



Technical Assistance Report

Project Number: 48242
Regional—Cluster—Capacity Development Technical Assistance (R-C-CDTA)
October 2014

Knowledge for Solutions

ABBREVIATIONS

ADB	–	Asian Development Bank
COE	–	center of excellence
COP	–	community of practice
DMC	–	developing member country
KMAP	–	Knowledge Management Directions and Action Plan
RKSI	–	Regional Knowledge Sharing Initiative
RSDD	–	Regional and Sustainable Development Department
TA	–	technical assistance

GLOSSARY

Center of excellence	–	A research or training institution, a think tank, a university or one of its departments, or a private research institution having a high reputation in scholarly research in development, public policy, science, and entrepreneurship. The institution's mission comprises institution building and capacity development in a developing country or a country in transition.
Just-in-time knowledge exchanges	–	The right information provided at the right time in the right format.
Knowledge solutions	–	Case studies, research, big data analysis, pilot demonstration activities, experimentation, and information used to solve development problems.
Knowledge portal	–	A portal that purposely supports and stimulates knowledge transfer, knowledge storage and retrieval, knowledge creation, knowledge integration, and knowledge application (i.e., the processes of knowledge management) by providing access to relevant knowledge artifacts. Repository-oriented components and functionalities of a knowledge portal include a knowledge organization system, repository access, search, and applications and services. ¹
Knowledge services	–	A range of activities, including content creation, event organization, independent evaluation, knowledge sharing tools and systems creation, partnership facilitation, peer review, policy advice, safeguard compliance review, and training or capacity development. Knowledge products are the outputs of knowledge services.
Knowledge products	–	Outputs of knowledge services; may be in the form of

¹ C. Loebbecke and K. Crowston. 2012. *Knowledge Portals: Components, Functionalities, and Deployment Challenges*. <http://crowston.syr.edu/system/files/KP%20to%20distribute.pdf>

databases, multimedia, and publications or documents

- South–South knowledge exchange – One form of cooperation among developing countries. It enables demand-driven and direct sharing of practical knowledge between or among developing countries. Effective country-to-country cooperation is often characterized by inclusive and horizontal partnerships and networks based on equity, trust, and mutual learning.²
- Triangular cooperation – A collaboration in which traditional donor countries and multilateral organizations facilitate South–South initiatives through the provision of funding, training, and management and technological systems as well as other forms of support.³ No internationally agreed definition exists for triangular cooperation, which may also be referred to as trilateral cooperation, trilateral assistance, tripartite cooperation, or tripartite agreement.

NOTE

In this report, "\$" refers to US dollars.

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In preparing any country program or strategy, financing any project, or by making any designation of or reference to a particular territory or geographic area in this document, the Asian Development Bank does not intend to make any judgments as to the legal or other status of any territory or area.

² Working Party on Aid Effectiveness. 2011. *Building Block Proposal: South-south and Triangular Cooperation: Unlocking the Potential of Horizontal Partnerships for Better Development Outcomes*. http://api.ning.com/files/r-UGJKvH7tfXMvmjbbb5mxsugEBhmHjncadRO4WHJaxu2GV8Vb1DBDt13GuVpcjQzi7VWQd6c7Gjl-gpbPr8TBB5CigqY69V/111128_Building_Block.pdf

³ International Fund for Agricultural Development. *South-south and Triangular Cooperation*. http://www.ifad.org/south-south/index_full.htm

CONTENTS

	Page
TECHNICAL ASSISTANCE AT A GLANCE	
I. INTRODUCTION	1
II. ISSUES	1
III. THE CAPACITY DEVELOPMENT TECHNICAL ASSISTANCE	3
A. Impact and Outcome	3
B. Methodology and Key Activities	3
C. Cost and Financing	5
D. Implementation Arrangements	5
IV. THE PRESIDENT'S DECISION	5
APPENDIXES	
1. Design and Monitoring Framework	6
2. Cost Estimates and Financing Plan	9
3. Outline Terms of Reference for Consultants	10

I. INTRODUCTION

1. Strategy 2020¹ of the Asian Development Bank (ADB) mandates ADB to develop, mobilize, and apply knowledge solutions to help the poor in our developing member countries. The midterm review of Strategy 2020 highlights that “DMCs increasingly seek ADB’s knowledge to address complex challenges, improve the development impact of operations, and develop into knowledge economies.”² This was evident during ADB’s 2014 annual meeting, where members emphasized ADB’s continued relevance on challenges such as aging and urbanization, and ADB President Nakao stressed ADB’s continued help by tailoring its responses to the specific conditions of countries.³ A strong and dynamic economic, scientific, and social knowledge base is a prerequisite for stimulating innovation and structural change (footnote 2, para. 123).

