Guide for Building and Strengthening Organizational Knowledge Management Capacity

IN ORGANIZATIONS WORKING IN GLOBAL HEALTH

Global Health Knowledge Collaborative (GHKC)
Task Team Product

Sarah Burns, CARE

Angela Forest, USAID, Personal Services Contractor

Lani Marquez, University Research Co., LLC

Meenakshi Mehra, Management Sciences for Health

Erin Shea, Save the Children

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GHKC

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Contents

Acronyms

AAR	After Action Reviews
BAR	Before Action Reviews
CLA	Collaborating, Learning, and Adapting
CoP	Community of Practice
GHKC	Global Health Knowledge Collaborative
HR	Human Resources
IT	Information Technology
K4Health	Knowledge for Health Project I and II
KM	Knowledge Management
MEL	Monitoring, Evaluation, and Learning
ODI	Overseas Development Institute
USAID	United States Agency for International Development
WHO	World Health Organization

km Introduction

Rationale and Objectives of this Guide

Knowledge management (KM) unites the efforts of people and units within an organization to leverage learning from past experience to inform future actions—enabling the organization to make the best use of its knowledge resources and staff. For these reasons, KM has been an area of increasing interest in the global health and development arena for decades, especially over the last few years as adaptive management and iterative approaches to development have come to the forefront of global health programming.

Although KM activities for global health programs have been well documented, with tremendous guidance and training materials developed to support the integration of KM within global health programming (see **Box 1**) ***there has been less documentation and guidance around embedding KM specifically within organizations working in global health.*** This guide was developed by a task team of the Global Health Knowledge Collaborative (GHKC) to add to the existing literature and guidance by providing concrete directions, tools, and templates to global health practitioners to either start or grow KM programs within their organizations.

BOX 1 — VALUABLE RESOURCES FOR KM IN GLOBAL HEALTH PROGRAMS

- KM Training Package for Global Health Programs *(https://www.kmtraining.org/)*
- Knowledge Management for Health and Development Toolkit *https://toolkits.knowledgesuccess.org/toolkits/km*
- The GHKC Guide to Monitoring & Evaluating KM in Global Health Programs & Indicator Library *https://indicators.globalhealthknowledge.org/working-together-measure-and-demonstrate-value-knowledge-management*
- ODI's Tools for Knowledge and Learning: A Guide for Development and Humanitarian Organizations *https://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/188.pdf*
- Knowledge Management for Development Journal *https://www.km4djournal.org/index.php/km4dj/welcome*

Organization of the km Guide

This guide consists of six sections:

km 1

The first is an introduction to what KM is and why it is valuable to organizations of varying sizes working in global health; it sets the framing for the rest of the guide.

km 2

The second section describes the typical objectives of KM in organizations working in global health, including common strategies and activities that are used to achievethese objectives.

km 3

The third section looks at the ways KM can be structured in organizations, the placement of the KM team within an organization, and the roles within the team.

km 4

The fourth section contains examples of tools and approaches an organization can use to achieve its stated KM objectives, including links to specific tools and guidance.

km 5

The fifth section briefly outlines some methods to monitor and evaluate the KM activities being implemented.

km 6

The sixth and final section outlines some recommendations for getting started.

The sections by nature overlap and are not meant to provide concrete, step-by-step guidance to solve all KM challenges. Each organization working in global health is unique, and this guide attempts to provide an array of options and considerations that can be used to make decisions within specific cases and contexts. It also provides templates and tools to re-purpose when initiating or growing KM within an organization working in global health.

Introduction

This section defines KM, drawing on GHKC and K4Health frameworks, and describes common organizational goals that KM approaches can help achieve. It seeks to make the case for why these goals are valuable to an organization and provides advice on how to advocate to organizational leadership to invest in KM and on how to demonstrate the value of KM to staff.

What Is KM?

The **KM Training Package for Global Health Programs** (https://www.kmtraining.org/), developed by the USAID-funded K4Health Project, defines KM as *"a systematic process of collecting knowledge and connecting people to it so they can act effectively and efficiently."* K4Health expands on this to describe KM as a function of people, processes, and platforms: *"Most knowledge is created, captured, and shared through human interaction—making it essentially a social act. People must, therefore, be at the core of any KM approach...Processes, both formal and informal, help us capture and share knowledge, while technological platforms...can expedite knowledge storage, retrieval, and exchange."*

Wikipedia (https://en.wikipedia.org/wiki/Knowledge_management#:~:text=Knowledge%20management%20(KM)%20is%20the,the%20best%20use%20of%20knowledge) defines KM as *"the process of creating, sharing, using and managing the knowledge and information of an organization. It refers to a multidisciplinary approach to achieve organizational objectives by making the best use of knowledge."*

USAID (https://www.usaid.gov/sites/default/files/documents/1868/O4-P4_KM_FactSheet.pdf) describes the purpose of knowledge management as *"to help an organization ensure that knowledge is generated, captured, shared, and applied systematically and strategically so there is continuous learning, effective engagement, and organizational improvement."*

All of these definitions emphasize that KM is about connecting people and their knowledge and enabling them to leverage and apply that knowledge to improve work. Put simply, KM is about people working together to share what they know to achieve results that are far beyond what anyone can accomplish alone. In international development organizations in general and organizations working in global health in particular, there has been growing interest in KM as a discipline to help draw on the experience of all stakeholders to take program and organizational performance and outcomes to new levels.

Why Is KM Important?

There is a common understanding that collective knowledge produces better solutions to complex problems than does individual knowledge or expertise. KM is important because it unites the efforts of multiple people and units within an organization to address a challenge—it allows organizations to make the best use of resources, avoid re-inventing the wheel, solve a problem only once, and ensure that those lessons can be applied again when needed. KM ensures staff can work faster, cheaper, and smarter by leveraging past experience to inform future actions. KM also helps organizations develop corporate capabilities by harnessing key learnings so knowledge can be recorded, codified, and made available for future use, even if the individuals originally involved leave the organization.

Knowledge Is Created and Shared in Conversation

How Can an Organization Practice KM?

A main challenge for organizational KM is that collective knowledge is hard to pin down; on one hand, it exists in the form of organizational procedures and practices (which may be both explicit and implicit) and knowledge assets like technical approaches, tools, and reports. On the other, a critical source of collective knowledge are the ideas and experience of staff which can be used but are often not written down, existing as tacit knowledge in the minds of individuals.

For organizations working in the global health arena, KM is about making use of all the knowledge an organization has at its disposal and practicing good stewardship of its knowledge resources, which encompass organizational procedures and practices, knowledge assets like technical approaches and tools, and the individual knowledge and experience possessed by its staff. However, because so much of an organization's intellectual capital is contained in the minds of its staff, a vitally important function of organizational KM is making explicit "who knows what"—who in the organization is knowledgeable or adept at certain practices or skills and having mechanisms in place to draw on their knowledge when needed. This can take the form of experience directories that indicate the detailed areas of expertise and experience of individual staff, but also include mechanisms that facilitate informal knowledge sharing and peer problem-solving within the organization. Such mechanisms include internal listservs (where staff sign up to join topical listservs of interest to them), working groups focused on particular content areas, and spaces for staff to raise challenges and seek solutions from colleagues in existing forums like monthly divisional meetings. For such mechanisms to function, staff need to know they have "permission" to use time and internal communication channels for peer problem solving and sharing, and management needs to allocate time and space for such endeavors.

Connection before Content

People are more willing to share their knowledge and expose their thinking when they have built a trust relationship with others.

In summary, KM is about making use of all the knowledge an organization has in terms of its employees, its products, and its documented processes and approaches. To make KM work, organizations need to put into place knowledge creation and sharing processes or modify existing work processes so they become opportunities for generating and sharing knowledge. Such processes are more effective when they are organized and intentional, as opposed to ad hoc, and when they extend across the entire organization, as opposed to being localized in only certain units.

KM Is Everybody's Business

A common pitfall in trying to get organizations to adopt KM processes is for KM to become the "property" or dominion only of KM staff or champions. However, the most effective strategy for building a KM culture within the organization is to make KM "everybody's business". That is, make it clear that KM can benefit everyone in the organization—from programs to operations to fundraising—and that everyone in the organization can and should apply basic KM principles and thinking in their work—that KM is everyone's responsibility. It needs to be clear that everyone in the organization has important knowledge to share and can benefit from the knowledge of others.

km 2 The Objectives of Knowledge Management

Introduction

This section describes the typical objectives that organizations pursue with KM efforts. What objectives are most important for the organization will depend on many factors—organizational size and maturity, number of core capability areas, level of experience of personnel, resources, etc. This section draws on KM literature about the objectives organizations often pursue with KM and seeks to provide guidance on how to identify the most important objectives for an organization. Defining KM objectives and even setting priorities among these objectives can help guide where the organization should make investments to expand and develop its KM functions.

What Are Typical Objectives that Organizations Pursue with KM?

Organizational KM supports two basic objectives that are important to the growth and survival of any organization:

- Improve efficiency and productivity
- Support organizational learning

Improving Efficiency and Productivity

Reducing resource use to achieve the same outputs and/or increasing outputs or performance with the same level of resources streamlines work processes and improves the capacity of employees to accomplish their work. KM processes and strategies can directly increase employee capacity to perform their assigned tasks by increasing employee knowledge of effective approaches that others in the organization have used and connecting employees with organizational colleagues and resources that can help them. Such knowledge can help employees avoid pitfalls, repeating mistakes others have made, and "reinventing the wheel" by wasting time and energy on coming up with a solution to a problem that has already been solved by others in the organization.

Supporting Organizational Learning

Organizational learning is the process by which an organization improves itself over time through gaining experience and using that experience to create knowledge that can be transferred within the organization and applied again. KM also supports adaptive management actions that emerge from organizational learning, allowing for greater transfer of programmatic innovations to other contexts. Organizational learning can also directly support business development, another critical objective of most organizations, by strengthening and expanding organizational capabilities, allowing the organization to compete more effectively for new business, and creating new business opportunities.

Note that organizations typically pursue both of these objectives across the organization, in programmatic work as well as in operational or administrative work.

Differences Between Organizational and Project KM

While both KM objectives are applicable in all areas of an organization, there are some differences in how KM is used to improve organizations and how KM is used to improve programmatic or project results. Organizational KM looks at generating, storing, and using

Staff practicing conversational techniques for knowledge integration at a KM training in Cote d'Ivoire.
Photo credit: URC, USAID ASSIST Project.

information at the program, office, and organizational levels. This also includes looking at ways of increasing the efficiency of internal administrative procedures (for example, the ease of filling in travel forms or procurement processes). Project KM looks at generating, storing, and using information at the project level and sharing findings with external audiences in the global health arena, as well as ensuring that learning from others is fed back into project operations. This primarily focuses on looking at ways of improving project results and outcomes (for example, the best way to engage community health workers in a malaria prevention project). While the objectives and functions are similar between organizational and project-focused KM, organizational KM focuses on operational and programmatic activities that strengthen learning across the organization and not just for the benefit of a single project.

We always know more than we can say, and we will always say more than we can write down.

The process of taking things from our heads, to our mouths (speaking it) to our hands (writing it down) involves loss of content and context. It is always less than it could have been as it is increasingly codified.

Dave Snowden
7 Principles of Knowledge Management

Leveraging Project KM to Support Organizational KM

Due to growing interest in USAID in KM and learning practices in the form of its Collaborating, Learning, and Adapting (CLA) policy and program guidance (https://usaidlearninglab.org/qrg/understanding-cla-0), many USAID-funded projects include KM or CLA components. Organizations working in global health that implement these projects often create project-specific KM processes and systems to carry out the funded work.

Project-oriented KM usually involves creating KM systems that operate for the benefit of the project, including a heavy focus on documenting project experiences and sharing them externally through more formal communications methods. Organizational KM usually involves creating KM systems that operate across the entire organization, with specific focus, in some cases, on using knowledge for business development. This usually includes a heavy focus on knowledge bases and repositories for future searching as well as libraries or shared folders/drives where projects can save final products for future use by others in the organization. The documents produced by projects should be stored for perpetual use in these knowledge systems. With planning and a little creativity, project KM can be productively leveraged to support organizational KM without compromising the performance of project KM functions.

