a community or network.
   - Relevant questions include: Who participates and how? What does membership and participation mean? How is governance conceived? Is there an explicit mission statement? Are there focus areas of operation?
   - As a result, we would ask: How might people most effectively organize themselves to advance knowledge management and knowledge sharing in the development sector?

These two cross-cutting themes, knowledge orientation and organizational structure, can be used to understand the current KM4Dev identity. With regard to the first theme, we understand

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9 The identification of cross-cutting themes and development of a 2x2 matrix is a standard scenario planning technique, described for example in Diana Scearce, Katherine Fulton, and the Global Business Network community, *What if? The art of scenario thinking for nonprofits* (2004). Usually, this technique is used to focus on exogenous variables, such as economic conditions, resource availability, or technological development. The approach we take here is to focus on identity, as comprised of worldviews, social structures, and technologies.

10 See [http://www.km4dev.org/notes](http://www.km4dev.org/notes) and The wealth of communities of practice – pointers to assess networked value?

11 While we consider these two themes to be the most prominent and significant for KM4Dev, other themes that emerged include those of (1) sponsorship (views and beliefs about KM4Dev relationships with and accountability to organizations in the development landscape, ranging from employers to funders or universities); (2) North-South understandings (views and beliefs about the role of international development in relations between the global north and global south); (3) the differences between people with high and
KM4Dev participants as currently and primarily valuing an “interaction” orientation to knowledge production, rather than an “expertise” orientation. With regard to the second theme, we understand KM4Dev as currently and primarily exemplifying a “loose” organizational structure, rather than a “more formal” one. Clearly, these are not absolute positions along these two dimensions. In fact a good deal of the creativity and appeal that KM4Dev has for its several constituents is that there is some day-to-day tension and negotiation between the extremes.

These two cross-cutting themes can also be used to situate this current identity in a 2x2 matrix framework, with each quadrant representing a scenario pathway. Based on our characterization of KM4Dev’s current reality -- “interaction” orientation, “loose” structure -- we situate KM4Dev in the lower left-hand quadrant of the matrix in Figure 3. We then examine the other three quadrants as potential scenarios.

In its fullest expression, each scenario would be characterized as a potential “identity” for KM4Dev, with regard to internal logics, including implied worldviews, social structures, and prevailing technologies. However, this type of detailed characterization is beyond the scope of this report, and we instead provide merely an initial glimpse of these scenarios, with references to specific statements gathered in the survey and in previous reports.

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long-term involvement in KM4Dev and those whose involvement is peripheral or recent; and (4) ongoing discussions about technology infrastructure.
Figure 3 shows the matrix that we develop as a framework for the different scenarios:

**Future Identities: Orientations and Structure matrix**

<table>
<thead>
<tr>
<th>Expertise orientation</th>
<th>Interaction orientation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Looser structure</td>
<td>More formal structure</td>
</tr>
<tr>
<td>3. Faceted</td>
<td>4. Funded</td>
</tr>
<tr>
<td>1. Current</td>
<td>2. Focused</td>
</tr>
</tbody>
</table>

**Figure 3.** These scenarios imply a worldview. Orientation describes how knowledge is created and managed. Structure describes how people are organized to learn and manage what they know. Each scenario is discussed, starting with the “Current” scenario, followed by the “Focused”, the “Faceted”, and the “Funded” scenarios.
Table 1 shows some of the implications of these scenarios that are developed in the report that follows.

### Identity Highlights in the Orientations and Structure matrix

*What does KM4Dev want to be when “we” grow up?*

<table>
<thead>
<tr>
<th>3. Faceted future:</th>
<th>4. Funded future:</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Loose coalition of experts <em>ply</em> their trade</td>
<td>● Organization serves expertise</td>
</tr>
<tr>
<td>● Services marketplace within KM4Dev</td>
<td>● Formal secretariat with budget and agenda</td>
</tr>
<tr>
<td>● Classes &amp; other revenue-generating activities</td>
<td>● Various membership levels</td>
</tr>
<tr>
<td>● Individual and collective needs coexist</td>
<td>● Respond to goals of funders</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>1. Current identity:</th>
<th>2. Focused future:</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Contribution guided by need, awareness</td>
<td>● Organization serves emergence</td>
</tr>
<tr>
<td>● Self-organized knowledge facilitation and learning is ongoing</td>
<td>● More focused conversations and projects</td>
</tr>
<tr>
<td>● Finding out “Who knows how-to?”</td>
<td>● Explore new topics and audiences</td>
</tr>
<tr>
<td>● F2f and organizational episodes</td>
<td>● Advocate “positions” on KM or development topics</td>
</tr>
<tr>
<td>● Non-trivial feat to have thrived for so long</td>
<td></td>
</tr>
</tbody>
</table>

Table 1. Each of these scenarios describing what things might look like is explored below.

To paraphrase George Box, “Essentially, all scenarios are wrong, but some are useful.”

These scenarios are constructed to help KM4Dev think about directions and possible futures. In fact different groups will make sense of them differently and react to them positively or not, depending on their professional roles or backgrounds. In addition the KM4Dev Core Group (the current leadership or governing body for KM4Dev), KM4Dev “members” (however they define themselves), and “others” (including the employers or clients of “members” as well as prospective funders) are each likely to see these scenarios somewhat differently.

For all those different groups to reach a common understanding would be a very tall order indeed. In some ways the very diversity of views about KM4Dev is an emerging opportunity that may not have existed before. How much of a shared understanding is good or necessary? Seeking an understanding that is shared more broadly is a challenge that KM4Dev can now take up: it is a unique social formation holding an important worldview that defines and organizes itself in a very complex and constantly changing environment. Given that, the different scenarios will appeal and make sense to different stakeholders. In that sense, this report is for you, whether your role is that of an interested onlooker, a veteran, a new member, or a sponsor. The Wenger-Trayner model of systems convening\(^\text{13}\) would suggest that personal initiative will have to play a significant role in the evolution of a learning system such as KM4Dev -- a system that sits between organizations, programs, consultants, and people that enables them all to engage in a neutral space, without organizational issues and hierarchies interfering. Many people ask how much effort and intention they should devote to knowledge management in the development

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13 [http://wiki.km4dev.org/KM4Dev_Futures:_landscapes_of_practice_and_systems_convening](http://wiki.km4dev.org/KM4Dev_Futures:_landscapes_of_practice_and_systems_convening)
sector as they choose to participate in KM4Dev or not. Now people will need to consider questions such as: how much effort and intention are appropriate or necessary regarding KM4Dev itself as it evolves? Will things just “turn out” or is it necessary to have a plan? (Or both? Or neither?)

Understanding KM4Dev in terms of present and possible futures

1. Envisioning the present: the current identity

We begin by describing the current KM4Dev identity, using the cross-cutting themes identified above as the framework. In the current scenario, KM4Dev is focused on human interaction as the main knowledge management issue and method. At the same time it is organized in “as loose a way as possible”.

