BECOMING MORE EFFECTIVE LEARNING ORGANIZATIONS

AN ONLINE SPEAKER'S CORNER DISCUSSION LED BY JAN MAES, SARA NAAB SCHAFF, LUIS OSORIO, AND SYBIL CHIDIAC. THE FORUM WAS HOSTED ON microLINKS.ORG

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INTRODUCTION AND OVERVIEW

DAY 0: WELCOME TO THIS SPEAKER'S CORNER

Post By: Jan Maes

Welcome to the 22nd edition of the microLINKS Speaker's Corner on "becoming more effective learning organizations", a discussion that has attracted more than 150 participants, a record! This Speaker's Corner does not aim, like most Speakers' Corners, to promote the sharing of knowledge around a specific issue in microenterprise development, but will instead focus on (the need for improved) knowledge sharing itself. Knowledge is perhaps the single most important asset to bring about the sustainable changes that most development organizations are pursuing. But knowledge by itself does not add much value to our practice. In order to become more effective at what we do, we need to be able to apply additional analysis and judgment to translate that knowledge into new insights and action.

Unfortunately, the reality is that most of us are stuck in to-do mode and spend very little time on reflection. As a result we tend to repeat the same mistakes, reinvent the wheel, or implement interventions that are suboptimal in terms of outcomes, cost-efficiency or sustainability. How can we build more effective learning organizations is the main theme of this Speaker's Corner. Building more effective learning organizations (BELO) is also the name of a USAID/MD small grant facility that enabled four microenterprise development organizations or programs within those organizations (CARE, FFH, Practical Action, and WOCCU) to take a break from to-do mode, and explore ways to improve their knowledge sharing and learning processes, and ultimately to better integrate internal and external lessons learned into idea generation and improved programs.

The BELO project managers of three organizations will each facilitate one day of this three-day online discussion, by not only sharing their own challenges and experiences, but also inviting each of you to share your idea s and ways for improving knowledge sharing and learning in your organizations. Sara Naab-Schaff from Freedom From Hunger will be our facilitator for Day 1 focusing on why organizations or programs decide to become serious about knowledge sharing and learning, and how organizations assess their existing knowledge assets and activities, including opportunities for improvement as well as potential barriers to new knowledge sharing and learning practices. Luis (Lucho) Osorio of Practical Action will take the discussion from there and focus on practical steps organizations or programs and even individual can take to improve knowledge sharing and learning. On our last day, Sybil Chidiac of CARE-US will be our guest moderator and she will help us take a more forward look: how can organizations gauge the effectiveness of improved knowledge sharing and learning processes? How to measure results and convince senior management, boards, and donors about the importance of ongoing knowledge sharing and learning efforts?

We also have the privilege to have as our special guest, Ben Ramalingam, currently serving as strategic advisor to the Active Learning Network for Accountability and Performance in Humanitarian Action (ALNAP). Until recently, Ben led the program of work in knowledge management and organizational learning at the Overseas Development Institute (ODI), London. During our three-day discussion, he will share insights from his research on knowledge and learning in the international development sector, and ask further thought-provoking questions. I hope that you take full advantage of his presence by asking your questions and sharing your own experiences with him.

Before handing over to Sara, I want to make an important distinction between what could be called an organizational versus a programmatic approach. Practical Action and CARE used their BELO grant to improve learning at the programmatic level (the Markets and Livelihoods Program within Practical Action, and Village Savings and Loan Programming within the Economic Development Unit of CARE), whereas Freedom From Hunger used its grant to support its organization-wide path towards improving knowledge management and learning as a new business strategy for the organization. Both approaches are quite different in terms of initial needs assessment, strategy development and implementation, which will become clear from the different perspectives offered by our guest facilitators.

Thanks to all of you for your interest in this exciting topic and I look forward to a very exciting discussion.

Jan Maes
Facilitator of the BELO Learning Network

DAY 1: UNDERSTANDING KNOWLEDGE MANAGEMENT AND MAPPING KNOWLEDGE ASSETS AND FLOW

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Sara Naab Schaff

Thank you Jan for such a great introduction to this very important topic of knowledge management. I fully agree that knowledge is the most critical asset of any development organization and that effective learning and knowledge management are key to fulfilling our organizational missions and truly making a difference in the world.

I am Sara Naab Schaff, Freedom from Hunger's Knowledge Manager, and host of today's discussion. My role as knowledge manager is to support the organization in becoming a more effective learning organization and to develop systematic approaches to managing information, knowledge and lessons learned throughout the organization. Today's discussion will focus on understanding what knowledge management / organizational learning is and various approaches to build a knowledge management strategy.

Let's begin the discussion by talking about what knowledge management is and what it means for organizations.

Because knowledge management and effective learning within organizations are such broad topics and many of us come to it with different understandings about what it is and what the goals are, I have come up with a few goals (not an exhaustive list by any means) that I feel are an important part of any a knowledge management strategy:

1. Use knowledge and learning to enable the organization to achieve its mission – The value of learning is to enable people to more effectively meet the goals of the organization. We learn from what we do so that we can do what we do better, more efficiently and more effectively.
2. Protect knowledge as an organizational asset – Knowledge is the key asset that enables organizations to achieve their goals. Problematically, knowledge lives in the minds of the people who do the work of the organization.

Therefore a goal of knowledge management is to mitigate the risk of losing key knowledge when staff leave or change positions.

3. Respect the knowledge lifecycle – Knowledge is created, codified, stored, searched for, found, understood and re-used. Breakdowns between any of the steps can lead to breakdowns in knowledge sharing and learning within the organization. The development of a strategy to improve knowledge sharing structures often begins with an analysis of knowledge processes already in existence.

4. Implement tools and systems that align information, people and technology – Finally, knowledge management / organizational learning strategies often recommend solutions that utilize tools and practices that support learning and knowledge exchange.

5. The above listed goals can compete with each other – for example – empowering learning across the organization through dialog may enable staff to use knowledge to achieve their jobs but it may not support the goal of institutionalizing knowledge to be re-used over time or by people not engaged in the conversation. I would love for us to debate which of the goals have been most central to our experience, in what ways do they come in conflict with each other and other goals of knowledge management that I have not included which have been key to your organization's knowledge management strategy.

Questions to start the discussion:

1. What has been the experience of your organization? Why are you interested in learning and knowledge sharing?

2. What do you think of the four goals I described? Are any of these goals more important than the others? Why?

3. Are there goals for your knowledge management strategy that are not listed here? Are there perhaps goals you discovered while working towards better knowledge sharing?

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Kathleen Keiser

I'd like to briefly share the experience of our organization:

When our office opened 9 years ago, the director was very intent on setting up systems, and on working intentionally. Because of these goals, and a few other unrelated reasons, he spent almost 2 years creating an elaborate system - for both knowledge management and programming – without implementing any of our program. Though our headquarters was unsurprisingly frustrated with this result, the original director's legacy has proven to be an impressive information management system that attempts to capture all organizational knowledge.

The result?

Let me start with the negatives: Our system is so big that it is sometimes impossible to find something you wrote just a few days ago! This is because each topic we try to capture inevitably touches on several categories; the category you (or someone working on the same issue) think is most pertinent when s/he files it may not be the category you (or they) are thinking of when searching for the info. Second, we spend a lot of time "filing" information, which though obviously an important step, sometimes becomes the sole purpose of your work. The action steps are pushed back because the filing isn't done (or can't be found), or action steps are not even created because the person has been so focused on capturing all the information. Though there are other reasons for stagnation in our organization, I think that this focus on filing is a big one. How to continue to capture all the information, but be action-focused as well?

Now the positives: Once you have found the topic you are searching for, there is often a great deal of information. Of course, people in our organization use the system differently, so sometimes there is no information in a place you are sure there should be something. The challenge when there is information is sifting through it to find what is important to your current question. Facing this challenge makes you question how much information to w rite down when you are "filing"; should you include absolutely everything that has transpired so that the next person who needs the info will be able to find it? Or do you just write down the points that are pertinent to the project you're working on now?

A recent interesting development is the use of a "template." The template is a distressing 6 pages long, but it captures every topic of organization-wide interest (we're a small organization) in a few words. This way, when you're starting a new "file" (for example when you're considering a new partnership with a local company interested in CSR), you can capture all of the information on this template. Though it takes a while to go through all the pages of the template, it can be useful to remind you of aspects of our program that could or should be touched on.

A final point to note for the purposes of this discussion is that we are constantly changing the details of our filing system. This can be frustrating when it feels like busywork. But, slowly the system is becoming a tool that many of us can use to our advantage.

I don't know how helpful our case is for larger organizations, but for smaller ones it is definitely worth considering. Just try not to spend two years setting it up!

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: M.V. Mathew

Dear All,

Greetings from NOCER-India. We are working with grassroot level people all over Kerala ,Karnatka, Pondicherry, M.P., and some parts of Tamilnadu. I fully agree with Sara Naab. The KNOWLEDGE is the POWER. We started with no funds. We 61 members and volunteers started the work. We found that the people are lacking knowledge AND THEY ARE EXPLOITED by police and political parties. The main problem is the lack of awareness about Police and their duties. We conducted classes with eminent retired Judges , Advocates. The people got knowledge, but the problem continued.

The people asked us where is this information? They want it in records. We have started publishing books related Human rights, consumer rights, environmental rights, health rights. We distributed this books for Rs. 2or five. It is 1/25or1/10 Dollars. It is very cheap, and beneficial to people. They bought it. We continued the publishing. Now from 1992 onwards we have published 78 small books. This changed the organization and the people. Please see www.Ashoka.org/node/2554. During the discussion if it is interesting I shall share some case studies how it benefited our organization and the people.

With regards,

M.V.Mathew

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Luis Ernesto Osorio-Cortes

Hi Katherine:

I am Lucho Osorio and I will be co-facilitating tomorrow's discussion.

I want to thank you for your sincerity in sharing with us the positive and negative points of your process of becoming a More Effective Learning Org. (MELO). Part of the success of this discussion is to be open about our processes. We need to recognize that becoming a MELO is not easy and is not done overnight, and we are bound to make lots of mistakes. In fact, I would say that if the organization is not allowed to make those mistakes (caused by a commitment to find out what is really useful for itself), the process will not be owned by its people and will not be sustainable.

Before I move on, let me explain what I understand for "sustainability" in this context: for me it is the ability of the organization to purposefully adapt its learning processes/strategies to the challenges it faces everyday in the pursue of its mission. If this is so, the organization has to understand the logic of its learning processes/strategies and the role that they play in its interactions with the different internal and external stakeholders.

Having said this, there is no harm and it is recommendable to hear what others have to say and use those bits of experience that we believe will do it for us. But we have to have some clear ideas of what we need, what we want to achieve, and what things will work in our organizational environment. External experts can help an organization become a MELO, but their function should be to "fill in the blanks" not to paint the whole picture for the organization. The picture has to be imagined, felt and owned by those who will use it to understand and change the world around them. And this applies to senior managers as well, who sometimes act as external consultants, trying to drive strategies, processes and tools from the top, with little or no consensus, trial and error, and ownership. I think your (Katherine's) example reflects this type of management. Your director's intentions might have been good, but I think he forgot some key elements:

- Learning is a complex and messy process that is very difficult to plan in advance using a linear, log-frame, top-down approach.

- Explicit knowledge (i.e. ideas in paper or other media) is not the only important knowledge in an organization. In fact, I believe that tacit knowledge is more important for development organizations than explicit knowledge.

- We all learn in different ways. An interesting model (imperfect but useful) is that of the 4 learning styles (I think the categories are Pragmatic, Reflective, Thoretical, and Activist). A good learning system allows for those different styles to co-exist, make synergies and have fun learning. Only a small share of explicit knowledge is properly captured by staff who really need them. Forcing people to learn using explicit knowledge is an immense waste of human talent and creativity.

- In the development industry, most knowledge assets (e.g. a report, a research, etc) become obsolete very fast. Very few of them survive as key reference points for a long time (normally principles and good practices). Those are the assets that need to be protected, shared and monitored. The rest is knowledge that I call "inspirational". Its function is to inspire staff and stakeholders for a short time; to instill new ideas and energy into people's minds and hearts, so they can take their own work to a higher level of impact. It is OK if after sometime, that knowledge is gone. Contexts are fundamental in the development industry... and they change very fast, making "inspirational" knowledge useless after a short time.

- It is easier to find documents if they are contextualised. This is one thing we are beginning to try out in our programme. For example, you can use your theory of change as the core text to which all the main files are linked. Of course, that theory has to be known by all those people who will use the docs. Hyperlinks have made this possible and easy.

Do you think some of these mistakes explain some of the problems you have had in your organization?
Do you disagree with some of those points?

Thanks,
Lucho Osorio

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Sara Naab Schaff

Lucho and Katherine,

I think you touch on one of the core debate on how knowledge management and learning can be implemented in an organization -- in one hand, you have a central repository with a well designed lexicon and on the other a free flowing tacit system focused on the immediate needs of learner / workers

Neither of these strategies outweigh the other, in my opinion. The one most relevant to your organization would be dependent on the amount of change in the environment (and thus value in the future use of learnings) and the nature of the work -- how tacit it is.

My organization, Freedom from Hunger has traditionally been very strong at Ad-hoc learning. We made stuff up as we went, we talked about it, we shared emails, we incorporated in our program design. BUT, we were small and all the staff were very much like family.

Recently, we went through a phase of tremendous growth. New programs, new positions and our biggest struggle has been -- what do we know already?? Hasn't someone already done this? So much of our key knowledge has gotten lost.

A concrete example --

A trainer wanted to hold a workshop on a topic that we have done many times. She researched our documents and didn't see anything close to what she was doing so she spent 3 months preparing the workshop. A few weeks later, she was sharing the outcomes of her trip when an "old-timer" chimed up and said, I did a similar workshop -- the documents are in my file.

Therefore, I have focused on trying to understand the work patterns of our staff to find some way to capture knowledge organizationally that is unobtrusive to their work routines (huge challenge) while keeping my eyes open and supporting individual staff efforts to open dialog and promote "moments of learning" as they happen.

I think our challenge as knowledge managers is to push the envelop and innovate systems for knowledge sharing that work for people --

What about videos, podcasts, or even go to some of the places we work where the village has a town griot that preserves the history and learning orally.

Has anyone seen any interesting innovations that serve to balance these competing goals?

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: M.V. Mathew

Dear Kathleen,

It is happy to hear your experience. The gathering of knowledge is very difficult and the source we have to find correct or believable. The effort we are taking is become happier when we are distributing this knowledge to masses and they are getting benefit from it.

In my opinion it is most important to share the knowledge to the unwanted and needy people.

With regards,

M.V.Mathew

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Abdur Rob

Hi Sara,

Thanks for encouraging us to discuss about the knowledge management issues.

Practical Action Bangladesh has been working for quite long time to manage knowledge regarding its success, mistakes and failure that pave the way forward. It starts with recoding of baselines, analysis of performance and impacts and lessons learned. Use of communication media like printed materials, video and audio testimonials, experience sharing meeting workshop provide a kind of knowledge which we re-examined last year by intensively interacting with people and different stake holders to know the effectiveness of these materials.