Knowledge exchange between implementers from Tanzania and Lesotho to share best practices in preventing mother-to-child transmission of HIV. Credit: URC, USAID ASSIST Project

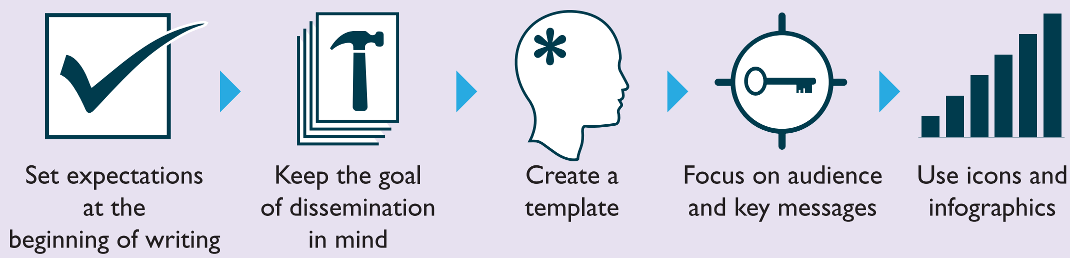
At minimum, organizations working in global health should put in place procedures to ensure that learning from each project can be fed into the larger organizational ecosystem to inform other projects implemented by that organization. This is often done by creating internal working groups that link KM leads or focal points within various projects so they can share ideas and strategies. Note that not every project may have a designated KM role on its team; in such cases, think more broadly about other learning-related roles such as M&E or MEL specialists or learning advisors and try to involve such individuals in internal KM working groups. While it is important not to use project resources to directly serve organizational KM needs, most donor agencies do expect and encourage their partners to have organizational learning processes in place that will ultimately benefit their projects.

Another strategy to facilitate cross-project learning is to standardize learning processes and systems across all projects in an organization. This often requires that the organization codify its KM systems and processes so that they can be readily applied by different projects, including at the proposal stage. Having go-to KM champions and staff within the organization who can contribute to proposal writing and project start-up planning can also help to standardize KM approaches across projects.

SHARING A PROCESS PEER TO PEER, FROM PROJECT TO ORGANIZATION

Sustaining Health Outcomes through the Private Sector Plus (SHOPS Plus), a large global health project, used a well-honed process for documenting project lessons and findings in technical briefs. A common challenge was that an activity or research study generated a lengthy report, which, due to its length, might turn readers off. To address this, the project's knowledge management team treated each publication like a family, a family with offspring. Viewed from this angle, the purpose of the publications process was not to cut down information but *to bring people in*. The idea was to grab the audience's attention first, then to present the depth of the work. The team sometimes used a metaphor of a family when explaining the strategy to technical writers, at times reluctant to see their work condensed. The progenitor (grandfather) was the full report (50,000 words). He sired a brief (father, 8,700 words) and along came the kids (1,000-562 words). The children play on different platforms. Think of a blog post or article on a website. The family pets are blurbs for social media posts. All belong to the same family and relate back to the full report.

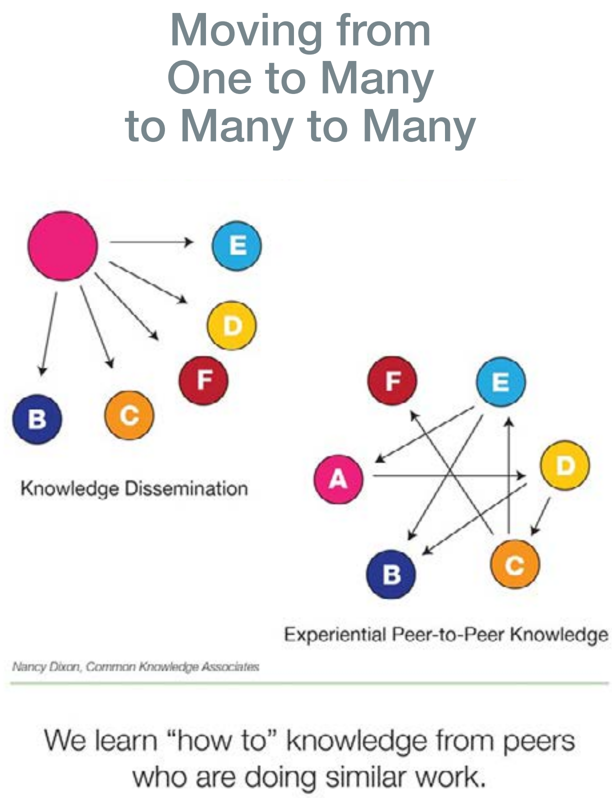
The team followed these tips to go from tome to tweet:



The project shared this process with communications and knowledge managers on other projects throughout the organization at the monthly communicator's meeting. In addition to giving concrete examples of the process, the team had a few caveats and workarounds. A big caveat that was the ballpark estimate for the investment required to produce a good parent was costly. To synthesize a lengthy report into a 4-pager with charts would take many hours of someone's time. Sometimes, it is not worth it. The challenge that remained, however, was how to reach a decision maker with important information. The hack? Share a slide deck* instead.

* *In addition to a slide deck, some organizations use programs like Adobe Spark (https://spark.adobe.com/) or Microsoft Sway (https://sway.office.com/) to present an engaging digital story using various media (photos/graphics/video/text/resources). These sites can also be used to create a shared resource link, good for a series of related project materials, like the above example, or for key events, like a conference or project closeout.*

What KM Activities Are Commonly Used to Pursue these Objectives?



There is a wide array of activities that KM programs conduct on an organizational level to improve both efficiency and organizational learning. There are many proven practices that organizations have developed to provide a systematic way for members of the organization to share their knowledge internally as well as across organizational boundaries. Some KM experts[1] divide these practices into two main categories: *Connecting and Collecting.*

Connecting practices bring together people with relevant experience and skills (often referred to as "know-how") and provide them with opportunities to learn from one another, share lessons, and generate new ideas about their work. Common examples of connecting practices are communities of practice, technical working groups, and knowledge-sharing meetings or events.

Collecting practices seek to gather or capture information; oftentimes the information collected includes new insights gained through connecting practices. Common examples of collecting practices are knowledge repositories, databases, and focused debriefings after major activities. Connecting practices and collecting practices are not mutually exclusive, and many of them can be used to serve both purposes.

Regardless of the activities that are selected, it is important to periodically evaluate KM strategies and objectives vis-à-vis organizational mission, strategic objectives, and priorities to ensure that resources are well invested and continuing to yield benefits to the organization.

1. Nancy Dixon (https://www.nancydixonblog.com/) of Common Knowledge Associates (https://www.commonknowledge.org/) and Nick Milton (http://www.nickmilton.com/) of Knoco Ltd. (https://www.knoco.com/) have written extensively about connecting and collecting KM practices.

Solving Cross-Functional Issues

A common KM activity is to use KM tools to solve cross-functional issues, that is, issues that affect multiple units of an organization with different functions. When senior leaders are engaged and identify priority topics to guide organizational KM activities, KM efforts are focused on areas of strategic value to the organization. Part of meeting the organizational objectives of improving efficiency as well as improving organizational learning is to identify areas of concern or "pain points" for the organization and focus KM efforts on those areas; often this involves bridging organizational silos to address knowledge-sharing needs.

Choosing to invest resources in these KM activities and priorities also assumes that the organizational leadership has made some commitment to the value of KM for the organization and has signaled to senior managers and to staff in general that organizational KM activities are part of each employee's responsibilities—that all staff are expected to contribute to knowledge sharing and knowledge creation, within the boundaries of their role or position.

Using KM tools to address cross-functional challenges can showcase the value of KM in achieving organizational objectives. By solving long-seated issues, KM gains credibility as a valuable approach that can be applied across the organization.

Documentation and Communication

Improved organizational learning

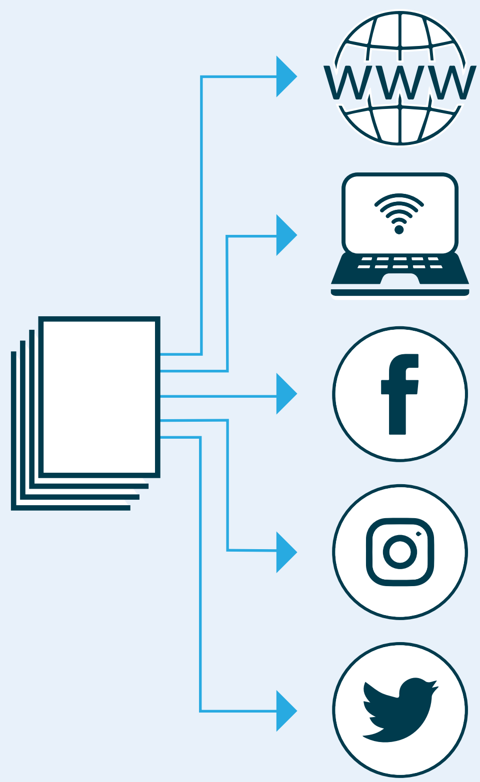
KM activities around documentation and communication are also used to meet the organizational objectives of improving efficiency and learning. Within organizations working in global health, the documentation of project experience, whether in the form of activity documentation, best practices, lessons learned, program briefs, evaluations, success stories, or any other type of written report on what happened, why, and how, is a necessary and valuable part of sharing what the project did with others. This sharing can be for organizational fundraising purposes, for basic information-sharing purposes, for donor requirement purposes, or for the benefit of future practitioners. Usually, most of the focus of KM within development projects is on documenting results or experiences specific to that project. Yet at the organizational level, supporting that documentation and going beyond single projects to look at global or regional level evaluations or cross-project comparisons is more useful for analyzing experiences at a higher level, to inform broader organizational learning and business development.

A lot has been written on how to do this, and it includes communications, monitoring, evaluation, and learning (MEL) teams, and many others. There are many strategies for getting the best information from project experience; the work of MEL teams to capture changes in project results and document the minutiae of actions that led to those results, to show what works, what doesn't, and why, is all part of this documentation. The outputs of these documentation activities may be white papers, blog posts, journal articles, or any other form of communication in written word.

Strategic dissemination

Once documentation has been finalized, it needs to be shared. A communications plan is usually developed for either project or organizational documentation, with specific thought going into who should be sent the documentation and with what level of detail; should it be presented at conferences; should it be posted on a website or intranet; or should it be shared via social media. Note that there are many ways to reuse the same basic content in multiple avenues.

There are many ways to reuse the same basic content in multiple avenues



Some organizations assign the communication of knowledge products and resources to different parts of the organization. In some cases, the organization's communications team is focused specifically on donor audiences and may consider project documentation as too 'technical' for them, leaving it to technical teams to lead the external communication of these materials. In other cases, there are specific communications teams focused on ensuring that technical audiences external to the organization get the detailed information they can use. Regardless of the team doing the work, sharing through listservs, the public media, conferences, external websites, social media, etc., helps to convey project documentation and learning to external parties. This often involves sharing the work internally and storing information in internal systems and then leveraging these internal resources to share the work externally through other mechanisms that address the interests of specific external audiences.

Staff Experience Capture

As stated above, many KM activities in organizations working in global health focus on capturing staff experience for others to learn from without requiring the staff to speak to each other. This also includes ensuring a smooth onboarding experience, as new staff can learn from institutional knowledge of those who came before them.

Staff experience capture includes the onboarding processes of deciding what information new staff need to have to make them more productive and having processes in place to ensure that all new staff across the entire organization are systematically provided this information to support their productivity. Related to onboarding is the strategy of assigning experienced staff to mentor new staff during their initial months, to "show them the ropes" and be an informal source of advice and guidance.

