

THE KNOWLEDGE PLATFORM: WHERE WE ARE AND WHAT WE'VE LEARNT¹

Fundar discusses their experience designing, implementing and managing the Knowledge Platform - an online social space that provides members with the opportunity to interact, network, share knowledge and learning in the field of social accountability- including some of the most important lessons learned which might be relevant to those designing similar platforms.

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INTRODUCTION

As social accountability (SAcc) practitioners, we are constantly looking to learn about good practices, how our peers implement their SAcc initiatives, how they adapt SAcc tools to their contexts, and how they overcome challenges they might face. In fact, lately, there has been an increasing awareness in the SAcc field that learning is essential for the effectiveness and impact of initiatives seeking to enhance government accountability². Although we learn a lot from reflecting on our own processes and experiences, we have seen that learning from others' experiences is also very fruitful and enriching for our work.

In this context, in 2013, the Global Partnership for Social Accountability (GPSA) envisioned the

creation of a Knowledge Platform (KP) that would support their grantees and other practitioners' learning and knowledge exchange on SAcc. Once the idea was conceptualized, the challenge ahead was to develop and launch the KP. This is where we, Fundar, entered into the scene.

After a competitive process, **Fundar**, a Mexican civil society organization aiming to advance substantive democracy, was awarded with a GPSA grant to design and manage the KP.

Although we knew that there were many challenges ahead, we saw many opportunities in working in the creation and management of such a platform.

¹ This note was developed by Marine Perron and Janet Oropeza Eng from FUNDAR, Center for Analysis and Research (@FUNDARMexico), December 2015

² B. Halloran and J. Ross, Funding, Learning and Impact: How do Grant-making Practices Help and Hinder Real Grantee Learning?, GPSA Webinar, June 3rd, 2015.



Fundar's experience in SAcc and Knowledge Exchange

Since its inception in 1999, Fundar has carried out SAcc exercises to assess and monitor the efficiency and transparency of public spending and public policies in Mexico. To do so, it has developed innovative analysis and evaluation methodologies (budget analysis, access to information, human rights approach, etc.) and has established linkages with local, regional and international organizations, networks and policy makers. Our work has been acknowledged by several donors, international organizations, and rankings. For example, the University of Pennsylvania's 2014 Global to Go Think Thank Report named Fundar the 3rd top Think Tank in the World with the Most Innovative Policy Ideas/Proposals.

In the last five years, Fundar has also consolidated as an organization with expertise in promoting face-to-face and online peer learning and knowledge exchange among organizations in the Global South. Since 2011, we have implemented projects with an online learning component, such as the Evidence and Lessons from Latin America and the Global Partnership for Social Accountability Knowledge Platform. Throughout its history, Fundar has gained knowledge and practical experience not only on SAcc, but also on what promotes and encourages effective learning, networking, and peer-exchange among practitioners in the Global South.

In April 2014, after a few months of designing and planning the KP within Fundar and with the [GPSA Secretariat](#), the KP was launched.

And so far it has surpassed all our expectations. It is now a dynamic knowledge exchange and networking platform with over 2,000 members from 125 different countries, who contribute everyday with materials, reflections, news and events on social accountability. Although it was challenging to encourage participation at first, in the last year, we have seen with excitement that many users are now contributing proactively, either through the platform or by email. This has allowed us to give the turn we wanted to the platform: the members have become the knowledge providers and learn from each other's work.

Since the launch, thanks to more than 30 SAcc practitioners, we have had 14 webinars, 8 expert e-forums and e-learning course; 25 people have written blog posts; and many others have sent their materials, news and events for the platform and the bi-weekly "Latest News."

From our perspective, these numbers reflect the importance of having such platforms and spaces as a means for practitioners to learn and enhance their SAcc initiatives and work.

As we mentioned, both learning and having the capacity to adapt and respond to contextual factors are essential for the effectiveness and impact of SAcc initiatives. In our experience, managing online learning spaces like the KP is no different. In our journey of designing and managing the KP, we have had to adapt. For us, this constant learning has been really valuable and that is why we would like to share some of our most important lessons learned which might be relevant to those designing similar platforms. Some of these may seem obvious to you, however they are the result of many months of experimenting and adapting and we must recognize that it is always challenging to implement changes as you go. We have definitely seen the value of redirecting our strategies. **Hence, we hope that you find the following lessons useful.**



Design your platform according to users' needs, not the opposite.