The interactions focused on the following questions:

I. What does knowledge mean to the poor?
II. What are their heterogeneous knowledge needs?
III. Understand how poor people manage and access knowledge as well as innovate and adapt to knowledge.
IV. What do poor people consider as barriers to knowledge management and its advancement?
V. What are the best means, practices and approaches that will enable the poor to build their capacity to capture, manage, improve and use knowledge for their living?

We used 4 steps methodology for the interactions that include review of concept, participatory community appraisal, survey and consultative workshops with rural people. General perceptions of the people are:

* Knowledge helps people to engage themselves in diverse work in rural life
* It helps them managing / maintaining family
* It is about self-development
* It comes from brain storming and intelligence
* It helps in solving problems & in making decisions
* It brings change in their life
* It means ways of earning
* It is about their children's education

* It increases mutual respect and happiness
* It changes social behavior
* It enables people to advise others and about welfare

The people have emphasized that they first need information about earning income, then education, health, technical skills, natural calamities and others. In rural Bangladesh context where we work, the people are receiving information and knowledge from a wide range of sources which includes family (31%) was the most important source of knowledge to the rural households and neighbor was mentioned as an important source by 12% respondent followed by different institutes 11%, media 9%, NGOs 9%, elders 7%, market 6% and knowledge gained from visits 5%, friends 3% and leaders 2%.

Lack of people's interaction, mutual trust and social network were found as the three most important barriers of managing tacit knowledge in rural areas. Segregation of households and families was also found an important barrier of the promotion of tacit knowledge. On the other hand, poor communicative language, lack of resource and inconvenience time was the barriers of explicit knowledge identified by the participated in the interaction activities.

In a very disadvantaged ethnic community (Dinajpur) participants mentioned the barriers of tacit knowledge development includes mistrust, social conflicts, jealousy and rural fragmentation while lack of literacy was the most important barrier of understanding explicit knowledge. Besides, fragmentation of rural families, loss of ownership, ignoring attitude on local knowledge by the youth and absence of promoting organisation/ institution were the main threats of accessing tacit knowledge, whereas accessibility, lack of financial resource and poor quality of communication were the most important threats of accessing explicit knowledge across well-being groups.

For knowledge generation and management leading to achieving sustainable livelihoods, people consider exposure visit to business, training and educational institutions; conservation of local knowledge about flood, river erosion and ethnic groups; and promotion of knowledge through ICT centre, School and collage, NGO offices can be very useful. They also think that supporting village libraries, village knowledge agent, village leaders and mobile Science laboratories with tailor made service could be the interventions that can benefit the community as a whole.

Regards,

Abdur Rob

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Kathleen Keiser

Hi Lucho -

Thanks! You raised some really interesting ideas. Let me respond to some of them:

-You talked about explicit vs. other types of learning. Doh! This is obvious but somehow I'd forgotten it when thinking about our knowledge management system. I think the people in our office who really utilize/depend on the system are so focused on "capturing" the information (so that steps made during one person's meeting won't be lost when another person picks up the trail), that we forgot about that point. We're focused on knowledge management rather than learning, even though learning is really the point of any knowledge management system!

Your comments make me wonder how to keep the aspects of our current system that work (like capturing info from a meeting so that others can use it when they meet the same people), but broaden it in ways you suggested (like capturing methods from a meeting so that others can use them when they meet different people).

Another point that may clarify why we are so hung up on knowledge sharing: often, our projects are not managed strictly by one person. Donors, advisors, potential interns - these are even more difficult to say that the information is "managed" or pertinent to only one or two people. Often, as relationships with outside actors develop, we realize that staff other than those first in contact with the outside actors should also be in touch. This usually happens three or four or five times with any outside actor. Thus, instead of having to repeat the same information (and probably forgetting some of it along the way) to each new staff person involved, we try to "capture" the info. This, I think, is the type of info you were referring to as being necessary mostly in the short-term. While I agree, there are still many difficulties with this short-term information management! I think those types of difficulties are what I was primarily referring to in my first post.

-Right you are, about contextualizing documents and using hyperlinks to find information. I think we've done a fairly good job of creating a usable system that usually works to contextualize our documents appropriately. But.. it's those documents that don't quite fit into one of our categories, or could fit in several different places, that cause problems. We've been using hyperlinks for a while now but often run into the problem that someone has re-organized the system to make sense of the current reality, and the hyperlinks no longer connect to the necessary information.

-I just saw Sara's most recent post. Thanks for the example! I think it explains really well the challenges we face as our organizations get bigger. In fact, I keep thinking about my organization as a "small" one but due to some very large personalities (and ensuing conflicts), we don't operate like a family much of the time. So, we're not able to share info the way you described in the past at Freedom from Hunger.

As for your question about innovative ways of information sharing; do you think these can be used within the office? It seems to me that the examples you suggested would be great if you're trying to determine in the field what programs have happened before, what's worked, etc. But in the office, when dealing with information passed through hallway conversations, emails and phone calls, many of those systems don't seem to apply. I'm not suggesting there aren't better ways of capturing information into learning tools, but I think tools for office use will be quite different (sometimes at least) from those used for program development.

-Finally, to return to Lucho's questions about whether I think some of the mistakes made were because of too much initial planning without enough interaction: definitely! Now, several years and one director later, we are much better at changing the system to suit our needs as they arise. However, you touch on the points of consensus and ownership. This is still a major problem. Currently, we face a lot of HR problems with some of ou r program staff. While some staff are eager to learn and apply new concepts, some really seem to do as little as possible particularly when asked to innovate. (There are a lot more issues going on here but they just aren't relevant for this conversation.) The reliance by top managers on using the knowledge management system was not reached by consensus, and often the program staff only feel ownership over the few documents they themselves have created, not over the system as a tool for the entire office to use.

I'm really excited and intrigued by this thought of knowledge management through other learning styles.. I'm not quite there yet in terms of seeing how to improve our system to include those styles, but I'll be working on it!

Thanks all,

Kathleen
(Habitat for Humanity - Jordan)

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Alison Griffith

Hi,

I'm really enjoying this discussion already I just wanted to add some further thoughts on the issue of KM and top down management. To be honest I think Practical Action has benefited from clear and strong leadership in putting learning and knowledge sharing (and management) very high on the organisational agenda. We had a major strategy review in 2000 and went from a structure of technology programmes to thematic Aims (Markets and Livelihoods being one of the new Aims) - this was painful for many, of course, but at the same time the organisation re-orientated itself and was explicit that knowledge was a top priority. This meant that money was allocated to hard- and software. Job descriptions were changed to reflect the importance of learning and sharing; new posts were created in the new Knowledge and Communications Unit and we allocated budget to develop better ways communicating with each other (we're still struggling to get SharePoint right though!).

I think this prioritisation by the directors was an important foundation for us. Of course there are many challenges in making it work in practice One of those challenges is to avoid it becoming the preserve of those with "knowledge manager or officer" in their title i.e. everyone else leaves it up to them and it doesn't get truly mainstreamed (maybe abit like having gender specialist in the "old days" - but the challenge with mainstreaming is that it can then become invisible again!).

Really looking forward to hearing what others think

Alison

Alison Griffith
Practical Action

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Tony Pryor

This promises to be an excellent discussion; so far the overview of how different organizations are addressing knowledge and learning is fascinating. Just a couple of thoughts, in part to link back to the day's questions:

- Learning is important, but it's not an end result. One learns to do something, to improve some condition, to get something done. The trick it seems to me is to understand, "count", and to whatever extent possible promote the transformation of knowledge to learning and to action. Stacey Young is now calling her own program "Knowledge driven microenterprise development", which I think begins to get at this issue.
- Second, it's important to remember that the lack of knowledge is not the only thing affecting impact; it might be necessary but it's by no means sufficient.
- Finally, it can be instructive for those of us on this list to look at the knowledge sharing approaches of agencies and organizations quite different from ourselves (such as BP and Xerox). In both instances, what became key to

pass along were approaches to problem solving, not just "facts". In my view, what is important to learn is how to analyze and solve a problem, not necessarily to restate verbatim some "solution" to someone else's problem. This is significant in that what then needs to be transferred are not just lists of facts but approaches.

The last point for me links to some of the comments this morning about problems we are all having as organizations age, people move on, etc. We don't know what we don't know: the last one who left explained what she knew, but not how she knew it; they told us a bunch of facts but they have left out the key ingredients.... All of these statements are heard over and over again. For me, this discussion then becomes inextricably linked to the care, feeding and flow of human resource assets and skills (which is why I find a strong relationship between workforce planning and learning, more so than just with information technology decisions).

Tony Pryor
International Resources Group, QED Team Microlinks Knowledge Management Advisor

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Luis Ernesto Osorio-Cortes

Dear Tony (Pryor):

It was easy for me to agree with the points you made in your email. However, after a deeper reflection on the first bullet point (learning is not an end; it is a means to effective action), I would like to share some thoughts:

Development projects should promote long-term processes of change in a certain group of society. Now, if we want these changes to be sustainable, the members of that group should use knowledge in ways that help them overcome shocks, stresses, new challenges and scenarios, etc. The only way for this to happen without our eternal presence is if the members of that group acquire appropriate learning attitudes, spaces, routines, systems and institutions.

In this sense, learning becomes an end in itself, and we as development NGOs should, in every project ,strive to make sure that those attitudes, spaces, routines, systems and institutions are created and/or nurtured.

It is not enough to limit ourselves to the implementation of a set of activities in a given sequence if those activities (i.e. the project) are not driven from the inception phases by the awareness that without those elements (learning attitudes, spaces, routines, systems and institutions) our efforts are just hot air.

Abdur Rob, the Bangladesh team leader of Practical Action's Markets and Livelihoods Programme, made a contribution that shows a clear intention of his team to understand how learning occurs within a community. This understanding is becoming fundamental for the implementation of their project in Dinajpur.

In our learning model, we consider 4 loops and one of them refers to learning within market systems (our field of work). We are constantly looking for new ways of promoting learning within marginalised farmers and between them and other market actors (two spaces we are currently promoting and researching on are: Market Opportunity Groups and Interest Forums).

I understand that learning as a means to action sounds attractive, but if we accept the idea of learning as the backbone of sustainable social change, we need to accept that learning is an end in itself.

Thanks,

Lucho Osorio
Practical Action

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Sarah Reidy

It's very interesting to hear about the experiences of other organizations on this topic. I'm the Information Technology Manager for my organization and I've been working in tandem with my organization's knowledge manager for several years on a large project to better secure and enable knowledge management. I am tasked with providing systems that support and, as possible, automate the processes within knowledge management. It has been quite a challenge - the bulk of my organization's work is the creation of information and the exchange/dissemination of knowledge.

For me, Sara's comment (echoed by others) that the goals of knowledge management can compete with each other has been my biggest obstacle. How to create a system that effectively captures and manages information without placing a burden on staff who must key in the data. In my experience, systems that place a burden on staff with complicated or lengthy processes can fail as staff abandon those systems. This is especially true when senior staff are not vested in the project.

For my organization's knowledge management needs, my initial inclination was to immediately build a system that would capture and slot and secure the data. Happily, however, my organization's Knowledge Manager suggested that we start small. We spent one year inventorying what we had and how it was currently stored. That was an enlightening process and I learned much about how my staff captures and processes information into knowledge. Our next phase was to standardize as much as we could the processes and methods for capturing and storing information without fundamentally disrupting our staff's work. We're now in the third phase and moving into the fourth phase of moving knowledge stores into centralized systems that are more easily available to staff.

Our goal is to create systems that keep our intellectual capital secured and accessible but also encourages creativity and innovations through collaboration (both among staff and with external audiences). I believe that achieving this goal requires several things:

- Understanding how we create information
- Understanding how we are currently managing, sharing and storing our information;
- Identifying systems that should be changed (cut out superfluous steps) or eliminated (if they are duplicative with other systems) and then making sure that all staff are fully vested in these changes and trained;
- Standardizing, where possible, the systems in use so staff have less "technology" to learn and understand;
- The systems provided do not increase staff's administrative task work by more than 5-10%;
- The systems provided encourage staff to collaborate and share information within the organization and with the organization's partners, colleagues, and external audiences

I read Luis' post with great interest: I agree that tacit knowledge is often much more valuable -- conversations among staff on a topic will spark ideas and new ways to form knowledge: can we capture this process with an automated system? Or do we capture and secure our knowledge more as a reference to the work that's been done?

I look forward to this discussion and already are encouraged by the ideas and suggestions.

Thank you,

Sarah M Reidy
Population Action International, Washington DC U.S.A.

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Peter West

Sara and other participants,

Please excuse my late contribution (it's a function of differing time zones).
I found the posts-to-date to be inspiring.

In my knowledge-sharing experience ...

- "Time" (mine, others) has always been a major challenge. You are so busy trying to get your own work done, that you have little time left to help others. Optimizing time enhances opportunities for sharing. Tools and techniques (e.g., time/task management) can help individuals to get things done more efficiently. To avoid duplication of work or failure to find the right document and/or person, you can adopt a "Push" / "Pull" approach. "Push" refers to processes and systems that inform people about the skills-base of other individuals (e.g., experience profiles) and the availability of new materials (e.g., a what's new newsletter). "Pull" refers to processes and systems that facilitate enquiry (e.g., using the e-mail system to broadcast information about a new task or responsibility and soliciting informed advice and support).

- Trust (e.g., the timeliness and accuracy of your knowledge, your willingness to share) and safety (e.g., openly asking for help is encouraged and supported) are essential for sustained knowledge sharing.

- Reciprocity and recognition encourage commitment to knowledge sharing.

- Interaction (in-person/electronically, formally/informally) is where the tacit knowledge gets exchanged. Promote time and opportunities for interaction.

- Two technologies that encourage interaction and are frequently cited as facilitators of knowledge sharing are: communities of practice and networks. Communities focus on practice and identity - a group of people with a common task or challenge/opportunity focused on collectively developing an effective solution. Networks focus of connection and exchange - a group of people with common interests sharing experiences and resources. The combination of communities and networks is very powerful.

- The leadership of the organization must explicitly and frequently communicate (and demonstrate) the mutual value of knowledge sharing.

Appreciatively,

Peter West
Management Consultant
Canada

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING?

Post By: Jan Maes

Masood's message on the tension between our public and private transcripts caught my attention as well. And your comments, Alison, about the special status of the donor among our stakeholders, is certainly an important factor. I have often wondered why it has taken non-profits so long to take the path towards becoming learning organizations, whereas for-profits (and Tony mentioned a few good learning examples) saw the value a long time ago. Becoming better at learning is ultimately about the bottom line, which can be aligned easily with the interests of most stakeholders of a private enterprise, but much less so with those of a development agency. If our bread and butter consists of implementing logframe-based projects and reporting to donors, then what's the use of KM&L to become better at achieving our missions, unless our missions are properly aligned with those of our funders? I think that this is an important conversation we need to have within our organizations as well. Becoming a truly learning organization can have the power to revisit our mission and reinvent ourselves, something which I think does not happen often enough within the international development sector.

Jan

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING?