2. The midterm review of Strategy 2020, the President’s 10 points in his 21 November 2013 memorandum on Reforming ADB’s Institution-Wide Knowledge Management,⁴ the Planning Directions: Work Program and Budget Framework 2015–2017,⁵ and the first Knowledge Operations Review Meeting (KORM)⁶ all provide fresh impetus and direction for taking a unified “One ADB” approach to sharing knowledge with DMCs and serving as a source of best practices.

3. The proposed technical assistance (TA) will foster an enabling platform for ADB to work as “One ADB” in providing knowledge solutions for its DMCs by creating structures and systems to better link ADB knowledge and operations, as well as staff, with DMC practitioners and with development partners. It will provide the foundation for jointly creating knowledge solutions to development problems in DMCs. The cluster approach is proposed because the three subprojects provide basic components for improved exchange of knowledge solutions with DMCs, creating significant potential synergies. This approach will also support ADB in establishing a sustainable mechanism to support knowledge work for its DMCs, because it potentially allows additional resources to subsequently be mobilized. The TA concept paper was approved on 3 February 2014.⁷

II. ISSUES

4. In general, ADB’s stakeholders see ADB as having a very strong impact on overall development and being an excellent source of knowledge. However, despite knowledge solutions being a driver of change, “only half give good marks for promoting knowledge sharing and best practices.”⁸ A special evaluation study recommended ADB improve its approach to capturing, sharing, and using knowledge.⁹ The Knowledge Management Directions and Action Plan (2013–2015) (KMAP) builds on the findings of the special evaluation study by defining

¹ ADB. 2008. *Strategy 2020: The Long-Term Strategic Framework of the Asian Development Bank, 2008–2020*. Manila.

² ADB. 2014. *Midterm Review of Strategy 2020: Meeting the Challenges of a Transforming Asia and the Pacific*. Manila (para. 117).

³ ADB. 2014. Closing Statement by ADB President Takehiko Nakao at the 47th ADB Annual Meeting. <http://www.adb.org/news/speeches/closing-statement-ADB-president-takehiko-nakao-47th-ADB-annual-meeting>

⁴ ADB. 2013. Memo from President Nakao on Reforming ADB’s Institution-Wide Knowledge Management. Manila.

⁵ ADB. 2014. Memo from President Nakao on Planning Directions: Work Program and Budget Framework 2015–2017. Manila.

⁶ Convened by ADB President Nakao in April 2014.

⁷ The TA first appeared in the business opportunities section of ADB’s website on 21 May 2014.

⁸ ADB. 2012. *ADB Perception Survey*. Manila.

⁹ Independent Evaluation Department. 2012. *Special Evaluation Study: Knowledge Products and Services—Building a Stronger Knowledge Institution*. Manila: ADB.

ADB's goals in this area and providing a plan for transformational actions.¹⁰ The KMAP specifically recognizes the need for strategic and programmatic partnerships with centers of excellence and knowledge hubs, expanded ADB operations for innovation and pilot-testing, greater South–South knowledge sharing, and easier access to data and information, all of which have DMCs as the primary beneficiary. As a result, efforts to be more strategic about knowledge management and sharing across ADB grew significantly in 2013 and 2014.

5. Many DMCs, particularly those who graduated to middle income status, have vast amounts of successful development experience that could be more widely shared. They are also willing to learn from the experiences of other countries. For example, the People's Republic of China, India, and Indonesia each has 40–50 years of experience in supporting South–South cooperation. Other countries, such as Malaysia, Thailand, and Viet Nam, have been increasing their efforts in this area over the recent years. Germany, Japan, and the Republic of Korea are strong supporters of South–South cooperation and triangular cooperation.¹¹ ADB, the Japan International Cooperation Agency, the United Nations Development Programme, and the World Bank Institute are all active supporters of South–South knowledge sharing. ADB's regional cooperation programs and other TA projects have been using South–South knowledge sharing approaches, such as study tours, twinning programs, and expert exchanges, to achieve objectives. The Phnom Penh Plan, the Central Asia Regional Economic Cooperation Institute, and the Regional Knowledge Sharing Initiative (RKSI) provide examples. Knowledge hubs have also been supported. Interregional knowledge sharing activities are critical for capturing good development experiences (e.g., with the Inter-American Development Bank) and are tackling issues common to Latin America and Asia and the Pacific.