Due to frequent staff turnover in organizations working in global health, another critical strategy for organizational learning is to capture knowledge of employees who leave and to capture the knowledge assets[2] and resources of ending projects. Having a procedure for offboarding staff typically involves the staff member's supervisor and includes identifying how all key tasks that were performed by that employee will be assumed by others in the organization and ensuring that knowledge assets developed by the employee are available in shared drives. Another offboarding best practice is to conduct a debriefing interview with the departing staff member to elicit insights, institutional memory, and recommendations.

Pause and Reflect

A typical activity that organizations working in global health use to achieve organizational learning objectives is to pause and reflect, meaning to engage in intentional reflection and documentation of the insights gained to chart a new path forward. This can take many forms, including gathering available knowledge and resources within the organization to inform proposals or new projects. Another strategy to facilitate the transfer of organizational knowledge is to conduct a short desk review to identify what the organization has done previously on a topic or in a country, to identify possible knowledge resources that could be useful to a new project. Having well-organized organizational capability statements that can be searched by topic and country, can also facilitate this knowledge transfer. Organizational learning also includes ensuring time is set aside to reflect upon and document what happened during an event.

There are many activities that support Pause and Reflect, but the two most common are After Action Reviews and Before Action Reviews, described on pp. 40-41 of this guide. After Action Reviews are a process whereby the key stakeholders of an activity come together after the activity to discuss what was supposed to happen, what actually happened, why there was a difference, and what they'd do better next time. The learning captured from that meeting then gets fed into organizational systems for improvement and change. Before Action Reviews are similar, where a group of people study the previous reports of relevant actions and gather recommendations for the new activity based on past experience.

2. Project knowledge assets include best practices, codified explicit knowledge such as standard operating procedures or guides, and the knowledge and insights of key project staff.

Peer-to-Peer Learning (Knowledge Exchange and Facilitation)

Establishing procedures and processes to facilitate knowledge sharing across the organization are basic inputs to enable staff to connect with and learn from each other to improve efficiency and productivity. These would include organizing topic-specific knowledge exchanges across projects and establishing and fostering internal interest groups or communities of practice (CoPs) or other ways of communicating within the organization (e.g., topical internal listservs) to facilitate sharing of knowledge and insights on priority topics. Topical listservs are especially convenient when employees can self-select which lists they want to be part of and when there is a shared understanding of when to use them to put out calls for help with solving a particular problem or performing a specific task.

Another function that KM practitioners sometimes lead in organizations is that of facilitator

Another function that KM practitioners sometimes lead in organizations is that of facilitator—whether as a neutral party to facilitate After Action Reviews for projects, a neutral capturer of institutional knowledge in an exit interview, or the convener and facilitator of CoPs (or the trainer of others to lead and facilitate CoPs). The KM practitioners themselves can serve as facilitators, but they can also train others on facilitation techniques and provide tools and templates for others to follow to become better facilitators.

Organizational context is a driving factor of whether facilitation is seen as a KM activity or not, but the ability to bring people together to exchange ideas, integrate lessons, and share what may not have been written down is a key function that any KM initiative should support. Other facilitation needs are to support organization-wide activities that foster KM behaviors, such as leading Fail Fairs or Journal Clubs or other large participant gatherings to gather insights.

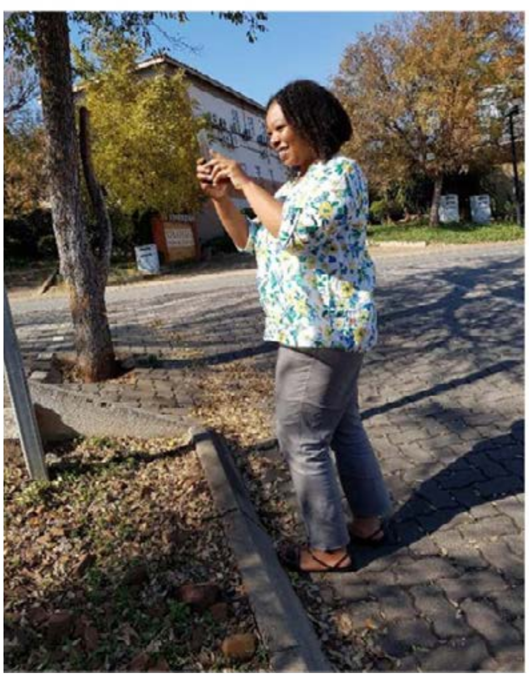
Another peer-to-peer learning strategy to support organizational learning is to learn from other organizations and competitors in priority areas through staff participation in external learning activities, such as CoPs and other learning networks, briefings, conferences, etc. This also includes staying on top of the latest academic and gray literature in the field. To effectively leverage these external learning opportunities, the organization needs to establish processes for documenting, sharing, and storing insights from such participation. These processes could include short back-to-office emails highlighting key points of learning and short presentations on conference participation at staff meetings.

Curating, Organizing, Storing, and Using Structured Knowledge

One way that curating structured knowledge improves efficiency is by enabling staff to find the people with the knowledge they need through staff experience directories. In practice, internal staff experience directories can take many forms: expanded profiles in the email system, a designated informal or social system (like Workplace or Yammer), linking internal systems to external ones (like LinkedIn), opening internal HR systems for search, or specifically created databases of expertise. The main goal, regardless of system, is an up-to-date, searchable database of staff, their experiences and skills, and a method of contacting them.

Another strategy to facilitate efficiency is to clearly organize shared electronic files to make it easier for staff to access existing organizational knowledge assets and to know where to store knowledge assets they create. Good electronic file management could involve developing a taxonomy system to govern file structure (e.g., standardizing the structure of project files across all projects in the organization) and creating file management and naming guidance to ensure work products can be easily located and utilized. Another consideration in electronic filing systems is to make sure that file names are short so as not to exceed character limits on file names and pathways. A good practice is to put in place procedures for regular file maintenance to move outdated information to archive folders.

Organizational learning requires that the organization have in place processes and systems for gathering, documenting, storing, and transferring best practices, insights, tools, and



"A lot of my work right now is learning and understanding the relationship between knowledge management and the work that I have done before and how I can better translate it. What will help me the most in my new role is that I have worked in the field setting, when I lived in East Africa I was out in the communities, I was part of the day to day activities and that helps me think about *'what and when are the opportunities for learning, how do you capture stories, what are the hard parts about that, how do you plan and prepare for capturing stories, what are the logistics for gathering stories and how do you plan for learning?* I hope that this will be of use at my new job and will help me provide better, smarter support to my teams."

Beth is a Knowledge Management Advisor at URC in Bethesda, USA

Photo and compilation by Angella Kigonya, URC lessons learned from projects and specific activities to make them available to others in the organization who can apply them. Such processes and systems should be articulated as "how we do things" and made available for new projects during their design and at start-up, so that they can be incorporated into project procedures. The expertise and experience mapping activities described above can also inform new projects by identifying individuals and projects within the organization who could be invited to planning meetings to contribute expertise that could be valuable to the new project.

Effectively capturing knowledge assets, such as reports, end line data, stories, and photos/videos, of closing projects requires time and advance planning. Project staff should prepare inventories of key project knowledge products, tools, and approaches and provide guidance on how these can be most effectively used by others in the organization. A plan should also be developed that explains where these assets and resources will be stored and still accessible to others, both inside and outside the organization after project closure (e.g., transferring resources from a closing project website to the organization's website or intranet). Our experience has been that if closing projects don't address these needs before project end, valuable knowledge assets can easily be misplaced or lost, representing a loss to the organization.

DOCUMENTING FAMILY PLANNING ADAPTATIONS TO COVID-19 THROUGH AN INTERACTIVE STORYMAP

In May 2020, the WHO Implementing Best Practices (IBP) Network, the USAID-funded Knowledge SUCCESS project, and the USAID-funded Research for Scalable Solutions (R4S) project formed the COVID-19 and Family Planning/Reproductive Health Task Team to create a space to discuss challenges faced by family planning stakeholders during the pandemic. Members shared both short-term adaptations and longer-term strategies to respond to COVID-19, and the Task Team documented these in an interactive story map that was inspired by a similar one developed by PSI to visualize their COVID-related program adaptations. They started with a Google document to which task team members could contribute information on country-specific adaptations and challenges. Each entry also provided contact information for the person knowledgeable about the experience. IBP members entered information as free text; R4S staff at FHI 360 did the categorization of the information by area of the FP adaptation (service delivery, social and behavior change, and advocacy/policy) and displayed the information as an interactive map (*https://fhi360.maps.arcgis.com/apps/webappviewer/ind ex.html?id=9996ab31d9e34600a3fe7d5ddae05ded*) using ArcGIS Web AppBuilder. The Task Team continues to seek examples of adaptations to add to the map; email ibpcovidfptaskteam@gmail.com for more information.

Introduction

This section explores the structures, roles, and functions that organizations working in global health need to prioritize for effective KM programs. It provides an overview of:

1. How to structure KM in the organizational chart;
2. How to formulate roles and job descriptions to match those needs; and
3. How to build capacity in KM in the organization.

How to Structure KM in the Organizational Chart?

While organizational context is integrally important to identify where and how KM should be structured within an organization, there are some variations in the standard locations KM can be placed. Depending on the main activities that are envisioned for KM to take on at a particular organization, there are different places KM could fit in the organizational chart. It is also possible that certain staff are identified to lead KM, but the work is delegated to a cross-organization group of staff working on various aspects of KM. This is not meant to be directional, just showcasing options and how they relate to various activities.

In most, if not all, organizations, responsibilities for KM fall to a diffuse group of staff that come together either by organizational mandate or by natural identification of a community of practice. And beyond the staff who have a KM focus, it is also important to include KM activities in the job descriptions of all staff, as KM truly is everyone's responsibility.

In many cases, KM roles cover a wide array of KM activities and do not neatly fit within any one organizational unit. This section outlines some general areas that KM works in that need to be considered when selecting how to structure KM in an organization and provides examples of where KM could fit depending on the primacy of various activities.

Potential Organizational Home	KM Activities
Executive Office / Strategy	Cross-functional issues, documentation and communication, staff experience capture, pause and reflect, peer-to-peer learning, using structured knowledge, and kick-starting KM
Cross-Functional Working Group	Solving cross-functional Issues
Communications	Documentation and communication
Human Resources	Staff experience capture
Monitoring, Evaluation, and Learning	Pause and reflect
Technical Programs	Peer-to-peer learning (knowledge exchange and facilitation)
Information Technology, Technical Programs	Curating, organizing, storing, and using structured knowledge

Executive Office/Strategy

In cases where KM is just starting in an organization, or if KM focuses on cross-organizational activities, it is valuable to have KM be part of the strategy team or part of the executive office. Having a direct connection with the most senior leaders of the organization gives KM programs' change management initiatives the strongest allies and cause staff to see KM as a true organizational priority instead of something that a siloed department is trying to achieve. This comes with its own pros and cons, as while it is wonderful to have executive buy-in, it can sometimes be seen as a top-down initiative that staff must participate in, instead of want to participate in. It is important to ensure executive buy-in and to have champions in the middle and lower levels of the organization; KM should be everyone's business. Another challenge is that as executives change, KM could be seen as a pet project and be eliminated as leaders transition.

Cross-Functional Working Group

Instead of sitting within an organizational chart, sometimes KM is started as a group of staff working together without one clear organizational unit behind it. And although KM should never be driven by just one organizational unit or one team and should always in some form be a cross-organizational effort with many voices and many drivers, not having a place within the organization sometimes leads to budgeting, resourcing, and prioritization challenges. While there can be an overarching support person who is working to align initiatives and bring cohesion, each department and team will have its own way of working that needs to fit into large organizational goals. A cross-functional working team that meets regularly and is jointly responsible for organizational KM is needed for KM to be truly successful. And this group requires someone with a deep understanding of digital tools for KM--preferably someone within the IT department who can act as an ally to ensure IT support of KM activities.

A cross-functional working team that meets regularly and is jointly responsible for organizational KM is needed for KM to be truly successful.