Post By: Carrie Keju

As Jan so rightly points, the for-profits-even those within the development community-do a better job at this than us non-profits do. In managing to a bottom line, the efficient and effective use of each resource is necessary across the whole agency or unit. Resources and assets are expected to yield a return on investment-and this very much includes generation and management of knowledge and the creation of further learning opportunities, which then give the non-profit a competitive edge. Conversely in NGOs we tend to manage resources in discrete units based on program awards and objectives. Too often when the program ends, the knowledge is "managed" right into a filing cabinet or a report submitted to the DEC. This is a lesson that we-the NGO community-have learned through decades of successful grants management with multiple donor agencies. But the filing cabinet is not locked and old dogs can learn new tricks. I would like to follow up on Alison's reference to the AMAP BELO activity and the opportunities to learn it provided.

I am the director for Pact of the AMAP Small Grants Activity, which is a grants under contract (also known by the highly unattractive acronym GUC) mechanism. Under a GUC, an organization is contracted to assume USAID's role in issuing and managing awards. In this capacity I have had the unique opportunity to build programs and donor/grantee relationships with the main goal being, well...learning! The overarching purpose of this funding mechanism has been to target learning opportunities and needs for both USAID/MD and its partners. The BELO activity is only one of the activities conducted with this GUC-others include Poverty Assessment Testing, multiple funded cohorts for case-study research, exploration of social-performance audits as internal management decision making tools, and some individual pilots and research programs. The uniqueness of this program is that the whole is a learning laboratory, not that the number of grantees are small-and I attempt to manage it for U SAID/MD as such.

As the program director, I wear two hats-that of the donor with my grantees and that of a contractor with my funder. Besides the lessons learned being shared in this discussion by the BELO grantees, I have learned in this role that there really is much more contractual flexibility than we see when we are busy managing to the log-frame. Too often we slip into an adversarial relationship with our donor where we feel that we need to defend our work to them. Our successes become bigger and our failures are white-washed. Opportunities to learn and have rich questioning discussions are lost. This is as true to non-government funding streams as it is true for government funding streams. The success of the AMAP GUC activities has been built on candid donor/grantee relationships and reporting, where both are working together to garner the greatest lessons for the strongest contribution to our industry. I see this as my ultimate deliverable to USAID/MD under this contract and I either build it in or ensure that it's built in to every project-from the RFA through to the final program report structure. Perhaps this candid relationship is easier for grantees and Pact to achieve than it would be for USAID directly, though if so this is an illusion. All the awards that Pact issues follow ADS Series 300 requirements and in reality are just as restrictive as those issued directly by USAID. That might bring us back to size. Although I currently have 38 open awards, the program is small in staff and I am directly engaged on each project design, award selection and issuance and then management. This enables me to observe learning and work with grantees to maximize that.

The real bottom line is that managing any of these programs for learning requires a lot of additional time effort, on behalf of the grantee and implementer as well as the awarding agency. The implementer in regards to observing, documenting, and sharing learning and candidly discussing what works and what doesn't. The awarding agency in identifying learning objectives early, stating those clearly, and mining program reports for lessons and following up with grantees to reap the best of these. No wonder we so often opt for the much easier placing of the report in a filing cabinet. To successfully move beyond this, programs need to be designed and managed for learning in their entirety. As donors build KM&L expectations into their required program deliverables and manage that so as to return a benefit to the practitioner and as practitioners

design programs to reap more directly and disseminate more fully experiences and observations, we all have the opportunity to build together not only effective learning organizations but a more effective development industry with stronger and more sustainable impacts. Active forums like this contribute to the reality of the dream.

Carrie Keju

Senior Program Officer, Economic Empowerment
Program Director, AMAP Small Grants
Pact, Inc.

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Sarah Reidy

The last few posts bring up some key considerations for me regarding learning -- is this a process which supports innovation and knowledge transfer or is it also, as Luis points out, also an end goal?

For me, if I try to categorize learning as a process, I see it only as a system of steps and procedures that we have to, well, learn.

However, if I look at learning more as a goal, I see that there is a need for supportive processes/systems, a need for a supportive environment, but these are only tools to foster learning.

I had a tendency to think of systems as purely technical -- I was missing the boat on some other key needs: the freedom and safety of people to express their ideas, knowing that they will be honestly considered; understanding that difference of opinion can spark new ideas (i.e., people understand that it's good to disagree in a constructive manner); risk taking can lead to really interesting innovations (again, giving people the freedom totry new things that might fail).

It's worked for me to understand that I need to build systems that support learning, not systems that "try to do" the learning. I believe that there does need to be systematic approaches to how my organization learns: defining what happens after a project is finished (answering questions such as: what did we want to do; did we do what we wanted to do; what happened that we didn't expect) and what we do with the knowledge gained (how will we share this). Providing time to ask these questions also lets us reflect on what our original goal was expected to be and what our outcome actually was.

Sarah Reidy
Population Action International

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Luis Ernesto Osorio-Cortes

Hi Sarah (Reidy):

I think at this point it is useful to mention a model that has helped us (see page 8 of doc "Learning for Development - A literature Review (K. Pasteur) in the Documents section of this Speakers Corner. It is called the Information-Knowledge Learning continuum, and it basically says that if we want to become better learning orgs, we need to be able to navigate well between Data/Information (WHAT), Knowledge (HOW) and Wisdom (WHY). One addition we made to the model is that we see the flow not only in one direction (from data to wisdom) but in both (wisdom must also inform the data we use and collect).

This is precisely what I want to highlight here: I perceive that many unnecessary stresses and loss of resources are caused by not knowing what knowledge to produce, share, protect and monitor. It seems that our desire to be excellent knowledge managers is pushing us into a compulsive need of "hoarding" data, at all costs (and they are big costs... both human and financial!). A compulsive behaviour that we try to ease by nurturing the illusion of us as creators of extremely organised information management systems.

There is info/data that is fundamental for a smooth development of our activities and for transparency purposes (e.g. financial info, minutes of meetings, field diaries) and it must be stored and protected. But this information needs to be processed in certain ways for us to generate new knowledge (e.g. analysing financial info to obtain an organizational trend, or a set of field diaries to understand how we are implementing activities). Now, which information to analyse and what knowledge to produce must be informed by our existing values, principles, strategies, objectives, approaches, etc (our "wisdom").

What I am trying to say is that before we try to implement automated systems or any other apparently very efficient system of knowledge capture, we need to have clarity on what is the type of knowledge we want to capture and for what purposes. And I would dare to say: the fewer the better.

In many occasions, I have seen that we put more effort in producing knowledge for the donors (upwards sharing) than the effort we put in producing useful knowledge for the organization (inward sharing) and the communities we work for (downward sharing)! This is a big issue that I hope we can discuss with donors at some point: How can they create incentives for organizations to reach a balance between upward, inner and downward knowledge sharing and learning. I would love to hear how other organizations are trying to achieve a balance here.

Thanks,
Lucho Osorio

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Ben Ramalingam

A fantastic debate so far. I want to provide a perspective from some work I have been doing on organisational change in the aid sector. Specifically, it is the idea that much of organisational knowledge and learning is fundamentally shaped by what we think our organisations actually are. Consequently, there is much disagreement and debate which is a result of different assumptions and beliefs that are held - often within the same organisation!

A leading KM guru, Ikujiro Nonaka, suggests that many modern organisations are organic, built on processes that are customised and unique, based on specific individuals and their specific experiences and knowledge. Such organisations do not not produce commoditised products, but rather intangible outputs that are complex solutions to unique problems. These organisations may be seen as dynamic, 'just-in-time' knowledge networks. In such settings, KM / OL relates to: "...tapping the tacit and often highly subjective insights, intuitions, and hunches of individual employees and making those insights available for testing and use by the company as a whole..." (Nonaka, 1991, p3). The value of KM/OL is in terms of its contribution to adaptive problem solving at the individual and group levels.

However, in contrast to this, the majority of KM / OL initiatives are based on a model of organisations as machines. This means that information processing is at the forefront, that KM / OL is based on automation and routine, on exploiting physical assets and creating tangible outputs in the form of commoditised products. From this perspective, each segment in an organisation can be analysed with reference to costs and revenues, and the organisation can be "re-engineered" - like a car with a faulty engine – to improve effectiveness and efficiency. In this dominant model, the useful organisational knowledge is formal and systematic - hard data, codified procedures and organisational principles. The value of knowledge and learning is assessed using metrics such as improved efficiency and lower costs.

There is evidence to show that the above rings true in many aid organisations. A 2005 ODI review looked at knowledge and learning strategies in a range of different aid organisations, from large to small. Most of the organisations stated that they are using explicit knowledge and learning strategies in order to make their work more efficient and effective, and there was a telling tendency to point to information systems as the 'end product' of initiatives, rather than to processes for tacit organisational learning. This tendency prevailed despite the widely held view that information was only a part of the overall organisational learning picture. By contrast, a 2005 ALNAP review of field level learning found that "the explicit knowledge is always in catch-up mode at the field level" and that it is "seldom in the right form at the right place at the right time for field staff". It appears that while only a minority of initiatives focus the larger part of their efforts on the human and tacit aspects of knowledge and learning, the needs of field workers are squarely in this area.

Some might argue this is because organisational learning and knowledge management is based on a misunderstanding of what knowledge is, and what organisations need to do in order to exploit it. Others might suggest that it is because aid agencies are under too much presure to be accountable for learning, which in turn creates pressure for the visible, explicit forms of KM / OL. Either way, there is a need for a more realistic view of what aid agencies are, and what they do. The perspective from Practical Action is especially valuable, because it keeps us grounded in aid realities. More on the field perspectives on learning, and the value of tacit versus explicit knowledge for the kinds of problems aid agencies face at the ground level, would help to move this exciting debate forward.

Ben Ramalingam
Strategic Advisor
ALNAP
email: b.ramalingam@alnap.org

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Monique Mikhail

Dear all -

Perhaps I am the only one participating who is completely new to the field of Knowledge Management, but I would like to take the conversation back to the basics, if I may, and perhaps challenge you all with helping me to get off the ground.

I previously had a research position within my organization. Our new management came in 6 months ago and had KM in their last organization (although, it really was more an information management system) and they felt it important to create a new role in the organization since we do an extremely poor job of sharing documents, let alone tacit knowledge. Since I started in my new KM role 1 month ago, I have come across several problems which I hope you all can help me solve. I'm sorry that I'm not adding tons of experience to this discussion, but was hoping that this discussion would address some of the original questions posted and provide me with tools/advice. While it's been interesting, I feel that much of the discussion is theoretical and well beyond the current place that I find myself. I'm hoping that you all might be able to help me with more brass tacks of KM.

Ok, here are my problems thus far:

1) Most of the literature I have found gives broad suggestions or steps for setting KM strategy, knowledge mapping, etc. but very few give the concrete HOW to do all of these things. Since my background is not in KM, it's difficult to know how to do it. I liked the earlier reference to "small steps" instead of grand IT system scale beginnings, but what are these small steps in your experience? What can I do to get the ball rolling and build some trust in the organization (I think many wonder why KM is necessary.)?

2) Most in the organization assume that KM is information management and want me to collect all of the documents, synthesize the learning and give it to them. How can I better separate the two in people's minds and explain to them what KM is and what my role should be? How much information management is really part of KM? Ho w do I not get completely subsumed with this?

3) Fleshing out the differences and overlap with M&E, training/capacity building, and communications functions within the organization is proving to be difficult. Are there good analyses of these and how they all might function well together? Again, the separating out of what my role really is and should be is fuzzy at the moment. How can I help clarify the differences/overlap of these roles in the organization?

4) My understanding of KM seems to be different from the perspective of management. I am now being asked to scale back my knowledge mapping efforts (which I've just begun with some basic KM audit questions and taxonomy-related questions in a questionnaire) and focus on concrete deliverables for staff. This appears to be traveling to our country

offices and pulling the "learning" out of them to then share in documents and tools, training materials, etc. To me this is more of a research role than a KM role, but maybe I'm wrong? I don't see how I can go about making things better if I have no idea where we are currently at or where we want to get to, but somehow concrete deliverables have trumped the broader steps I thought were necessary. Thoughts/suggestions on how I should address this?

I'm sorry if this is not educational for those of you who have been doing KM for some time, but perhaps helping me address these problems/questions will bring forward tools/steps for others who are also new to KM.

Thank you, and I very much look forward to your advice and recommendations.

Monique

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING

Post By: Sara Naab Schaff

Monique,

I think your questions are very important

Point 1 will be the topic of tomorrow's discussion -- so I will leave it till then

Point 2 - I think that getting everyone on the same page is one of the most difficult tasks of a knowledge manager. Everyone has different ideas - ranging from information management, IT, learning coordinator, documenter, etc.

My role at Freedom from Hunger was very fuzzy in the beginning and in fact it took a good year to define what I did. I found that I had to lead the process -- patiently -- by listening and speaking -- mostly listening.

I really studied the organization. What are the needs? Where should I focus? What will have the greatest impact? I also did small things along the way with individuals to start dialog or to help them improve the way their small team managed information.

You may also look to allies within the organization - are there other roles that support information management that you could draw in to support the demands management is making on your time.

point 3 I think M&E is a key part of learning from what we do. I think knowledge management is in large part the extension of M&E covering not only the "what" but also the "how" of our work.

point 4 You are heading in the right direction it seems. There are a lot of methods - quick and dirty and extensive for assessing knowledge management. (I'll post some of my experiences in the other discussion.)

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING?

Post By: Stacey Young

Thanks, Monique, for articulating some of the key questions surrounding the task of establishing a KM program. I can really relate to these -- we grappled with them when getting the USAID Microenterprise Development KM program off the ground. Some quick thoughts on these matters (and I understand we'll have a chance to address some of them in more depth in Day 2):

1) re: small steps toward building trust among those who may not see KM as necessary -- This was an issue for us as well. We later understood that we were encountering a classic mix of early adopters, first and second majorities, and laggards (also known as curmudgeons). At the time, we just felt as though we were bashing our heads against a wall.... what turned the tide slowly in our favor were a couple of things.

First, although the earlier versions of microLINKS made lots of people crazy, the early adopters seized upon it and showed what it could do (including a group that asked us in June 2004, before the site even went live, to open up a collaborative space up on the development site so they could have an online conference on youth & microfinance – still one of our best, and viewable here). We encouraged these early adopters and also learned from them the kinds of support we needed to provide to make our knowledge management activities contribute substantially to their work and development objectives. The support that QED and IRG provide to online forums such as this one that we're having now evolved through a lot of trial and error, mainly with these early adopters.

Second, we kept putting successes like this in front of the skeptics/slower adopters, and they slowly came around, I think both out of a sense of the value this kind of collaboration could create/was creating in international development activities and specifically in terms of their own goals; as well as (let's be honest) in some cases out of a bit of competitiveness a nd fear of being left behind.

2) re: your second point, involving people who conflate KM with information management -- honestly, this is a big problem here at USAID. And we all know about the conflation of KM and IT....

When I was reading your post, I was thinking that maybe one way to get at the problem you're experiencing -- that people in your organization are so focused on categorizing and storing the (info? knowledge?) they have, to the exclusion of focusing on how to share or even apply that knowledge -- one way to get at that and make them stop focusing on their supply of information or knowledge would be to ask them the central question, "Who do we want to do what?"

The *who* reveals key audiences/stakeholders, and the *what* reveals your objectives/what you want those audiences & stakeholders to do. Once you have that sorted out, you can get into why you want them to do those things (what are the objectives for your organization/the developing world), and how you want them to do those things (what knowledge sharing activities/opportunities will you put in place to aid the pursuit of these development objectives?). This who, what, why, how exercise -- essentially strategic planning -- gets people firmly focused on the _demand_ for the knowledge we have, the appropriate ways to package it, and the best ways to provide a forum for sharing that knowledge. This technique has helped my office gain clarity on our priorities. We can't capture and store everything -- this gets us to focus on capturing, storing and sharing those things that emerge as priorities.