6. These experiences, while signifying DMCs' rising expectations of ADB as a regional development agency, also highlight several critical weaknesses of ADB: (i) efforts at the project level are not linked to each other to ensure knowledge flows out of one DMC and into another; (ii) an operational mechanism does not exist to understand and respond to knowledge demand and supply of DMCs across the boundaries of ADB's operational departments; (iii) ADB does not have a platform by which knowledge (including third-party, non-ADB content) held by ADB staff and consultants, DMCs, and development partners can be freely exchanged for the benefit of DMCs; and (iv) no mechanisms exist to capture the use of knowledge by DMCs and the impact of knowledge sharing. Major lessons learned include basing knowledge partnerships on well-articulated demand and having clear design and monitoring frameworks with measureable indicators.¹² Staff developing and implementing knowledge partnerships should follow the recommendations outlined in ADB's Guidelines for Knowledge Partnerships.¹³

7. The KMAP and KORM suggest ADB use its operations cycle to ensure ADB's knowledge solutions are DMC-led (footnotes 6 and 10). The MTR Action Plan¹⁴ directs ADB to appoint country directors of resident missions as "knowledge custodians", authorized to coordinate the design and implementation of country knowledge management plans; create a framework involving flexible procurement rules and financing arrangements to facilitate strategic knowledge partnerships with external institutions, including research and academic institutions and civil

¹⁰ ADB. 2013. *Knowledge Management Directions and Action Plan (2013–2015): Supporting "Finance ++" at the Asian Development Bank*. Manila.

¹¹ The Export-Import Bank of Korea (KEXIM). 2013. *Program Book: Roundtable Conference on Building Effective Knowledge Sharing for Development*. Unpublished.

¹² ADB. 2013. *Technical Assistance Completion Report: Establishment of Regional Knowledge Hubs*. Manila.

¹³ ADB. 2011. *Guidelines for Knowledge Partnerships*. Manila.

¹⁴ ADB. 2014. *Midterm Review of Strategy 2020 Action Plan*. Manila

society organizations and individuals; and develop a knowledge portal. By taking fresh approaches to peer-to-peer sharing, learning, knowledge capture, and problem solving, ADB may be able to work more efficiently with its DMCs to solve problems faster around the region.

III. THE CAPACITY DEVELOPMENT TECHNICAL ASSISTANCE

8. The TA focuses on innovative use of knowledge, technology, and partnerships to connect development practitioners in the common pursuit of solving development problems. First, it will allow ADB to proactively partner with potential centers of excellence (COEs) that have specific research activities that can directly contribute to ADB's work programs in selected countries. Second, it will foster an ADB-wide framework with which ADB can broker and coordinate "One ADB" South-South cooperation objectives and activities as well as complement and build on existing efforts, such as the RKSI. Third, it will provide an online portal that will promote knowledge sharing and collaboration. In summary, the TA will catalyze an enabling platform for DMCs and COEs to be active knowledge partners of ADB, with DMCs targeted as the primary beneficiaries.

A. Impact and Outcome

9. The overall impact of the TA will be DMCs adopting knowledge solutions addressing priority needs in Asia and the Pacific. The expected outcome will be ADB delivering knowledge solutions in line with respective country knowledge plans for the benefit of DMCs.

B. Methodology and Key Activities

10. Knowledge sharing needs to be approached from many angles and target many players. In addition to the traditional central government to central government approach, other important stakeholders—including cities, local governments, communities, academics, researchers, and civil society groups—will be targeted through approaches that are relevant to them, including joint creation of content and sharing of third-party content.

11. The TA comprises three subprojects. Each subproject focuses on a particular aspect of peer-to-peer knowledge exchange that enables development practitioners to learn from each other's experiences, crowd-source solutions,¹⁵ work together to solve problems, and have access to information and solutions in formats that meet their needs. Additional subprojects, or topping up of initial subprojects, may be proposed later, particularly if cofinancing is obtained.¹⁶

12. **Subproject A: Partnerships—Centers of excellence.** ADB's COPs have identified potential COEs that can contribute through their research programs and pilot demonstration activities in areas such as inclusive business, renewable energy, water pollution, and sanitation, as well as research agendas of ADB.¹⁷ The CoPs will consult the DMCs through the country directors of resident missions and in line with the country knowledge plans to initiate institutional

¹⁵ "The practice of obtaining needed services, ideas, or content by soliciting contributions from a large group of people and especially from the online community." Sourced from: www.merriam-webster.com/dictionary

¹⁶ Based on the feedback from DMCs and lessons learned from the TA, proposals for scaling up will be prepared for each subproject and for which support from development partners and philanthropic donors (both corporate social responsibility and foundations) will be sought with the help of ADB's Office of Cofinancing Operations.

¹⁷ A good example is the collaboration with COEs in South Asia to introduce non-sewer solutions in urban areas in ADB's work, supported by Sanitation Financing Partnership Trust Fund, a partnership of the Bill and Melinda Gates Foundation and ADB.

partnerships with selected COEs and knowledge hubs. The COPs will develop and support work programs with the selected COEs. Partner COEs can also be sources of external expertise to support ADB's COPs and operations with DMCs. The subproject will also implement a few pilot innovative projects in partnership with other ongoing TAs¹⁸. ADB will share the outputs with DMCs as knowledge solutions, and publicly recognize the COEs that provide scalable and replicable innovative ideas¹⁹.

