

Making a knowledge plan

A MERLIN / DEVELOPMENT LEARNING LAB PRODUCT

Edited by

Ottar Mæstad (DLL/CMI) and Ole Morten Stavland (MERLiN/Digni)

April 2025

Contents

Background and purpose	2
Preparation	3
Knowledge for change: A ToC approach to knowledge management	3
Scope of the knowledge plan	4
Timing is key	4
Steps towards a knowledge plan	6
1. Identify and prioritize knowledge needs	6
Knowledge needs for aid organisations	6
Approaches to identifying knowledge needs	6
2. Decide how to fill important knowledge gaps.	9
Potential knowledge investments. A menu.	9
Investing in knowledge of high quality	15
3. Plan for knowledge uptake and use	16
Organizational level: Preconditions for knowledge uptake and use	16
Knowledge product level: Targeted action to make knowledge understood and trusted.	17
4. Plan how to implement	19
Overall responsibility	19
Who will do what?	19
Detailed implementation planning	20
Capacity building for knowledge management	20
5. Allocate budget and resources	20
How to balance knowledge investments vs. programme investments	20
Practical hints	22
6. Plan for evaluation and learning	22
What a knowledge plan may look like	23
Items to be included	23
Structure of a knowledge plan	23
Acknowledgements	27

Background and purpose

Background: Good knowledge management is key to the quality and impact of development programmes. One of the elements of good knowledge management is to develop knowledge plans that describe what knowledge will be acquired and made available, for what purpose, and how this will be done.

Knowledge plans are currently requested and evaluated by Norad as part of grant application processes. However, there is little guidance on what to include in knowledge plans and how to go about developing such plans.

Against this background, the MERLiN (monitoring, evaluation, research and learning in Norway) network initiated two workshops in collaboration with the Development Learning Lab to share ideas and jointly develop a structured approach to developing knowledge plans. This document is produced based on discussions in these workshops.

Purpose: The purpose of the document is to provide practical assistance in the process of developing a knowledge plan. It should not be seen as a recipe but rather as a collection of ideas that can be used as a source of inspiration.

Content: A basic idea is that knowledge investments should be viewed as an integral part of development programmes, implemented with the aim of enhancing impacts for rights-holders.

The document discusses the essential steps in developing a knowledge plan and provides examples of what a knowledge plan might look like in practice.

Best practice in this area is expected to develop rapidly in the years to come, and we therefore encourage continued sharing of experiences and lessons learnt across organisations.

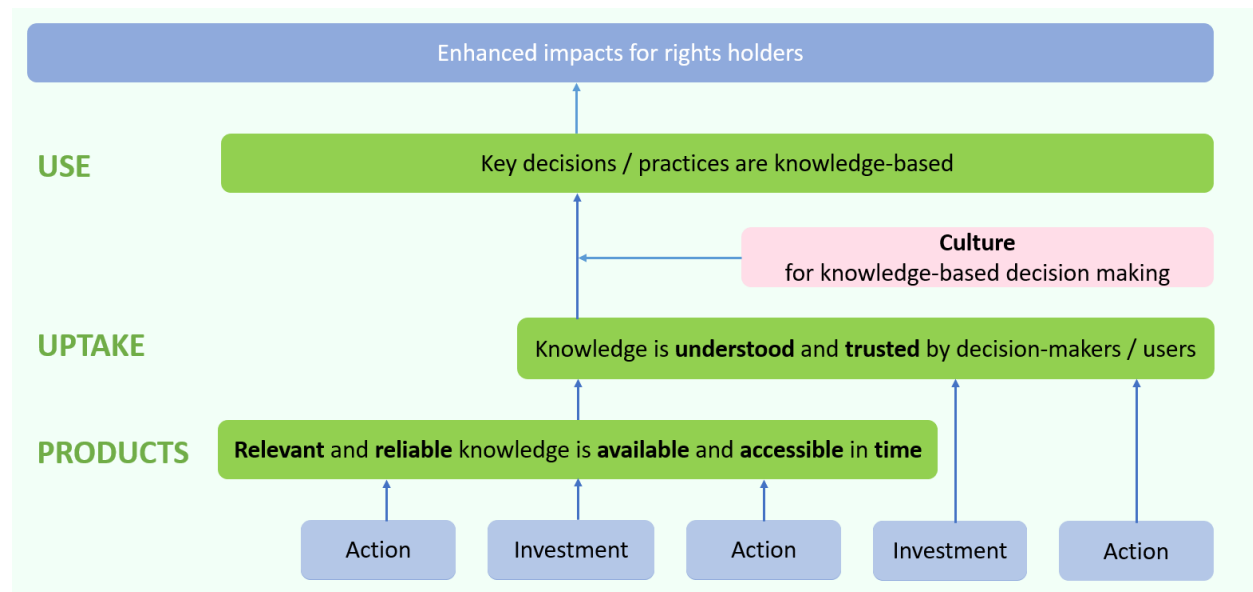
Preparation

This section highlights issues that should be considered in preparing the process of developing a knowledge plan.

Knowledge for change: A ToC approach to knowledge management

A basic idea underlying this document is that knowledge investments and use are important for programme impact. Knowledge investments should therefore be treated like any other component of the programme. We recommend developing a Theory of Change (ToC) for knowledge investments, even though this is not a donor requirement.

The figure below outlines a general ToC for knowledge investments. This can be a stand-alone ToC, or it can be integrated as part of the overall programme's ToC.



Three elements need to be in place for knowledge investments / activities to enhance the impacts for rightsholders:

- 1) Relevant and reliable knowledge needs to be available and accessible for decision-makers / users at the right time
- 2) Knowledge needs to be understood and trusted by decision-makers / users.
- 3) A culture for knowledge-based decision making needs to be in place.