**Human interaction is fundamental to knowledge generation**

Currently, the leading view within KM4Dev is that knowledge generation is something that happens through social interaction at various levels: (1) interaction in “the field” (situated in specific social, cultural and environmental contexts) and (2) designed and assessed through more reflective interaction in a situation that is once-removed from the field (e.g., “back at the office,” or “in the community”). These social interactions are informal and mostly spontaneous: they “bubble up from the bottom” although can be supported through deliberate facilitation and expertise (or, occasionally, provocation). Among other things, facilitation can help with online interactions or the production of knowledge records or representations in near real-time. The practice of producing reflections that are once-removed from the interaction can be observed in the summaries of email discussion that KM4Dev members occasionally produce.

In KM4Dev, knowledge-generating interactions are facilitated as much by group norms and a culture oriented toward learning as they are by an individual facilitators or initiative. Riff Fullan noted the personal importance and value of KM4Dev culture of openness and learning orientation. In many ways, the KM4Dev culture is itself KM4Dev’s main asset and singular achievement. Contact with that culture has influenced both individuals and their organizations. Camilo Villa mentioned the power of direct contact with other practitioners. Helen Gillman said that her first contact was ‘foundational’ for views, relationships and practice.

In addition to the email exchanges, this participatory model of knowledge production is exemplified in KM4Dev face-to-face meetings and accounts for the many epiphanies that members report. In completing this study we heard a remarkable number of stories along the lines of, “I found my professional family; finding that I’m not crazy was tremendously encouraging.” Therefore access to KM4Dev process and culture is a key outcome. Participating in a face-to-face meeting seems to trigger a significant shift in attitude toward KM and KM4Dev. Although participating via email is useful and widely accessible, participation in the face-to-face
meetings is not possible for many people. Raising funds so that participation is not limited to people from well-funded organizations has been a key to the diversity that makes the meetings productive.

KM4Dev serves as a forum for negotiating and transmitting values about interaction. Ewen Le Borgne lists some of the values that KM4Dev people taught him, including learning, communication, knowledge management, empowerment, social change. Based on this belief about knowledge generation, KM4Dev participants tend to value open and visible participation, without limiting who gets to observe and minimal vetting of speakers. Good process is itself considered an outcome.

Informal discussions about formal expertise generate important knowledge

The view that knowledge production and management is fundamentally about human interaction is not the only one that exists in KM4Dev. Another view emphasizes the role of experts, and sees the role of knowledge management more on the side of knowledge collection, organization and delivery of the work of recognized producers of knowledge (ideally, products that are “evidence-based”). Clearly this activity involves social interaction and sensemaking. KM4Dev itself is very sophisticated in this regard and its members have a lot of expertise about developing that capacity in development organizations. In this second understanding of the system, the value of KM4Dev is in the way this sensemaking can be supported, in providing access to expertise, and, ideally, in delivering polished syntheses. What is important to notice is that in KM4Dev practice this view is somewhat subordinate to the focus on interaction and facilitation: Denise Beaulieu was surprised at narrow focus on facilitation.

The larger society and, especially funders and large development organizations, hold with the expertise orientation in being (or aspiring to be) science-based, rational, and hierarchical (based on merit and expertise). This orientation is focused on best practice, measurable impact, using a program logic model approach to evaluation and monitoring financial flows. Knowledge management is therefore a function that is in service of recognized expertise. In this view KM4Dev is a space for interactions about expertise (and its support) that crosses organizational or disciplinary boundaries.

Although we describe the Interaction / Expertise Orientation mainly in terms of knowledge generation (“the front end” in a logic model view), it has correlates on the program or learning evaluation side as well, as suggested in Table 2. This suggests that how KM4Dev regards itself and its activities is subject to the same differences in worldview that exist about knowledge generation.
### Comparing logic model and developmental evaluation

<table>
<thead>
<tr>
<th>Purpose of intervention</th>
<th>Traditional program logic model evaluation</th>
<th>Developmental evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose and mindset of evaluation</td>
<td>Effectiveness, efficiency, impact, and scalability</td>
<td>Performative support for innovations and adaptations in dynamic environments</td>
</tr>
<tr>
<td>Modeling approach</td>
<td>Causality is hypothesized, predicted, and tested</td>
<td>Causality is based on pattern detection, retrospectively constructed from observations</td>
</tr>
<tr>
<td>Accountability</td>
<td>To external authorities and funders</td>
<td>To fundamental values and making a difference</td>
</tr>
<tr>
<td>Ideal findings</td>
<td>Validated best practices that can be generalized across time and space</td>
<td>Effective principles that can inform practice and minimum specifications that can be adapted to local context</td>
</tr>
<tr>
<td>Reporting mode</td>
<td>Scholarly voice (third person, passive)</td>
<td>Engaged voice (first person, active)</td>
</tr>
<tr>
<td>Evaluator stance and attributes</td>
<td>Independence, rigor, credibility</td>
<td>Teamwork, creativity, methodological flexibility, tolerance for ambiguity</td>
</tr>
</tbody>
</table>

Table 2. How a complex interaction orientation can frame program evaluation. Howard Silverman contributed this adaptation. Although it was not available until afterward, it is very much in accord with the stance behind this [IFAD funded synthesis project](#).

In practice the Interaction and Expertise orientations not only overlap, they are woven together in KM4Dev’s regular interactions. In terms of visualizing the future, what is important to consider is the balance between the two.

**Efforts to organize KM4Dev as a whole are secondary to interaction, and minimal organization is best**

Although KM4Dev contains many “pockets” of organization and in some respects is intricately organized, KM4Dev cannot really be called “an organization.” One indicator of the lack of an overall organizational structure is that KM4Dev has no bank account or legal status as such -- and that is intentional. Some deliberate, organized effort is needed to keep its conversations going and make the collective resources available. The question is: how much effort, how
comprehensive, and how should that effort be structured? And which organizing efforts are important or deserving of broad support? These are persistent questions (see http://wiki.km4dev.org/KM4DEV_2013_community_meeting) and they can be divisive (e.g., “I feel connected to some of the people that I think share my view on this [governance issue, but unconnected to those who have a different view].”).

In the minimal organization model, efforts to support KM4Dev activities are all carried out by volunteers who typically focus on a specific and narrow area. The focus and level of effort in a volunteer model depends on member awareness of what needs to be done, willingness and availability, all of which vary over time and from one person to another: Simone Staiger-Rivas described finding the right level of contribution/effort. An “About” page on the Ning site describes how Helvetas provides some organizational functions such as domain-name registration and coordination of any funds received, such as the grant from IFAD that has funded this study.