13. Subproject B: South–South knowledge sharing program. The subproject will establish the systems and provide DMCs with support for South-South knowledge sharing activities in coordination with regional departments. Countries that can provide knowledge and experience in these areas will be identified by ADB's regional departments and matched with target DMCs for South–South learning activities, with the RKSI serving as an example. The most strategic kinds of knowledge sharing will receive priority (e.g., peer consultations on sector policy development or development plan creation) with other examples being study tours, knowledge exhibitions, and twinning arrangements.²⁰ Exchanges and their impact will be captured and shared in various accessible formats on the knowledge portal in a repository of good practices and lessons learned. Sector-based forums, meetings, and workshops could be considered on a limited basis. Large, one-off summits and conferences will not be supported without follow-up dialogue and monitoring.

14. Subproject C: Knowledge portal. The subproject's objective is to become the public interface for supporting ADB's overall peer-to-peer knowledge exchange work and solutions to development challenges in DMCs. Separate from yet complementary to ADB's public website, the portal will be structured around sector and thematic communities of practice (CoPs) that function as knowledge hubs for sharing ADB and non-ADB (third-party²¹) content and for collaborating, including through social media channels and crowd sourcing. DMCs will be the primary beneficiaries. The subproject will be the gateway to online tools, services and products, such as case studies; technical blogs; ask-the-expert webinars, web chats, and online chats; toolkits; how-to guides; e-learning courses; and TOR repositories. OIST will manage the development of the systems and platforms as specified in the MTR Action Plan and Information Systems and Technology Strategy III. DER will ensure the subproject will complement, yet be distinctive from ADB.org. The tools and services may be developed by OIST or be established through social media platforms, such as Linked-In. DER and OIST will provide advice on these. An editorial team, located in RSDD and in coordination with the CoPs, will curate technical content and turn it into digestible, relevant formats. The team will also set up content partnerships with non-ADB sources in DMCs and development partners. Original ADB "signature" areas, such as virtual study tours, are being created through other projects. Practitioners in DMCs will be encouraged to create their own content as well as to crowdsource. To build and maintain communities, be developed quickly, stay on the technological forefront, and prevent "reinventing the wheel", the portal is envisioned to seamlessly interface with well-established social media sites, such as Facebook, Scribd, Linked-In, and others as they evolve.

¹⁸ The project team will partner with ongoing RSDD TAs, such as the *Technical Assistance for the Establishment of a Market Place for Transfer of Low Carbon Technologies to Asia and Pacific* (2009) and the *Cluster Technical Assistance Establishing a Pilot Center to Facilitate Climate Technology Investments in Asia and the Pacific* (2012).

¹⁹ Further support to COEs will be provided in line with the MTR Action Plan's proposal to set up an innovation fund to provide seed monies for supporting new and innovative projects selected through a competitive process.

²⁰ World Bank and the South–South Opportunity. 2012. *The Art of Knowledge Exchange: A Results-focused Planning Guide for Development Practitioners*. http://wbi.worldbank.org/wbi/Data/wbi/wbicms/files/drupal-acquia/wbi/The_Art_of_Knowledge_Exchange_revised.pdf.

²¹ In addition to links, actual third-party content, such as event presentations, metadata of publications, and documents from partner organizations, will be housed in the platform's database.

C. Cost and Financing

15. The TA is estimated to cost \$1,500,000, which will be financed on a grant basis by ADB's Technical Assistance Special Fund (TASF-V). The cost estimates and financing plan are in Appendix 2. Cofinancing will be explored to support additional projects.

D. Implementation Arrangements

16. ADB will implement the TA through the Regional and Sustainable Development Department (RSDD). Upon TA approval, the subproject proposals will be submitted for approval of the director general of RSDD, in accordance with ADB guidelines on cluster TA processing.²³ Subprojects will be designed and developed in close collaboration with ADB regional departments (including resident missions), COPs (thought leadership and guidance on content), Department of External Relations (web sites and dissemination) and the Office of Information Systems and Technology (IT platforms and systems). A steering committee comprising heads of DER, ERD, OIST, RSDD, and two regional departments will oversee the TA with a united "One ADB" approach, giving implementation advice and monitoring progress.

17. The intention is for these value-adding structures, systems, and activities (e.g., systematic documentation) to be integrated into ADB core operations and COP work to better support DMCs and eventually be financed through core budget (through potential cost savings from amalgamating ADB websites developed through regional TA projects, currently all independently administered), through new TA subprojects with cofinancing, and/or with ADB staff running them. The portal will help reduce costs for setting up and maintaining knowledge hubs, and enable teams to concentrate on content, not portal building and technical maintenance. Subproject C will be the digital basis for subprojects A and B, and planned or existing activities by ADB's regional departments, RSDD, and COPs. No expansion of human resources is anticipated, and no additional budget will be requested. The TA will explore additional means to generate cost savings from other sources to sustain the work.