When you design an online platform, be as inclusive as you can in the activities conducted and take into account users' languages, time zones, internet connectivity, thematic interests, challenges related to communication technologies and limited available time to engage in virtual activities. You should also consider that there are different kinds of users who will be attracted to different kinds of activities (some like to read, others like to write, others like to listen, others like to network, others are more visual, etc.).

It might seem obvious, but we cannot emphasize enough the importance of taking the time to know your users and their thematic interests and challenges, so that you can tailor content to their needs. Also, be responsive and open to their feedback on the platform's usability. Users are the best critics when it comes to online platforms, only they can tell you what is user friendly and what is not.

For the KP, we have performed a satisfaction survey among users and several in-depth interviews with targeted participants. This feedback has been valuable and has helped us to identify areas and activities that could be improved. For instance, the surveys highlighted the need to organize some activities in other languages.

To respond to this feedback, in September 2015, the GPSA KP held its first webinar in French called ["Ouvrir la boîte noire : facteurs contextuels de la responsabilisation sociale"](#). We also published a [blog post](#) in both English and Spanish and another one is on the way.

The platform also allows us to collect information on our users, such as their countries and whether our members come from civil society, government, academia, private sector, among others. It is also possible to get hints on what their thematic interests are through the form members need to fill out as they register.



Manage expectations- online participation is tricky.

When implementing online platforms, it is really important to manage expectations and to understand that generating active participation is a challenge. Evidence shows that active and regular participants on online activities usually do not exceed 15% of total members³. Low levels of participation can be explained by the "lurking" phenomenon⁴, which refers to the large amount of members that do follow the discussions and benefit from them but never contribute, or by the fact that members are not always available to contribute actively. For example, some practitioners might go into fieldwork or workshops and may be absent for some weeks.

Given that achieving active participation is challenging, we have learned that much of the work takes place "behind the scenes." To ensure users' participation, you might need to be constantly in touch with them and with potential speakers to engage and remind them about the platform's activities. Also, you should always be there to provide technical support when users face challenges otherwise they might get disappointed and will not engage with the activities. For example, in the case of the KP, with membership of more than 2,000 users, we receive approximately 3 to 4 emails a day from

³ Katy Jordan, ["MOOC Completion Rates: The Data"](#) and Chris Parr, ["Not Staying the Course"](#), May 10th, 2013, Times Higher

⁴ A compilation of a [Discussion about Lurkers](#) on the Online Facilitation Listserv which features 1626 members provides arguments in defense of lurking. It argues that participants have many reasons for not participating, but that does not mean that they are not learning or benefiting from discussions. They used the term "peripheral participation" to define the phenomenon of participants that are not active in a community but benefit from it.

users, some of which might be of participants wanting to share their work or materials or facing technical challenges. We address these emails as diligently as we can because we know that users are our main asset and they are expecting to hear from us. To ensure meaningful participation, we have also learned that it is very important to plan your upcoming activities well in advance and to identify and target potential key participants. For example, every time we are having a knowledge activity – whether a webinar or an e-forum - we map key organizations and networks working on the subject matter and then invite them to engage in the activity, as we know that they can bring insightful reflection and experiences to it. We also invite

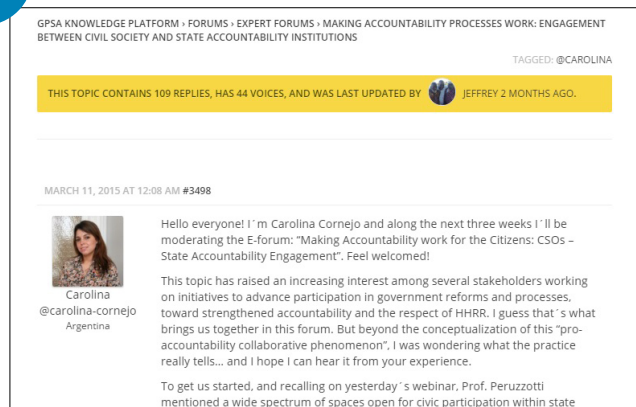
guest moderators to our e-forums. There are many advantages when you invite guest moderators, as they can help you map more potential users from their own networks and help you out with a wider dissemination of your events. They also bring valuable knowledge in specific topics where you might lack experience, and provide participants with very thorough answers. This is key in an e-forum, because a satisfied participant is a participant that will come back!

We invest time in doing this, as we have seen that if you bring motivated participants who work on the theme and are willing to engage, it is more likely that others will jump in.