“Self-organizing” means that the effort involved and the benefits of producing a face-to-face event, for example, are not visible unless you participate (Melissa Bator found that seeing open space is believing at the 2013 Seattle meeting). With KM4Dev’s complex technical ecology and several modes of participation, self-organization implies that people need to take care of themselves: Helen Gillman points out the very individual mix of participation modes and how an individual can “orbit around KM4Dev” while they focus on project implementation. This can all seem quite chaotic, but KM4Dev is structured by a set of organizing principles that structure activity; they are partly written down and partly held tacitly by its members. This loose structure continues to accommodate dualities in KM4Dev that were noted in 2008:

- Pragmatists – theorists
- North – South
- KM systems and tools – people
- Open KM – Stealth
- Small organization – large organization / network
- One org – HQ + country offices
- Active poster – Active lurker
- KM mandate – working a.o. on KM
- Answers – Questions

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14 The work KM4Dev members do as members of the Core Group, or as members of workshop organising committees, or by summarizing threads, or by posting rich and thoughtful comments on the email list, etc. IS completely voluntary (or at least not paid by KM4Dev). However, donor funds are used to pay hosting and domain name fees, which then incur the cost of negotiating, undertaking, monitoring and disbursing funds around contracts, etc). Helvetas has provided these services in the past, charging a very low 10% administrative fee.
It may be that greater structure would make accommodation of such a great deal of variance less fluid. The minimum effort and structure that KM4Dev requires, given the current emphasis on the interaction orientation, includes:

- Boundary maintenance: member registration on the email list and for the other KM4Dev platforms.
- Platform integrity: software upgrades or system maintenance for the Dgroups, Wiki and Ning platforms.
- Message moderation: Protecting the conversation by preventing SPAM and other disruptions.
- Organizing face-to-face events: gathering resources and people for the occasional meetings, such as the July 2013 meeting in Seattle.
- Maintaining structure and coordinating the whole.

Notice that facilitating, guiding or controlling the conversation is not included in this list. It is generally assumed in the current scenario that responsibility for facilitation is collectively held, with the occasional focused conversation initiated by someone with a specific interest or expertise (such as the one led by Ana Maria Ponce on the HimalAndes water issues, which was partly supported by IFAD funding).

Evidently KM4Dev is formal enough, given the fact that it has survived for so many years. But is it too informal? The looser structure that currently prevails in KM4Dev holds that what doesn’t get done must not have been that important, echoing one of the “laws of open space.” Therefore from an overall organization perspective it is OK for some people to not find their “home” in KM4Dev due to their lack of access, inability to deal with KM4Dev’s complexity, or simple lack of persistence. On the other hand, it is up to individual KM4Dev members to help each other with those very issues of access and complexity; it is worth noting that a significant outcome of participation in KM4Dev can be to learn to be persistent and brave in pursuing a knowledge management and knowledge sharing agenda. This circularity is an example of how the integrity of a social system can have outcomes that appear to be negative and positive at the same time.

There is nothing to stop KM4Dev conversations from branching off or meandering in unanticipated directions. Participation is open so anyone can pose a question, answer, or create or edit a wiki page. Although the conversations in KM4Dev clearly have a particular kind of rigor (in interviews and conversations several people have reported being quite intimidated by KM4Dev’s illustrious membership), it is a very “lossy” system. In this context, lossy means that many insights are shared without being summarized or organized, much less “managed.” Two of the scenarios considered in this report will look at some of the consequences (beneficial or not) of greater organizational structure.

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15 Imagine what it’s like writing a report to KM4Dev containing community assessments or recommendations.
Overall “governance” of KM4Dev is through a volunteer Core Group of participants. There are 16 people who gather together as a core group through an email list (km4devcoregroup [AT] dgroups.org) and occasionally for synchronous meetings, online or (seldom) face-to-face. The dialectic between interaction and expertise is evident in the way the core group functions: as described in the Core Group ToR. People are members because they care about KM4Dev and want to be involved, not because they are qualified by a specific level or kind of expertise and certainly not because they are able to guarantee a certain level of effort. In a very important way, awareness of organization and structure follows directly from KM4Dev interactions:

“During the debate I established closer connections with the List and the Ning moderation team, and realized the best way to speed up the debate would be to become part of the moderation team myself.” Ponce.

Since its formation in 2006, there has been ongoing turnover in Core Group membership but there are no fixed term limits. There is no designated leader or management team in the core group.16

How KM4Dev’s interaction orientation aligns with its informal structure

In the current state of affairs, the current orientation that values interaction over expertise aligns very well with KM4Dev's informal structure, although we can see some resulting tensions as well. First we consider this scenario’s alignment “within KM4Dev” and then how the current KM4Dev scenario aligns with its environment.

In some fundamental ways the process of interaction, reflection and inquiry is inherently self-organizing, whether it is taking place online or face-to-face. When facilitation is observable in KM4Dev it is not just a light-weight kind of facilitation (e.g., focused on making it through an agenda in a designated amount of time), but a more values-based effort leading to inclusion, inquiry and evolving community structure. Facilitating connections across organizational and disciplinary boundaries requires some independence, informality and “give” in the structure. Facilitation of email conversations is lightly supervised by individuals, but is heavily influenced by group norms and traditions. When it comes to enabling informal face-to-face interactions, which are a key to deeper engagement, some purposeful effort and funding are key enablers. The following detail from Charles Dhewa’s account of his journey with KM4Dev illustrates the mix of informal participation and a formal (funded) intervention that set the stage for significant growth and learning:

16 While a “lossy” system is perfectly OK in informal conversation, it can become problematic in the context of governance. During the several interviews conducted as part of this study, Nancy White, Camilo Villa, and Johannes Schunter all mentioned that they thought that their offers of financial support for the minimal organization model were not heard or really considered by the Core Group. (It turns out that they were heard by some members and that a partial discussion did take place) Their statements are a reminder of how the logic in one scenario (say, the “Funded Future”) can hide offers or opportunities in another (e.g., the current one). Conversely an offer made according to the logic of one scenario might not address issues that are “obviously important” in the context of another scenario.
“I was new to Dgroup and its rules such that, even though I had signed for the KM4Dev Dgroup, I could not confidently jump into conversations. In one of the threads, I read that a KM4Dev face-to-face event was to be held in Almada (Portugal). Riff Fullan was inviting people from the South to apply for participation sponsorship. Although I was a bit late in applying, I was surprised when the reply from Riff indicated I had been selected to participate. This was going to become my first journey to Europe and my first longest journey by plane. You can imagine my anxiety.”

The informality of KM4Dev has the benefit of allowing people to step into a leadership role at several levels, by leading a conversation, a project or the community itself. A leadership role leads to several positive outcomes, including increased confidence, skills, a larger network, and a reputation in the community and beyond. Learning in this context includes learning to do, learning to recognize what needs to be done, and even learning to get paid work in the international development sector. KM4Dev members who lead conversations become well-known and so find that they receive more responses to their comments or queries, validating the integrity of the community’s culture of informal exchange. Over the years we can see that people do give back to the community, according to their ability, availability and understanding of what’s needed. Provided that the community is aware of what is needed, things get done in a somewhat chaotic self-organizing way.