18. The TA is expected to be implemented from September 2014 to August 2016.²⁴ The TA will require 47 person-months of international consulting services and 80 person-months of national consulting services. Consultants will be engaged by ADB in accordance with its Guidelines on the Use of Consultants (2013, as amended from time to time) through a combination of recruitment approaches involving both firms (e.g., academic institutions) and individuals, as appropriate. As this is a cluster TA project, consultant selection will apply different methods depending on the size and nature of the contracts. The outline terms of reference for consultants are in Appendix 3. Disbursements under the TA will be carried out in accordance with ADB's *Technical Assistance Disbursement Handbook* (2010, as amended from time to time).

IV. THE PRESIDENT'S DECISION

19. The President, acting under the authority delegated by the Board, has approved the provision of technical assistance not exceeding the equivalent of \$1,500,000 on a grant basis for Knowledge for Solutions, and hereby reports this action to the Board.

²³ ADB. 2011. Technical Assistance. *Operations Manual*. OM D12/BP. Manila.

²⁴ TA activities will not start in a DMC unless a no-objection letter has been obtained from the government.

DESIGN AND MONITORING FRAMEWORK

Design Summary	Performance Targets and Indicators with Baselines ^a	Data Sources and Reporting Mechanisms	Assumptions and Risks
<p>Impact The overall impact of the TA will be DMCs adopting knowledge solutions addressing priority needs in Asia and the Pacific.</p>	<p>Number of developing member country users reporting problems addressed linked to technical assistance (TA)-based knowledge solution applications Baseline: not available 2016: 5</p>	<p>Documentation of how the subproject outputs are used to solve development problems, user satisfaction surveys, TA completion reports</p>	<p>Assumptions Cannot adequately document within the TA time frame</p> <p>Supportive infrastructure, institutional capacities, and national policies to allow the use, and scaled-up application, of, the knowledge solution</p>
<p>Outcome The expected outcome will be ADB delivering knowledge solutions in line with respective country knowledge plans.</p>	<p>Number of Asian Development Bank (ADB) and other projects incorporating knowledge solutions generated by the TA subprojects Baseline: not available 2016: 2 projects</p> <p>Number of productive and sustained partnerships emerging from the knowledge exchanges Baseline: not available 2016: 5</p>	<p>TA progress and completion reports, ADB annual reports, ADB pipeline</p> <p>DMC reports</p> <p>Partnership agreements, survey results</p>	<p>Assumptions Documentation can be adequately done within TA time frame</p> <p>Capacity and resources are available to adopt solution</p> <p>Local policies support adoption of solution</p> <p>Risk Political priorities change</p>
<p>Outputs Subproject A: Partnerships—Centers of excellence</p> <p>1. Centers of excellence (COEs) actively providing ideas (knowledge solutions) to solve problems</p>	<p>Number of COEs providing ideas to ADB's research agenda and pilot demonstration activities Baseline: not available 2016: 8</p>	<p>Contracts with funded entities</p> <p>Actual outputs, subproject completion reports</p> <p>Financial reports, online updates</p>	<p>Assumptions Full ownership and participation by developing member countries and centers of excellence</p> <p>Partners agree to share their knowledge and profiles</p>

<p>Subproject B: South–South knowledge-sharing program</p> <p>1. South–South knowledge sharing facilitated</p> <p>2. Documentation of solutions shared via dedicated knowledge portal</p>	<p>Number of South–South knowledge activities brokered Baseline: not available 2016: 5</p> <p>Percentage of exchanges resulting in follow-through activities, e.g., just-in-time exchanges, twinning Baseline: not available 2016: 25%</p> <p>Percentage of client satisfaction over follow- through initiatives Baseline: not available 2016: 50%</p> <p>Percentage increase in number of unique visits and visitors Baseline: not available 2016: 5% per annum</p>	<p>Workshop and/or meeting proceedings, back-to-office reports, TA progress reports</p> <p>TA progress reports, memoranda of understanding, letters of agreement, partnership agreements.</p> <p>Pre- and post-event surveys</p> <p>Web analysis statistics (such as Google Analytics)</p>	<p>Risk Level of interest in engaging with and accessibility of South– South potential collaborators is not high</p>
<p>Subproject C: Knowledge portal</p> <p>1. Operational knowledge-sharing portal established and maintained, with target users engaging with ADB and peers</p>	<p>Percentage increase in number of unique visits and visitors Baseline: not available 2016: 5% per annum</p> <p>Percentage increase in the volume of the portal's (i) content, and (ii) contributors Baseline: not available 2016: 5%, 5% per annum</p> <p>Number of communities engaging in peer-to-peer exchanges Baseline: not available 2016: 4</p> <p>User satisfaction rating Baseline: not available 2016: 50%</p>	<p>Web analysis statistics (such as Google Analytics)</p> <p>User satisfaction survey</p>	<p>Assumptions Solutions and tools do not need to be developed using proprietary software</p> <p>Target audiences agree with, contribute to, and echo or share the knowledge available at the portal</p>