In the figure, a culture (or practice/habit) for knowledge-based decision making is presented as an assumption. Organisations where such a culture does not exist, needs to take steps to develop one (e.g., through leadership, procedures, incentives). Such actions may or may not be part of a knowledge plan.

Scope of the knowledge plan

Knowledge plans may be developed for a whole organisation, for a programme (with one or several thematic areas), or for a single project.

This document has not been developed with a particular scope in mind. Readers are encouraged to pick and choose whichever elements that may be found relevant.

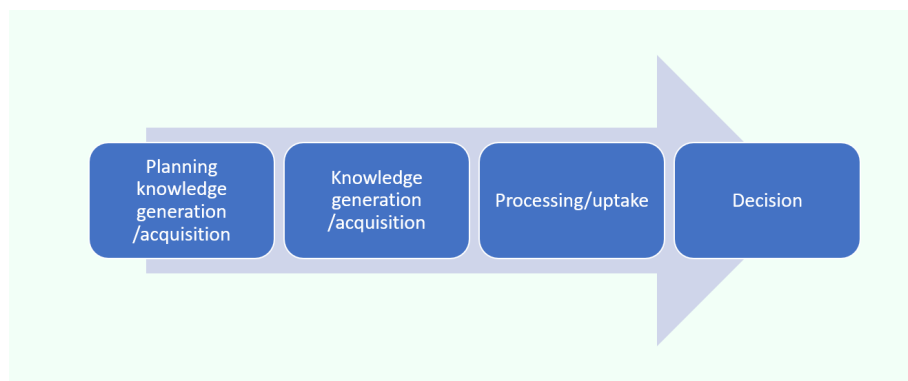
That said, all organisations need to decide what kind of knowledge work will take place at each level of the organisations – project level, thematic level, programme level, and overall organisational level. A balance must also be struck between multi-year, strategic plans that define main priorities and shorter-term implementation plans.

Organisations that work in many thematic areas and with large variation in how projects are implemented, are naturally forced to have a stronger project focus of their knowledge work than organisations that have more coherent thematic approach and less variation in implementation modalities.

Even if not all the donors of an organisation may request a knowledge plan, we encourage developing knowledge plans with the whole organisation in mind. Knowledge plans should be designed in a way that makes it useful for the organisation, rather than as an exercise in compliance. When submitting knowledge plans to a specific donor, it can be specified which elements of the overall knowledge plan that will be funded by that donor.

Timing is key

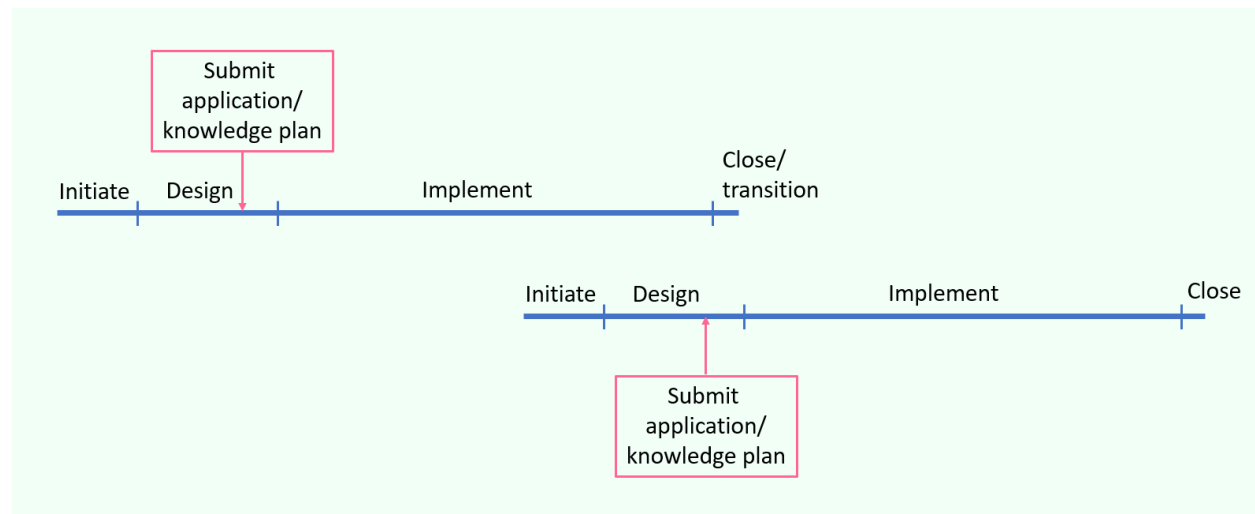
For knowledge to influence key decisions, it must be available beforehand. We therefore recommend mapping out when key decisions are made and allocating sufficient time for planning, knowledge generation, and uptake in advance. (see figure below).



Knowledge needs for a particular project may arise well ahead of the time when a knowledge plan is submitted and funded (see figure below).

The figure illustrates the steps in the project cycle, including the typical timing of submission of a project proposal and knowledge plan. Both the initiation and design phases of the project require significant knowledge inputs, which will not be provided by the knowledge plan that is financed at a later stage.

One way around this problem is to develop knowledge plans with a longer time perspective than a single project and include the knowledge needs for the initiation and design of future project cycles.



The project cycle perspective may be a useful one for a more detailed knowledge planning.

The next section outlines key steps in the development of a knowledge plan. These steps are reflected in the questions in the left column in the table below. Asking these questions in relation to each step in the project cycle may be one way to structure the knowledge planning process.