Of course the current scenario is not a utopia and we can point out examples of how the scenario’s interaction and structure dimensions are in tension with each other. The effort that it took to develop an updated picture of KM4Dev suggests that its loosely linked technology platforms do not make ongoing self-awareness easy: who is new, what needs to be done, and what problems are on the horizon are not easy to answer in the present KM4Dev environment.

KM4Dev members tend to be high-value, high-contributing members of their own organizations. They are very busy people who experience intermittent or ongoing overwhelm in their jobs. As a result, their participation is also intermittent as it must compete with other demands. Since many people participate in small increments over a long period of time, the benefits of participation accrue almost invisibly, so it is easy to forget or not know how to give back to the community. Finally, KM4Dev’s self-organization means it is also “self-service” and so participation in KM4Dev requires certain skills, clarity of intention, and persistence. Despite the trend line of increasing membership, supporting new members is a challenge for a very loosely structured community.

KM4Dev’s loose structure and orientation toward interaction can become problematic when the subject is KM4Dev itself. The IFAD Funded Synthesis Project has repeatedly brought up questions about structure and orientation during the months from September 2013 to January 2014. The ensuing discussions suggest that, even when people don’t tune out, on this topic it is very easy for people to talk past each other and simply dismiss opposing views. Digging out the logic behind other people’s statements that seem wrong or hard to understand is hard work. In this situation, the fact that it is so easy to withdraw or drift away from KM4Dev can be a
double-edged sword because the incentives to persevere in an argument are not as strong as they are in a place-based community or in a workplace.

**Scenario alignment with the larger environment**

The fact that there are few obvious competitors suggests that KM4Dev occupies a unique niche in the international development landscape. Because it is unique, it could be a real loss if “improvements” led to the loss of key members or of the community’s vitality. KM4Dev influences its environment in many ways. For example its use of readily available platforms is a reminder to its members and to development organizations that “simple and low cost may be good enough.” The energy and passion of KM4Dev members influences development organizations by providing an example of how informal participation and learning can occur in practice:

> “The experience of speaking with people about their KM strategies, challenges, etc. was really affirming. It informed the implementation of the KM strategy at my organization.” - Bernal-Cruz.

In what ways does the environment around KM4Dev challenge this current scenario of interaction and loose structure? The international development sector is large and complex and it evolves just as KM4Dev does. There are new questions about what “international development” is just as there are questions about what KM is. As mentioned in the introduction there are concerns that KM4Dev may not be “keeping up” with the field:

> “We are often talking about the exact same things (KM wise) that we talked about 6 years ago, which makes you wonder whether the KM field (or we as a group) haven’t evolved at all... We used to have the finger on what’s new, what’s emerging (e.g. in the Web 2.0 debate), but right now I am not seeing that so much.” - Schunter

In a way, the direct voice of practice that is expressed in the give-and-take of KM4Dev conversations may be the ideal way to sense change in international development. The challenge comes in forming a collective response to observed changes. Any signals from the environment that “something has to change” will initially be subtle and difficult to agree upon when so many people with such diverse points of view are involved, That makes KM4Dev itself very incremental in its evolution. It is a bit of an imponderable whether a loose and open system is more resilient than a more tightly controlled one, which may turn on a dime, but can also degenerate into group-think and a monoculture.

Whether agreement could ever be reached about the current KM4Dev scenario or not, the debate about the alternative scenarios is even more subject to disagreement. Hopefully those disagreements will turn out to be productive, generating insights about worldviews, of organization, of community and of personal styles and interests.
2. A Focused KM4Dev: More formal structures supporting an interaction orientation

In a way this scenario appears to be the most attractive: supporting the interaction orientation while gathering more resources that are better-organized on behalf of the same vision that has motivated KM4Dev from the beginning. Who would argue with the idea of “more of a good thing?” Well, every scenario contains trade-offs and so there are some risks worth considering with this one, too.

In this scenario we imagine professional staff who would support all the different activities that support KM4Dev’s interaction orientation. Evolving in this direction would extend support for activities that KM4Dev members themselves might not organize but which nevertheless seem important. More “focused conversations,” such as the one about water management innovations in the Andes and Himalayas, is an obvious example. With more support, KM4Dev could take a public “position” on KM or development topics as suggested by Dan Boom:

> KM4D should develop an agenda for policy influences towards Secretaries and Development Agencies. We should try to influence the 2030 development goals and ensure that the knowledge voice is reflected or incorporated in global program designs. - Boom

Clearly there are many topics that are relevant to knowledge management and international development and where interaction and knowledge sharing are important. These include (at least) climate change, human rights, intervention or evaluation methodologies, and fundamentally different assumptions and frameworks about the development sector (as suggested by John Akude in his contribution about advocacy or Ian Thorpe in his posting about Landscapes of Practice). All of these topics, obviously, are of interest to KM4Dev members, whose KM4Dev experience is relevant to making progress in these areas. How these topics would be addressed in face-to-face activities as well as in its online interactions and whether they would crowd out other important topics is an open question.

In addition to giving additional attention to specific topics, KM4Dev could benefit specific groups who are currently absent or under-represented. These might include specific demographic or professional groups such as farmers in the Democratic Republic of the Congo (mentioned by Narcisse M bunzama in his contribution on infrastructure) or workers at lower or higher levels in development organizations (as suggested by Dan Boom above). In a way, KM4Dev as a whole or its leadership would act as a systems convener in a landscape of practice in the international development sector.

Given that these additional activities represent modest extensions of what currently goes on in KM4Dev, it could be that modest additional organizational structures would be be sufficient. A professional community organizer to support or initiate interactions and more resources to
support technology infrastructure and face-to-face gatherings come to mind. From one perspective delegating these activities to some organizational structure (presumably with paid staff) would allow KM4Dev members to focus on “the good stuff” and the community would be assured that new arrivals, for example, are consistently welcomed and supported properly. A greater emphasis on horizontal knowledge sharing in aid and development organizations makes the demand for services and models that support interaction more important:

“The challenge for existing development organizations is whether they can adapt rapidly enough to fulfil this new role or whether they risk to become irrelevant. This new role will rely a lot on organizations (and individuals) developing skills in knowledge exchange, brokering, facilitation, partnership building etc. in a flatter way but I think KM4Dev activities will go from strength to strength, even as they evolve.” - Thorpe.

In this scenario, supporting interaction more effectively might lead to more funding for KM4Dev by making it clearer how and how many development organizations benefit from the interactions in KM4Dev. That could justify financial contributions from those organizations to its sustainability.