Communications

If the main focus of KM is to document project experiences and communicate with external audiences, KM can also sit within the Communications team. This inevitably leads to some of the challenges around documenting what truly happened for purposes of learning instead of packaging learning in a way to make it 'safe' for public consumption. This also leads to a focus on website development, information architecture, and a focus on targeting 'lay' audiences. When KM is focused on documentation and communications, the role it plays in the organization tends to be less on internal operational KM opportunities and more on documenting programmatic experience for fundraising purposes.

Human Resources

KM can also sit within the Human Resources team, but usually is only done so when the primary focus is on onboarding, employee experience, learning and development, and offboarding. This usually leads to KM having a more general focus and less connection to the KM being done in projects (documenting and communicating). A benefit of having KM sit in HR is the focus on professional development opportunities, improved efficiencies for onboarding, and clearly organized and available HR information for staff. It can also lead into all-staff meeting facilitation and internal communications functions as well.

Monitoring, Evaluation, and Learning

When KM activities are prioritized around Pause and Reflect, it is usually more program-focused, leading into adaptive management and program improvements. In such instances, KM's home may be the MEL team. This usually means the focus of KM is on sharing evaluation reports, documenting learning from programs, or analyzing data to identify trends across projects. In some instances, if the organization has a strong CLA orientation, the KM function in a MEL team is to facilitate knowledge sharing and ensure that conversation, analysis, and communities are engaged to interrogate the data to identify in more nuanced ways what worked and what didn't. KM in MEL teams usually focuses heavily on adaptive management and CLA activities and is less focused on organizational KM activities like intranets.

Technical Programs

In organizations working in global health, it is common that even if the organizationally-focused KM team doesn't sit within the Technical Programs unit, there are KM staff within the unit focused on programmatic KM who are available to provide technical assistance to specific projects. With this type of KM, usually the focus is on documenting what occurred and ensuring a communications lens to documenting specific programs or interventions. It is possible that this role also takes on a research lens, providing literature review and research support to program staff. This can be expanded so that each program team has their own KM function, allowing each team to be specific in how they focus their knowledge generation and stewardship efforts.

A common role breakdown is that a KM staff member in the Technical Programs or MEL team will be focused primarily on programmatic KM, ensuring learning is being done in projects and fed back into and across organizational level KM systems. This usually means the KM activities are focused on program improvement, project design, and technical assistance activities. Organizational KM activities that look at improving operational efficiencies or ensuring the proper use of technology for document sharing, are less of an area of focus.

Information Technology (IT)

In most KM communities, it is heavily discouraged to have KM be part of IT, with the thought that KM, which should focus on People, Processes, and Technology, becomes only about Technology. However, in some organizations where KM is very focused on internal organizational KM, such as repositories, file management intranets, and 'digital workplace' or collaboration, the KM team sits within or close to the IT team. A further challenge to KM being in the IT realm is that the hiring managers are usually IT-trained experts, and the resulting hires may be more focused on the technology side than the user side of KM. However, being within the IT sphere does provide an opportunity to be the bridge between the organization and IT and really create the most useful, user-friendly IT tools to support KM activities.

How to Formulate Roles and Job Descriptions?

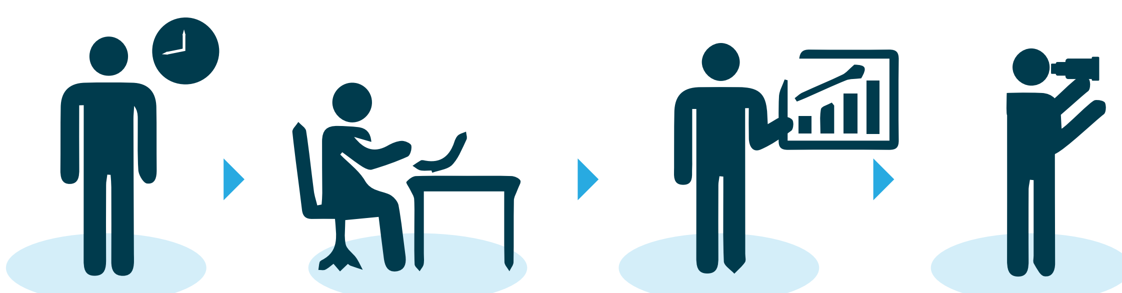
After an organization identifies the main KM activities it wants to support and using that information, identifies where those functions should sit in the organizational chart, the organization then needs to formulate roles and job descriptions to find staff to fulfill those functions. Similar to the other sections, organizational context is critical in understanding the roles and job descriptions an organization needs, along with the skill sets they should be hiring for, versus the skill sets they can identify internally.

Ideally, a long-term vision of what KM can be for an organization will be agreed upon, which will then help formulate the team. The KM team should be located close to the work being done, prioritizing local knowledge and experience. For each function of KM, along with the envisioned structure, some assumptions can be made to help formulate roles and job descriptions. Smaller organizations, where it may not be possible to develop a dedicated KM team, can also use this section to incorporate KM functions into existing roles based on priority activities.

The KM team should be located close to the work being done, prioritizing local knowledge and experience.

Beyond job descriptions for staff specifically focused on KM, it is also important to include some key KM activities in everyone's job descriptions. This ensures that all staff are aware of the role they play in organizational KM and what the expectations are around their participation in KM activities and that staff can be evaluated against their adherence to those standards. KM is everyone's responsibility, and by including details in everyone's job descriptions, everyone is able to understand their specific roles to play and how to play them.

Different levels of staff can also be used to fulfill KM roles:



Paid interns
time-bound activities

Analysts/junior staff
less KM experience

Advisors/managers
can train others on KM

Directors
lead KM initiatives

Characteristics and Behaviors

Regardless of the official roles, the activities they'll be undertaking, or the functions or units KM staff sit in, all KM staff should have a certain set of core characteristics that allow them to succeed in KM:

- Embody the values of collaboration, knowledge seeking, knowledge sharing, and organization.
- Patience, a customer service orientation, a drive to change things for the better, and a belief that knowledge can change the world.

A belief that people know what will help them and that everyone deserves to be listened to. Resilience to weather potential pessimism towards KM activities.

Paid Interns

Depending on the organization's use of interns, hiring paid interns who are studying KM at university is a great option. Paid interns are best used for closed-ended projects or big kick-offs that are then planned and resourced for sustainability. Good examples of these are: 1) the creation of one knowledge product based on evaluations or analyses conducted by experienced staff; 2) surveys or studies of particular knowledge management practices with an analysis of current conditions that more senior staff can use to evaluate the direction of KM activities; or 3) the initial creation of a repository of knowledge products. It is integrally important that interns be paid, that they gain valuable skills for their future careers, and that they not be used simply to replace higher paid staff or do work that needs to be perpetually funded. Job descriptions for interns should be written more like scopes of work, to identify a particular task they are going to achieve in their time-limited internship.

Junior Roles

Junior level roles can be inexperienced staff with an interest in KM. These roles can be assigned long-term management of KM activities, like coordination of a community of practice, updating and maintenance of knowledge repositories, and coordination and minor facilitation of knowledge-sharing events. Junior level KM roles can come straight from secondary education and be trained on the job or can have masters level degrees with KM coursework. Since KM is a less formal academic field, interest in the area, previous work experience, or a career path change are all sufficient for junior KM roles. Job descriptions for junior roles should be written to include a list of activities that the role will manage and be responsible for, along with the opportunity to be involved in other KM activities in a support function.

Advisors/Managers

Mid-level roles can lead particular aspects of KM programs, but not necessarily the entire portfolio. They are able to provide advice and guidance on KM and to be a resource that staff trust and go to for their knowledge-related needs. They do not need formal training, but it is helpful if they are responsible for particular aspects of KM. For example, a person leading a curating and organizing activity portfolio would be ideally trained in librarianship; a person leading communication and documentation efforts would ideally have some formal training on documentation and knowledge transfer and editing/writing skills; and a person leading a knowledge repository would ideally have some formal IT training to understand the system they are using. Job descriptions for advisor roles should be written to include the area within the KM program that they will be responsible for leading and identify the particular skill sets needed within those areas. Such roles should also require the ability to advocate for KM as well as teach others about it.

Directors/Leadership Roles

These are higher level roles that don't necessarily require a certain number of years of experience but do require a leadership skill set and mindset that can see a vision, articulate it, and sell it to the organization so everyone understands where the KM program is going. This role doesn't require formal education, but it is important to understand some of the theoretical implications of the work going on. Job descriptions for leadership roles should be written by the staff that will be under them, with the buy-in and input from the leaders above them, so everyone understands what they are looking for. It is important for leadership roles in KM to have had experience working in more junior roles so there is some understanding of the possibilities, the challenges, and the realities of working in KM. It is also recognized that in smaller organizations, KM Directors may also have Advisor-level duties as well. Of tremendous importance in the Director and Leadership level roles is the ability to continually advocate for KM and be a champion for their team and what KM can bring to an organization, as well as the ability to understand business needs and communicate what KM can do for each aspect of the organization. Having knowledge of how global health organizations function is of great benefit to be able to speak to and relate to other senior leaders they have to work with.

Job descriptions for leadership roles should be written by the staff that will be under them, with the buy-in and input from the leaders above them.

Illustrative Job Roles and KM Activities

The chart below provides examples of tasks that job roles can perform in the outlined KM activities.

JOB ROLE KM ACTIVITY AREA	PAID INTERNS	JUNIOR ROLES	ADVISORS / MANAGERS	DIRECTORS / LEADERSHIP
Solving Cross-Functional Issues	* Provide support for coordinating working groups	* Coordinating working groups & KM champions	* Leading KM champions groups	* Forming and leading working groups
Documentation and Communications	* Research and write discrete products	* Document entire program area or project as directed by plan	* Create documentation and communications plans	* Set strategy and organizational guidelines for documentation and communications
Staff Experience Capture	* Conduct discrete interviews to capture knowledge	* Coordinate mentorship or onboarding program	* Develop onboarding strategy and plan * Develop offboarding and knowledge capture plan	* Ensure cross-organizational support for staff experience capture activities (to capture "how to" information)
Pause and Reflect	* Synthesize and write AAR or BAR Reports following meetings	* Facilitate pause and reflect sessions following standards	* Develop and refine pause and reflect guidance	* Ensure pause and reflect sessions are embedded across the organization
Peer-to-Peer Learning	* Coordinate a standalone learning event	* Coordinate ongoing CoPs or learning events	* Develop and refine learning event standards * Facilitate sensitive events	* Work cross-organization to embed learning events as part of culture
Curating and Organizing	* Add identified materials to an existing repository * Cull, clean up, or reorganize existing repository	* Day-to-day management of existing system	* Develop and implement systems (needs analysis, user experience testing, etc.)	* Work cross-organization to get the funding and resources required to build repository

KM training in Benin. KM training is more effective when it gives staff the opportunity to practice KM techniques and explore KM concepts with members of their work team. Photo credit: URC, USAID ANCRE Project.

How to Build KM Capacity in an Organization?

Part of the role of the KM team, regardless of organizational chart location, should be to build capacity around KM for all staff members in an organization. The type of KM skills needed varies dramatically among staff but range from needing to facilitate virtual communities of practice to organizing files in internal KM systems. The skills required should be trained for each particular task, and the KM team should be able to provide support on a wide variety of KM challenges.

Beyond the tasks and skill-based capacity building, the KM team needs to work across the organization to build, sustain, and encourage a culture of curiosity and learning and to ensure that staff try to find out who has done this before, beyond just providing a directory for them to search, and ensure that at the end of an activity staff take time to pause, reflect, and document their learnings to share with others, beyond just moving to the next task. Encouraging a shift in organizational culture is never easy, but by providing hard skills and KM products, as well as gentle consistent reminders and senior leadership buy-in for using those skills and products, an organization can adopt a KM mindset.