This post is far too long, so I'll stop here and hope that we can address the other issues you raised tomorrow.

Stacey Young
Sr. Knowledge Management Advisor
USAID Microenterprise Development office

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING?

Post By: Peter West

Monique and others,

You are not alone. Getting started in knowledge management is both exciting and overwhelming.
In response to your first question ...

Monique wrote -

"*1) Most of the literature I have found gives broad suggestions or steps for setting KM strategy, knowledge mapping, etc. but very few give the concrete HOW to do all of these things. Since my background is not in KM, it's difficult to know how to do it. I liked the earlier reference to "small steps" instead of grand IT system scale beginnings, but what are these small steps in your experience? What can I do to get the ball rolling and build some trust in the organization (I think many wonder why KM is necessary.)?*"

Examples of useful resources (new and old) include:

1) The development of an instrument to measure readiness for knowledge management

Knowledge Management Research & Practice (2007) 5, 75–92. doi:10.1057/palgrave.kmrp.8500132

Access to the full article requires a subscription. You may choose to contact one of the authors and enquire about the availability of free reprints and other resources.

2) Knowledge Management Fieldbook (384 pages, 1999)

Wendi R. Bukowitz and Ruth L. Williams

"Filled with case examples based on the authors' original interviews with more than 50 organizations, the Knowledge Management Fieldbook enables managers to build a detailed action agenda. Using an elegantly simple framework for thinking about the knowledge management process, the authors advocate a strong link between tactics and strategy that will appeal both to in-the-trenches managers and senior executives at the helm who are grappling with how the knowledge economy impacts upon their business. Get beyond theory: use knowledge management to make a difference in your organization. The Knowledge Management Fieldbook is a hands-on guide full of practical advice for managers wishing to implement knowledge management within their organizations. Presented within a comprehensive, yet easy-to-use framework, this book provides quick references to specific areas of the knowledge management process, from information gathering, to facilitating internal knowledge sharing, to measuring the organization's knowledge assets. Managers will be able to assess their organization's strengths and weaknesses using the Knowledge Management Diagnostic. Their knowledge management scores will guide them to specific chapters where they can learn about elements of the knowledge management process that are most critical to them. Case studies, exercises, action agendas and self-assessment tools abound, giving managers a ground-level approach for tackling the challenges of knowledge management. Using compelling arguments, the authors demonstrate that managing knowledge assets is no longer a choice, but a necessity."

While the book is 'old' (in the context of the KM timeline) it provides a number of interesting techniques and tools.

3) Google searches (in Google, Google Books, Google Scholar)

May reveal some target and useful resources/contacts:

e,g,. search for: "knowledge management" + ~getting started

"knowledge mapping" + ~getting started

Hope this helps,
Peter West
Management Consultant
Canada

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING?

Post By: Peter West

Monique and others,

There is considerable confusion between what individuals classify as Knowledge Management (KM) and Information Management (IM).

In response to your second question ...

Monique wrote- "2) Most in the organization assume that KM is information management and want me to collect all of the documents, synthesize the learning and give it to them. How can I better separate the two in people's minds and explain to them what KM is and what my role should be? How much information management is really part of KM? How do I not get completely subsumed with this?"

A couple of years ago, in response to my own frustration with the confusion surrounding IM and KM, I did some research and constructed a table that tries to put Information Technology, IM and KM into perspective. I have added a copy of the Word document ("

Putting Information Technology, Information Management, and Knowledge Management into Context") to the "Documents" section of the "Speaker's Corner 22: Becoming More Effective Learning Organizations" webpage.

I would be most interested in your comments about the content and usability of the table.

Appreciatively,

Peter West
Management Consultant
Canada

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING?

Post By: Luis Ernesto Osorio-Cortes

Dear Monique:

I loved the fact that your email is full of very concrete challenges. I would like to use your text to share some of our experiences (my inputs are embedded in your text):

[Monique:] Perhaps I am the only one participating who is completely new to the field of Knowledge Management, but I would like to take the conversation back to the basics, if I may, and perhaps challenge you all with helping me to get off the ground.

I think you are not alone Monique, we are two at least! Despite the fact that a big chunk of my work is on KM&OrgLearning, my studies are not formally around those fields. I come from chemical engineering and development studies. I had to learn on the run when I came to Practical Action and still am (I hope the learning never stops!). A great thing for our team was to be part of the AMAP-BELO project. It was a relatively small budget but it gave us the focus and the intention that we needed to put KM&OL at the core of our activity for the last 20 months. Having Pact and USAID, and the other organizations who participated (Freedom From Hunger, WOCCU and CARE-US) by our side, following up what we did, providing support and ideas and making sure that we distilled lessons periodically were fundamental conditions for us to be where we are now (far from being an excellent learning organization but in the right track and moving relatively fast). I hope USAID continues expanding this approach and other donors follow suit.

[Monique:] I previously had a research position within my organization. Our new management came in 6 months ago and had KM in their last organization (although, it really was more an information management system) and they felt it important to create a new role in the organization since we do an extremely poor job of sharing documents, let alone tacit knowledge. Since I started in my new KM role 1 mo nth ago, I have come across several problems which I hope you all can help me solve. I'm sorry that I'm not adding tons of experience to this discussion, but was hoping that this discussion would address some of the original questions posted and provide me with tools/advice. While it's been interesting, I feel that much of the discussion is theoretical and well beyond the current place that I find myself. I'm hoping that you all might be able to help me with more brass tacks of KM.

I highlighted a section of your text that for me is very telling: you say that the new managers felt that KM was very important. There are some points that I would think about if I was in your position:

- Why do they feel so? What is their logic? Do they have a "theory of change" in their heads (i.e. can they imagine the processes and hypotheses of how KM&OL can transform the organization)? Or is this feeling rooted in the illusion of KM as the organizational saviour... (the silver bullet)?

- How are they communicating to the organization the reasons why they feel KM is important?

- Is the rest of the organization getting the message?

Despite the fact that in Practical Action, we have a senior management who is already committed to Knowledge and Learning (and we have a newly appointed International KM, a.k.a. Zbig... who is also listening), not a lot of effective learning was happening, at least in our team. For example, we were not sharing lots of valuable experiences across countries effectively; we were repeating design/implementation mistakes in our projects; some tools, like Stories of Chance were not being used properly, etc. (we still have problems in all of these points but positive and exciting changes are beginning to happen at a very high speed!).

My point here is that, unless people at every level of the organization see change happening in daily decisions and attitudes as a result of KM&OL-related activities, the intention and buy-in of senior managers will remain as such... an intention (unless your organization operates like the army). I will come back to this later on during the day. Staff has to realize that KM is not an abstract, remote thing... the realm of "the experts". They have to see KM as a common sense (it is!), practical and fun thing at their reach. (As I mention in my welcome message of today: try to demistify KM).

[Monique:] Ok, here are my problems thus far:

1) Most of the literature I have found gives broad suggestions or steps for setting KM strategy, knowledge mapping, etc. but very few give the concrete HOW to do all of these things. Since my background is not in KM, it's difficult to know how to do it. I liked the earlier reference to "small steps" instead of grand IT system scale beginnings, but what are these small steps in your *experience? What can I do to get the ball rolling and build some trust in the organization (I think many wonder why KM is necessary.)?*

This is precisely the topic of today's discussion! Fasten your seat belts and get ready for an avalanche of tips and tools! ;-) (Everyone: I am gonna need your help here!)

[Monique:] 2) Most in the organization assume that KM is information management and want me to collect all of the documents, synthesize the learning and give it to them. How can I better separate the two in people's minds and explain to them what KM is and what my role should be? How much information management is really part of KM? How do I not get completely subsumed with this?

I deeply believe that KM (and Quality Assurance) must be the realm of the project teams. When KM (and QA) is disembedded from the staff interacting with the communities and other social stakeholders, KM is dead. It is important to have effective info systems but this is not the key to an effective learning org.

Having said this, I assume you are in a privileged position to know where K is being generated and who needs it. What we try to do in our team is to connect those people and let them talk (we try to make those conversations known to other using blogs, wikis, or emails, etc).

Another thing we are trying to do is to create spaces for decentralized distillation of knowledge. This sounds a bit of a mouthful but the concept is very simple (the application requires the creation of new routines... which can be tricky). One of the techniques we are trying to use is Stories of Change/Most Significant Change. Here, there are different levels of reflection and distillation of important knowledge using stories of change in a given project. For example, the team collects SoC and then gets together to identify the MSC emerging from them (this is a clear example of a learning conversation). Those MSC can then go to the next higher level of the organization and the process is repeated. There is a good manual about this written by Rick Davies and Jess Hart called "The MSC Technique". You can see it by clicking here. We also created a blog to allow some teams to share ideas about this. Here you can also see a slideshow with a simplification we made to Davies' and Hart's technique. All your comments are welcome!

[Monique:] 3) Fleshing out the differences and overlap with M&E, training/capacity building, and communications functions within the organization is proving to be difficult. Are there good analyses of these and ho w they all might function well together? Again, the separating out of what my role really is and should be is fuzzy at the moment. How can I help clarify the differences/overlap of these roles in the organization?

I do not really know. This is something I believe you have to decide on your own. But once you have decided which approach to use, you should put effort in making sure that people understand it. For example, what role they play in the KM&OL processes. What routines and spaces they should lead and which ones you will lead. What are the key routines and documents that you will be monitoring. How will you use those routines/docs. Which routines/docs are not important to you. To which audiences you/they will be communicating the knowledge your org produces, etc.

One of the things we are doing in our team in terms of M&E is to define three areas of M&E: our projects! , our learning processes and the influence of our ideas on others. For each area we are defining a model and a set of indicators. The main challenge: having staff using the models and the indicators! Again, go little by little... trying to have some people "feeling" how those models/indicators make their life easier. They will spread the voice.

[Monique:] 4) My understanding of KM seems to be different from the perspective of management. I am now being asked to scale back my knowledge mapping efforts (which I've just begun with some basic KM audit questions and taxonomy-related questions in a questionnaire) and focus on concrete deliverables for staff. This appears to be traveling

to our country offices and pulling the "learning" out of them to then share in documents and tools, training materials, etc. To me this is more of a research role than a KM role, but maybe I'm wrong? I don't see how I can go about making things better if I have no idea where we are currently at or where we want to get to, but somehow concrete deliverables have trumped the broader steps I thought were necessary. Thoughts/suggestions on how I should address this?

With this approach you risk entering in to much to-do-mode and not knowing at the end what the whole process was about. You risk also sending the wrong message to staff: "do not worry, you do not need to take the KM&OL bull by the horns... Super-Monique is here to squeeze your knowledge out and share it around". I think this will lead you to the "expert , centralized scenario" and KM/OL will never be embedded in what people do daily. Of course, you can help with distillation of knowledge, theorization and setting up appropriate info management systems but they have to do their own distillation and reflection as well (hopefully in groups).

[Monique:] I'm sorry if this is not educational for those of you who have been doing KM for some time, but perhaps helping me address these problems/questions will bring forward tools/steps for others who are also new to KM.
Thank you, and I very much look forward to your advice and recommendations.
Monique

I hope this helps. Thanks Monique for sharing your challenges... I hope others come up and share theirs and the solutions they have implemented to overcome them. The more concrete the better. This is the day of the tools and tips! Bring them on!

Lucho Osorio

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING?

Post By: Stacey Young

Lucho, these are all really excellent points, and helpful ones. I want to underscore one: the importance of our KM work being tied to and driven by our interactions with stakeholders.

At USAID and in large bilaterals generally, one sees a mix of KM efforts, some of which are driven by technical agendas with development objectives (e.g., protect natural resources and empower local communities by giving local populations a stake in those resources; or, deepen and strengthen financial sectors so that they better and more sustainably meet the needs of those marginalized in formal banking systems), and some of which are more removed from those objectives and are essentially driven by supply of knowledge, desire to systematize organizational processes, etc.

The former efforts respond to local need and local activities (and the fact that there are few one-size-fits-all solutions in international development). They also respond to evolving understanding of how to promote development objectives. For these reasons, they're often more able to test various KM approaches and adapt them to specific (and changing) development contexts.

The latter kinds of efforts can tend to box themselves in by choosing KM approaches and processes that don't always fit all of the circumstances they're meant to address, and by being deployed as mandated, prescriptive processes that have an organizational stamp of approval, which defines as out of bounds a lot of the creative experimentation and flexible adaptation required to remain relevant and useful.

This points out the friction that Masood mentioned yesterday between an organization's "public transcript" and its "private transcript" (a nice formulation, I thought). Publicly, we can espouse responsiveness to development needs -- which responsiveness inherently calls for flexibility, creativity and adaptation. Privately or internally, the organization seeks standardization, prescription, uniformity that doesn't work in our programs and often doesn't end up working all that well in our operations either. So one question is, why this quest for restrictive prescription on the part of organizations whose work is essentially defined by the need to be responsive, flexible and adaptive to changing local contexts? And, how to promote a more rational, effective approach?

Thanks to all for an excellent discussion so far -- I look forward to comments on this and many other matters today!

Stacey Young

USAID Microenterprise Development office

DAY 1: WHAT'S THE BIG DEAL? WHY FOCUS ON KNOWLEDGE SHARING AND LEARNING?

Post By: Alison Griffith

Hello again,

I like Stacey's question about how to promote a more rationale flexible approach. I guess many of us in this discussion have a key "stakeholder" who often takes priority over all the others - the donor agency! One of my personal learnings during the BELO AMAP project was that we needed to adapt to the rhythms of the different actors and go with what is working. Since this doesn't fit with our typical modus operandi (i.e. a logframe with measurable indicators) it can be quite unnerving. We were lucky in that BELO AMAP were prepared to be flexible with us and go with it (perhaps because the number of grantees was small so it was easier to know that they were making progress, even if it didn't quite match what was originally planned). Some of the outcomes were less predictable but hopefully more sustainable because the activities tapped into what was working for people. We realise that donors need to feel confident that a more flexible approach is going to deliver results so we need to get better at measuring the outcomes and showing the impacts (sorry to state the obvious but it's a reoccurring theme for us in the market development field!).

Thanks for a great discussion.........

Alison
Practical Action

DAY 1: PROGRAMMATIC AND FIELD KNOWLEDGE SHARING VS OFFICE / ORGANIZATIONAL KNOWLEDGE SHARING - KEY DIFFERENCES

Post By: Sara Naab Schaff

A theme that I see emerging in the conversation that Lucho and I frequently discuss is:

- What are the key differences between programmatic / field based knowledge sharing and organizational / office knowledge management?

- What types of systems or practices can support each? or Both together?

As you all have also wrestled with these issues, I would love to hear your thoughts.