However, organizational structures and the funding to support them would certainly have strings attached and unintended consequences. What would the downside of this scenario look like? There are three main issues. The first area involves the risk that instead of having topics and activities guided exclusively by practitioners and their perspectives, activities would be influenced by views in a funding organization. Imagine focused conversations that “should happen” but lack energy because it turns out that members are not interested enough. Once begun, a relationship with a funder is difficult to renegotiate, change, or walk away from. The value of KM4Dev’s independence is hard to assess, but might be hard to regain, so this question of sponsorship deserves careful thought.

A second general area of change that this scenario might involve is that by professionalizing KM4Dev and providing support “as a service” many opportunities for practice, collaboration, and small-scale influence are lost because volunteers are not really needed if tasks are handled by paid staff. The question comes down to whether the work to support KM4Dev at its present scale, within the assumptions of this scenario, is inherently valuable as a “practice field” or not. Five years ago, KM4Dev was an excellent practice field on the level of conversation, of technology infrastructure, and of governance. Has that fundamentally changed?

The third area has to do with the uniqueness of KM4Dev, which would be diminished in this scenario. Apart from competing with other communities for resources or support, KM4Dev projects or efforts suddenly would become an existential concern.

17 KM4Dev’s lack of formal structure may complicate the receipt of grants and gifts.
As I believe in institutions - and also see them fail or seek rent on the commons / citizens - I want KM4Dev to stay away from it and I watch, nudge, react .... - Pels

These three areas interact with each other. For example, a “pockets of volunteer activity under a professional umbrella” model is frequently found in non-profit organizations. Essentially the decision whether something is worth doing or not is replaced by one that determines whether an activity belongs on “the paid service side” (with concomitant certification and liability issues) or on the “volunteer initiative side.” Establishing the distinction and boundary between two sides would take time and an unknown amount of effort.

3. A Faceted KM4Dev: How a greater emphasis on KM expertise would work with a loose structure

What would KM4Dev look like if it remained as organizationally informal as it is today but held a more expertise-oriented worldview? Imagine that recognized expertise would be the main topic and expert practitioners would be showcased. Perhaps the interactions about activities and events would also be managed by those very same experts. What would it be like? What activities, tensions or alignments would we see? What benefits or possible losses could be expected for members?

Although in this scenario KM4Dev would be quite different, it would build on existing elements. KM4Dev presently helps organizations recognize the expertise that they already have, as suggested by a participant in the Seattle face-to-face meeting:

I realized KM isn't as "fluffy" of a practice as I once thought, and that we really are doing a lot of different types of KM work at CRS. We just need to do it more systematically across the agency. - Isanhart Balima

This scenario would recognize the knowledge and expertise that exists in KM4Dev and make it more visible. For example, one member proposes developing a KM4Dev Knowledge Manifesto:

“...where we will describe what we believe in as a network (basic things like multiple knowledges, knowledge in action, the fact that KM is a means to an end, the need for multiple ways to influence through knowledge etc..)" - Beaulieu

This scenario could become a reality if we imagine a different worldview for KM4Dev. It would reduce the emphasis on interaction as the key expertise and the vehicle for learning in KM4Dev and would therefore change the nature of participation in KM4Dev. It could involve informal pockets of self-organizing structure based on expertise within a larger umbrella that is very informal. It would include new ways of supporting and disseminating expertise in the international development sector, such as:
• KM4Dev could maintain a roster of members offering their services for hire. It might build on the existing member profiles but it would have more information on expertise, contact information, and there might be restrictions on who claims the level of “expert.” A KM4Dev speaker’s bureau could identify and support approved experts. It would take KM4Dev closer to LinkedIn and make it more of a services marketplace. KM4Dev membership could itself become a badge indicating expertise.

• KM4Dev members might offer classes and other events with an expertise dissemination function under a KM4Dev umbrella. The face-to-face meetings are a prime example. They could either be revenue-generating in themselves or they could be sponsored by funders or other organizations in the international development sector. This would take KM4Dev in the direction of a training or degree-granting organization.

• KM4Dev could contain a library that publishes resources about best KM practice, along the lines of an agricultural extension service. This could build on KM4Dev’s substantial information base on “best practices” that has been accumulated in its discussion summary.

In this scenario, securing funding from formal, more expertise-oriented organizations might become easier, as specific KM4Dev services and activities directly address the perceived needs of international development organizations and funders. The costs of infrastructure, facilitation or community support would then be seen as “overhead.”

There are several ways in which this scenario would hold some fundamental tensions. For example, the fact that there are many different and independent “practices” under the KM4Dev umbrella would need to be addressed. How would that negotiation and selection of “best best practices” (which some regard as a myth) occur? Would the application in the field of expertise and best practice be included or would that bring KM4Dev back to the existing interaction orientation? Would there be tensions not only between competing practices but also between competing experts? This scenario seems like it might be the most unstable scenario of the four.

4. A Funded KM4Dev: More formal structures to support an expertise orientation

In a way this scenario combines some of the benefits and risks or losses of the other two scenarios (a “Focused” KM4Dev and a “Faceted” KM4Dev). The following comment suggests the paradoxes of this scenario very well:

“I feel that KM4dev needs to become more of a professional organization, which would provide more formalized services, support linkages etc. for its members, but I am not sure it would survive such a shift....As KM professionals we must be able to clearly demonstrate the value added of our work - creating the conditions for continuous learning and adaptation requires considerable investment. In our organizations, KM is still seen as nice-to-have, not must-have. In a time of shrinking budgets, that is very risky.” - Gillman
Additional organizational activities and structures of this scenario would respond to changes in the international development sector. It is not hard to imagine many, many activities that would be good for KM4Dev, the international development sector and the world. The other scenarios develop several ideas as to what is possible. In this scenario more rigor and an emphasis on expertise would be emphasized. For example, just as there is a demand for more KM tools and more rigorous standards for knowledge (e.g., randomized control trials) so could KM4Dev be more sophisticated in demonstrating the value of KM to organizations and the field of international development itself. KM4Dev would function more like a research consortium that focuses on many of the topics that have concerned its members over the years.

This evolving focus and worldview would have organizational implications. KM4Dev would need a formal secretariat that would attend to a myriad of concerns. It might begin with helping new members get their bearings in KM4Dev itself and in the world of KM by providing training and by making its existing FAQ’s easier to find and more polished. It might clarify membership boundaries so that the costs of the secretariat are spread equitably across the membership. It would make relationships with funders and KM projects more systematic than the informal relationships that have characterized it in the past.

In this scenario KM4Dev might benefit from a wider range of funding opportunities because it would be more focused on products and expertise that are in demand in the international development sector. In addition to individual contributions, it might be that organizations are willing to contribute funds or staff time because of a narrower and more explicit focus. Given a more sophisticated organizational structure and professional management, there is the possibility of cross-subsidies so that funding obtained in one area could benefit another.