	Initiate	Design	Implement	Close/ transition
What do we need to know?				
What are the significant knowledge gaps?				
What will we do to address knowledge gaps and ensure knowledge uptake?				
What are necessary resources and conditions to achieve this? What is good timing?				
What are challenges / risk to our knowledge work? Actions needed?				

Steps towards a knowledge plan

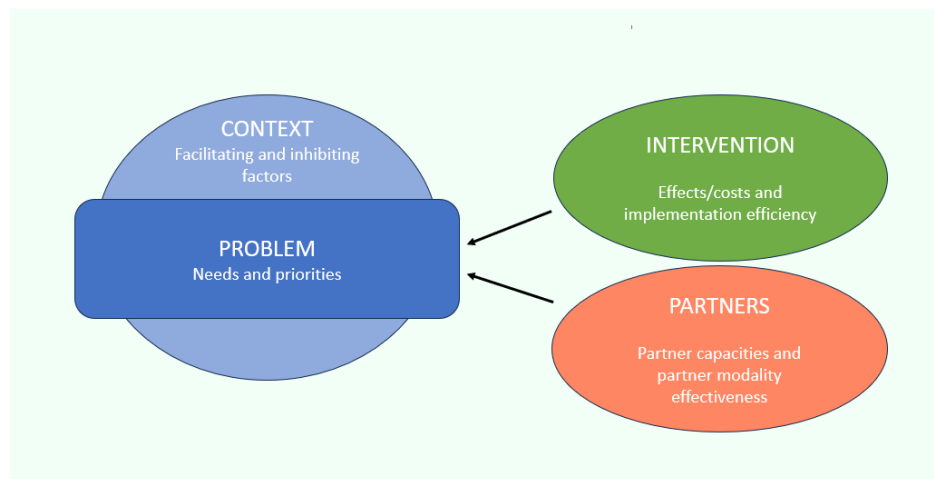
1. Identify and prioritize knowledge needs

Knowledge will always be imperfect. A knowledge plan should prioritise to fill the most critical knowledge needs. A set of approaches to this task is outlined below.

Knowledge needs for aid organisations

Before and during the process of identifying knowledge needs it may be useful to step back and remind oneself of the broad knowledge areas that any aid organisation must grapple with.

Key knowledge needs of aid organisations fall within the domains illustrated in the figure below.

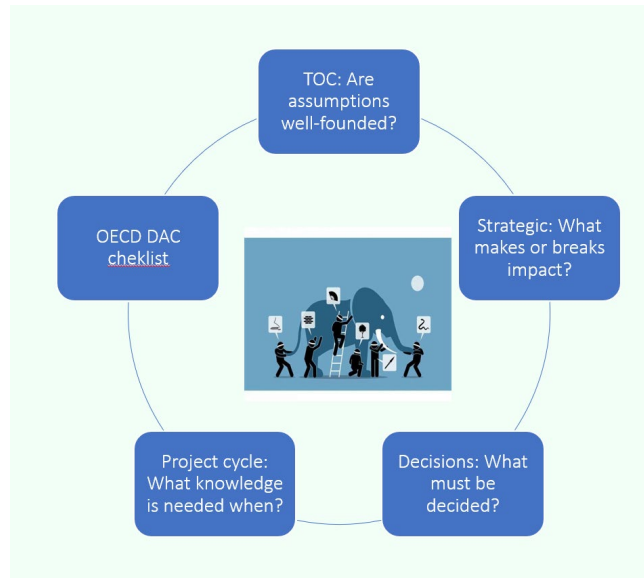


At the core are the **needs and priorities** of the rights-holders that the organisation is serving. To understand how to assist, the organisation needs knowledge about the **context**, the (cost)-effectiveness of alternative **interventions**, and how **partners** can be supported to take a lead this work.

Approaches to identifying knowledge needs

Identifying and prioritising knowledge needs may seem overwhelming, as there is often much that remains unknown.

This section suggests five complementary approaches that bring some structure to the task, summarised in the figure below. It may be useful to combine several of the approaches. These approaches may be used either at the head-office level or at country or project levels.



A. ToC approach: What are the knowledge gaps in the ToC of the programme?

This approach asks where the knowledge base of the programme ToC is weak.

The ToC is built around a set of assumptions, each of which should be supported by knowledge. Some examples of assumptions are:

- **Causal and behavioural assumptions:** Assumption about how specific actions/interventions will lead to desired outcomes (“If this is done..., then...”), including how target groups will respond to the intervention.
- **Contextual assumptions:** Assumptions about conditions external to the project that are necessary for its success (politics, stability, economy, environment, etc.).
- **Implementation assumptions:** Assumptions about resources, capacities, and stakeholder commitment that are critical for implementing the interventions as planned (e.g., are key stakeholders willing to contribute? Will government agencies collaborate?).

Assessing the knowledge base for each of the assumptions involved may help identify important knowledge gaps.

B. Strategic approach: What is most critical for having impact?

Some elements of the ToC are typically more important than others for having impact.

The strategic approach asks which parts of the project/programme that is most critical for its impact and prioritises knowledge needs in that area over knowledge needs that are less important.

One may for instance ask if any of the assumptions underlying the ToC are “killer assumptions” in the sense that if they are not true, the project is very unlikely to succeed.

Approaches A and B are clearly complementary. [Here](#) is a tool that may assist in doing A+B in a systematic way.

C: Project cycle approach

This approach asks which knowledge needs the project will face at each stage of the project cycle, and even into the next cycle of the project.

- Initiation
- Design
- Implementation
- Close / transition to next cycle

This approach facilitates taking the time aspect into account in the planning.

D: Decision-making approach: Identify knowledge needs with reference to key decisions

This approach focuses on the knowledge needs for key decisions. These decisions can be:

- Decisions at the project level. In this case, the decision-making approach resembles the project cycle approach.
- Decisions beyond the project level: Strategic decisions about how the organisations' work should evolve over time.