<p>Activities with Milestones^d</p> <p>1. Subproject A: Partnerships—Centers of excellence</p> <p>1.1 Conduct inception exercise to identify specific problem areas, establish protocols for partnership with COEs and, knowledge hubs; set up and manage system for screening proposals (months 1–4)</p> <p>1.2 Partner COEs and knowledge hubs selected [months 6-18]</p> <p>1.3 COPs develop work programs with selected COEs and knowledge knowledge hubs [add months]</p> <p>1.4 Implement work programs [months 12-24]</p>	<p>ADB: \$1,500,000</p>
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<p>2. Subproject B: South–South knowledge sharing program</p> <p>2.1 Conduct inception exercise to identify specific country demand for new information or knowledge of DMCs and develop a long list of potential exchanges (months 1–3)</p> <p>2.2 Consult with knowledge providers, COEs, and relevant staff and verify their commitment for each request (month 4)</p> <p>2.3 Develop work plan for knowledge solution activities to be conducted under the TA program and verify commitment of stakeholders, including DMCs, ADB, knowledge providers, COEs to selected activities (months 5–6)</p> <p>2.4 Facilitate communication between knowledge providers and recipients to define problem; conduct small-scale workshops, study tours, and field visits; document all exchanges, solutions, and impact and put on knowledge portal (months 5–23)</p> <p>3. Subproject C: Knowledge portal</p> <p>3.1 Conduct survey with targeted users (months 1–5)</p> <p>3.2 Audit ADB content (including review of ADB taxonomy and creation of confidentiality ranking system for documents) (months 1–6)</p> <p>3.3 Develop knowledge sharing policies and protocols: third-party content, content formats, translation, metadata, approval system (months 1–6)</p> <p>3.4 Based on the survey findings, fine-tune concept, develop information architecture and web design (months 6–7)</p> <p>3.5 Build site and do usability testing (months 8–11)</p> <p>3.6 Launch knowledge portal pilot (month 12)</p> <p>3.7 Add 10 more communities (months 13–23)</p> <p>4. General</p> <p>4.1 Work to integrate support for these systems into ADB core budget and staff work plans as part of knowledge work (months 12–24)</p> <p>4.2 Analyze results and report on progress</p>	
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^a In accordance with the Operations Manual, subprojects and their activities will be authorized at head of department level subsequent to cluster technical assistance approval. ADB. 2011. Technical Assistance. *Operations Manual*. OM D12/BP. Manila.

Source: Asian Development Bank

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COST ESTIMATES AND FINANCING PLAN
(\$'000)

Item	A	B	C	Total Amount
Asian Development Bank^a				
1. Consultants				
a. Remuneration and per diem				
i. International consultants	430.0 ^e		400.0	830.0
ii. National consultants	25.0	25.0	130.0	180.0
b. International and local travel	5.0	5.0		10.0
2. Training, seminars, conferences ^b	50.0	360.0		410.0
3. Surveys ^c	5.0			5.0
4. Miscellaneous administration and support costs ^d	10.0	15.0	20.0	45.0
5. Contingencies	5.0	5.0	10.0	20.0
Total	530.0	410.0	560.0	1,500.0

Note: The technical assistance is estimated to cost \$1,500,000, of which contributions from the Asian Development Bank (ADB) are presented in the table above.

^a Financed by ADB's Technical Assistance Special Fund (TASF-V).

^b This includes modest funding for South–South knowledge exchanges and travel costs of ADB staff acting as resource persons.

^c This includes a survey for assessing demand and needs for ADB knowledge.

^d This includes services to outsource the hosting of the knowledge portal.

^e This includes initial support for selected COEs.

Source: Asian Development Bank estimates.

OUTLINE TERMS OF REFERENCE FOR CONSULTANTS

1. A team of staff will oversee the overall technical assistance (TA) as well as lead the three subprojects to ensure that Asian Development Bank (ADB) staff members in ADB's Regional and Sustainable Development Department (RSDD), in collaboration with staff in regional departments, internalize the knowledge from this TA instead of outsourcing all the work to consultants. Several consultancy inputs will, however, be needed to supplement staff inputs for building a critical mass of content in appropriate formats and doing survey and technical tasks associated with building the knowledge portal. This implies using international and national consultants (individuals and firms) in supporting roles while the structures and systems are being developed. For the short-term technical activities leading to the physical design and development of the knowledge portal that are best packaged and managed independently, digital agencies may be selected. The TA will require the services of experts in logistical and event coordination, the internet, communications, marketing, and project management. Detailed terms of reference, the precise extent of consultancy inputs, and consultant selection methods will be defined during subproject preparation, in accordance with ADB procedures for cluster TA. Individual consultants will be recruited through the consultant management system, following ADB's Operations Services and Financial Management Department guidelines. Firms will be recruited through quality- and cost-based selection. The centers of excellence (COEs) for subproject A will be engaged through the institutional development consultant modality.