The main risk of in this scenario is that the exploratory vibrancy of KM4Dev’s current interaction orientation would be lost as expertise becomes more narrowly codified. The sense in which KM4Dev is a demonstration of the very process of voluntary, self-organizing knowledge sharing that it advocates and stands for would be lost. Funding all of the work that is involved in a large network such as KM4Dev would be impossible. How would the boundary between the work of those who are paid to work on behalf of KM4Dev and those who volunteer be handled? Maintaining the morale, volunteer energy, and sense of shared purpose would be essential. That is KM4Dev’s irreplaceable asset.

**Issues across all scenarios**

There are some issues that merit consideration but do not really fall into any of the four scenarios. They are mentioned but not fully explored here.
Changes in KM, organizations and the development sector
The KM field is not static: organizations and the problems they face are increasing in complexity so KM generally has matured from a technology focus to a focus on people. In many development organizations, KM is more mainstream than in the early 2000’s, so members face different challenges today. The organizations that KM4Dev members represent are probably even more diverse than they were at the beginning (and in fact many members of KM4Dev do not see themselves as “representing” any organization).

Connections to funders and organizations
Regardless of what direction KM4Dev takes in its evolution, the financial or other support from funding organizations will depend on the relationships that individuals in KM4Dev have with those organizations. Negotiating the terms of accountability will turn on both who represents KM4Dev and how KM4Dev is organized.

North-South issues
KM4Dev has deep roots in the global North and a deep commitment to development in the global South. A large proportion of its membership is from the North and they work for organizations based in the North, and KM4Dev is influenced by the values and worldview that prevails in those organizations. Increasing participation drawn from the global south and setting the agenda from the perspective of those new participants would be a significant shift for KM4Dev.

Attend to infrastructure
Infrastructure costs need to be covered no matter which direction KM4Dev takes. This report has argued that decisions about infrastructure need to follow those about direction. The Core Group has considered a range of needs ranging from a minimum budget of USD 1500 per year to cover the costs of dGroups, Ning, and the wiki, to more expansive versions such as:

<table>
<thead>
<tr>
<th>KM4Dev Budget area</th>
<th>Amount(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed operation costs (server hosting, etc.)</td>
<td>$5000-6000 per year</td>
</tr>
<tr>
<td>Wiki maintenance</td>
<td>?</td>
</tr>
<tr>
<td>Innovation fund</td>
<td>$15,000</td>
</tr>
<tr>
<td>Annual meeting/workshop</td>
<td>$25,000</td>
</tr>
<tr>
<td>Core Group</td>
<td>$0 (voluntary work +/-5 days per year/person)</td>
</tr>
</tbody>
</table>

Core-periphery issues in KM4Dev
Many people listen to the KM4Dev conversation but do not “speak” (by posting to the email list). On the one hand the number of listeners are all the direct beneficiaries of KM4Dev. Consulting those listeners is inherently difficult so that “reaching consensus” across the entire KM4Dev network is very difficult, especially on topics such as KM4Dev direction and transformation.
Metabolizing these scenarios and moving forward

What are the next steps for individuals, for KM4Dev’s Core Group, and for the community as a whole? There has been a lot of activity, discussion and soul-searching during the past six months so the question of how to metabolize, digest, and move forward needs to be mentioned here. Here are four directions that all need energy and attention. In a way they are both fundamental and obvious, so it’s important that they are not ignored.

Clarify KM4Dev values -- what should be preserved and what discarded?

Discussing KM4Dev values has always been a theme in community discussions and has been foregrounded during the interventions and provocations that have been part of the IFAD Studies Synthesis project. This ongoing process of self-renewal is always simmering in the background, but it does need some structure and awareness to be healthy. Envisioning occasional times for self-reflection and giving them appropriate structure needs to have a bit of “community focus and intention.” In a large and diverse network such as KM4Dev, the job of defining identity and values does not really end.

Clarify linkages, sponsorship, and the neighborhood -- how is KM4Dev connected?

Independence from any one organization is a KM4Dev value that is often repeated and makes KM4Dev unique. But without sacrificing that independence, individual members and leaders need to look more carefully at how they connect to the many organizations large and small in the international development landscape. How do those organizations benefit from the existence of and activities in KM4Dev? How do those organizations contribute and is that contribution proportional to value received? To what extent is participation in KM4Dev blessed by formal processes in those organizations? How do other communities fit in this landscape?

What would pathways to engagement with and support of KM4Dev mean for an organization? Could we build a statement describing meaningful pathways to involvement and leadership by analogy - but for organizations? Awareness of adjoining communities or services can guide growth and development of KM4Dev. Making KM4Dev more visible to the in that international development landscape through a Newsletter could bring energy, connections, and, possibly, resources.

Clarify governance, self-organization, leadership and coordination

Just as values and linkages need attention, so does governance. Proposals for core group succession management and the ensuing discussion are examples at a macro level, but

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18 In his book Leadership (1990), John Gardner proposes: “Values always decay over time. Societies that keep values alive do so not by escaping the process of decay but by powerful processes of regeneration.”
leadership also happens in many smaller-scale interactions as suggested in pathways to involvement and leadership. Regular reflection and renewal in the area of governance will always be important.

Making it personal and individual and sharing it back

When KM4Dev was very small and very young, it must have been obvious to everyone who got involved that their participation made a difference and that calls for action were indeed addressed to them, personally. Now that KM4Dev is much larger and older, calls to action are more ambiguous. Just to be clear, this report is directed at you. You play a role in the future of KM4Dev. You must take action. Without you, “it” won’t happen. But when you do take action, be sure to report the how and the why behind your actions back to the group.

Conclusion and a longer range view

KM4Dev plays a vital role in the international development landscape, with many opportunities opening up on the horizon.

Because of its size and complexity and the diversity of its members, KM4Dev’s evolution will seem messy. This report will have been useful if people with different points of view are able to communicate with each other more effectively about their differences and their common cause. That means more people having a fuller understanding of KM4Dev, of the different directions it could take, and of the implications of those directions for global development.

Annex I - Selected quotes from “what was your experience?” surveys

Here are selected highlights from the responses to the survey conducted in December 2013 http://wiki.km4dev.org/The_KM4Dev_experience_as_a_context_for_thinking_about_its_future:

- Ana Maria Ponce - leadership initiative, access, and learning
- Daan Boom - Seek to influence policies and leaders
- Daan Boom - small network beyond development
- Joel Muzard - there are several KM4Devs
- Camilo Villa - power of direct contact with other practitioners
- Denise Beaulieu - surprise at narrow focus on facilitation
- Rachel Cardone - connection between KM and organizational change
- Camilo Villa - what is the advantage of a formal organization?
- Lissette C. Bernal-Cruz - not being alone is affirming, informs implementation
- Leia Isanhart Balima - recognizing what’s already there in own organization, not so “fluffy”
What happened?: This year, (Sep 23 to Oct 10, 2013), I had the chance Focused Conversation titled: "Knowledge Sharing around Water Management innovations in the Andes and the Himalayas". My colleagues from HimalAndes Initiative and I were encouraged by the KM4Dev Core Group to conduct this dialogue during three weeks. We collected 11 case studies, some comments and used three different platforms which were interlinked using the Wiki as the Central Knowledge Hub for the discussion. The Wiki page has now 1,700 Hits: 
http://wiki.km4dev.org/Knowledge_Sharing_around_water_management_innovations_in_the_Andes_and_Himalayas

When did this experience occur?: Sept 23-Oct 10, 2013

Did that experience influence your participation, work or actions later on? If so, how?: This debate had a very rich collection of case studies from the Andes and the Himalayas. The KM4Dev Journal Editorial Team suggested to use them for a special edition, probably in 2015.