DAY 1: PROGRAMMATIC AND FIELD KNOWEDGE SHARING VS OFFICE / ORGANIZATIONAL KNOWLEDGE SHARING - KEY DIFFERENCES

Post By: Zbigniew Mikolajuk

We also need to discuss the issue of involvement and place of poor and marginalized communities in knowledge sharing. Community-based knowledge centres should be capable to adapt knowledge materials from larger organizations and global sources and produce their own localized and contextualized knowledge products - electronic and non-electronic. Knowledge sharing is a 2-way traffic. We can learn a lot from traditional knowledge and real problems faced by people who need the knowledge to cope with overwhelming changes. The focus on organizations is not enough to make knowledge resources available to those who need them most.

Zbig

DAY 1: PROGRAMMATIC AND FIELD KNOWEDGE SHARING VS OFFICE / ORGANIZATIONAL KNOWLEDGE SHARING - KEY DIFFERENCES

Post By: Tony Pryor

It is pretty amazing how these discussions tend to overlap. The Bellanet km4dev email list is having a series of ongoing discussions right now, ONE of which is on km versus/compared to km for dev, which gets right to Sara's email.

Lucie: what's the best way people not yet on km4dev can view this discussion thread? And I'll ask our folk here to post a summary of the microlinks discussion once it's done.

DAY 1: CONVERSATIONS AND DOCUMENTS -- THE MEAT AND POTATOS OF KNOWLEDGE SHARING

Post By: Sara Naab Schaff

Throughout the threads so far we keep coming back to two basic tools that improve knowledge sharing:

1. Creating opportunities for dialog

2. Systematically managing documents and other information

I have some questions that I would like to pose to the group

1. How can these two key strategies re-enforce each other

2. Where and how do they compete with each other -- culture? Work Practice? System design or Technology choice?

DAY 1: CONVERSATIONS AND DOCUMENTS -- THE MEAT AND POTATOS OF KNOWLEDGE SHARING

Post By: Masood Ul Mulk

Masood Ul Mulk SRSP NWFP Pakistan writes

One of the biggest challenges to learning that I find in development is the huge gap between public transcript and private transcript of organisations. The public transcript is how we all in development express our work; its the words, terminologies symbols that we use to describe our work and which enables us to communicate with one another while often in different cultures and enables us to relate to one another.. The public transcript is how we describe our work within the accepted paradigms of the day, however what we actually experience in the field; the complexities, the nuances etc is expressed in the private transcripts that we experience and respond to. The literature that organisations produce, the manuals that are designed are all based on the public transcript of organisations while sadly most of the learning lies in the private transcript. Take for instance the millions that pours into Pakistan in the name of improving governance. There are endless consultants coming in trying to redesign the governance institutions. The rhetoric becomes shriller. New institutions are being built, new rules and systems designed and put in place. But for anyone working in the field, its not the rhetoric that counts, its the reality that he faces. The reality is that there are very few institutions that function. Things work if it's understood that the society functions on relationships which need to be identified, nurtured and developed. If you can understand them you can get things done; if not you keep going in circles. However, when learning exercises are described they will only talk about institutions but ignore the relationships because the latter does not fit into the paradigm of the day. Institutions that become learning organisations bring these two parts of their work together. But the challenge is how can one do that in development?

DAY 1: CONVERSATIONS AND DOCUMENTS -- THE MEAT AND POTATOS OF KNOWLEDGE SHARING

Post By: Tony Pryor

Masood's piece is extremely subtle and is something worth discussing in detail. In particular I'm fascinated by how learning occurs across countries, even within the same organization. Raises questions of the importance of local knowledge, and the transferability, utility of that knowledge for other locations, contexts and issues. You want to avoid the notion that everything is SO context specific that nothing can be replicated, but he raises really interesting questions about how experience can be "ramped up".

I can think of a number of instances where a very localized lesson was then extracted into a "public" face, usually to turn that activity into a "best practice", or then to model the action into something that can be taken and "projectized" into other situations, and then that experience actually NOT being readily adapted in the next context. There are other situations however where ideas that are "public" in Masood's definition still have an impact somewhere else in terms of "private" or localized learning.

One example that comes to mind was the case of Pro Mujer, a very successful micro-credit program based around women's groups which initially came from Bolivia, and then was modeled as a "best practice" by the donor community and re-packaged for other countries. The question that came up though was what exactly was the "model" that was being exported, if indeed Pro Mujer really evolved organically in response to problems, rather than as a formalized micro-credit project. See the interview with Carmen Velasco by clicking here.

There is then a link to the question of assessments; what exactly are we assessing, and why? The activity as defined in the "public" space of organizations, or the lessons learned (good or bad) that evolved over time "privately"?

Tony

DAY 1: CONVERSATIONS AND DOCUMENTS -- THE MEAT AND POTATOS OF KNOWLEDGE SHARING

Post By: Serafin Talisayon

Dear colleagues,

I feel that the questions Sara posed at the start of Day 1, namely which goals of KM are more important, and which she again asked in two other postings, namely how we balance competing goals and how key strategies can re-enforce or compete with each other, have not been addressed much in our discussions.

Which knowledge should we capture or share first? How do we establish priorities in our learning processes? Since we cannot learn everything and manage all knowledge, how do we tell which is more important from those that are less important? Another way of asking these questions is: how do we align KM with organizational goals?

Two years ago, the executive director of an international network of NGOs asked for our help. Their Board members flew to Manila and are meeting together with an observer from their major funding sponsor. She asked, can I please convince her Board that KM is important? My time slot was only one hour (Board members are busy and important people; their time is valuable!). And she warned that the observer is avowedly skeptic about KM!

I did a quick workshop with the Board members, where I asked a series of 3 questions.

I asked the Chairwoman Question 1: to an outsider like me, can she please tell me in a few brief sentences what are the important development outcomes their network wants to help bring about? (I then wrote the key phrases on the whiteboard; the result was 2-3 key outcomes)

Then we distributed small metacards and felt pens to the Board members including the observer. Then I asked them to write down (in short phrases) answers to Question 2: What programs, functions or projects of your network and its members are most important in achieving those development outcomes. We posted and clustered their answers on the white boards. After about 15-20 minutes discussion, we picked out a very important program. (There was much debate what is the "most" important; so we settled for "a very important" program).

I next asked them to write down again in metacards, their answers to Question 3: What skills, information/knowledge, support systems and relationships are very important in implementing this program well? Again we posted and clustered their answers. We then discussed the results and arrived at a priority shortlist.

Finally, I concluded, "according to your collective judgment, the performance of your organization hinges on how well you manage the knowledge items in this priority shortlist."

During coffee break, the observer approached me and said something to the effect that KM is indeed important. :)

My position is that KM must be driven by the socially valuable outcomes an organization wishes to achieve or contribute to. One way to ensure this is to ask your internal and external customers' needs and requirements. In other words, KM must be demand-driven, not supply-driven (that's why I think knowledge mapping/inventory is a waste of resources). Peter mentioned about the push vs. pull choice. Knowledge push is too expensive (big databases and portals); knowledge pull from users is cheaper (you exert only the effort needed to solve a specific problem or need from a specific user).

Cheers!

Serafin

Dr. Serafin D. Talisayon
CCLFI.Philippines
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DAY 1: CONVERSATIONS AND DOCUMENTS – THE MEAT AND POTATOS OF KNOWLEDGE SHARING

Post By: Abdur Rob

Hi everyone,

In response to Sara's questions, I would like to share the following case story that may touch the two issues she raised.

Project on Milk Market Development - Create new opportunities for dialogue

Practical Action Bangladesh identified and invited markets actors and stakeholders involved in milk sector in Dinajpur. It arranged a market mapping workshop to draw value chain, know available business services and overall business environment. At the end of this workshop, a market development working group was formed to have dialogue after every two or three months on different issues affecting the milk market in Dinajpur. The working group was comprised of Milk Producer (8), Collector (3), Pravet (3), Processor (2), Public Sector Veterinary Surgeon (1) and Bank Manager (1).

Dialogue among these actors was facilitated by adapting the SDCAsia's relationship matrix that enabled the facilitators to identify different relationships, select processes, establish baseline, forecast the future, assess state of relationships, adjust forecast and look forward. I think the tool provided us a clear direction about documents (e.g.

relationship matrix, minutes of the meetings, plan of actions, programme schedules, etc.) to be produced. In this regard, the dialogue and management of documents mentioned above provided a lot of information reinforced each other.

Up to now, the result of dialogue is very encouraging as it has significantly facilitated stakeholders' participation to set targets for qualitative changes; revealed how stakeholders are related and interdependent to each other; set joint targets so that it improves relationships/ attitudes of the actors and increased increase transparency and obligation by all stakeholders. One of the most interesting aspects of this process is that the dialogue participants understand the challenge regarding how to sustain the interest of the market actors and stakeholder to monitor the changes.

Where and how do they compete with each other -- culture? Work Practice? System design or Technology choice?

A very difficult question, I don't have concrete answer to this. However, work practice of some market actors like processors occasionally distorted the dialogue and documentation process. For example, initially we found the processors hesitant in sharing information about total milk they usually purchase because they thought

that it could give the clue of their business success to their competitors. They also feared that documentation of information about their business may go to the income tax officers.

Regards,

Abdur Rob

DAY 1: MORE WAYS TO SHARE YOUR EXPERIENCES

Post By: Jan Maes

Hi everyone,

Thanks to everyone for all the excellent points made so far. There is a lot of learning about learning to do! Just a few comments:

- Not everyone might be talking about explicit versus tacit knowledge on a daily basis, so let me make the term 'tacit knowledge', well uh, a bit more explicit by referring you to a definition in Wikipedia.
- Some resources on Knowledge Management and Learning have already been posted on the Speaker's Corner website, http://www.microlinks.org/ev_en.php?ID=21337_201&ID2=DO_COMMUNITY. Feel free to post new documents or links to websites, discussion forums, videos, or any tools or examples of knowledge management and learning that you want to share. Please send these to Anna van der Heijden (avanderheijden@irgltd.com), who manages the Speaker's Corner, and who has offered to create a KM and Learning Exhibit website, to be linked to this Speaker's Corner.

- Lastly, given the sometimes sensitive nature of introducing knowledge management and learning strategies into an organization and the already mentioned crucial need to get senior management on board, feel free to post your message anonymously, if needed. The best way to do so is to send your message directly to me or the guest facilitator of the day, and we'll post on behalf of you.

Thanks again for such tremendous sharing of knowledge!

Jan Maes
Facilitator of the BELO Learning Network

DAY 1: HOW TO DO A KNOWLEDGE ASSESSMENT

Post By: Sara Naab Schaff

Sarah Reidy made a great sec way into our second topic for today when she said:

"We spent one year inventorying what we had and how it was currently stored"

Assessment is a major part of getting started with knowledge management and learning within any organization. The goals of your knowledge management strategy will affect the way you perform your assessment. The goal is to discover what you already have going for you and where you need to focus your efforts for improvement.

Each of the BELO participants used a number of different means for assessment which they will share over the course of this discussion. Based on our previous discussions, I would like to highlight a few salient questions that we have all faced:

1. What is the appropriate balance between assessment and "Just rolling up our sleeves and trying stuff"?

2. What are the most critical components of a knowledge audit / assessment?

3. What does a complete knowledge audit / assessment look like?

4. What are the best tools / methods for measuring knowledge and learning within an organization?

I have many ideas to share on these points, but first I would like to open it up to the group. What are your thoughts?

DAY 1: HOW TO DO A KNOWLEDGE ASSESMENT

Post By: Jan Maes

Hi everyone,

Before we wrap up our first day's discussion later today, I want to encourage you to share your experiences or pose your questions regarding Sara's last topic, i.e. the role of a knowledge/learning assessment within your organization or program. I know that many of you are contemplating how you or your organization might get started to engage in better knowledge management and learning, and a knowledge assessment is often a good way to start. It helps you understand what knowledge is already captured and used, where the gaps are, and whether, as Serafin urged us to reflect on, knowledge management and learning processes are aligned with organizational goals. A knowledge assessment exercise is also a good way to engage a variety of stakeholders in starting to think about the value of KM and learning.

I would especially like to ask those of you who are relatively new to this, what kind of challenges have you been facing in getting started with improving KM and learning within your organizations?

Thanks!

Jan Maes
Facilitator of the BELO Learning Network

DAY 1: HOW TO DO A KNOWLEDGE ASSESMENT

Post By: Elizabeth Toder

Hello Jan and folks:

First, thanks so much for everyone sharing their thoughts and experiences. I'm finding it really helpful to learn from these examples and discussion. To respond to Jan's last question regarding barriers: My experience of late has been that organizations as a whole are reticent to embark on a KM road, not because they don't suspect it would be useful or improve their organization, but because they feel it would cost them a lot in dollars and they don't want to make this commitment.

Would it be possible to discuss ways that people have engaged their organizations to put $$ resources towards becoming an organization better positioned to learn and grow? What are some strategies used?

Many thanks.

Elizabeth

DAY 1: HOW TO DO A KNOWLEDGE ASSESMENT

Post By: Sara Naab Schaff

I just wanted to share a few of my experiences with assessment.

We started off quite simple. As a small organization that traveled quite frequently and interacted with a number of partners we felt a bit like boats passing in the night.

A small group of people interested in improving knowledge sharing came together and discussed experiences. From there, they surveyed staff on types of information they most frequently needed access to and how easy it was to access.

Based on this, they built a plan to develop a knowledge portal and hired me to be the knowledge manager. Simultaneously another group had formed called the "norms and values group" which discussed cultural issues, work frustrations and knowledge sharing problems.

The portal was launched and now I had to come up with an ongoing knowledge management plan. Not knowing where to attack, I drew data from many sources.

I performed two types of assessment:

1. I did a type of knowledge audit where I used various data sources - (staff survey, inventory of knowledge assets, system review, technology review, portal use statistics, interviewing and job shadowing) to build a complete picture of information and knowledge flow within the organization. To help structure my findings, I used the attached "knowledge pyramid" which goes from the most explicit and tangible knowledge assets to the most intangible, tacit ones. Each layer is built by the layers below. Documents are written by people, who are part of a process, which is embedded in an organizational context with a certain type of culture and language. I found that many of our knowledge management issues stemmed from deeper ones - people couldn't find documents, for example because they didn't have a common understanding of the taxonomy in which they were stored. Or people didn't learn from each other because they had different work practices and cultures and didn't realize other people were working on potentially similar problems.

2. The second knowledge assessment I did was more "bottom up." I held a workshop for each of our main departments and walked them through the goals of knowledge management that I listed in my earlier post. For each goal I had a set of activities (similar to Sarafin's post) which allowed us as a group to collectively identify knowledge management and learning priorities.

Interestingly, the two assessments developed a nearly identical list. If I had to do it all over again, I would have focused on the participatory assessment because it builds buy-in and recognition of the need from the beginning.

It was useful to have done some leg work prior because in some instances people couldn't find examples or express their needs. In such cases I had good questions to help stimulate dialog.

DAY 1: HOW TO DO A KNOWLEDGE ASSESEMENT

Post By: Tony Pryor

On this question of cost, part of this revolves around what "KM" is. If it's thought of as primarily an IT system, then getting a decision to move forward across the "enterprise" can be painful; in my experience these days the decision ends up being more than the senior manager really wanted to pay, and less than is really needed.