E: The OECD DAC criteria as a knowledge checklist.

The [OECD DAC criteria for evaluation](#) may also serve to identify important knowledge gaps. The criteria bring attention to the following aspects of the project / programme:

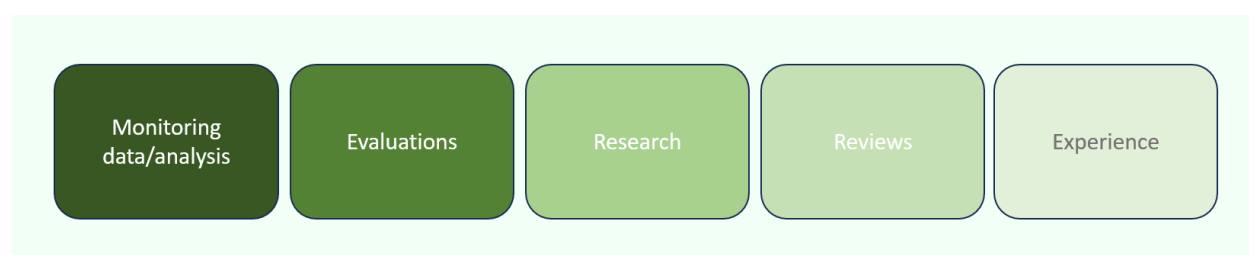
- Relevance: is the intervention doing the right things?
- Coherence: how well does the intervention fit?
- Effectiveness: is the intervention achieving its objectives?
- Efficiency: how well are resources being used?
- Impact: what difference does the intervention make?
- Sustainability: will the benefits last?

2. Decide how to fill important knowledge gaps.

Potential knowledge investments. A menu.

This section presents a menu of potential knowledge investments – including both generation of new knowledge and systematisation/review of existing knowledge. It is organised around the main knowledge domains outlined under step 1 above. Within each knowledge domain, it presents a set of relevant knowledge questions and suggestions of knowledge sources / methods that may be used to answer each question.

Potential knowledge sources can be grouped into the categories illustrated below – cognisant of the fact that there may be some overlap between the categories. For instance, monitoring data can serve an important role in evaluation and research, provided it is of sufficient quality.



Each source has its strength and weakness. It is important to understand which sources are appropriate and may provide reliable knowledge in each case. (Note: Experience here refers to the experience within aid organisation and among its partners).

Problem and context

Examples of questions	Examples of knowledge investments	Comments
What are the needs / rights violations? What is the problem? Where? For whom? How are they affected?	Research/monitoring: <ul style="list-style-type: none">- Needs assessments (surveys, key informant interviews) Research using secondary data: <ul style="list-style-type: none">- Official statistics- Demographic and Health Surveys.- Living Standard Measurement Surveys Reviews: <ul style="list-style-type: none">- Reports based on any of the above Experience:	When using secondary data, assess how well the data represent the specific area you (plan to) work in. This knowledge may be important for advocacy, as well as for intervention design.

	<ul style="list-style-type: none"> - Observed needs and gaps. 	
<p>What is causing development / humanitarian challenges?</p> <p>What are the barriers and opportunities for change?</p>	<p>Reviews:</p> <ul style="list-style-type: none"> - Research on causes of development challenge. <p>Research:</p> <ul style="list-style-type: none"> - Study of local perceptions. - Study of correlations and causal patterns. <p>Experience:</p> <ul style="list-style-type: none"> - Perceptions of causes and barriers for change. 	<p>A possible strategy may be to start with reviews of research and then cross check with local knowledge and experience. If these do not align, deeper studies at the local level may be appropriate.</p>
<p>What are the contextual factors that may facilitate and impede solutions?</p> <p>Example: Who are the relevant stakeholders and what are their interests?</p>	<p>Research:</p> <ul style="list-style-type: none"> - Mapping of resource constraints, knowledge, beliefs, and norms. - Political economy analysis of power structures and interests involved (e.g., conflict analysis, gender analysis). - Study of local perceptions of key barriers and facilitators for change. <p>Experience:</p> <ul style="list-style-type: none"> - Perceptions of barriers and facilitators for change. 	<p>Solid understanding of local resource constraints, knowledge, beliefs, norms and interests involved is essential, because impact of interventions may hinge on addressing all key barriers at the same time.</p>
<p>Who else is working on this issue?</p> <p>What is the added value of our efforts?</p>	<p>Experience:</p> <ul style="list-style-type: none"> - Knowledge about other actors and their contributions <p>Research:</p> <ul style="list-style-type: none"> - Mapping of the landscape of actors 	

	and their contributions.	
Are the contextual assumptions of the ToC valid?	Reviews: <ul style="list-style-type: none"> - Previous research in the local context. - Reports with data from the local context. Experience: <ul style="list-style-type: none"> - Knowledge about contextual factors. 	