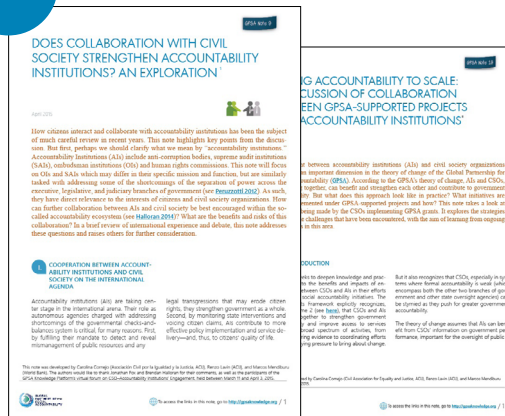
1 WEBINAR



2 FORUM



3 DISSEMINATION NOTES 9 & 10






Get your platform users in the driver's seat, so that they truly own it.

Our experience has shown us that it is key to convince users that the platform is theirs' and that they own it. They are the main providers of knowledge – not us– as we are only the facilitators. A good way to do so is by acknowledging their participation and putting names and faces behind their contributions. We have noticed that when users are given a space to share their stories and lessons learned and are acknowledged for doing it, they feel motivated and develop greater ownership of the platform. In fact, during the last year, we have seen with great enthusiasm that many users have approached us to explore the possibility of holding a knowledge activity on the KP, either an e-forum, a webinar or both. Others have offered to write blog posts to broadly share their work. This reflects how users are starting to see the KP as theirs' and as a valuable space for sharing their lessons learned and stories.

Additionally, we have come to realize that, even when users do not proactively offer to lead activities or share their stories, it is important that we, as the community managers, encourage and support them to do so when their work and knowledge could be of interest to the larger community. Most people would like to contribute and sometimes the only thing they need is a little help.


Several months ago, we decided to reflect participants' greater ownership of the KP in our bi-weekly newsletter, "[Latest News](#)," which is our main channel of dissemination that reaches more than 2,000 contacts. We created the "Our members at a glance" section, where we feature interviews with "super users" or welcome newly registered members. We have also started to acknowledge users' contributions to the newsletter.



Identify your value-added and look for complementarity.

Currently, there are different initiatives and organizations, such as [Transparency and Accountability Initiative](#), [Results for Development Institute](#) or [Making All Voices Count](#), to name a few, seeking to promote learning on accountability. Many international organizations, such as [Oxfam](#) or [CARE](#), have their own learning strategies as well. In this context, for us, it has been key to get to know these other initiatives or platforms and identify what our value-added is, to be able to potentiate it. We have also sought to collaborate with them and build synergies.

For example, with TAI and the GPSA Secretariat, we organized a webinar and e-forum on Funding, Learning and Grant-Making Practices, which had good participation rates.⁵ By doing so, we avoided, the best we could, overlap with other platforms and initiatives and, even better, we sought to complement them. Given the complexity of governance issues, particularly in developing countries, we do believe that all organizations and initiatives supporting governance and accountability learning and knowledge exchange must work together.




Work closely with your IT team, they are the magicians that can make ideas become a reality.

The programmers and web designers play a fundamental role in creating and managing an online platform. They are the ones who can tell you what is feasible and useful and what is not, and they can make your ideas – even the craziest ones – come true. Over the last two years, we have realized that the IT team and the community managers need to work closely together.

⁵ The webinar had 49 attendees, while the e-forum had 54 posts, coming from 24 participants.

er and have a very fluid relationship to address challenges and discuss new ideas and possible improvements. In our case, having an in-house IT team at Fundar has been indispensable to the functioning of the platform. We can always run to their office as soon as a technological challenge comes up!

A final but very critical aspect to take into account as well is that IT staff might speak in highly technical language. For this reason, community managers should make an effort to learn and understand this language and vice versa, IT staff should try to conceptualize and visualize community managers' ideas and requests.

 **Maintain fluid and good communication with international cooperation, it can be your best soundboard.**

As we mentioned before, we have worked closely with the GPSA Secretariat to design and manage the KP. We hold virtual meetings with them on a bi-weekly basis and this space is a safe one to discuss new ideas and share upcoming challenges. We must acknowledge that many times they have been our best critics and have offered us innovative ideas to improve our activities, as well as flexibility to change and adapt our strategies. They have also been of outmost help in connecting us with possible bloggers, speakers and participants. We do believe that in the past two years, we have been able to create a common vision which has been key in taking the KP to the place we want it to be.