But turn it on its head and say: KM is using what we know more efficiently and more effectively. It includes getting the most from our seasoned staff and our long term partners, while grooming new staff and partners for the future. As defined thusly, NOT to "do" KM is to waste resources. This is especially the case as the information age affects the costs of sharing, and as others adopt sharing cultures. But I would start (and end) with the human dimension, get the technical staff and the head of human resources to buy in (if necessary by not calling it KM) and only much later worry about the technology (beyond what you probably have now). Bear in mind that some of the most exciting KM efforts used email and lunch meetings (an idea which is probably going to generate anger in some quarters!). It's about the people first, and given the cost and scarcity of experience in any of our organizations, almost anything which better uses that resource looks to be money well spent. This though gets you into what often is uncharted territory for KMers: personnel performance evaluation policies, regs on the use of retired staff, mentoring approaches, exit interviews and other approaches.

And the key to how that is linked to an assessment? In my mind, an assessment should cover the potentialities of the staff to solve the next set of problems, not just the documents that codify the last team's handling of last year's problems. Not that lessons learned and the like aren't useful. But it's as important to capture the subtlety of thinking of the people involved than just the "facts". A quality assessment in the hands of someone who doesn't understand any of it isn't necessarily " effective" knowledge.

By the way, on the question of best practices, Steve Denning at the Bank would also say that one always learns the most from things that don't quite go right, NOT just from success stories. There are a ton of approaches (many of which come from BP or the US Army) which relate to sharing of knowledge between peers - peer assists, after action reviews, etc. These tools (most of which are best done face to face) may be critical approaches to build into organizations, if k sharing really is going to have an impact. And a key element in these: their focus often

is not just for posterity, but for the here and now: how do we affect programs for the better NOW.

Tony Pryor
IRG

DAY 1: HOW TO DO A KNOWLEDGE ASSESSMENT

Post By: Serafin Talisayon

Hi Sara,

From our experiences, people tend to dislike answering long questionnaires or assessments. We had to devise/evolve easier and more interesting ways to do assessments. Developing KM assessments has been a learning experience itself for me and my colleagues here in the Philippines.

Here are two examples:

1. Using a 1-page questionnaire, we ask staffs basically 2 things: what knowledge assets they need most for their work (demand) and what among these are not so available (supply) in the quantity and quality they require. Then we address those knowledge assets with biggest supply-demand gaps. "Knowledge assets" encompass actionable information (data, manuals, templates, what works, process documentations, tools, etc.), skills set, various support systems and relationships. BTW, this simple approach can serve as a guide to prioritizing content and functionalities in an intranet. Before and some time after implementing the intranet improvements, we ask a simple question: *What percent of your typical work week do you spend looking for information you need for your work?* You will be surprised that in some organizations, people waste as much as 4-5 months a year just hunting for information If you can reduce this wastage by 1 month, in effect you are saving the organization 1 month worth of payroll and giving staff members 1 extra month of doing more productive work!

Elizabeth raised the issue of $ costs and benefits of KM. This is one of those few KM cases where you can provide a clear $ answer.

2. We invite professional/technical staff to a lunch "brown bag" session. We ask one question: *From your experiences and observations, what are the qualities and aptitudes of a top-performing professional/technical staff which are not found in their CVs* (or resumes, or biodata)? This is an example of mining tacit knowledge of knowledge workers. A documentor is assigned to ensure that everything is captured. The results are always very revealing to the participants. They realize that excellent performance depends on so many non-technical skills (people savvy, EQ, macro perspective, self-awareness, team player, etc.) that never figure in their recruitment and promotion decisions! The whole process takes only about 1 to 1 and one-half hours.

Cheers!

Serafin

Dr. Serafin D. Talisayon
Director for R&D
CCLFI.Philippines

DAY 1: HOW TO DO A KNOWLEDGE ASSESSMENT

Post By: Sara Naab Schaff

Sarafin,

I agree that people don't like answering long questionaires (though they will do it if they feel there is value)

My question to you is: I have found that people most often cannot express knowledge they need or knowledge that they gain from working together. It becomes so contextualized and routinized that it is hard to think about when sitting at a meeting or answering a questionaire. How have you dealt with this?

DAY 1: HOW TO DO A KNOWLEDGE ASSESSMENT

Post By: Stacey Young

I want to underscore what Tony said about the cost of KM and the cost of not doing KM -- excellent points.

I also want to suggest to Monique (and others) a low-cost, practical approach to making the business case for KM to senior managers. If you can find an example of duplicated efforts in your organization (or in the external activities it supports), it can be fairly easy to figure out at least a rough estimate of the cost involved in the effort that duplicated something already being done. That cost is a clear and specific cost of not doing KM. And, if you can find an example of something that was done that failed because it was not in accordance with best practices -- practices about which information was available but that your organization didn't gain access to and apply -- the cost of that activity, too, is a clear and specific cost of not doing KM.

Neither of these approaches captures the full potential of KM or the full cost of not doing it, but both can be effective ways of focusing senior managers on the concrete implications of what they may view as an abstract concept.

Stacey Young
Sr. Knowledge Management Advisor
USAID Microenterprise Development office

DAY 1: HOW TO DO A KNOWLEDGE ASSESSMENT

Post By: Sybil Chidiac

Greetings all,

I just saw this message and see that we are already touching on issues related to day 3! I can't wait to discuss this more with you all but before this exciting day ends, I would like to add a quick message about the way we at CARE went about conducting a knowledge sharing assessment of some of our VS&L programs. It is apparent through the discussions posted on this forum today that there is a range of experiences regarding knowledge sharing and learning. I am very happy to see that we have the opportunity to talk about our different levels so openly and really tackle the challenges that hold us back and the lessons learning/ best practices moving us forward.

My name is Sybil Chidiac, the Technical Advisor of CARE's Economic Development programs and the third facilitator of this 3 day discussion. Although my topic on measuring results and building support comes at the end of this Speaker's Corner discussion I thought I would jump in and share CARE's experiences on conducting a knowledge needs assessment as it was very eye opening for us and directly enriched our strategy formulation and implementation phases.

Needs Assessment and Framework

CARE took a programmatic approach to the Building a More Effective Learning Organization project. Within the Economic Development programming, CARE's project goal sought to identify and share best practices for program design for multi-sectoral approaches to Village Savings and Loan programs in six southern African countries. The methodology used was to first implement a knowledge management, sharing and learning assessment of the six southern African countries participating in the project (Angola, Malawi, Mozambique, South Africa/ Lesotho, Zambia and Zimbabwe). To incorporate the most state-of-the-art practices and processes, collaboration with Accenture through Accenture Development Partners[1] (ADP) was proposed in order to identify and deploy learning and knowledge management solutions appropriate to the CARE BELO project country VS&L programs. The firm Accenture was specifically chosen because it is a leader within the private sector in global management consulting, technology services and is committed to delivering innovation. Within the project BELO, ADP assisted CARE to assess the current state of knowledge sharing with respect to the VS&L program in the six selected countries and identify the barriers to effective learning; identify the key needs to enable effective learning - in terms of human capacity, policy & staff incentives, and technology - and evaluate options for addressing these needs, drawing on CARE's experience in the field as well as external leading practices in the areas of knowledge management and organizational learning.

To start out, a Knowledge Sharing Framework is used as the basis for the needs assessment. The knowledge sharing framework is composed of 9 different components to when whole, form a cohesive knowledge sharing and learning structure that can be applied to a program or an organization. This framework was intended to be a flexible approach that could be adapted to be used by other CARE programmatic contexts to assess knowledge sharing and learning opportunities. Below the 9 components are listed with a brief explanation:

- Strategy: the comprehensive plan to be implemented for managing organizational knowledge.
- Governance: the structure and systems by which an organization controls and oversees its knowledge processes along best practices and the organization's strategic vision.
- Monitoring and Evaluation: the methods to measure ongoing knowledge sharing activities and their link to organizational productivity.

- Culture and Behaviors: the norms and attitudes toward knowledge sharing activities in an organization.
- Policy and Incentives: the understanding of what compels knowledge sharing behaviors in the organization and the alignment of those behaviors to performance management practices.
- Technology / Tools: the enablers of knowledge sharing behaviors and activities that accelerate time to competence and productivity within an organization.
- Content: the content architecture and set of standard requirements to enhance content quality in an organization.
- Communications: the channels of communication used to deliver and share knowledge in an organization.
- Process: the standard work processes to support the systematic sharing and use of knowledge in an organization.

In order to understand the current knowledge sharing situation and desired future state, structured questions within the above nine framework components need to be developed and data collected from the relevant stakeholders within the organization or program. This type of procedure can be called a gap analysis. At the end of data collection period the analysis of the data will reveal the gaps in a program's or organizations' overall structure. The data collected from these questions will reveal the current state of knowledge sharing and learning within the organization or program within each component.

What worked:

Investing in the needs assessment and framework proved to be beneficial for the development of a KS Strategy and Implementation plan. With an assessment being conducted before energy is invested in building an effective learning organization, everybody understands what is at stake, what the problems are and what types of rewards can be achieved. This will help achieve wider buy-in and participation at all levels.

The needs assessment and framework findings allowed CARE's ED programming to focus initial energies on the areas with the greatest opportunity for change, since not all the areas can be attacked for various resource constraints. To make the most impact and gain more KS "champions" focusing on the areas with the greatest opportunity for change for your program or organization according to the assessment framework! results will end up making large strides to building an effective learning organization;

What didn't:

Although the culture and behavior component was not found to be an area for the greatest opportunity for change, it is important not to underestimate the investment needed to strengthen the organizations' perceptions on knowledge sharing culture and behavior. Underlying all of the practices and processes that will be put in order to carry out the steps to building an effective learning organization are new behaviors and culture of knowledge sharing. For example, if an electronic database is created for the repository of knowledge, the behavior of gathering and storing knowledge at the repository must enter the habits of the stakeholders. Placing emphasis on enforcing the necessary behavior and culture for learning to take place will enable the focus on building the KS components to occur.

[1] ADP is a not-for-profit unit within Accenture, the global management consultancy, which provides field based business and technology consultancy services to organizations in the international development sector. This commitment to innovation was of particular interest to CARE, which has an organizational partnership with ADP to help address specific IT opportunities and challenges, provide management, and deliver support to particular initiatives, while seeking to build or augment the organization's capabilities at headquarter and field locations (when deemed necessary) .

Sybil Chidiac
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DAY 1: HOW TO DO A KNOWLEDGE ASSESSMENT

Post By: Denise Senmartin

Dear Serafin et al,

Great to learn of your experiences!

At our organization we are carrying out an effort to enhance knowledge sharing among the teams that are by country focus. We have created thematic learning communities (TLCs) with members from the country teams that work on a same topic. As just starting we would like to apply a baseline survey to measure any impact of these TLCs with the time.

Some of the questions to pose are those you point out, how do you look for information, how much time it takes you to find it, who asks you for information, etc.

Apin, it would be very interesting to have more information about the checklist of knowledge needs! It seems a useful 'multiple choice' type of question that would encourage more specific answers.

Any other experiences with surveys to measure internal knowledge sharing?

Thanks,

Denise

Denise Senmartin
Officer Knowledge Sharing
International Institute for Communication and Development (IICD)
www.iicd.org

DAY 1: HOW TO DO A KNOWLEDGE ASSESSMENT

Post By: Jan Maes

Hi Denise,

You and a few others have touched upon a great point, i.e. how to measure impact, how to gauge results from improved KM&L. Much of this discussion will take place tomorrow, and I am very curious to see what participants have to say about this.

Thanks,
Jan

DAY 1: HOW TO DO A KNOWLEDGE ASSESSMENT

Post By: Serafin Talisayon

Hi Denise, Jan and Anna,

Thanks for your interest in the checklist. I think it may be useful for others that I post this in the discussion list for all to read.

The logic behind the Capability Assessment checklist is the following:

1-VALUABLE RESULTS the organization wants to produce

|

| determines:

|

2-What the organization MUST DO

|

| which is not always the same as:

|

3-What the organization IS DOING

Gaps between 2 and 3 are what the Capability Assessment checklist tries to detect and prioritize.

The 53-item checklist is composed of items in layman language that are so selected that each item corresponds to one or more KM tools or solutions (which the layman-respondent does not need to know). What the staff answering the questionnaire does is to scan the 53 items, and select at most 3 items that he or she feels are MOST NEEDED for whatever they are doing in the organization, program/project or team (whichever you are assessing). The more staff answering the questionnaire the better.

The output is a shortlist of prescribed KM tools/solutions appropriate to the top 3 gaps.

This service is provided free by CCLFI.Philippines. Please access this service at: http://www.cclfi.org/cachecklist (leave the box "Access Code" blank).

Caveat: The Capability Assessment checklist presumes that there is no substantial gap between 1 and 2. Staffs usually have notions of "What the organization must do" different from that of their internal/external customers. The latter group is in a better position to judge the gap between 1 and 2.

BTW, for programs/projects it is expected that the logframe -- once approved by the donor or top management -- had closed the gap between 1 and 2.

Your feedbacks are most welcome so we can keep improving the assessment tool.

Cheers!

Apin

Dr. Serafin D. Talisayon
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DAY 1: HOW TO DO A KNOWLEDGE ASSESSMENT

Post By: Mehrul Islam

Hi Everyone,

Can we have your inputs on the following issue specifically which is related to the discussion below as well specifically following issues

Topic: Understanding knowledge management and mapping knowledge assets and flow

Question 1: We produce many reports and documents and normally archive those to shared drive so that staff members can read and learn. Frankly speaking from our experiences so far, not many people are actuality reading documents from the shared drive. Many organizations have also developed IT based KM systems and the results probably are mixed. Now the question is firstly and how to demonstrate the value of KM in a fairly large organization (over 800 employees located in various regions of the country" and Secondly " how can we establish balanced KM systems in our organization. (IT based but also attracting human elements since learning occurs through individual interactions between human being)

With best regards,
Mehrul

DAY 1: HOW TO DO A KNOWLEDGE ASSESSMENT

Post By: Serafin Talisayon

Hi Sara and other colleagues,

That is true. Some people are more reflective than others (in MBTI, "I" and "P" people are more reflective than "E" or "J" people).

From our experiences, the following may work. You know what actually works in a situation after you try it.

1-- We learn while we work, but most of this learning seems semi-conscious.

So, before team members forget, it is useful that after an activity, they ask themselves "what worked well?" Because members see things from their varying "lenses", it helps each member to see through others' eyes what they may not readily see. Did you also observe this?

2-- However, when you start to ask "what did not work well?" most people shift to defensive mode, and then learning goes out of the window. Trust is important here, as pointed out by Abdur, Peter and Monique. But even in a small group with high level of trust among them, I still observe this tendency. When I drop my self-awareness, I do it too! :)

3-- I also ask: *"In the past week, what document or information took you a long time to locate? or never found up to now?"*

4-- Because many people are not really aware of some of their knowledge needs, as you pointed out, what you can also try is to give them a checklist. The problem is, it must be quite comprehensive (our checklist has 53 items). Then they just check the top three, or something like that. I can give you a copy, if you wish (email me directly; not through this list). We have tried this checklist with about 20 organizations in the Philippines and

2 in Asia. Maybe the others have tried other solutions? I would like to hear about them too.

Cheers!
Apin

Dr. Serafin D. Talisayon
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DAY 1: NEEDS ASSESSMENT. PRACTICAL ACTION'S EXPERIENCES

Post By: Luis Ernesto Osorio-Cortes

Hi all:

Before this first day finishes I would like to share with you some practical stuff we have done in terms of needs assessment.