Intervention impact and cost-effectiveness

Examples of questions	Examples of knowledge investments	Comments
Is the intervention acceptable and relevant for the beneficiaries?	Evaluation: <ul style="list-style-type: none"> - Evaluation of relevance (interviews or survey) 	A small sample will normally suffice.
What are cost-effective interventions for this outcome – generally or in a specific context?	Review: <ul style="list-style-type: none"> - Studies of the effects and cost-effectiveness of interventions to achieve a specific outcome. 	This would be an <i>outcome</i> -focused review.
What are the effects and (cost-effectiveness) of our intervention(s)?	Review: <ul style="list-style-type: none"> - Studies of effects and cost-effectiveness of a particular intervention. Research/evaluation: <ul style="list-style-type: none"> - Impact evaluation (with cost analysis) - short-term or long-term effects. 	<p>This would be an <i>intervention</i>-focused review.</p> <p>Measurement of effects normally requires a counterfactual. Impact evaluation methods use different approaches to establishing the counterfactual.</p> <p>When no other factors than the intervention are likely to affect outcomes, effects can be measured through before-after comparison.</p>

	<ul style="list-style-type: none"> - Process tracing or contribution analysis 	Process tracing or contribution analysis may be used to assess the likelihood of meaningful effects, but not to measure effects. Cost-effectiveness can therefore not be assessed.
<p>Why are intended effects achieved, or not?</p> <p>What are the factors explaining positive/negative results?</p>	Research/evaluation: <ul style="list-style-type: none"> - Impact evaluations that collect data on causal pathways, and/or where there are multiple intervention arms that explore alternative causal pathways - Process tracing of causal pathways 	Process tracing may be conducted in conjunction with an impact evaluation or as a separate study.
Are the causal and behavioural assumptions assumption in the ToC valid?	Reviews: <ul style="list-style-type: none"> - Previous research 	
Are the effects of the intervention long-lasting?	Research/evaluation: <ul style="list-style-type: none"> - Impact evaluation of long-term effects, including after the intervention has ended. 	This can be done as part of an impact evaluation measuring both short-term and long-term effects, with data collection taking place some time after the intervention ended.

Implementation

Examples of questions	Examples of knowledge investments	Comments
Is project implementation on track?	Monitoring: <ul style="list-style-type: none"> - Comparing status with objectives/targets on activities, use of resources, take-up, feed-back, etc. 	<p>Investments that increase the accuracy, representativeness or timeliness of monitoring data may be considered.</p> <p>Examples:</p> <ul style="list-style-type: none"> - Capacity building in sampling, data collection and analysis

		<ul style="list-style-type: none"> - Digital platforms for data collection and analysis - Using third-party data
<p>Are activities implemented at the scale and with the quality planned for?</p> <p>What are the causes of any deviations?</p>	<p>Evaluation:</p> <ul style="list-style-type: none"> - Real time or retrospective evaluation with focus on implementation fidelity. <p>Monitoring:</p> <ul style="list-style-type: none"> - A comprehensive monitoring framework that focuses on quality of implementation and explanations of changes. 	
<p>Is the implementation approach effective?</p> <p>Can the implementation approach be made more effective?</p>	<p>Experience:</p> <ul style="list-style-type: none"> - Experience with what it takes to implement effectively in the local context. <p>Research/evaluation:</p> <ul style="list-style-type: none"> - Experimental research comparing alternative implementation approaches. - Real-time evaluation with focus on implementation effectiveness. 	
<p>Is the implementation approach cost-efficient?</p>	<p>Research/evaluation:</p> <ul style="list-style-type: none"> - Cost-efficiency analysis (costs per output). Benchmarking. 	
<p>Does implementation cause any unintended side effects (positive/negative)?</p>	<p>Research/evaluation:</p> <ul style="list-style-type: none"> - Real time or retrospective evaluation to map potential unintended effects. 	<p>Measurement of unintended effects require the same approach as measurement of intended effects (cf. intervention impact below).</p>

		In randomized evaluations (RCTs), measurement of unintended effects can be done at endline. Otherwise, a baseline is normally needed for measurement, which then also requires that potential unintended effects can be foreseen.
Are the assumptions we make in the ToC about conditions for effective implementation valid?	Evaluation: <ul style="list-style-type: none"> - Assessment of implementation risks and resources. 	
Is the intervention model sustainable without the organisation?	Monitoring: <ul style="list-style-type: none"> - Assessment of implementation and financial data. Reviews: <ul style="list-style-type: none"> - Review of similar intervention models by other organisations. Evaluation (or experience): <ul style="list-style-type: none"> - Sustainability study revisiting project site some time after intervention ended. - Assessment of local actors' capacity and funding opportunities. 	

Partner modality

Examples of questions	Examples of knowledge investments	Comments
<p>Is the partner modality effective?</p> <p>Do partners have the capacity they need?</p> <p>How effective is our organisation in strengthening partner capacity?</p>	Evaluation: <ul style="list-style-type: none"> - Partner modality assessment - Partner capacity assessment - Assessment of partner vs. direct implementation 	

	- Assessment of capacity strengthening efforts.	
--	---	--

Investing in knowledge of high quality

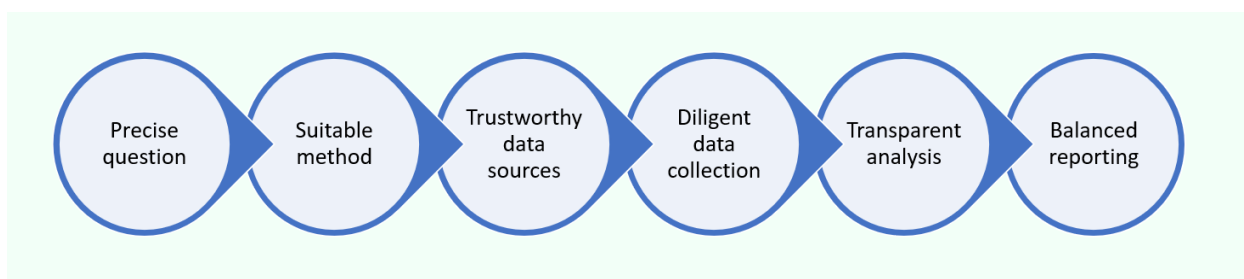
A necessary condition for knowledge to make a difference for rights holders is that the knowledge is reliable enough to be taken seriously in decision making.