Subproject A: Partnerships—Centers of Excellence

2. **Center of Excellence**¹ (international, IDC modality, intermittent over 24 months). Selected Centers of Excellence will be engaged through the IDC modality². They will each nominate an expert to make a presentation at the ADB annual event. The expert will develop the details of the presentation in close consultation with the RSDD staff, concerned focal persons in the COPs and regional departments. The COEs whose presentations are finally selected as innovative, replicable, and scalable under ADB projects, will develop the ideas further into a proposal that can be funded by ADB, in close consultation with the concerned persons in CoPs and regional departments.

3. **COE coordinator** (individual, national, 18 person-months, intermittent over 24 months). The coordinator will assist the ADB project team in

- (i) communicating and logistical coordination for activities associated with COEs within and outside Asia and the Pacific;
- (ii) communicating with entrepreneurs and financiers who work on innovations;
- (iii) and planning and organizing the annual events that showcase innovative ideas for addressing development problems.

Subproject B: South–South Knowledge Sharing Program

4. **South–South knowledge exchange logistical coordinator** (individual, national, 18 person-months, intermittent over 24 months). The coordinator will

¹ A COE (i) is not exclusively funded by ADB, i.e., a consultant mode; (ii) it has a track record or academic and/or scholarly reputation as a national and/or regional COE in policy development, research, innovation, education, and executive training; and (iii) operates with support from government (think tank) or other types of long-term funding.

² RSDD will work closely with ADB's Operations Services and Financial Management Department on the terms of reference for the IDC modality (in line with ADB policies and the proposed changes under the MTR Strategy 2020 Action Plan), to recruit each COE as "ADB knowledge partner".

- (i) assist with logistical coordination for knowledge exchanges,
- (ii) ensure all materials are collected for documentation of exchanges,
- (iii) assist in preparing materials about exchanges for uploading,
- (iv) conduct survey of impact of exchanges, and
- (v) assist in preparing the final report to record lessons learned.

Subproject C: Knowledge Portal

5. **Information architect** (international, individual, 3 person-months intermittent over 6 months). The architect will

- (i) based on the top task findings, refine the portal's concept and develop a prototype to be used by the developers and by the designer to create the design templates;
- (ii) define major content and page types, e.g., events, publications, blogs;
- (iii) create information architecture—top level and second- and third-level navigation;
- (iv) define portal taxonomy and metadata requirements;
- (v) define search function requirements;
- (vi) create clickable paper prototype; and
- (vii) conduct usability test of prototype in coordination with the digital project manager.

6. **Digital project manager** (individual, international, 22 person-months, intermittent over 24 months). The manager will

- (i) lead the creative concept and technical development of ADB's new online knowledge portal by working closely with the selected consultant management system and site administrator;
- (ii) facilitate the definition, idea generation, and delivery of web products that link to marketing strategies and integrate digital approaches and creative design;
- (iii) produce work plans and coordinate the efforts of the creative team, including digital art directors, creative and media managers, web traffic and search specialists, development teams, and technical staff;
- (iv) create and enforce project schedules with input from team as needed, ensuring deadlines and launch dates are met;
- (v) utilize project management and systems development best practices throughout the development and production processes;
- (vi) ensure the integrated elements of digital projects come together on time and meet stakeholder expectations for data integrity and product quality;
- (vii) develop innovative concepts and online marketing strategies and coordinate the internal design, development, and production efforts to help the portal achieve its digital marketing and knowledge outreach goals;
- (viii) assist with the upload of content using the web content management system (Drupal) or basic HTML;
- (ix) make recommendation for improvements to existing information architectures and content workflows;
- (x) work with developers and information technology staff to assess any technical challenges (troubleshooting) in displaying the content;
- (xi) keep up to date with best practices in writing for the web, social media trends, web usability and design, and business and industry trends;
- (xii) prepare quarterly corporate reports on portal statistics, presentations, technical documentation, etc.;
- (xiii) support the maintenance of a customer relationship management system and

- ensure it meets internal requirements and adheres to current policies; define and segment distribution groups for optimal targeting of RSSD marketing and dissemination initiatives; manage database of targeted subscribers, including tracking of marketing campaigns and analysis of reader/user data;
- (xiv) identify and evaluate internal and external events, partnerships, and synergies to further enhance distribution of ADB knowledge products, as well as contact and marketing lists; and
- (xv) work with editors to write, produce, and distribute collateral materials for ADB's major knowledge products and services, including e-fliers, e-newsletters, e-mail blasts, blogs, leaflets, knowledge sharing sites, and social networking sites.