To build capacity in hard skills, a combination of creating self-service trainings, providing direct support, and providing in-house technical assistance is the best approach. Create a training regime and map out and create self-service training modules, whether using your organization's Learning Management System, or doing something as simple as recording your screen and walking through a PowerPoint. Having monthly KM community of practice calls where interested parties can learn about various KM activities, facilitation techniques, or new tools is another option. Depending on your organization's culture, find the most helpful regular approach to sharing information about KM tools and techniques and how to use them.

Having senior leadership model the behavior they want to see, by reinforcing that these sessions are important to attend, actually attending themselves, or offering the KM team's support to other parts of the organization in senior leadership meetings is another effective way of generating interest in learning more about KM. Ask a senior leader to attend a session or be the participant in a training, or even recommend to their staff to watch the training video. The recommendation and approval from a senior leader can sometimes push staff members to pay attention to messages.

While KM is a known term in most development organizations, having a KM strategy, with a clearly articulated vision and goal is the first step in building understanding of KM and aligning people to it. This strategy should be used to develop a workplan that should also be socialized with staff once approved by leadership. This allows the exact meaning of KM for that organization and how to encourage KM behaviors within that organization to be constantly reiterated and built upon. Providing training for both organizational and project staff on KM and knowledge exchange is needed to ensure the success of KM activities. This involves not only training and reinforcing the use of the systems and procedures, but change management and behavior change activities that cause staff to adopt more sharing, searching, and use behaviors in their daily work. A common and useful way to measure success of a KM initiative is to use a KM capacity or maturity matrix which measures how ingrained these ideas and behaviors are across the organization.

Introduction

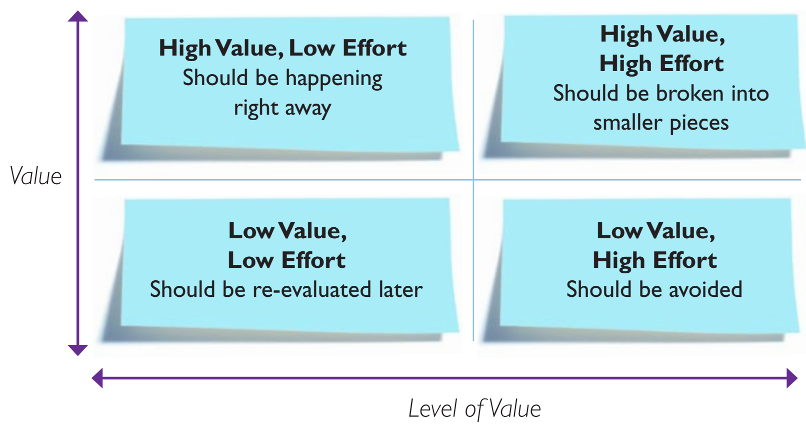
This section reviews and discusses various tools and practices that can be used to achieve organizational KM objectives. These tools and practices are diverse and can be customized to best meet the needs of your specific organizational context.

How to Prioritize Tools and Approaches?

In organizations working in global health, where resources can often be limited, it is important to prioritize tools and approaches for KM based on the effort needed and the value for money.

Filling in a simple 2x2 matrix where the x-axis is the level of effort and the y-axis is expected value can help organizations prioritize the tools included in this section to maximize the impact of KM in the organization. This activity is most useful when completed with a group to bring in various perspectives.

How To:
Using post-its, group members should write the activities being considered and determine where they fall in the matrix. It is natural to have more items near the top (high value), so it's important to balance the matrix by moving the axis so that there are roughly an equal number of post-its in each quadrant.



This will clarify which high-value activities should be happening already (top-left quadrant) and which ones can be broken down into smaller pieces (top-right). This activity can be revisited once every 6 months to 1 year to ensure that priorities reflect organizational context.

Tools and Approaches

There are various tools that can be used to achieve the objectives outlined in Section 2. This section on KM tools and approaches provides comprehensive information allowing potential users to understand the purpose, benefits of, and guidance on the best timing and application of each tool and approach. Each of the following tools and approaches is explained in a summary table that can be used as a handout or quick guide.

Tools for

1. SOLVING CROSS-FUNCTIONAL ISSUES:
   - Champions
   - Working Groups
2. DOCUMENTATION AND COMMUNICATIONS:
   - Planning Tools and Templates
   - Lessons Learned and Program Documentation
   - External Communications
3. STAFF EXPERIENCE CAPTURE:
   - Onboarding
   - Offboarding
4. PAUSE AND REFLECT:
   - After Action Reviews (AAR)
   - Before Action Reviews (BAR)
   - Debriefing
5. PEER-TO-PEER LEARNING (KNOWLEDGE EXCHANGE AND FACILITATION):
   - Communities of Practice
   - Learning Events and Exchanges
   - Knowledge Fairs
   - Knowledge Cafés
   - Peer Assist
6. CURATING, ORGANIZING, STORING, AND USING STRUCTURED KNOWLEDGE:
   - Repositories/Knowledge Bases
   - Intranets
   - Document Management and Collaboration
   - Expertise Locators

I

Solving Cross-Functional Issues

- Champions
- Working Groups

What the objectives of these tools are	KM functions within organizations can be involved in the process of resolving cross-functional issues to develop a systematic process, maximize communication among stakeholders, and ensure documentation for future learning. There are multiple methods to achieve this; two are described below.
Why they're beneficial	Allows organizations to break down siloes to accomplish tasks.
When to use them	When a problem spans multiple organizational units.
How to use them	Identify the problem that needs to be solved, identify the best tool to engage to solve that issue, and engage.

Resources and guidance

Government Services Administration:
Running Tiger Teams (https://tech.gsa.gov/guides/Tiger_teams/)

Champions

KM activity this tool supports	Solving Cross-Functional Issues
What the tool/ approach is	As described in The Importance of Champions: A Change Management Manifesto (https://usaidlearninglab.org/lab-notes/importance-champions-change-management-manifesto), "active champions can serve multiple functions: • **Promoters -** Advocate with other colleagues for change integration. They "talk the talk" and build relationships to proactively connect stakeholders to examples of positive change outcomes. • **Integrators -** Build ideas for change into their work. They serve as examples of how change can be implemented. By being practical and realistic, they find new paths for integrating new attitudes and practices. • **Modelers - "**Walk the talk" by modeling change-based behaviors and values in how they work and interact with others. They share successes and challenges in how they have shifted their behavior, mindset, and are reliable resources for other champions. Potential Champions can be encouraged to gain the skills to become active: • **Inquirers -** These individuals are open to new ideas, feedback, and approaches. They are curious and want to know more. • **Enthusiasts -** These individuals see change as being aligned with their interests but are unsure how to operationalize it."
Why it's beneficial	These individuals will promote buy-in within their networks by using their relationships and knowledge of the target initiative to gain support.
When to use it	This approach is best used when rolling out a new system or process organization-wide.
How to use it	Stakeholder mapping can identify candidates that will be champions.

Resources and guidance

Six Sigma: The Champion: Key to Six Sigma Success (https://www.6sigma.us/six-sigma-articles/champion-key-to-six-sigma-team-success/)

Ernst & Young LLP: Increasing Employee Engagement During Times of Organizational Change: A Case Study (https://www.propertycasualty360.com/2014/06/23/increasing-employee-engagement-during-times-of-organizational-change-a-case-study/?slreturn=20201113154920)

USAID Learning Lab: The Importance of Champions: A Change Management Manifesto (https://usaidlearninglab.org/lab-notes/importance-champions-change-management-manifesto)

Engage for Success: Using Champions to Communicate: Communications TAG Toolkit (https://engageforsuccess.org/using-champions-to-communicate)

Working Groups

KM activity this tool supports	Solving Cross-Functional Issues
What the tool/ approach is	Time-bound working groups with a clear scope help solve complex problems which require perspectives from various parts of an organization.
Why it's beneficial	Serve as a forum for cross-organizational collaboration. Some knowledge-related issues, for example the roll-out of an organization-wide knowledge capture or sharing approach, may require perspectives from groups across the organization. To increase the effectiveness of a working group, members should adhere to a scope and time commitment, solicit feedback equitably from each representative, and provide realistic and actionable recommendations.
When to use it	Working groups should be used when an issue cuts across departments or has no obvious owner.
How to use it	• Determine if the working group should be in-person, virtual, or both. • Ensure that all relevant groups are represented and that diverse perspectives are sought out. • Establish ground rules that will promote equitable participation from all representatives. • Use the first meeting to define the terms of reference and agree on a specific time period that the working group will exist. Conduct a review of existing institutional memory on the issue that is being addressed. • Decide how the group will communicate progress and outcomes to the organization.

Resources and guidance

USAID Learning Lab: Scoping Questions for Working Groups (*https://usaidlearninglab.org/sites/default/files/resource/files/Scoping Questions for Working Groups.pdf*)

Build Initiative: Collective Impact Forum: Tools for Working Groups (*https://www.buildinitiative.org/Portals/0/Uploads/Documents/resource-center/community-systems-development/3B%201Collective%20Impact%20Working%20Groups%20Toolkit.pdf*)

Etsy Design: Crafting an Effective Working Group (*https://medium.com/etsy-design/crafting-an-effective-working-group-da77bded3aaf*)

2

Documentation and Communications

- Planning Tools and Templates
- Lessons Learned and Program Documentation
- External Communications

What the objectives of these tools are	Usually done in writing, documentation captures information and knowledge generated during a task or activity. • Subset: What is process documentation by Lucidchart (*https://www.lucidchart.com/pages/tutorial/process-documentation*)
Why it's beneficial	It serves as a record of activities and decisions made that can be referred to later when memories fade. It can help chart the progress of actions and activities or identify where progress is needed. It can help spur conversation to address issues that may be raised based on the documentation gathered (i.e., exit interviews, process or culture surveys).
When to use them	Documentation can be used at any time during any activity, whether it's an individual or group activity. It can be used in an informal way to capture key elements or in a formal way to be an official record of meetings and decision making.
How to use them	Documentation can be gathered manually (via writing) or through audio or video recording.

Resources and guidance

USAID Learning Lab: How to Document Best Practices in Humanitarian Crisis (*https://usaidlearninglab.org/ask-answer/how-document-best-practices-humanitarian-crisis*)

Scott Young: How to Take Notes While Reading *(https://www.scotthyoung.com/blog/2019/01/29/take-notes-while-reading/*)

Medium: 6 Essential Tips on How to Take Effective Notes at Conferences (*https://medium.goodnotes.com/https-medium-goodnotes-com-6-essential-tips-on-how-to-take-effective-notes-at-conferences-7d1ec98a4524*)

Planning Tools and Templates

KM activity this tool supports	Documentation and Communication
What the tool/ approach is	Workplans, identification of roles and responsibilities, terms of reference, etc. They are living documents that allow teams to record important information about project activities or roles and responsibilities and monitor change over time.
Why it's beneficial	Planning tools can get everyone in a group on the same page about roles and responsibilities or progress against activities when working on a collective task. Templates provide structure and consistency when multiple people are assigned to the same task.
When to use it	Ideally at the beginning of any major activity, but they can also provide structure when brought in the middle of implementation.
How to use it	Agree on planning tools and templates as a primary step to completing with your team; identify the key tasks and people involved.

Resources and guidance

American Productivity & Quality Center: KM Tools and Templates (*https://www.apqc.org/blog/knowledge-management-tools-and-templates*)

Lessons Learned and Program Documentation

KM activity this tool supports	Documentation and Communication
What the tool/ approach is	Brief and easy-to-read documentation that outlines the lessons learned and successes of various projects and programs. They are standardized documents that allow a project to be summarized in an easy-to-digest manner that holds up over time and shares information that others can learn from.
Why it's beneficial	They quickly summarize a project for future use and understanding. They can be shared both internally and externally in the form of gray literature.
When to use it	At any point throughout the project or program; major milestones should be documented. At the end of a project when the project needs to be summarized and archived.
How to use it	• Plan for documentation as part of project design and work planning. • Identify key indicators, either programmatic or qualitatively collected for the purposes of the documentation, and record the indicators, key results, and lessons in a standardized format.