Knowledge is always uncertain, but the degree of uncertainty varies with the methods used to generate the knowledge. High quality knowledge has a lower degree of uncertainty.

What is “high enough” quality for aid organisations? One possible answer is that quality must be such that **new knowledge has the potential to make decision makers revise their prior beliefs**. If new knowledge contains unexpected results but these results are rejected or ignored because the study was not reliable enough, the investment has been a waste.

Generating reliable knowledge

The process of generating reliable knowledge requires high quality in each step of the process, as illustrated below.



We encourage paying particular attention to ensuring that the choice of method is well suited to the question at hand. In the past, many evaluations in the aid sector have suffered from low methodological quality. This may for instance easily be the result when a small project evaluation aims to assess all the OECD DAC evaluation criteria.

Before choosing a method, it may be useful to consult someone with research competence.

Using existing knowledge

Available knowledge may be inconsistent and contradicting. By picking research articles selectively, it may be possible to find some support for many different approaches.

Good practice in using existing knowledge includes:

- Leaning on the whole body of relevant knowledge, not on single studies.
- Assessing the quality and relevance of available studies.

Applying both principles creates a strong foundation for making the best use of existing knowledge.

Ability to assess the methodological strengths and weaknesses of various studies is required to implement these principles.

3. Plan for knowledge uptake and use

To generate knowledge is not likely to make a difference without efforts to make knowledge understood, trusted and used, and unless knowledge is available at the time when decisions are made.

It may be useful to distinguish between two levels of planning for knowledge uptake and use. At the **organizational level**, certain preconditions need to be in place for knowledge to be used, e.g., staff skills for absorption of knowledge, systems for knowledge sharing, and a culture for knowledge-based decisions making.

At the **knowledge product level**, action must be taken to ensure that knowledge is communicated to the users, in time, and in a way that fosters understanding and appropriate trust in the knowledge – essential preconditions for its adoption and use.

Organizational level: Preconditions for knowledge uptake and use

Preconditions	Potential actions	Comments
Staff skills for knowledge absorption	<p>Train staff about where to find knowledge and how to critically assess the reliability of various sources of knowledge.</p> <p>Ensure that knowledge is transmitted when onboarding new staff.</p>	<p>Some basic level of understanding is probably the right level of ambition.</p> <p>Use researchers to make judgements about various sources of evidence.</p>
Systems for knowledge sharing	<p>Invest in digital platforms for sharing knowledge (management dashboards, knowledge repositories, etc.)</p> <p>Establish or participate in learning spaces / arenas / networks.</p>	Systems for knowledge sharing can be built <i>within</i> organizations or <i>across</i> organizations.
Culture for knowledge-based decision making	Make leadership commitment to knowledge-based decision-making.	<p>Culture = “how we do things here”.</p> <p>These are just a few examples of actions that may contribute</p>

	<p>Develop decision-making processes, templates and guidelines that ask for the knowledge basis of decisions.</p> <p>Use data actively to manage programs in real time.</p> <p>Openly discuss shortcomings, criticisms, what didn't work etc.</p> <p>Management responds to recommendations in evaluations, and management response letters are followed up.</p> <p>Ensure sufficient time between program cycles to let new knowledge influence decisions.</p> <p>Build country level ownership to the learning agenda.</p> <p>Provide incentives for learning and improvement, including being transparent about failures.</p>	to a culture for knowledge-based decision making.
--	--	---

Knowledge product level: Targeted action to make knowledge understood and trusted.

Ambition	Potential actions	Comments
Make knowledge understood	Define target group(s). Who is going to act on this knowledge?	<p>The target group could be within or outside the organization, or both.</p> <p>There is intrinsic value in communicating the knowledge to those who have been part of a "study". That</p>

	<p>Set aside time and budget for learning.</p> <p>Tailor the communication to the audience, e.g.,</p> <ul style="list-style-type: none"> - Fact sheets and short written material - Interactive presentations / workshops to interpret and share knowledge - Culture sensitive knowledge products (language, visual, auditory). 	<p>may require a different communication strategy.</p> <p>This is crucial. Uptake is a process that takes time, it does not happen quickly.</p> <p>May include investment in analytical capacity.</p>
Make knowledge trusted	<p>Co-creation of knowledge</p> <ul style="list-style-type: none"> - Include target audience in preparation and implementation of knowledge generation - Create mutual understanding of the purpose of knowledge generation. - Involve and inform partners in development of your own knowledge plan <p>Further actions to build trust in the reliability of knowledge.</p> <ul style="list-style-type: none"> - Explain how knowledge is produced, where it is coming from. - Make sure it is built on solid methodology. - Obtain assessments from trusted knowledge producers. 	<p>Participation in knowledge generation may increase trust in findings.</p>

	<ul style="list-style-type: none"> - Ensure reliable quality assurance mechanisms. <p>Beyond the particular knowledge product:</p> <ul style="list-style-type: none"> - Educate managers and decision-makers about what is robust vs anecdotal evidence - Make sure there is no cherry-picking of “suitable” knowledge, but that all relevant knowledge is considered. 	
--	---	--

4. Plan how to implement

To bring the knowledge plan to life, it needs to encompass an implementation plan. Implementation planning involves addressing questions such as:

- Which specific tasks will be done?
- Who will do what?
- Who is responsible?
- What are the timelines and milestones?

Overall responsibility

The knowledge work will be competing for attention with other important tasks. A knowledge plan that is anchored in the top management of the organisation, with clear responsibilities and accountability mechanisms, may help ensure that knowledge management receives due attention.

Who will do what?

Decisions about who will do what may have significant cost implications and must therefore be made early in the process, before budgets are allocated.