Did it change your role or connections to people in KM4Dev or elsewhere? If so, how?: During the debate I established closer connections with the List and the Ning moderation team, and realized the best way to speed up the debate would be to become part of the moderation team myself.

Did it change your thinking or views? If so, how?: I realize the Wiki is a powerful hub and repository of knowledge but needs to be better organized. My view of the Ning
Platform has not changed, I still think KM4Dev needs to have a clear centralized structure with better linkages between the Wiki, List and the Ning platforms.

Daan Boom - Seek to influence policies and leaders
- that KM4D should develop an agenda for policy influences towards Secretaries and Development Agencies. We should try to influence the 2030 development goals and ensure that the knowledge voice is reflected or incorporated in global program designs.

Daan Boom - small network beyond development
- This small network does not only cover members from km4d but also knowledge managers in private sector or are for specific reasons not a member of km4d

Joel Muzard - there are several KM4Devs
- There is not one KM4DEV, there are several KM4DEVs. One is the KM4DEV of the members who participate on the discussions on the electronic Boards. And there is several groups, geographical groups, language groups, groups related to organizations, groups related to several understanding of what is Development or their understanding, and what is KM or their understanding.

Camilo Villa - power of direct contact with other practitioners
- [Prior to attending a f2f even in 2006] I was starting to believe that I was crazy. It was a relief to find out that there were more crazy people around, hahaha. I came from the academic sector where knowledge and information are seen and used in a completely different way. To "discover" collaboration and sharing as part of a working space and with humour...ahhh that is a treasure.

Denise Beaulieu - surprise at narrow focus on facilitation
- I was surprised to realize how much focus was placed on facilitation (in all its facets) relative to issues like: what kind of knowledge are we talking about? Is all knowledge worth sharing? What is our role as a community with respect to the increasing importance of the evidence-based policy discourse (with its threats and opportunities)? How can we better explain what we are doing so that organizations can be convinced that a more systematic utilization of knowledge can improve relevance and effectiveness? What is a legitimate source of knowledge?

Rachel Cardone - connection between KM and organizational change
- Noting that I haven't spent a lot of time on the website, highlighting cases of successful and failed activities or approaches that are perceived as "KM" might help deepen outsiders' awareness of what KM is, and why they should (or not) be invested in it.
- Nobody within the community has a common sense of what KM is, resulting in a lot of inward-facing discussions. There is a common interest in systems change, yet very little rigor / outreach into the communities that are at the cutting edge of understanding how to work in complex systems.
- so many development agencies have funded positions with KM in the job title / description, and yet there is still that "what are we doing?" mentality.
Camilo Villa - what is the advantage of a formal organization?

- Honestly I don't see the advantage of switching to a legal entity. Which is that one project that you would like to execute today that you cannot under the current framework? If capturing and managing some resources is really a strong need, then I think that what we need to find is philanthropist that could host an account in his own foundation.

Lissette C. Bernal-Cruz - not being alone is affirming, informs implementation

- **What happened?**: My first KM4Dev annual meeting...it was both inspiring and affirming. After years of being aware of KM4Dev but unable to attend the annual meetings, I was able to see the community in action. I appreciated the energy of the participants and the facilitators... the passion for KM was evident and more than once I heard participants say "I am not alone."
- **When did this experience occur?**: July 2013
- **Did that experience influence your participation, work or actions later on? If so, how?**: The experience of speaking with people about their KM strategies, challenges, etc. was really affirming. It informed the implementation of the KM strategy at my organization.

Leia Isanhart Balima - recognizing what’s already there in own organization, not so “fluffy”

- It gave me new ideas to bounce around with colleagues at a great time when we’re going through a new strategy for KM & Learning. I also identified folks at similar NGOs who I can now bounce ideas off when we’re tossing around new ideas within CRS.
- **Did it change your thinking or views? If so, how?**: Yes, I realized KM isn't as "fluffy" of a practice as I once thought, and that we really are doing a lot of different types of KM work at CRS. We just need to do it more systematically across the agency.

Melissa Bator - seeing open space is believing

- A room full of mostly strangers worked together to develop and run an open space agenda for the Seattle 2013 meeting

Riff Fullan - importance and value of KM4Dev culture of openness and learning orientation

- [Meeting people at KM4Dev f2f events] have been invariably highly inspiring and great learning and networking experiences. I have met most of the people I think of as friends related to my work at a KM4Dev meeting. It's no coincidence that such contacts have been so valuable, because I think there is a certain culture of openness, of wanting to learn, of mutual respect that is typical of a KM4Dever. People who believe in behaving in those ways are the kind of people I like to stay in touch with.

Denise Beaulieu - proposing tool development

- tools that we can use for KM strategies, explaining what we are doing etc.. and
Denise Beaulieu - proposing a knowledge manifesto

- a KM4DEV Knowledge Manifesto where we will describe what we believe in as a network (basic things like multiple knowledges, knowledge in action, the fact that KM is a means to an end, the need for multiple ways to influence through knowledge etc.)

Jaap Pels - concern re institutional risks

- As I believe in institutions - and also see them fail or seek rent on the commons / citizens, I want KM4Dev to stay away from it and I watch, nudge, react ....

Jaap Pels - Fragmentation is a strength

- The KM4Dev is fragmented which is our strength. Let us wait for a strategy discourse to guide structure.

Simone Staiger-Rivas - finding the right level of contribution / effort

- I was member of the core team for many years, then decided to leave because i didn't have the time and energy to contribute any more. I still try to do one specific activity per year (2012: ks toolkit update day, 2013: member of org team of the Seattle gathering).

Anonymous - pushback when called to join core group; difficulty of “constitutional conversations”

- What happened?: The worst experience of the event was the meeting about the future of KM4Dev which was actually an "advertising" event for core-group membership, with an imposed agenda from existing core group members. Various people mentioned in the meeting that we should use the opportunity to discuss ways forward for the community (thematically) instead but this was brushed away. Interest in the needs and wants of the community-members present (which were mostly newbies [to a physical meeting] like myself) seemed, for the most part, absent.
- When did this experience occur?: July 2013 at KM4Dev seattle
- Did that experience influence your participation, work or actions later on? If so, how?: I am not sure about this.
- Did it change your role or connections to people in KM4Dev or elsewhere? If so, how?: Probably, I feel connected to some of the people that I think share my view on this. The core group still feels like a black hole (even though I have to admit that I am not actively seeking information about it).
- Did it change your thinking or views? If so, how?: It did. I was more aware of the core group as a separate entity to the overall community that had "higher" stakes in KM4Dev.

