## Tool: An Introduction to the Knowledge Management Index for Global Health

**Objectives**

1. To identify the existing and potential capacity to implement knowledge management
2. To identify potential opportunities for improvement in the implementation of knowledge management
3. To develop an action plan for an organization to strengthen their knowledge management capacity

**Purpose**

The Knowledge Management (KM) Index for Global Health tool assesses an organization's current implementation and capacity for KM initiatives.

**When Should This Tool Be Used?**

The index should be used as a baseline assessment to inform the creation of project activities meant to enhance KM capacity. It can also be used as an end line measure to assess changes in KM capacity and implementation of KM initiatives overtime.

**Components of the Tool**

The index covers a total of four domains including organizational structure, learning opportunities, internal knowledge management culture, and knowledge management for global health. A series of key KM elements accompany each different domain.

**Knowledge Management Index Number**

1. The KM Index for Global Health measures the KM capacity of an organization using both qualitative and quantitative data.
2. The quantitative data is tallied from the number of KM elements an organization is practicing and is called the “KM Index Number”.
3. Each of the KM domains in the Index has a set number of KM elements:
   1. Organizational Structure – 7 KM Elements
   2. Learning Opportunities – 5 KM Elements
   3. Internal KM Culture – 10 KM Elements
   4. KM for Global Health – 6 KM Elements
4. Based on the responses to the Index questions, the facilitator will tally which KM elements are currently being practiced and will be noted as the “KM Index Number” for that particular KM domain. For example, if an organization is only using 3 out of 7 KM elements under Organizational Structure, their KM Index Number will be 3 for Organizational Structure.
5. The KM Index Number will be interpreted using responses to open ended questions to determine how well a KM element is being practiced and potential areas of improvement.
6. If an organization is not currently using a KM Element, the facilitator will note that the organization may want to consider practicing it in the final report.

**Knowledge Management Index for Global Health**

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| **Organizational Structure** | | **Illustrative Probes** | **KM Index Number & Recommendations** |
| The organization has a common vision for knowledge management, including an accepted definition of KM and a KM strategy related to the organization’s mission. Resources are allocated for knowledge management activities, including staff time and funds. The organization has staff members specifically assigned or dedicated to KM activities and responsibilities. Employees are knowledgeable about KM concepts (e.g. types of knowledge, knowledge exchange techniques). They perform their KM roles consistently as part of their job function. | 1. Does your organization have a definition for knowledge management?  2. Does your organization have a knowledge management strategy for internal KM?  3. Does your organization have a knowledge management strategy for external KM?  4. Does your organization have a staff member(s) assigned to internal KM activities and responsibilities?  5. Does your organization set aside funds for internal KM activities?  6. Does your organization set aside funds for external KM activities?  7. Does your organization conduct periodic surveys of all employees to determine information needs and measure satisfaction with existing KM activities? | 1. What is your organization’s definition of KM?  2. What is your organization’s internal KM strategy?  3. What is your organization’s external KM strategy?  4. How many employees are assigned to KM activities?  5. How much money does your organization set aside for KM activities?  7. How does management use findings from surveys? |  |
| **Learning Opportunities** | | **Illustrative Probes** | **Recommendations** |
| The organization encourages learning and continuing professional development among its employees. The organization regularly offers training and other learning opportunities to strengthen existing skills and build new skills/knowledge among staff members. | 8. Do new staff hires receive an orientation, which provides an overview of the organization's mission and work, and available learning opportunities?  9. Do all employees receive ongoing training on common KM concepts (tacit/explicit knowledge, knowledge exchange techniques)?  10. Does your organization regularly offer internal training opportunities to its employees?  11. Do employees have the opportunity to attend external training opportunities?  12. Do employees have the opportunity to attend conferences and meetings.  related to <organization’s field>? | 8. Do staff take advantage of learning opportunities?  9. What are some examples of KM trainings offered to employees? |  |
| **Internal Knowledge Management Culture** | | **Illustrative Probes** | **Recommendations** |
| The organization has a strong internal knowledge management culture, in which employees are encouraged to share their knowledge with others and seek out new ideas/approaches. | 13. Is everyone in the organization encouraged to seek out new ideas/approaches?  14. Are staff members supported (e.g. time, funds) in testing out new ideas/approaches?  15. Do employees receive incentives for sharing new information (e.g. recognizing contributions, offering monetary rewards)?  16. Are best practices collected and shared internally?  17. Are lessons learned collected and shared internally?  18. Is an internal database for storing best practices/lessons learned which is available to all employees?  19. Is there a staff directory, which details each employee’s competencies to assist staff with identifying colleagues who can be a resource?  20. Does your organization track the progress of its internal knowledge sharing initiatives?  21. Are employees able to safely report existing or potential problems to management?  22. Do departing staff participate in a hand off process to document their knowledge for use by the organization? | 15. Are these incentives effective in encouraging employees to share new information?  16. How often are best practices collected?  17. How often are lessons learned collected?  18. How often do employees access this internal database?  19. How often is this skills directory utilized by staff?  20. How does the organization track the progress of internal KM initiatives?  21. How does management respond to reports regarding existing/potential problems? |  |
| **Knowledge Management for Global Health** | | **Illustrative Probes** | **Recommendations** |
| The organization has a robust external knowledge management culture, in which the organization shares its knowledge (best practices/lessons learned) with external audiences in its field. The organization regularly seeks out new knowledge from external resources. | 23. Which health topics does your organization’s work focus on?  24. Does the organization consistently seek out and adopt the latest technical guidelines for <topics mentioned in question 1>?  a. If yes, please share 2-3 sources of technical guidance for your organization.  25. Do employees receive training on <topics mentioned in question 1>?  26. Are employees encouraged to join external professional organizations (e.g. working groups, associations) related to <topics mentioned in question 1>?  27. Does your organization have a database for sharing its knowledge with external audiences?    a. If yes, is this database routinely updated and managed?  28. Does your organization track the progress of its external knowledge sharing database? | 25. How often are these trainings offered?  28. How does the organization track the progress of its external knowledge sharing database? |  |