Which parts of the knowledge work will the organisation do internally? Which parts will be implemented in collaboration with external partners (e.g., research institutions / consultancy companies)? How will the collaboration with external organisations be organized – as a partnership

or as a consultancy? What can be done by local research partners / consultancies and where will external support be helpful?

It is recommended to bring external partners such as research institutions on board early in the planning process, preferably already in the development of the knowledge plan.

Norad has made clear that research institutions can be included as partners (sub-grantees) in projects and programmes when knowledge generation is one of the outputs / outcomes of the programme. This facilitates early involvement of research partners.

Detailed implementation planning

Sooner or later the knowledge plan needs to be operationalised with a breakdown of tasks, responsibilities for each task, and timelines/milestones.

This can for instance be done with a Gantt chart.

Investment	Task	Responsible	2025				2026			
			1st quarter	2nd quarter	3rd quarter	4th quarter	1st quarter	2nd quarter	3rd quarter	4th quarter
Internal learning arena	Developing the concept	NN								
	Mobilising people	NN								
	First learning event	NN								
	Second learning event	NN								
Impact evaluation	Develop the study	NN								
	Conduct the study	External								
	Communicate findings	NN								

Capacity building for knowledge management

The implementation of a knowledge plan requires some internal capacities for knowledge management, corresponding to the ambitions of the plan and the division of labour between internal and external resources.

If needed, the implementation plan may include investments in internal capacities for knowledge management.

5. Allocate budget and resources

Looking at knowledge investments as part of programme costs implies that knowledge investments should represent good value for money compared to spending on other programme components.

This section outlines how to think systematically about this issue.

How to balance knowledge investments vs. programme investments

“How can we spend money on knowledge investments when we instead could have delivered services to rights-holders”?

The question is well placed, and the answer is that knowledge investments can be justified only if they are expected to lead to programme improvements and higher future impacts.

A knowledge investment *breaks even* when the future increase in impacts is as large as the forgone impacts by incurring the investment.

Example: Assume that 5% of a programme is spent on knowledge investments. If this leads to a 5% improvement in the impact of the next phase of the same programme, the investment breaks even and can be justified.

If the current impact of the programme is to increase incomes of the rightsholders by 20%, investing 5% of the programme in knowledge would be justified if the programme can achieve a 21% increase in incomes in the next phase ($(21-20)/20 = 5\%$).

This is however likely to be a too strict requirement. If the programme continues in two phases, it would be sufficient if impacts increased 20.5% in each phase, and even less if the programme continues longer.

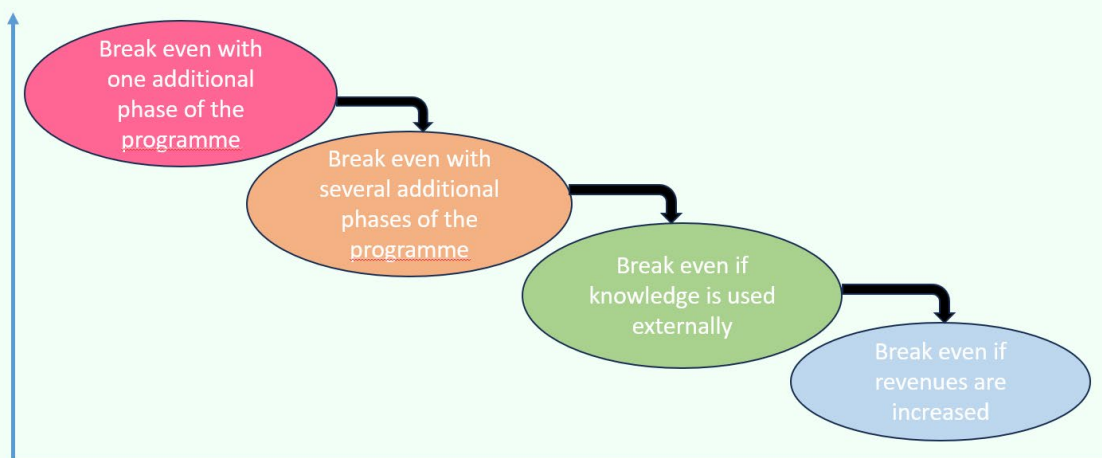
Furthermore, new knowledge may improve the impact of similar programmes run by other organisations. An even smaller improvement in impact is then needed for the knowledge investment to break even.

Finally, investments in knowledge may also increase donors' confidence in the organisation and lead to increased funding.

The considerations raised in the example are summarised in the figure below. Knowledge investments can be justified with reference to

- Higher impact in the next (or the current) phase of the programme.
- Higher impacts in additional future phases / scale ups of the programme.
- Higher impacts in other organisations' programmes.
- Potential for increased revenue.

Added impact – or reduced costs –
needed to break-even



Practical hints

Set aside time to learn: We have emphasised the importance of setting aside time and space to learn. This should be reflected in budgets.

Knowledge budget as part of programme budget or a side activity? In line with our emphasis on integrating knowledge investments as a part of the programme, we encourage that this is reflected in how the budget is developed.

Knowledge budget at main office or country office / project level? There is no clear answer to this question. For large knowledge investments that may benefit larger parts of the organisation – or other organisations – it might be wise to allocate the budget at a higher organisational level, even if the knowledge generation will take place within a particular country/project.

6. Plan for evaluation and learning

Like any other parts of the programme, knowledge investments should be critically assessed with the aim of improving future knowledge investments and learning.

Evaluation of knowledge investments may include questions such as:

- What did we learn from knowledge investment X? How were programmes improved?
- How could learning have been further improved?
- What kind of knowledge investments tend to have the greatest impact on programming – within and beyond our organisation.

What a knowledge plan may look like

The main effort in making a good knowledge plan goes into developing it, not in presenting it. The presentation can be made in a simple format.