Resources and guidance

K4Health: Making Content Meaningful (*https://www.kmtraining.org/sites/default/files/supplement-making-content-meaningful.pdf*)

External Communications

KM activity this tool supports	Documentation and Communication
What the tool/ approach is	Sharing with external audiences the lessons learned and other documents produced in the course of multiple projects or programs. Usually projects have extensive external communication plans for their work, but organizations should also analyze results across projects to identify organizational themes and strategic objectives that should be communicated to external audiences.
Why it's beneficial	It is a way of ensuring knowledge is shared back into the global health ecosystem. Such communication also serves to market the organization's capabilities.
When to use it	At any point throughout the work that a major milestone should be documented.
How to use it	• Plan for documentation as part of project design and work planning. • Identify work across projects and programs that should be documented and shared for external audiences. • Think about the listservs, conferences, and external websites through which the information should be shared.

Resources and guidance

WHO: Strategic Communications Framework (*https://www.who.int/mediacentre/communication-framework.pdf*)

3

Staff Experience Capture

- Onboarding
- Offboarding

What the objectives of these tools are	Ensuring that a new or changing staff member has a full experience of onboarding, appropriate mentoring and support, and offboarding so they obtain the knowledge they need to do their jobs, they add back to the knowledge base throughout, and at the end of their time they share what they did for future learning.
Why they're beneficial	Ensures the knowledge of the organization is transitioned most effectively to a new staff member and remains part of the institutional memory.
When to use them	Throughout the employee life cycle.
How to use them	Intentional thought into every aspect of an employee's experience at the organization, through hiring, promotions and job changes, and exit.

Onboarding

KM activity this tool supports	Staff Experience Capture
What the tool/ approach is	Onboarding is the systemized approach to orienting new employees where they receive information most pertinent for them to effectively do their jobs. Such information could include organizational charts, meetings with key personnel, or in-person or online training.
Why it's beneficial	Onboarding benefits organizations by supporting new employees in identifying and applying their previous knowledge to learn a new job and introducing new ideas and ways of working to an organization. It can also reduce turnover by helping new employees learn their jobs quickly and feel successful and valued within the organization.
When to use it	Generally onboarding is conducted when an employee first begins work in an organization.
How to use it	• Onboarding can be seen from the perspective of 1) logistical onboarding, and 2) cultural and knowledge-based onboarding. • Logistical onboarding focuses on activities such as making sure the employee's workspace is properly equipped, obtaining badging to access the work building, and setting up email and online system accounts. • Cultural and knowledge-based onboarding focuses on helping the new employee learn an organization's history and culture and provides a contextual backdrop for the employee to understand organizational and individual work processes and how the two ideally should work together.

Resources and guidance

Workfest: Transform the Employee Experience with These 5 Onboarding Resources (*https://www.zenefits.com/workest/best-employee-onboarding-resources/*)

Open Venture Partners: Reduce Employee Turnover (and Its Impact) Using KM (*https://openviewpartners.com/blog/reduce-employee-turnover-and-its-impact-using-knowledge-management/#.XnrhElhKhEY*)

Offboarding

KM activity this tool supports	Staff Experience Capture
What the tool/ approach is	Offboarding is the systemized process of ensuring staff share their knowledge prior to leaving the organization. Steps in this process could include electronic file identification and transfer, completing a work handover document and/or offboarding checklist, documenting specific job tasks, and conducting HR and KM exit interviews to capture departing employees' perceptions, experiences, and lessons learned while on the job.
Why it's beneficial	Offboarding allows for the capture of tacit knowledge and institutional memory that can be utilized to provide operational consistency and support remaining employees (via a handover document or documented task steps) in taking on tasks formerly done by the previous employee.
When to use it	Offboarding is initiated when an employee has announced his/her departure from an organization.
How to use it	Offboarding can be used to show outgoing employees that the organization values their feedback, and it can be an opportunity to get specific (and often honest) information on areas of the organization that work well and others that could be improved moving forward.

Resources and guidance

An offboarding checklist template should include:

- Primary stakeholders the position engages with and contact information
- Primary and secondary job duties and responsibilities
- A simple table can be used with the following headers: Current Project, Status, Action Needed, Partners & Key Contacts, Critical Issues/Priorities.
- Location/description of any key physical files/resources
- Website logins and passwords for shared team resources
- Unique software (with license status) on the employee's computer that will be needed by replacement staff (e.g., Adobe suite).
- Useful listservs, communities of practice (internal and external), journals, or newsletters to which the employee subscribed
- Calendar of major activities/events related to the employee's role
- Contact information after departure (email/phone)
- Summary of lessons learned and recommendations for new hire from departing employee

4

Pause and Reflect

- After Action Reviews (AAR)
- Before Action Reviews (BAR)
- Debriefing

What the objectives of these tools are	Pause and Reflect is a meeting of all stakeholders designed to help identify successes and challenges during the course of working on a project, task, or activity.
Why they're beneficial	Pause and Reflect activities give those involved an opportunity to learn and provide feedback to identify successes and challenges. They provide an opportunity for participants to consider the impact of changes in the environment in which the project or activity occurs. They allow for changes to be made during a project, task, or activity as opposed to when the work is completed. They encourage ongoing communication and can promote mutual understanding and teamwork.
When to use them	Pause and Reflect activities can be done during and after the completion of a project, task, or activity.
How to use them	There are many different approaches to engaging in Pause and Reflect. They include: After Action Reviews, Before Action Reviews, and Debriefing.

Resources and guidance

USAID Learning Lab: Tools to Help Guide "Pause and Reflect" Activities (*https://usaidlearninglab.org/ask-answer/there-tool-help-guide-pause-and-reflect-activitiesdevelop-questions-pause-and-reflect*)

USAID Learning Lab: Facilitating Pause & Reflect (*https://usaidlearninglab.org/library/facilitating-pause-reflect*)

After Action Reviews (AAR)

KM activity this tool supports	Pause and Reflect
What the tool/ approach is	After Action Review is a form of Pause and Reflect that allows participants to critically assess all aspects of the work and note areas for improvement or continued application in the future. After Action Reviews often focus on answering the following questions: • What were we trying to do? • Did we do it? • If not, why didn't we? • What lessons learned can be applied to address future challenges?
Why it's beneficial	Provides an opportunity to assess what happened and why. Designed to be learning-focused to help individuals and teams grow. Improves communication and feedback within teams.
When to use it	After Action Reviews can be done following project start-up in a new country or new technical area, during a project, following the completion of a major task or activity during a project, as well as after the close-out of project activities.
How to use it	• The facilitation process should have a clear beginning, middle, and end. The beginning should have participants address the following: 1) What was supposed to happen during the task, activity, project? 2) What actually happened? 3) What went well? 4) What didn't go well? 5) How can improvements be made moving forward. The middle of the process can be used to further discuss challenges/successes for clarity and mutual understanding. The end should give everyone an opportunity to provide final feedback. • The process should result in action items with roles, responsibilities, and timelines. The action items should be followed up on to ensure changes are made. Previous AARs should be reviewed before initiating a new task, activity, or project.

Resources and guidance

USAID Learning Lab: After-Action Review (AAR) Guidance (*https://usaidlearninglab.org/library/after-action-review-aar-guidance-0*)

MindTools: After Action Review (AAR) Process (*https://www.mindtools.com/pages/article/newPPM_73.htm*)

Food and Agriculture Organization Food Security Information for Action Programme: After Action Reviews and Retrospects (*http://www.fao.org/elearning/course/FK/en/pdf/trainerresources/PG_AARRetrospects.pdf*)

David Gurteen: Introduction to After Action Reviews (*http://www.gurteen.com/gurteen/gurteen.nsf/id/X00006DDE/*)

Before Action Reviews (BAR)

KM activity this tool supports	Pause and Reflect
What the tool/ approach is	Before Action Review is a form of Pause and Reflect that allows a team to assess the knowledge they currently have and ensure everyone has a clear understanding of both the *expectations* for the project and what the final outcome *should* be based on existing resources, staffing, etc. The BAR can be used to review current information on the upcoming task, activity, or project to identify lessons learned and risks that may be encountered.
Why it's beneficial	Allows for identification of lessons learned and risks/pitfalls before proceeding. Allows participants at different levels (managerial vs. field staff) to reach a common understanding of what actually can be accomplished based on funding, staffing, and other resources provided. Planning how knowledge will flow into and out of an initiative will foster new ideas and allow others to learn about successes and challenges.
When to use it	Use BAR before a project/task/activity begins. You may also do a BAR when you know or believe the relevant knowledge useful to your project already exists somewhere in your organization.
How to use it	• Set aside a time and appropriate location to gather your team. Try to include upper-level decision makers if possible. Think about what are the intentions for the project/task/activity and what has occurred before. • Some questions to consider: 1) What are our measures for success? 2) What are anticipated challenges we may face? 3) What did we learn from last time (documentation from previous reviews/assessments)? 4) What do we need to know? 5) What can we do to improve outcomes going into this project? • One key point of discussion for a BAR is to address how critical knowledge for the project/initiative will be accessed, who is responsible for finding it, and how new knowledge will be created and stored.

Resources and guidance

USAID Learning Lab: Before Action Review (*https://usaidlearninglab.org/library/before-action-review*)

National Health Service: Before Action Review (*http://www.kmbestpractices.com/uploads/5/2/7/0/5270671/before_action_review_postcard_pdf_410.6kb.pdf*)

LLIHN Clinical Librarians: Before Action Reviews (*https://lihnnclinicallibs.wordpress.com/2017/12/06/knolwedge-management-advent-door-3-before-action-review-kmadvent17/*)

Debriefing

KM activity this tool supports	Pause and Reflect
What the tool/ approach is	A form of Pause and Reflect that allows a team a time scheduled to report out or interview stakeholders to gather information to and from participants.
Why it's beneficial	Allows for learning and greater understanding among participants of activities, tasks and/or projects.
When to use it	Debriefing can occur before, during, or after activities, tasks, or projects take place.
How to use it	• Debriefings can be used to develop action plans based on topics discussed during a report-out or interview. • They can also be used to determine stakeholders' perceptions of/ responses to activities, tasks, and/or projects before or after they have occurred. They may serve to highlight challenges with how activities, tasks, and/or projects are being planned or have occurred, allowing for a change in course to ensure better outcomes. • By reflecting on and recognizing the knowledge, skills and attitudes used in an experience, debriefings allow participants to develop individual and group awareness that can inform future decision making.

Resources and guidance

Jump Foundation: What Is Debriefing and How Is It Done? (*http://experience.jumpfoundation.org/what-is-debriefing-and-why-should-we-debrief/*)

Journal of KM: The Leaving Expert Debriefing Process (*https://pdfs.semanticscholar.org/11f6/25132961b6193ac58a625276cc58fbbe1398.pdf*)

Peer-to-Peer Learning

(Knowledge Exchange and Facilitation)

- Communities of Practice
- Learning Events and Exchanges
- Knowledge Fairs
- Knowledge Cafés
- Peer Assist

5

What the objectives of these tools are	Peer-to-peer learning intends to share promising practices about an activity or initiative. Examples include: Communities of practice, brown bags, formal learning events, peer assist, and knowledge café.
Why they're beneficial	They allow learning and sharing to occur among colleagues or those with shared experience, making the knowledge exchange more readily acceptable and understandable.
When to use them	Peer-to-peer learning can be used any time there is a group of individuals with the same focus and interest in learning how to do something or do it better. Ideally, peer-to-peer is most successful when there are varied levels of experience, knowledge, or skills in the area that people have gathered to share and learn from.
How to use them	Develop a clear objective. It is critical to be as specific as possible when defining a peer learning objective. Identify a community leader. A successful peer-to-peer learning leader's activities and actions are pivotal during the period when the community is first formed. Cultivate or attract members with strong bonds. A clear objective serves as a form of social glue. In-person gatherings of professionals who oftentimes hold the same occupation also strengthen connections among members.