This might sound dead obvious but what we in Practical Action's Markets and Livelihoods Programme have been doing to find the most pressing learning needs and critical learning processes is to ask people. Now, the key is what kind of people to ask.

In our case, we have singled out three key groups (which will be different for each organization):

- Our teams in Bangladesh, Nepal, Sri Lanka, Sudan Zimbabwe and Peru; and to some extent, colleagues in the other three Programmes. We have focused mainly on the team leaders in each country but have also tried to include project managers and officers as much as possible.

- Market actors, with especial emphasis on marginalized, small-scale, rural producers. We are now focusing on multi-stakeholder groups (we call them Interest Forums), trying to understand how they work, what are the learning needs of their members and what are their success factors.

- Organizations interested in pro-poor market development (including donors). We are focusing on the members of the SEEP Network and the Livelihoods Network.

The key here for us has been focus, focus and more focus. We cannot transform all learning processes at the same time, so we are focusing on those we believe will have greater benefits and communicating inside and outside of the organization the benefits of those improved learning processes.

Additional to open questions, we used some tools to help us explore learning needs and processes more systematically:

1. Informal advice maps: You build the map by asking staff to list those people they talk to when they need advice. We did not find this tool very useful and we are not using it anymore.
2. Learning maps: You try to identify the processes, routines and spaces where knowledge happens and the knowledge assets produced (e.g. reports, etc). I can share the map we used if you are interested (please let me know). This map helped us to give some order to the conversations with the team leaders about learning needs, blockages and opportunities e team leaders (we tried it out with the team leaders of Sri Lanka and Sudan)
3. Communication maps: The Sri Lanka team have been using these maps to map out the communication processes that occur within a market system and have helped them to understand where the blockages are.
4. Matrix of QA routines: We created this matrix to map out the reporting and learning routines that each one of our teams has. This proved very useful and easy to apply and gave us insights into our teams learning dynamics and needs.

After some discussions with the QA manager (Barnaby Peacocke), we implemented a workshop during one of our annual international team meetings, where each team leader filled in a table like the one shown below:

Frequency	Process (how you do it)	Internal	External	Report Type	Internal Audience	External Audience
Weekly						
Monthly						
Quarterly						
Half Yearly						
Annual						
Occasional						
Contractual						

Then, the team leaders rated each process or routine using stars, according to the perceived added value.

According to the QA manager, the routines with the highest degrees of flexibility (where we can be more creative) are those different to the annual reviews and the contractual reports.

The tables produced by each team leader are under analysis and are giving us some ideas to streamline our QA processes in the short- and mid-term.

Finally, it is important to remember that we (in the M&L Program) are doing KM and promoting learning from a programmatic perspective, not from an organization-wide one. Identification of needs and learning opportunities are influenced by these two different perspectives. For example, within our program we "speak the same language", the team leaders have insider's knowledge of the learning needs of their staff, and knowledge needs are deeply influenced by the rhythms and characteristics of each of the projects we work in. These are conditions that may not be present when doing needs assessment from an organization-wide perspective (see Jan's welcome message for more info about these perspectives).

Thanks a lot and looking forward to the discussion tomorrow,

Lucho Osorio (Practical Action).

DAY 1: MOVING ON TO DAY 2

Post By: Sybil Chidiac

Thank you, Sara, for facilitating the first day of our discussion. You have posted a number of excellent questions and given us very practical advice from your own experience with FFH. We have covered a lot of ground today, and before moving on to Day 2, I want to briefly summarize some of the main insights from today's discussion. We are planning to provide you with a full synthesis document of the entire discussion after the Speaker's Corner close, which is the only way to fully capture the richness of this discussion. For now, I am only summarizing a few themes that were discussed today:

1. There seems to be wide agreement that setting up a KM system is only a means to an end, i.e. improving knowledge sharing and ultimately learning. There is less agreement as to whether this learning is an end by itself or a means to achieve one's mission better, but this difference of opinion depends to some extent of where the learning takes place: within the organization, or within the community where the organization seeks to promote sustainable improvements. Someone made the crucial point that the poor and marginalized communities that we work with need to be involved themselves in knowledge sharing and learning. One thing is also certain: learning for the sake of learning is not our goal: some of you have made excellent observations that learning needs to be in alignment with the organizational mission and KM needs to be driven by the outcomes an organization wants to achieve. But, as Ben Ramalingam warns, looking at learning as a (rather mechanistic) way to achieve our mission better and more cost-effective might prevent us from focusing on the kind of tacit KM and learning that is most needed.

2. The role of senior management has been touched upon by many of you. On the one hand, you want a strong commitment by senior managers to put knowledge management and learning high on the list of organizational priorities, in order to be able to make the required investments in time, money and peopl e. On the other hand, you want to also avoid that knowledge management and learning become a top-down process, without ownership and consensus by staff. The former scenario seems more of a threat than the latter, however, which reinforces the need to convince senior management of the value of improved KM and learning. Some of you have already suggested how this can be done, and this will also be part of our discussion on Day 3, when we will talk about how to show results and how to convince not only senior management, but also donors about the value of KM and learning.

3. Another interesting theme that most of you seem to agree on is that technology takes second place to people, when it comes to more effective learning. As Tony said, it's about the people first. Not only because you need their support and willingness to change certain behaviors, but also because to make learning truly demand-driven you need to focus on the people who require learning, whereas a focus on systems and technology often tends to focus more on the supply side.

4. The last part of today's discussion related to the need of a knowledge/learning assessment and how to do this. This discussion certainly provided us with a lot of very practical and useable advice. There exist several tools, such as knowledge audits and the knowledge sharing framework provided by Sybil to conduct a needs assessment points out the many dimensions that need to be taken into consideration. Importantly, when done collectively, a needs assessment also has the potential to help staff think about the value of leaning and KM from the beginning. A learning needs assessment or knowledge audit also lays the foundation for formulating a knowledge sharing or learning strategy, which is an important part of tomorrow's discussion.

Sara, are there any important points in today's discussion that you would like to highlight? We are about to move on to Day Two's topic, but this discussion will remain open, so anyone should feel free to continue to post c ontributions to today's topics as well.

Now I would like to give the floor to Luis (Lucho) Osorio of Practical Action who will focus on practical steps organization, programs or individuals alike can take to improve knowledge sharing and learning.

Jan

DAY 2: BECOMING MORE EFFECTIVE AT LEARNING

DAY 2: WELCOME MESSAGE AND KICK OFF-POINTS

Post By: Luis Ernesto Osorio-Cortes

Thanks so much to Jan and Sara for promoting a very interesting discussion so far. I have been fascinated with the richness of ideas, challenges and solutions coming from all over the world. I would like to welcome you all to the **second day** of this Speakers Corner on Becoming a more Effective Learning Organization.

My name is Lucho Osorio. I am the International Program Coordinator of the Markets and Livelihoods Program in Practical Action (formerly knows as the Intermediate Technology Development Group-ITDG). An important part of my job is to facilitate knowledge production and sharing amongst our country/regional teams, market actors and other organizations working on pro-poor market development.

I have the honor to be co-facilitating this day's discussion which focuses on a very exciting question: If we know what we need to fix (assuming that we did a good needs assessment), how do we do it?

Now, it is precisely because I do not think we can come up with a recipe to do this that we can have a fascinating discussion. Each organization has its own dynamic and personality for learning. We must try to understand how the organization works, its learning routines and spaces, and staff interests, and unleash the process using what is there. Of course, there are some principles that can help us become better learning organizations.

I would like to highlight that our experience comes from a "programmatic KM" perspective If you want to know more about this distinction, please check yesterday's Jan's welcome message.

The following are some experiences we gathered during the AMAP-BELO project. I would like to invite you to challenge or add to them from your perspective. I will try to contrast your ideas with more detailed information and concrete examples of what we did; what worked and what did not.

1. Give "teeth" to the intention to becoming a more effective learning org:

There has to be a background intention to become better at learning. It can be the informal agreement of a group or a formal policy coming from the senior management. In any case, make it operational or "projectize" it. Define a vision and a strategy; assign roles and functions; create accountability routines; and even assign a budget (no matter how small or big it is).

2. Allow the organization to discover good learning practices on its own:

Give staff the space and resources to make their own explorations and mistakes and to find their own ways to become a more effective learning team.

3. Organizational learning does not happen all the time and everywhere:

There are moments where learning is more intense than others (e.g. project design, meetings, periodic reviews, social gatherings) and there are special individuals who are more active in producing/ sharing knowledge than others. Identify those moments and use them for learning purposes. Identify those individuals and empower them, promote them and give them more voice in the organization.

4. Embed learning routines/spaces into pre-existing ones as much as possible:

Enhancing learning dynamics and embedding them into pre-existing organizational routines and spaces is preferable than creating new ones and helps to reduce costs and increase sustainability.

5. Create a culture that values learning mistakes (i.e. mistakes that lead to learning, innovations and better decisions in the future):

This is not a new idea in KM or in Practical Action but the process of creating this culture is new for our organization.

6. Promote Effective Learning Conversations as much as possible:

Despite that written material is important for some learning purposes and institutional memory; we have discovered the importance of effective conversations and hands-on experience to promote effective learning.

7. Demystify KM:

Learning has to be seen by staff as an easy thing to do and engage with not as the domain of an elite of experts who push a learning agenda from the top.

8. Be sensitive to unexpected opportunities for learning and boost them:

For example, if an email circulates in the organization and there is an unusual intense response, engage with that process and use it to promote "effective learning conversations".

9. Simplify the complexity of learning by building and testing a model that pins down the elements that the organization wants to privilege:

These principles may look neat but they are they are the product of a challenging and sometimes messy process. Furthermore, they are provisional lessons that we need to keep on refining and challenging. Some of the challenges were:

- Different levels of response and engagement from the country/regional teams. (Different teams responded differently and with different intensity to different learning processes.).

- Buy-in from country/regional directors has been gradual and on the basis of evidence, not imposed from the top.
- Transfer of new practices/thinking from team leaders to project managers and other staff requires pull from the latter as well as push from the team leaders.
- Technological tools (internet, audiovisual, Web 2.0) can help but do not solve the problem of learning. It takes a lot of trial and error to know which technologies help for what and in which contexts.

Before I open the floor for your ideas, I would like to ask you:

1. Which ones of these principles do you agree with and which ones you don't?
2. Did any of them seem particularly relevant to your situation?
3. Have you used some of them? Have they worked? Why do you think they worked or not?
4. What are the main challenges you have found?
5. How have you addressed those challenges?

Thanks a lot for sharing with all of us your thoughts and experiences.

I would also like to encourage everyone but in particular people how are just starting in this field of KM & Organizational Learning (like me) to see this discussion **also** as a community of advice and support. This is your chance to ask questions and advice to the experts our there who are following this conversation.

Ahhh! And if you want to share some sensitive information, please feel free to send it directly to me (luis.osorio@practicalaction.org.uk) and I will post it for you as anonymous.

Lucho Osorio
Practical Action

DAY 2: TOOLS AND APPROACHES (INTRO)

Post By: Luis Ernesto Osorio-Cortes

Dear all:

As you all know the description of today's discussion is:

Day 2 (March 5): Becoming more effective at learning **-** Based on existing needs, what steps can organizations or programs take, or what can you do personally to improve knowledge sharing and learning within your program or organization? What is the role of technology and how to promote a learning culture?

Additional to all the cross-cutting themes that will hopefully emerge today, I would also like to create some "boxes" where we can all contribute with concrete tools and approaches that you have used to become a more effective learning org (a MELO). Please share with us some details of those tools and approaches, the logic behind them, how you have implemented them, what has worked or not and why.

I will be creating this "boxes" throughout the day by opening a new discussion thread. If you want to contribute to a particular box, please use that thread (by replying to that message). And if you do not see the box you need, please create it by creating a new thread (you can do this by clicking on the little, blue "plus" button in the "Discussions" zone.

If you have problems doing this, send me the contribution specifying the name of the "box" and I will create the thread for you.

Thanks,

Lucho

DAY 2: TOOLS AND APPROACHES (INTRO)

Post By: Sara Naab Schaff

One framework that I learned in grad-school has been incredibly useful in helping me identify tools for knowledge sharing is the concept that knowledge and learning take place in two dimensions -- time and place.

So there are four combinations

- Same time, same place
- Same time, different places
- Different time, same place
- Different time, different places

Knowledge sharing that happens at the same time is usually best for brainstorming and problem-solving. There are many benefits to solving problems in a group - more collective experience, more brain-space to consider the problem and various variables, and network affects of someone mentioning an idea, that activates your own prior experience.

- Same time tools:
- Meetings
- Phone calls
- Web-conference

Different times is good for reflection, absorption into long-term memory and handling larger amounts of information.

Different time tools

- Email
- Discussion board
- Blog
- Wiki

Place - refers to a space physical or virtual where the learning happens. The place of learning often becomes the repository for reference and the extension of memory. A place we go to remember what we learned.

Same place - A group or team has a common space to share learning. This enables a single point for reference (keeping everyone on the same page).

Same place tools:

- Shared office or file cabinet
- shared network drive
- document repository
- online group or collaboration space

Different place - refers to each team member keeping individual stores of documents and memory aids.

Different place tools:

- My documents
- Email

When I work with a team and try to choose technology I listen for the goals and needs of learning and the nature of work to see what needs to be same time, same place, different time, different place and what tools best facilitate the learning.

DAY 2: TOOLS AND APPROACHES (EMAILS)

Post By: Luis Ernesto Osorio-Cortes

Let's begin with an (apparently) easy one: THE INFAMOUS AND OMNIPRESENT EMAILS

No one can deny that this tool is versatile and powerful for low-cost learning. How many times we get valuable info through them? (and yes... loads of spam and useless stuff).

One way we use them is to (again) promote learning conversations. The usual scenario goes like this:

- I get a message from a colleague. It contains inspirational knowledge, fundamental principles, a good case study, a good challenge/problem/mistake, a good or not-so-good practice, etc.

- Is anyone out there who is interested in this message? (The more you know the organization the better).

- If so, I send it to those people. If it is a sensitive issue I ask permission to the sender before circulating it (you have to build trust all the time).

- I also tell those people why I think that message is important for them and prompt them to engage in a conversation with the sender (asking them to CC me).

- I them make sure that all the interested people are getting copies of the emails.

Tip: The more people participate, the better. Usually, very few respond (even if most have paid attention to the message). The larger the group, the higher the chances of getting a response, which in turn can prompt others to respond. Sometimes (not appropriate always) I try to tease people by being somewhat polemic or vague to get people to react and get those brain juices flowing.

Advantages:

- Easy, fast, versatile, cheap.

Disadvantages:

- After the dialogue has occurred, important knowledge can be lost in the sea of emails of the people who participated.

Tools that can help tackle the disadvantages:

Blogs, wikis and virtual groups.

DAY 2: TOOLS AND APPROACHES: (COMMUNITIES OF PRACTICE)

Post By: Luis Ernesto Osorio-Cortes

Denis Semartin's message reminded me about what she calls "Thematic Learning Communities" (TLC). We have been calling them communities of practice (CoP).

Are they the same? I imagine so.

We have tried CoPs not by countries (like Denis did) but by sub-sectors or products: dairy, livestock, and non-timber forest products (NTFPs); by projects: hibiscus project funded by Wellcome Trust; and by activities: Participatory Video Training in South Asia.