 **Make your platform human, live and inviting for users.**

Online platforms must include a highly developed human component in their design and community management. In the end, users are people and they expect to see that information and communication technologies reflect that "humanity." Some of the improvements we made to the KP after the first year of implementation sought to make it live, human and invi-

ting for users. On the technological side, we re-designed the homepage to reflect two major changes. First, we created a "Highlights Area" with a specific call-to-action: We invite users to share their experience, participate in an upcoming activity or comment on the blog. We make sure to change this message and the appealing image attached to it on a regular basis. Second, we included a preview of the Networking Board, which resembles Facebook wall, on the homepage so that the first thing that members see is others' comments and pictures, reflecting that the platform is a community made by people.

On the community management side, we implemented two things to make the platform live and dynamic. First, we prepare social media posts for Twitter and Facebook on a bi-weekly basis where we invite users to comment or participate in our activities or acknowledge their work or contributions. Second, we write to members that participate actively on the KP to get to know them or to invite them to be featured in the platform. We have interviewed many of them by Skype or over the phone, which has helped them see that there are "people" behind the KP.

 **Design sustainable platforms.**

Online platform growth is always challenging to predict, especially when the project is designed to last several years. Online platforms' growth depends on many factors that, most of the time, are out of our control such as language issues, the thematic sector's growth, technological innovations and the proliferation of similar platforms. Even though most of donors and community managers would like online platforms to attract as many users as possible, quick growth might become challenging to manage on a technological level, especially to ensure that your platform does not crash and is sustainable in the long-term. Although predicting how much traffic the online platform will draw is difficult, we can define scalability and sustainability

strategies when designing them, such as developing an architecture that allows taking advantage of cloud computing in order to guarantee optimal performance and seamless user experience.

Face-to-face interaction helps in building trust among members.

Online platforms can connect and bring together people from very distant parts of the world, however they can never replace face-to-face interaction. As the KP community managers, we do a lot of networking at events we attend, such as conferences, workshops, summits. These spaces are critical for getting to know potential members and the work they do and, above all, for building a relationship of trust with them. We have seen that members that we have met face-to-face are more likely to participate in our activities and can even become champions of the KP. Likewise, we have also noticed that members of the KP that have seen and met each other are more likely to interact on the KP. Thus, in our experience, face-to-face interaction helps in developing greater trust among members of the KP.

Find ways to share more broadly the knowledge generated in your platform

Activities undertaken in the KP such as webinars, e-forums or the e-course might generate knowledge that could be useful not only for members, but for broader audiences. However, in our experience, systematizing that knowledge and packaging it to be shared among members and external audiences is challenging, particularly if you have scarce human resources. In spite of this, in the KP there are good examples of ways in which the knowledge generated there has been shared more broadly. For example, a [GPSA Learning Note](#) was prepared right after the KP e-forum on CSO–Accountability Institutions’ Engagement.

Also, some inputs gathered through the recent KP e-forum on Engaging with Citizen Voices and Experiences: the 2017 World Development Report on Governance and the Law will be used for the World Development Report 2017, which might potentially reach broader audiences.

Our main takeaway: members and their stories are the core of online knowledge platforms

In sum, we must recognize that in the journey of implementing the KP, we have learned a lot and have been touched by many inspiring stories, such as the [blog post](#) by Bakhadur Khabibov feeling like “a lonely soldier” in his path towards improving SAcc in the water sector in Tajikistan, or the [blog post](#) of Dil Afrose Duetee working for a decentralized and participatory budget in Bangladesh as a means to benefit poor and marginalized people. We could not be more grateful to all the participants, speakers, guest moderators and guest bloggers, who have shared their work, projects, stories and lessons learned or who have provided valuable feedback on our activities. We do hope that the KP and all its activities have enriched the SAcc projects and the work that members are implementing in their – sometimes complex– contexts and that are critical for improving social justice, equality, and the fulfilment of human rights. We also expect that by sharing some of our main lessons learned, we can enrich and inform similar knowledge exchange initiatives. In the end, all learning has the ultimate goal of improving the societies and world in which we live to make it fairer, and so that some of the most pressing needs can be addressed.

Visit us at www.gpsaknowledge.org.



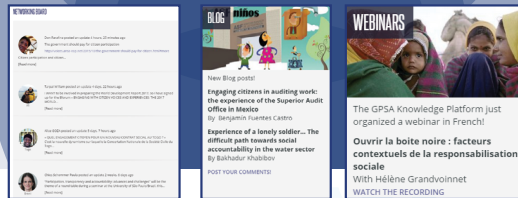
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