Resources and guidance

World Bank: The Art of Knowledge Exchange (*http://hdl.handle.net/10986/11983*)

Effective Institutions Platform: A Guide to Peer-to-Peer Learning (*https://www.effectiveinstitutions.org/media/The_EIP_P_to_P_Learning_Guide.pdf*)

USAID ASSIST Project: Tips for Design and Facilitation of Learning Sessions in the Context of Collaborative Improvement of Zika-related Services (*https://pdf.usaid.gov/pdf_docs/PA00WH5H.pdf*)

Communities of Practice

KM activity this tool supports	Peer-to-Peer Learning (Knowledge Exchange and Facilitation)
What the tool/ approach is	Communities of Practice (CoPs) are a group of people who share a concern, a set of problems, or a passion or established expertise about a topic, and who deepen their knowledge and expertise by interacting on an ongoing basis.
Why it's beneficial	A CoP brings together people from across the organization to discuss lessons learned, new evidence, and resources.
When to use it	A CoP can be used for a cross-functional topic in the organization that could benefit from bringing people together. For example, technical (like reproductive, maternal, newborn and child health, disease areas, MEL, etc.) or operational topics (country/project operations, start-up/close-out).
How to use it	• Communities are often best launched with a meeting to establish relationships within the context of the new community. • CoPs require an active facilitator who arranges in-person and on-line events, seeks out knowledge to post that the community needs, facilitates getting members' questions answered by the right people, and sets a welcoming and appreciative tone for the on-line conversation. • It's important to facilitate an inclusive environment to encourage participation from staff who have any level of expertise. • Organizations can create informal internal CoPs in the form of interest groups on topics that are priorities for the organization, that periodically meet and have means for ongoing communication (listserv, meeting opportunities) and archiving of CoP resources (shared drive, folders).

Resources and guidance

World Bank Group: *Building Community: A Primer 2018 Update* (*http://hdl.handle.net/10986/34014*)

Management Sciences for Health: Evaluating Technical Exchange Networks at Management Sciences for Health (*https://www.msh.org/sites/default/files/ortiz_evaluating_technical_exchange_networks_tens_at_msh.pdf*)

Wenger and Trayner: Introduction to Communities of Practice (*https://wenger-trayner.com/introduction-to-communities-of-practice/*)

Learning Events and Exchanges

KM activity this tool supports	Peer-to-Peer Learning (Knowledge Exchange and Facilitation)
What the tool/ approach is	Structured exchanges used to share knowledge of promising practices, approaches, or guidance. Can include things like brown bags, knowledge fairs, knowledge café, etc.
Why it's beneficial	Ability to share information about promising practices with a wider group. Structured events can be used when the goal is to impart information in an interesting and memorable way.
When to use it	Learning events should be planned regularly to promote the flow of knowledge through an organization. The type and scope of the event can be determined based on available level of effort.
How to use it	Each type of exchange will have different nuances in the planning process, but the important piece to remember is to ensure that the content is concise, engaging, and fits the style of the event.

Resources and guidance

Knowledge SUCCESS: KM Training Package for Global Health Programs: Share Fair (*https://www.kmtraining.org/content/telling-share-fairs*)

Hyper Island Toolbox: Virtual Facilitation Toolbox (*https://toolbox.hyperisland.com/*)

Liberating Structures (*http://www.liberatingstructures.com/*)

Knowledge Fairs

KM activity this tool supports	Peer-to-Peer Learning (Knowledge Exchange and Facilitation)
What the tool/ approach is	Face-to-face events in which participants set up physical displays to share their programs and projects. Highly interactive and collaborative, with practical demonstrations. Can be internal to an organization or open to partners and the public. Are free-flowing, open, flexible, and non-hierarchical.
Why it's beneficial	Mixes up people with different skill sets, specialties, and experiences, allowing them to engage in a variety of interactions. People can view the compilation of an organization's output and share thoughts and ideas with others in an unstructured, informal way. Creates opportunities to bring field staff or implementers together to explore each other's work and discuss interventions and results.
When to use it	To identify and highlight tacit knowledge. Showcase the work of individuals/groups which have not been fully shared previously. Demonstrate commitment to knowledge sharing.
How to use it	• Develop an organizing team to plan logistics, themes, and timing. • Confirm/determine any budget needed. • Plan out a year before event. • Prepare a Call for Proposals. • Conduct an After-Action Review, summarize and disseminate results/ findings after the event. • Can be convened at a regional or country level.

Resources and guidance

Food and Agriculture Organization: How to Organize a Knowledge Share Fair (*http://www.fao.org/3/a-aq228e.pdf*)

United Nations Development Programme: Knowledge Fairs (*https://www.shareweb.ch/site/Learning-and-Networking/sdc_km_tools/Documents/Knowledge Fair_Undp.pdf*)

Knowledge Sharing Tools and Methods Toolkit: Knowledge Fairs (*http://kstoolkit.org/Knowledge+Fairs*)

Knowledge Cafés

KM activity this tool supports	Peer-to-Peer Learning (Knowledge Exchange and Facilitation)
What the tool/ approach is	A *conversational process* - an innovative yet simple methodology for hosting conversations about questions that foster discussion about a topic of interest to participants.
Why it's beneficial	Can engage teams of multiple stakeholders and staff from various regions through pre-determined questions. Can address serious issues that have not been fully examined or discussed previously. Can evoke and make visible the collective intelligence of any group. This can increase people's capacity for effective action in pursuit of common aims.
When to use it	To tackle tough issues. To cross-pollinate ideas. To discover new insights into important questions and topics.
How to use it	• Clarify the purpose. • Create a hospitable place. • Explore questions that matter. • Connect diverse perspectives. • Encourage everyone's contribution. • Have hosts monitor themes and insights.

Resources and guidance

USAID ASSIST Project: Learning for Quality Improvement: Knowledge Management Approaches and Tools from the USAID ASSIST Project (see Techniques for Integrating and Synthesizing Knowledge) (*https://pdf.usaid.gov/pdf_docs/PA00WRR6.pdf*)

David Gurteen: The Knowledge Café concept (*https://knowledge.cafe/knowledge-cafe-concept/*)

Peer Assist

KM activity this tool supports	Peer-to-Peer Learning (Knowledge Exchange and Facilitation)
What the tool/ approach is	Peer Assist is a meeting of a project team with colleagues the team has invited to assist them with a significant issue the asking team is facing.
Why it's beneficial	Encourages learning from the experiences of others. Avoids duplication of efforts, starting over, and repeating the same mistakes.
When to use it	The request is initiated by the project lead when he or she thinks peers could be of help to the team. Typically, Peer Assists are called early in a project, but it is also possible to call a Peer Assist when a team runs into an unusual problem part way through a project.
How to use it	• Usually 4-5 colleagues, from other sites, meet together at the site of the asking team, or the assist may be held virtually if it is not possible to meet face-to-face. An assist may last from an hour to 2 days, during which time the asking team and those who have come to be assisters, are in dialogue about the project. • The asking team gains the insight of colleagues. The assisters gain as well, learning both from the project and from each other. Teams who call for an assist are not required to use the suggestions that others make, although most find the insights of their peers of considerable value to their on-going work. • When starting up new work in a country, bring either people from outside the country, or take a team from one region to assist a team in another region.

Resources and guidance

USAID Learning Lab: Peer Assists: KM Briefs (*https://usaidlearninglab.org/sites/default/files/resource/files/ppl_guidance_docs_peer_assists_final-new-2.pdf*)

Kent E. Greenes (Ask Magazine): Peer Assist: Learning Before Doing (*https://www.nasa.gov/pdf/489055main_ASK_40_peer_assist.pdf*)

6

Curating, Organizing, Storing, and Using Structured Knowledge

- Repositories/Knowledge Bases
- Intranets
- Document Management and Collaboration
- Expertise Locators

What the objectives of these tools are	Ensuring that organizational knowledge is captured without relying on person-to-person communication for retrieval.
Why they're beneficial	These tools ensure that explicit knowledge is available across the organization – meaning anyone can access the institution's collective knowledge at their own need.
When to use them	For both programmatic and organizational information, at all stages of most points of work.
How to use them	Ensure there is always time for documentation, clear ways to contribute to the systems, and clear ways to search them, with minimal barriers.

Repositories/Knowledge Bases

KM activity this tool supports	Curating, Organizing, Storing, and Using Structured Knowledge
What the tool/ approach is	Storing documented knowledge products, produced by the organization or by external parties, in a database that is searchable. May also take the form of providing access to external knowledge bases to organizational staff to ensure latest literature access. Storing living documents, final project documents, etc.
Why it's beneficial	Final deliverables can be viewed by staff across the organization to promote cross-pollination between projects. Ensuring that living and final documents are stored appropriately and separately allows staff to distinguish documents that are in the works vs. documents that have complete information.
When to use it	Some form of repository is necessary for staff to access and store documents. They can be stored on Google Drives or network drives or an organization can invest in a packaged or custom document database to allow users to perform more complex searches.
How to use it	• File management. • Document database (better for medium to large organizations).

Resources and guidance

Pebble Road: Organizing Digital Information For Others (*http://themimu.info/sites/themimu.info/files/documents/Ref_Doc_Organizing_Digital_Information_for_Others.pdf*)

Intranets

KM activity this tool supports	Curating, Organizing, Storing, and Using Structured Knowledge
What the tool/ approach is	A platform for an organization to communicate with its employees. Information that can be found includes: new employee information, information about policies, standards, and processes, organizational structure, programs, etc.
Why it's beneficial	Facilitates access to organization-wide policies to help staff in their daily work. Functions as a method of internal communication for organizational events and initiatives and leadership communications. Encourages employee engagement. Promotes employee collaboration.
When to use it	Mid-size to large organizations can benefit from streamlining communication via an intranet. An intranet requires a team of people to create relevant content, so ensuring an organization has adequate resources available is important.
How to use it	• A distributed governance structure is ideal to ensure that content is relevant and updated by staff who are closest to the information. • Staff in business units populate content within the intranet, which is managed by a core team of staff who may develop standards for quality and consistency (often IT staff).

Resources and guidance

HubEngage: Understanding Intranets Versus Employee Apps (*https://blog.hubengage.com/intranets-versus-employee-apps)*

Microsoft: Intelligent Intranet Roadmap (*https://docs.microsoft.com/en-us/sharepoint/intranet-overview*)

American Productivity & Quality Center: Using KM for Organizational Change at Pact (*https://www.apqc.org/system/files/K06815_KM%20as%20a%20Force%20for%20Transformative%20Change%20at%20Pact.pdf*)

Document Management and Collaboration

KM activity this tool supports	Curating, Organizing, Storing, and Using Structured Knowledge
What the tool/ approach is	The effective management, storage, and dissemination of print and electronic documents, spreadsheets, graphics, slides, forms, images, and other work products generated during regular work activities.
Why it's beneficial	Clear identification/naming and easy access to work products: Improves efficiency (reduces staff time wasted on searching for important folders and files). • Streamlines workstreams. • Saves electronic storage space. • Enhances collaboration (if everyone knows where work products are, they can be easily shared).
When to use it	File management should be applied in all aspects of the work products life cycle. Specifically, when content is: • Generated and modified • Managed and organized • Finalized and shared • Stored and retrieved for later use
How to use it	• Map out your workflow process to inform how folders/files should be structured; it can be helpful to develop a work product organizational structure. • Identify and map out what exists in all folders in all platforms (i.e., Google, Dropbox, SharePoint). • Identify content that is no longer being used and archive or delete it. • Use workflow and usage practices to build a new filing structure. • Based on resources and capacity, consider adopting automated processes to organize and manage electronic content.