7. Content management system development and site administrator (individual, national, 18 person-months). The administrator will

- (i) develop the site's content management system, accommodating a mobile version;
- (ii) manage, edit, update, and maintain the site (this includes all development work: CSS and theming, Drupal, jQuery, etc.);
- (iii) update and improve site navigation and information architecture as it evolves;
- (iv) maintain and develop the functional features of the knowledge portal, particularly in the context of the Drupal-based ADB.org main website;
- (v) install, upgrade, and modify modules on the portal;
- (vi) ensure safe deployment solutions are in place;
- (vii) handle domain name issues, registrations, set up, email issues, and overall maintenance;
- (viii) manage service providers and vendors required to support infrastructure, such as data storage, backup, and recovery; coordinate with ADB staff as required;
- (ix) use web analytics to inform plans and development priorities for the site;
- (x) assist in the execution of new online initiatives incorporating audio, video, and other new media types, e.g., rich site summary feeds, podcasts, and other delivery mechanisms, including to mobile devices;
- (xi) maintain and improve search engine optimization and search engine marketing for all web properties;
- (xii) monitor web traffic and competitor sites for SEO improvements; and
- (xiii) track web visitor behavior and modify knowledge portal design and content to optimize lead generation.

8. Web designer (individual, national, 2 person-months). In line with the ADB.org design style guide, the designer will develop mobile-responsive layout, graphics, templates, etc.

9. Senior writer and editor and online content manager (individual, international, 22 person-months). The consultant will

- (i) provide "the voice" of the site and ensure that the content has the same voice throughout, is stimulating, and of high editorial quality;
- (ii) regularly blog on development topics;
- (iii) plan, establish, and build—in quantity and quality—the online community for ADB knowledge products and thought leadership using blogs, job boards, links to social media sites, mobile applications, and any other device or technology to enhance the web experience for users;
- (iv) interview content owners and other stakeholders to document their vision for their content area, as well as analyze existing content management processes;

- (v) take the lead in organizing and presenting content in a way that benefits site users, including finding external sites for ADB thought leaders;
- (vi) conduct content analysis and audits;
- (vii) conduct content modeling sessions and document content types;
- (viii) work with staff in managing content web pages, posting content, and documents;
- (ix) ensure adherence to content taxonomies and metadata strategies;
- (x) write and post content online and through social media at regular intervals;
- (xi) contribute to and update social sites like Facebook and Twitter;
- (xii) help develop and document procedures to manage web content;
- (xiii) assist with the upload of content using web content management system (Drupal) or basic HTML;
- (xiv) moderate content as it is contributed to the knowledge portal by external sources;
- (xv) monitor social media outlets and respond to topics related to ADB's core knowledge areas;
- (xvi) keep up to date with best practices in writing for the web, social media trends, web usability, web design, and business and industry trends;
- (xvii) coordinate content creation and publishing of newsletters (internal or external); and
- (xviii) prepare internal and external communications including announcements and press releases, as needed.

10. **Web editor** (two, individual, national, 12 person-months each, intermittent over 24 months). The editors will

- (i) assist in building the online community for RSDD knowledge products and thought leadership using blogs, job boards, links to social media sites, mobile applications, and any other device or technology to enhance the web experience for users;
- (ii) manage content calendar and assist online content manager to create content;
- (iii) write materials;
- (iv) ensure that the web content has the same voice throughout;
- (v) take the lead in organizing and presenting content in a way that benefits site users;
- (vi) assist in conducting content analysis and audits;
- (vii) assist in conducting content modeling sessions and document content types;
- (viii) work with staff in managing content web pages, posting content, and managing documents;
- (ix) ensure adherence to content taxonomies and metadata strategies;
- (x) write and post content online and through social media at regular intervals;
- (xi) contribute to and update the social media sites;
- (xii) help develop and document procedures to manage web content;
- (xiii) assist with the upload of content using the web content management system (Drupal) or basic HTML;
- (xiv) moderate content as it is contributed to the knowledge portal by external sources in coordination with the online content manager;
- (xv) monitor social media outlets and respond to topics related to ADB's core knowledge areas; help find external sites for ADB content;
- (xvi) keep up to date with best practices in writing for the web, social media trends, web usability, web design, and business and industry trends;
- (xvii) coordinate content creation and publishing of newsletters (internal or external); and
- (xviii) assist in preparing internal and external communications including announcements, press releases, quarterly corporate reports, presentations, technical documentation, etc., as needed.