Items to be included

The following elements should be included at a minimum:

- Description and justification of knowledge needs and the priorities made, including how each item in the plan relates to the Theory of Change.
- Description of actions/investments, such as
 - o Knowledge synthesis / reviews – with description of topic
 - o Knowledge generation – with description of topic and methods
 - o Knowledge uptake / learning – at knowledge product level as well as at organisational level
 - o Knowledge management systems
- Rough timeline
- Budget

Other elements that may be included:

- Where the investment will take place (organisation as a whole, country, project)

The Theory of Change of knowledge management presented in the first section of this document assumed that a **culture** for knowledge-based decision making is in place. This may not be the case, calling for action to build such a culture. While such actions may be part of the knowledge plan, they may alternatively be part of an overarching **strategic knowledge management policy** that transcends any specific knowledge plan.

Knowledge plans that only include the minimum requirements outlined above need to be further operationalised at some stage, with specifications of

- Tasks
- More detailed timeline
- Responsibilities.

Structure of a knowledge plan

The knowledge plan may be structured as a narrative, as one or more tables, or as a combination of both.

Example 1:

This example combines two sections with narratives with one section consisting of a table.

A. Approach to strategic knowledge management

Brief description of how the organisation works systematically to build a culture for knowledge-based decision making. May refer to policies and practices that the organisation

is following.

B. Priority knowledge needs

Description of priority knowledge needs, with justifications, including relation to the Theory of Change.

C. Planned knowledge investments

Type of investment	Activity / Investment	Country / Region	Approach / method	Plan for knowledge uptake	Time	Budget	Learning outcomes and decisions/ actions supported
Knowledge synthesis / review	<i>Review of research</i> on the impact of interventions for reduced child marriage	Sub-Saharan Africa	Systematic review of research	Discussion of findings at country offices and with partners.	2029	0.3 mill.	Knowledge on the cost-effectiveness of various interventions. Will inform design of new program from 2031
	<i>Synthesis of experiences</i> on effective implementation of savings groups	Tanzania, Malawi, and Nepal	Workshops with partner staff in each country. Analysis and synthesis.	Produce guide that can be used in future programming	2026	0.2 mill.	Etc.
Knowledge generation	<i>Relevance assessment</i> of parenting intervention	Nepal	Key informant interviews	Meetings with management at country and HQ levels.	2026	0.1 mill.	
	<i>In-depth monitoring</i> of implementation of health intervention	Tanzania	Regular in-depth key informant interviews + analysis of monitoring data	Quarterly updates at country and HQ levels.	2026-2029	2.0 mill.	
	<i>Impact evaluation</i> of intervention for improved learning	Malawi	Randomised evaluation		2026-2030	5.0 mill.	
Knowledge uptake and use	Establish <i>learning network</i> on WASH	All countries	Quarterly digital meetings	n.a.	2026-2028	0.2 mill.	

Knowledge management systems	Platform for real time <i>analysis of monitoring data</i>	All countries	Name of platform	n.a.	2029	0.5 mill.	
-------------------------------------	---	---------------	------------------	------	------	-----------	--

In this table, knowledge uptake and use are both in a column – for activities related to specific knowledge products – and in a row – for organisational level activities.

The table format may not allow sufficient detail, especially on methods and plans for knowledge uptake and use. Further explanations may be added below the table if needed.

Example 2:

This example uses only narratives and differs from the example above by structuring knowledge investments according to the project cycle.

A. Approach to strategic knowledge management (as above)

B. Priority knowledge needs (as above)

C. Planned knowledge investments (selected entries from the table in Example 1)

Project design phase

- **Relevance assessment of parenting intervention**
 - *Country:* Nepal
 - *Approach/method:* Key information interviews
 - *Plan for knowledge uptake and use:* Meetings with management at country and HQ levels.
 - *Timing:* 2026
 - *Budget:* 0.1 mill.

Project implementation phase

- **Synthesis of experiences on effective implementation of savings groups**
 - *Country:* Tanzania, Malawi, Nepal.
 - *Approach/method:* Workshops with partner staff in each country. Analysis and synthesis.
 - *Plan for knowledge uptake and use:* Meetings with management at country and HQ levels.
 - *Timing:* 2026
 - *Budget:* 0.2 mill.
 - *Learning outcomes and decisions/actions supported:* Knowledge on the cost-effectiveness of various interventions, will inform design of new program from 2031
 -

Preparation for next programme phase

- **Review of research on the impact of interventions for reduced child marriage**

- *Country:* Sub-Saharan Africa
- *Approach/method:* Systematic search and analysis of research.
- *Plan for knowledge uptake and use:* Discussion of findings at country offices and with partners.
- *Timing:* 2029
- *Budget:* 0.3 mill.
- *Learning outcomes and decisions/actions supported:....*

Acknowledgements

This document was developed based on ideas presented and shared at two workshops in November 2024 and February 2025, facilitated by Development Learning Lab and the MERLiN network.

The following organisations participated and contributed:

- ADRA
- Atlas Alliance
- Care
- Caritas
- Development Fund
- Digni
- FORUT
- KFUK-KFUM Global
- LO
- Mission Alliance
- NIS Foundation
- Norges Vel
- Norwegian Helsinki Committee
- Norwegian Lutheran Mission
- Norwegian Association of Disabled
- Norwegian Church Aid
- Norwegian Human Rights Fund
- Norwegian People's Aid
- Plan
- Rainforest Foundation
- Right to Play
- SAIH
- Save the Children
- SOS Children's Villages
- Stefanus Alliance
- Strømme Foundation

Representatives from Norad also shared their reflections on strategic knowledge management and the purpose and content of knowledge plans.