Resources and guitance

Siyavula: Basic Concepts of File Management (*https://www.siyavula.com/read/cat/grade-10-cat/file-management/03-file-management*)

DGHDesign.com: File Management Course (YouTube) (*https://www.youtube.com/watch?v=k-EID5_2D9U*)

Expertise Locators

KM activity this tool supports	Curating, Organizing, Storing, and Using Structured Knowledge
What the tool/ approach is	Expertise Locators provide the information that allows seekers of knowledge to connect with experts. Each member of the organization has a profile that provides their expertise, projects, languages spoken, and often links to their articles and reports.
Why it's beneficial	For example, a search of the database might help a staff member to find a Portuguese-speaking colleague who has experience in a particular technical area to provide support to an activity in Mozambique.
When to use it	When specific expertise is needed and unavailable in your unit/team/project.
How to use it	• Could be linked to HR systems/tools/staff lists. • Develop an experience database hosted on the organization's intranet in which personnel can mark their areas of expertise and look for others with certain skills as needed.

Introduction

As with any organizational initiative, a robust monitoring of KM activities, tracking of indicators and statistics, evaluation of the data, and adaptation of the activities are needed to ensure they are both meeting their stated objectives, but more importantly, the needs of the staff they are meant to serve.

A lot of information about what KM indicators to use, how to track them, and the best methods for measuring different activities is available in the GHKC Guide to Monitoring and Evaluating KM in Global Health Programs (*https://usaidlearninglab.org/library/guide-monitoring-and-evaluating-knowledge-management-global-health-programs*). It outlines which indicators to use for process monitoring or outputs and has even been expanded to measure Partnerships and Adaptive Management. Selecting which indicators to use is based on the activities and strategy that your own organization sets forth as the key objectives of your KM program. And part of the KM program you put in place should include tracking of the work that you and the KM team (or any staff working on KM activities) do to support the KM program.

How to Evaluate Organizational KM Activities?

The data you collect can and should be used on a regular basis for monitoring and identification of needed course corrections and quick wins. Data should be reviewed on a regular basis (weekly/monthly) and used as part of KM program meetings, where activities and priorities for the next week/month are set. Regular reviews of data can also be shared with targeted stakeholders and users on a quarterly or semi-annual basis. These report-outs can take a variety of forms: a simple email with selected statistics, a one-pager, a gallery of graphics, or an information session. Sharing these statistics with users and stakeholders will show how their inputs contribute to KM on a larger scale and how the selected activities benefit the organization as a whole.

Beyond regular reporting, a robust yearly analysis should be conducted, looking at past trends, how they match up year over year, and what fell short of and what exceeded each goal or objective. Sharing this analysis not only with the senior leadership overseeing the KM program, but also with the entire organizational senior leadership can reinforce organizational commitment to KM. In addition, sharing a less detailed version with the entire organization, either through a presentation at an all-staff meeting or via an email, is another way to reinforce the value-added of KM to the organization. Using the analysis of the yearly program to showcase what has been accomplished and how the program is adapting to meet the needs of staff, is another avenue to generate buy-in. More importantly, this helps to gain supporters and advocates for the work, who can then continue doing some of the change management and capacity building activities needed to sustain KM within the organization.

Learning From Experience Requires Deliberate Reflection

Experience is inevitable; learning is not.

Reflection is most effective when it involves others with similar experiences.

Providing multiple forums for input and ensuring that input is used and acted upon are also invaluable in ensuring that the KM program meets the needs of staff. Organizational context also determines how organizational KM goals are set and by whom; the general best practice is to start with a specific concrete deliverable and expand activities year-over-year as the practice matures.

km 6 Recommendations for Getting Started

Introduction

Our recommendations for getting started are divided into two groups:

1. Advice for organizations with very nascent KM activities that are just getting started on practicing KM, and
2. Advice for organizations with some or even well-established cross-organization or project-specific KM activities that are looking to expand them and make them even more impactful.

Regardless of the current status of KM, starting with formalizing some KM activities or starting to use the terminology of KM when describing existing activities, is a great start. Section 4 of this guidance document, "The Tools of Knowledge Management," provides several examples of learning approaches that can be done with individuals, small groups and units, and throughout the organization. These activities demonstrate the value of KM in tangible ways and also signal that KM can be done simply and quickly—it does not necessarily depend on elaborate organizational structures or arrangements.

How Can an Organization Start Practicing KM?

Get Buy-in and Support from Senior Leadership

Impactful strategies to interest organizational leadership in KM must be crafted with an understanding of the management style, interpersonal relationships, and organizational culture of those in top management. The most effective strategies incorporate elements of effective communication and change management. Some strategies that can be used to obtain leadership buy-in include:

- Developing proposals for senior management on the benefits of KM functions and how they could be developed within the organization
- Making presentations to senior management on value-added KM strategies that are being used by collaborators or competitors, and
- Seeking permission to demonstrate the value of KM through a time-limited, pilot KM application.

Identify Existing KM Activities and Roles that Can Be Leveraged and Expanded

A useful initial step is to identify KM activities and functions that already exist within the organization, including project-led KM activities—even if they are not called KM—to establish the current KM landscape and facilitate the identification of opportunities to build on and expand current efforts. This also includes identifying existing or potential KM champions—people who practice KM, who believe in the value of KM, and who want to see the organization formally adopt and support more KM practices.

This landscape analysis can be accomplished by reviewing the work of each organizational unit (this work is also sometimes called a “knowledge audit”) and the scope of work of each project against the following KM activities:

- Solving cross-functional issues
- Documentation and communications
- Onboarding and offboarding
- Pause and reflect
- Peer-to-peer learning (knowledge exchange and facilitation)
- Curating, organizing, storing, and using structured knowledge

Organize KM Champions

KM champions can play a role in cultivating interest in KM within the organization as well as leadership and management support. It is important to nurture, encourage, and regularly engage with these champions—people who by their nature or position have a stake in organizational KM. KM champions can identify organizational needs and gaps in knowledge generation, management, and dissemination that could be addressed through the application of KM activities or processes. Through their energy, sphere of influence, experience, and connections, champions can tap into and highlight the real challenges they and others may be facing on a regular basis that impede productivity and significantly hamper the organization's ability to successfully meet its objectives. Sometimes these challenges may not be fully understood by those experiencing them until they are identified and openly discussed.

Champions are also valuable because they can demonstrate and promote the idea that at its core, organizational KM is a shared responsibility, and for it to be most effective, all individuals within the organization must be open to learning KM principles and practices and empowered enough to integrate them into their daily work. For more information on KM Champions, see Section 4 of this guidance document, "The Tools of Knowledge Management" under the subsection, "Tools for Solving Cross-functional Issues."

A regional KM training that brings together staff from different countries and backgrounds can be an efficient strategy for building capacity of staff who then become KM champions. Photo credit: URC, USAID ASSIST Project.

Identify Needs and Challenges that Can Be Addressed through KM Approaches

Identifying problems that the organization is facing which could be effectively addressed through KM provides an opportunity for KM solutions and strategies to be utilized and recognized by individuals at all levels of the organization. Resolving challenges by applying KM approaches can increase the number of KM champions through evidence of results and positive word of mouth and can offer a solid foundation from which to influence upper-level leadership to see KM as a viable and flexible option for enhancing organizational efficiency, maximizing operational outcomes, and increasing organizational learning. For example, organizing a focused peer problem-solving session to discuss solutions for an operational problem can inspire confidence and greater understanding of the applicability of KM. Such sessions can be done in as little as 45 minutes and typically generate solutions that immediately benefit all those who participated in the exercise.

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Build Interest in KM through Learning and Practice

Because organizations new to KM may not understand what it is and how it can be fully utilized to benefit an organization, colleagues will likely need to be exposed to KM principles and practices through various types of activities to help them understand the value and practical applications of KM in improving operations and building collaboration.

- Organize brown bag presentations that allow participants to discuss and internalize a working vocabulary and definitions of KM and KM practices that align with the organizational culture. This will help ensure a common organizational understanding of KM and dispel myths (e.g., KM is only about document management).
- Invite colleagues to webinars by KM experts or others on KM strategies and applications.
- Share articles and blogs on KM in areas of interest to the organization, including from competitors.
- Document initial KM experiences to build the evidence base for how KM can help achieve organizational goals.

How Can Organizations with Existing KM Programs Improve Them?

Take Stock of Existing Organizational KM Objectives, Functions, Roles, and Staff Capacity

- Assess how well the organization is performing and identify opportunities for improvement against these six areas:
  - Solving cross-functional issues
  - Documentation and communications
  - Onboarding and offboarding
  - Pause and reflect
  - Peer-to-peer learning (knowledge exchange and facilitation)
  - Curating, organizing, storing, and using structured knowledge
- Organize existing KM champions in the organization to support this formal review
- Develop a survey for all staff to gather views on the value and effectiveness of KM activities, to determine self-assessed confidence in using KM approaches and interest in KM training.
- Conduct interviews with key informants from across the organization to identify successes and challenges with applying KM across the organization:
  - How is each unit applying KM tools and practices?
  - What is working well?
  - What can be strengthened?
  - Are there new functions that need to be developed within the organization?

Develop an Action Plan to Address Opportunities for Improvement

Present the plan to organizational leadership for endorsement. Include recommended changes to how KM is structured/staffed, as needed.

Share Information Regularly

Share information about organizational KM successes and failures through regular updates.

Hire an Outside Expert to Review the Organization's KM Activities and Strategies

The expert can suggest strategies for improvement and also metrics to measure improvement in the organization's use of KM strategies. An outside KM expert can also help the organization to benchmark its KM activities and strategies against those of competitors.

Tools that Can Help

The table below outlines several tools to help you get started or jump start KM activities that allow for customization to best meet the needs of your organization.

Link	Description/Source
SWOT Matrix (https://3lsqjy1sj7i027fcn749gutj-wpengine.netdna-ssl.com/wp-content/uploads/2017/07/Picture5.png)	Use this to jot down your 2x2 Strengths-Weaknesses-Opportunities-Threats matrix.
KM Training Package for Global Health Programs (https://www.kmtraining.org/)	A full package of training resources developed by the K4Health Project to train staff and build capacity in KM and implement KM in global health programs.
KM for Health and Development Toolkit (https://toolkits.knowledgesuccess.org/toolkits/km)	A full package of resources to explain what KM is and its value to an organization, developed by the GHKC in 2016.
Strategy/30 second elevator speech on KM (https://www.smr-knowledge.com/your-knowledge-services-elevator-speech-via-the-heath-brothers-and-smr-international/)	Guy St. Clair, SMR-Knowledge.com
Offboarding Survey Example (https://usaidlearninglab.org/sites/default/files/resource/files/imc_handovers_toolkit.pdf)	International Medical Corps, Handovers
On the Use Of A Diagnostic Tool For Knowledge Audits (http://www.tlainc.com/articl145.htm)	Journal of Knowledge Management Practice, Vol. 8, No. 4, December 2007
Example Job Description KM Program Officer (https://www.kmtraining.org/resources/sample-km-program-officer-job-description)	kmtraining.org

(continued)

Link	Description/Source
Stakeholder Analysis (*https://www.skyrme.com/kmroadmap/stakeholder.htm*)	David Skyrme
Matrix of KM Tools and Techniques (*https://www.kmtraining.org/sites/default/files/km-matrix-updated.pdf*)	kmtraining.org
Share Fair example/tools (*https://www.kmtraining.org/resources/how-hold-successful-share-fair-2nd-ed*)	Knowledge Success/K4Health
Hyper Island Toolbox (*https://toolbox.hyperisland.com/*)	Online toolkit by Hyper Island with different activity types, participant numbers, length, and outcomes
Liberating Structures (*http://www.liberatingstructures.com/*)	Online toolkit by Liberating Structures with different activity types depending on outcome desired
The Art of Knowledge Exchange (*https://openknowledge.worldbank.org/bitstream/handle/10986/17540/843970WP0art0o0Box0382140B00PUBLIC0.pdf?sequence=18&isAllowed=y*)	Reference guide developed for staff at The World Bank

Knowledge SUCCESS (Strengthening Use, Capacity, Collaboration, Exchange, Synthesis, and Sharing) supports learning, and creates opportunities for collaboration and knowledge exchange, within the family planning and reproductive health community. Learn more at www.knowledgesuccess.org.