Johannes Schunter - KM4Dev not evolving fast enough

- We are often talking about the exact same things (KM wise) that we talked about 6 years ago, which makes you wonder whether the KM field (or we as a group) haven't evolved at all.
We used to have the finger on what's new, what's emerging (e.g. in the Web 2.0 debate), but right now I am not seeing that so much. These days it's a bit more about bringing newbies up to speed with known tools and methodologies.

Ewen Blog Post - the magic changed my life

Various quotes about values, tools, etc.

http://km4meu.wordpress.com/2012/09/26/a-tribute-to-km4dev-what-i-took-and-what-i-give/

Helen Gillman - first contact was ‘foundational’ for views, relationships and practice

I attended the annual KM4dev meeting in The Hague in 2001 (I think it was 2001). I had been hired to develop a communication & knowledge management strategy for a major programme at FAO and was initially trying to understand what KM was all about. At the time, it was a relatively new field in the development sector, so there was a lot of new thinking, new ideas, new approaches. I was inspired by my interactions with people like Nancy White, who spoke about how to build virtual teams; and Lucie Lamoureux, whose work on Bellanet was quite groundbreaking at the time. Steve Denning spoke about story-telling - a new approach at the time, and other practices such as peer assist and after action review were tried out in various sessions. It was a useful way to learn by doing or observing.

Helen Gillman - individual mix of participation modes

I have always remained somewhat of a lurker on the listserv - I read many posts and summaries on the wiki, but rarely comment myself. I also read the journal on and off. I suppose I use it as a window into the broader world of KM (in the sense of broader than my own area of work) and it is extremely useful to follow thinking as it evolves.

Helen Gillman - orbiting around KM4Dev, focusing on project implementation

From 2008 to 2012 when I was working as KM officer for IFAD's east and Southern Africa Division, I focused on learning with our project staff and country officers about how to build KM into project implementation in order to improve performance. During that period I was somewhat disconnected from KM4dev - it didn't really provide me with what I needed. Although I should definitely have shared on the listserv about what we were doing - even today I think that work remains quite new and relevant.

Helen Gillman - topic shifts in Seattle face-to-face meeting

I was in Seattle this year, and I felt that the style and energy was somewhat similar to the [2001] meeting in the Hague. However, there were many new people and there was a strong focus on how to get the evidence to make a strong business case for KM. This is a change - and we need to give it more importance.

Helen Gillman - the need for and risks of a professional organization

I feel that KM4dev needs to become more of a professional organization, which would provide more formalized services, support linkages etc. for its members, but I am not sure it would survive such a shift. I think that the community's energy has been fed by the
interest and dedication of a relatively stable core of people - and the broader community coalesces around that. However, as KM professionals we must be able to clearly demonstrate the value added of our work - creating the conditions for continuous learning and adaptation requires considerable investment. In our organizations, KM is still seen as nice-to-have, not must-have. In a time of shrinking budgets, that is very risky.

Ewen Le Borgne - Values that KM4Dev people taught me

- [The people in KM4Dev have taught me] to seek questions, not answers; to be happy with confusion (confusiasm), to dare asking questions and challenging thoughts, to build upon each other but to go beyond the 'yes we all agree and that’s wonderful', to look for what is not there, to care for each other, to value people and ideas beyond organisations, to trust myself and others, to let go, to experiment and experience, to live and learn…

Ewen Le Borgne - experimentation, adoption, and exploration of new tools

- I wouldn’t have tried the following tools if it were not for KM4Dev: blogs, wikis, Twitter, Slideshare, Delicious, Blip TV. And next to these direct influences, I am now much keener on exploring new tools such as Pinterest, Tumblr, Google+ etc. as a result of my exposure to KM4Dev. Secondary – but crucial – tools such as Doodle, MeetingWords, Wordle etc.

Annex II - Scenario inquiry guide

The questions and items in the following outline were used as an inquiry guide in developing the scenarios in this report. They are included here in case they are useful for further inquiry.

- **Theory - Worldview**
  - personal values and how they are shared collectively
  - View and assumptions about the world (whether assumed or negotiated by some or all)
    - about nations, economies, societies, and how they work
    - immediate institutional & political for work (e.g., in the development sector)
    - about volunteer or work possibilities in KM4Dev
  - Expression of the worldview
    - How expressed? When?
    - How explicit or intuitive or controversial?
    - How is it held? How flexible? How “empirical” or shared outside KM4Dev?
    - How inward- vs outward-looking

- **Social Structure**
  - KM4Dev “Membership”
    - Who is a member of KM4Dev, who is central, who leaves or stays, who leads?
    - Leadership structures and hierarchy of influence
- Permeability gradients, boundaries and their cost
  o Perceived benefits
    ■ Learning
    ■ Motivations, Identity and empowerment
      ● For individuals and subgroups
      ● Commonly shared
    ■ Employment and livelihood
  o Participation patterns
    ■ Cycles and rhythm (Heartbeat, time-keeping and scheduling)
    ■ Degree of social formality: designed versus evolved
    ■ metrics of success (existing regime and evolutionary process)
      ● for KM4Dev practitioners in the field
      ● within KM4Dev itself
  o Alternatives - adjacent to KM4Dev
    ■ Who competes with KM4Dev in this scenario
    ■ Who are the allies or natural partners
    ■ Can KM4Dev use them as models or warning?
  Relevant fields include:
    ● Technology: big/open data, visualization, data for development
    ● environmental activism, ecological resilience
    ● public health and sanitation
    ● education and learning

- **Prevailing technology**
  o Able to work across national borders using readily available and inexpensive information and communication technology
    ■ Customary or approved tools
    ■ Cost and accessibility
  o Level of practice
    ■ What’s worth talking about: level of practitioner skill
      ● first aid what do you do as a KM amateur (less potent / less dangerous interventions)
      ● high-authenticity interventions
  o Communication and interaction
    ■ technologies and their affordances
      ● interaction
      ● memory
      ● visibility
      ● appropriateness for different activities
      ● risks of using “too many tools”
    ■ global inclusivity (travel requirements)
    ■ platform independence & portability
    ■ cognitive load
    ■ Costs (and who pays)
- Effort and costs
- Wiki, NIng, etc.
- KM4Dev Journal
- Facilitation, moderation, administration

○ Legal and organizational vehicles
  ■ Agreements
  ■ Trust
  ■ Caution about one source of funding blocking another
    ■ funders
    ■ Individuals