We have had very different results in each case. Some CoP have never taken off and others have been very active but for relatively short periods of time.

We have used Google Groups to create them. We could have used Sharepoint but we still have problems of access in the most remote local offices in some countries and our Sharepoint set up does not allow access of external people, so Google Groups give us accessibility and it is more user-friendly than the current version of Sharepoint we have.

In the best cases, people have used the platform for info storage but not for interaction. People seem to prefer traditional emails to interact and avoid interacting through the Google platform.

Another problem is that Google asks for an Google account for users to have full functionality. Some people do not know how to do this or simply do not want to have a Google account.

The best case of success we have had so far was the NTFPs group. I believe that the success was due to the fact that I presented the group with a very concrete challenge, with a clear deadline: helping me build a case against certification, which was to be presented in the SEEP conference 2007. The level of activity was very high and once the task was completed, the activity ceased.

We have failed so far at generating a CoP that interacts regularly and that has ownership of the platform. We'll keep on trying different approaches.

Advantages:

- Conversations remain there for other to see and are easily accessible by members.

- They serve as storage spaces of interesting docs, references, links, etc.

- Easy and free to set up, versatile and user-friendly.

- They provide a single email address for the whole group.

Disadvantages:

- They require a certain level of knowledge about the platform (in this case Google Groups).

Useful reference:

SDC has a useful website about CoPs: http://www.communityofpractice.ch/en/Home/Concepts

DAY 2: TOOLS AND APPROACHES: (COMMUNITIES OF PRACTICE)

Post By: Sara Naab Schaff

Communities of Practice are, at base, communities. They take advantage of the oldest human mechanisms for learning. (To learn more about the theorectical concepts behind CoPs - read "Communities of Practice - Learning, meaning and itentity by Etienne Wenger")

True communities of practices operate like people in a church group, a neighborhood or in the microfinance world - a lending group. They have a social connection and set of shared experiences which brings them together to talk, laugh and most importantly share stories. People take on various roles within the community, some provide social glue and strengthen the ties between members by checking in and making sure everyone is ok. Others do outreach and draw new people into the group welcoming them and teaching them the group customs.

To unleash the power of community of practice, you have to provide a few things:

1. A common problem or reason for being

2. Opportunities to build trust

3. A means for ongoing communication (that becomes part of the member routines)

4. A community space - physical or virtual

This has been highlighted in our experience as a BELO community of practice. In the beginning I was not sold on the value of being part of BELO. I thought it would take from my time serving my organization.

At that time, we only had one of the pieces - a common goal.

The community started forming through Jan. He made the efforts initially to contact us, learn from us, share our experiences with the group.

I still wasn't sold.

Then, we began sharing stories over our conference calls. Opening up, sharing experiences, and really just talking about our realities. At this point we began to build trust, we also started to find roles within the group

We then met in DC and spent a day together discussing our learnings in a very free format. Discussions continued into happy hour where more trust and friendship was built.

Following DC we established virtual places (a blog and a wiki) to call our own and we continue to develop social roles within the group which make us feel the the "community" is established and we are all looking for ways to continue.

Communities of practice are one of the strongest tools for a knowledge manager, they are also one of the most time consuming if you want to build a sustainable community.

DAY 2: TOOLS AND APPROACHES: (KNOWLEDGE SHARING RESOURCES)

Post By: Peter West

Lucho and others,

As you know, in addition to yourselves, a great number of other individuals and organizations have committed considerable time and resources to the study of knowledge sharing.

It might be useful to develop a reference list of some useful knowledge sharing materials (and the people involved). My own library of articles lists over 700 entries with 'knowledge sharing' in the title - dating back to the year 2000. Here is a small sampling of materials (that you may already be familiar with)..

1) Sharing Knowledge Handbook 2 (2004, Oxfam Canada, 395 KB)

http://www.oxfam.ca/news-and-publications/publications-and-reports/sharing-knowledge-handbook-2

"Sharing Knowledge is a handbook written by Dr. Kingo Mchombu for men and women working in villages, towns and rural areas who wish to transform their communities through information sharing."

2) Sharing Knowledge: Innovations and Remaining Challenges (Independent Evaluation Group, World Bank)

* Sharing Knowledge: Innovations and Remaining Challenges - (Main Report) - 1.4 MB

* Sharing Knowledge to Achieve Development Goals ! - (IEG Précis) - 530 KB. Also available in French/Français and Spanish/Español.

* Sharing Knowledge to Achieve Development Goals - (IEG Reach) - 180 KB.

Background Papers

* Knowledge Sharing in Development Agencies: Lessons from Four Cases - 0.8 MB

* The Global Development Learning Network: A Review of the First Two Years' Operation - 1 MB

* Expert Knowledge Review: Primary and Secondary Education - 1.2 MB

* Knowledge Sharing: Power Sector Reform Review - 0.9 MB

* Knowledge Sharing: Public Expenditure Management Review - 0.5 MB

* Knowledge Sharing: Water Supply Sector - 2 MB

* Knowledge Sharing: A Review of the Literature - 1 MB

* Knowledge Sharing: Startup of the Development Gateway - 2 MB

3) Knowledge Sharing: Methods, Meetings and Tools (2003, Canadian International Development Agency)

I could not find a link for this document, but I have the PDF.

4) Hands-On Knowledge Co-Creation and Sharing: Practical Methods and Techniques (2007, 8.70 MB)

http://www.knowledgeboard.com/cgi-bin/library.cgi?action=detail&id=3788&dir_publisher_varid=1

Note: You must be a member of KnowledgeBoard to access this document. Membership is free and highly-recommended.

"Hands-On Knowledge Co-Creation and Sharing: Practical Methods and Techniques" presents thirty hands-on moderation, facilitation, collaboration, and interaction methods and techniques, both face-to-face and software-based. Each presented method/technique is augmented with real-life cases on its use; provides directions on what needs to be done before, during, and after the use of each method/technique to achieve tangible and measurable results; provides a set of tips and tricks on the use and adaptation of the method/technique for different contexts and settings; and provides a list of potholes to avoid when using the method/technique.

The prime audience of this book is industry practitioners, event moderators, facilitators, consultants, researchers, and academia with an interest in the use and adaptation of effective methods and techniques to foster knowledge co-creation and sharing."

5) A Handbook on Knowledge Sharing: Strategies and Recommendations for Researchers, Policymakers, and Service Providers (2006, 2.60 MB)

http://www.ice-rci.org/research_ops/Knowledge_Sharing_Handbook.pdf

"The target audience for this handbook includes those struggling with knowledge sharing among researchers, policymakers, and service providers in the health and social science fields."

I hope you find these thought-provoking and useful.

Peter West
Management Consultant
Canada

DAY 2: TOOLS AND APPROACHES: (KNOWLEDGE SHARING RESOURCES)

Post By: Luis Ernesto Osorio-Cortes

Dear Peter:

Thanks a lot for opening a new and very important box (Knowledge Sharing Resources). I hope all the "corner speakers" out there contribute with the resources they use the most. It is amazing how much literature is out there! I guess this is precisely why these kind of discussions are so important: they can save us a lot of time by pointing us towards literature that has been previously tested by others.

All the best,

Lucho Osorio
Practical Action

DAY 2: TOOLS AND APPROACHES: (RELAY TRAINING)

Post By: Luis Ernesto Osorio-Cortes

Relay training is basically an informal peer training approach.

If one of our staff receives training or attends a conference about an issue that is potentially interesting to other staff members, we try to use one or more pre-existing routines or spaces for them to share with others the key lessons they have learned.

We did this with very good results when two of our team leaders (Sudan and Zimbabwe) were invited at the beginning of 2007 by the Wellcome Trust to an international conference in Cambridge (UK) on animal health. The team leaders committed to pick up the key lessons and share them with the team leading a dairy project in Cajamarca (Peru).

We implemented the relay training in our annual international team meeting in Peru (mid-2007) and the results were brilliant. The team leaders delivered a very good presentation, the level of participation of the dairy project team was very high and the subsequent discussion was rich and deep (a perfect example of an "effective learning conversation"). We will keep on using this approach every time we can. For us as KMs it is important to be aware of what training/conferences staff are attending to, know which audiences might need that knowledge and know which routines and spaces to use to get the trainees sharing the knowledge to those who need it.

Advantages:

- It expands the reach of training/information opportunities that some staff have across the organization.

- If embedded in pre-existing routines/spaces (both face-to-face or virtual), the marginal costs tend to be relatively low (compared to the cost of the pre-existing routine/space).

- It empowers staff.

Disadvantages:

- Some lessons from the original training can be lost or distorted by the trainees.

DAY 2: TOOLS AND APPROACHES: (BLOGS)

Post By: Luis Ernesto Osorio-Cortes

I created this "box" for you all to contribute in case you have used blogs or are planning on using them

Thanks,
Lucho Osorio - Practical Action

DAY 2: TOOLS AND APPROACHES: (DOCUMENT REPOSITORIES)

Post By: Sara Naab Schaff

Many of us yesterday talked about our experiences with document repositories. I would love to learn more from people's experiences regarding their document repository.

1. Taxonomy / Lexicon - how are your documents organized? Are they cross-listed in more than one place?

2. Metadata - does your repository use metadata, what type, how has it supported finding of documents

3. Archiving process - how are documents added and removed from your system. All staff? archiving team? the knowledge manager?

4. Version - how does your system handle version control? what has been your experience with versioning?

5. Informal vs formal documents - to get to the point of "public" vs "private" scripts - is there a place in your repository for informal documents? How do you distinguish

I have wrestled a lot with our resposity and am in the process of refining many of these areas and would love to hear from others how their systems work -- even if your system is a shared drive.

DAY 2: TOOLS AND APPROACHES: (DOCUMENT REPOSITORIES)

Post By: Ben Ramalingam

Dear all,

This is a really interesting Day 2 discussion - thanks to everyone who has posted so far. It seems as though everyone has a lot to contribute on this topic, as well as a lot to learn. I wonder if we could tap into some of this with a simple online "knowledge exchange". I would love to invite participants and listeners to reflect on the broad topic of KM / OL "Tools and Approaches", and post a few sentences in response to the following questions:

- What is the ONE thing you would like to share (e.g. an effective tool, technique, approach that you have used) and

- What is the ONE thing you would like to learn (e.g. an existing challenge, something you are struggling with)

If we can get a few contributions flowing, we will all get to learn a bit more about other participants, and also be able to pick up on some threads for the future discussion and knowledge sharing.

So, let me start off the exchange.

ONE thing I would like to share is my experience and research on the use of After Action Reviews (AARs). They seem to be the most simple tool in the world, but in fact the way in which they are used often means that they cannot play an effective learning role. Either they are applied to one-off events, or the key questions are not asked properly, or the learning process is blocked by team hierarchies, so real self-critical assessment doesn't take place. But there are situations where this can be overcome, by paying careful attention to the application and purpose of the tool. Facilitative leadership is, I think, absolutely essential.

ONE thing I would like to learn relates to the same area, but focuses on the intersection between KM and OL. Specifically, has anyone used electronic systems to store AARs, and then subsequently access and re-use the lessons? In principle this is a great idea, but it is hard to make happen in practice. Does anyone else have any experiences here?

Does anyone else have ONE thing to share, and ONE thing to learn about tools and approaches? Or maybe you have some thoughts on my own exchange above?

Best,

Ben

Ben Ramalingam
Strategic Advisor
ALNAP
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DAY 2: TOOLS AND APROACHES: (DOCUMENT REPOSITORIES)

Post By: Serafin Talisayon

Hi everyone,

My more important learning experiences are those moments when I discover my own (hitherto unconscious) limiting assumptions. Others may call it "getting out of your mental box" or "discovering your own blindfolds".

ONE thing I would like to learn or hear from others is: from your own experiences, how do you become aware (or how do you help others become aware) of your limiting assumptions?

Apin

Dr. Serafin D. Talisayon
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DAY 2: TOOLS AND APPROACHES: (DOCUMENT REPOSITORIES)

Post By: Mike McGahuey

Hello Serafin,

A great question that I ask myself frequently. In addition to fighting my own biases, I frequently come up against paradigms that have been proven to be false but which still drive program designs and international initiatives. For example, in the Natural Resources Management (NRM) Sector we still fight the paradigm that only the State has the capability and moral authority to implement NRM programs on behalf of smallholders (e.g., forestry, watershed management, soil conservation, etc.). In contrast, we found that many NRM initiatives work best when smallholders exercise choices on their own behalf and that the most effective roles for the State are to lower barriers and help increase incentives.

We have made progress by providing evidence (knowledge) for the latter paradigm and showing how the former has failed (but, since we are fighting vested interests as well as long-held views, we have a lot to do yet). To get the knowledge to make the case, we found that we had to go beyond using performance indicators and look more critically at impacts. We found that if we focused on "judging performance" as defined by performance indicators, we sometimes missed the real lessons and impacts--particularly those were unanticipated by the indicators. The lesson to us was not to ignore the performance indicators, but not be limited to them when evaluating progress toward our objectives. I need to add here that a lot of this thinking was done by teams led Tony Pryor during USAID's push to become a more effective learning Agency in the early and mid-1990's.

For those interested in reasons why failed paradigms seem to persist, I am providing a link to a video presentation of a lecture by Hans Rosling who distinguishes "ignorance" from "pre-conceived misperceptions". It is well done and very thought-provoking. Click here to view it.

Best regards,

Mike

Mike McG ahuey
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Visit the FRAME website at www.frameweb.org

DAY 2: TOOLS APPROACHES: (KNOWLEDGE FOR POVERTY ALLEVIATION)

Post By: Serafin Talisayon

Dear Mike,

I agree completely. The State must do something to remove/reduce the many systemic drains that contribute to local poverty:

-- In the Philippines, commercial banks' local branches are more deposit takers than lenders; the result: private savings is siphoned off from the provincial areas to Manila

--Companies extract local natural resources, and most of the economic proceeds go to Manila and outside the country

--The brightest young kids migrate to Manila and abroad (loss of human capital)

You talk of false but persistent paradigms.

I believe there is a paradigm shift that development workers themselves need to make. We scanned more than 950 anti-poverty projects in the Philippines and studied the few most successful ones. One of our findings is: they are successful because they leverage on the local community's intangible assets (cultural/social capital, structural and stakeholder capital, access rights, indigenous knowledge, etc.). Many so-called "poor" communities are only financially poor (or they poor in local infrastructures and other tangible assets). Some are wealthy in intangibles!

This finding parallels the global trend where market values of corporations are accounted for more and more by their intangible assets than their tangible assets.

We call this new framework the KPA or Knowledge for Poverty Alleviation framework. We (my NGO CCLFI and our other NGO partners) are now in the process of developing operational toolkits following this new approach. It is the application at the village level of the KBD or Knowledge-Based Development that Daan Boom and I developed at ADB last year (he is also in this list).

To those interested I can email you some KBD and KPA materials.

Cheers!

Apin

Dr. Serafin D. Talisayon

DAY 2: TOOLS AND APPROACHES: (OPEN SPACE)

Post By: Daan Boom

Thanks Ben for kicking off.

The one thing I would like to share is Open Space Technology as learning and information gathering tool. The few times I have used and applied this tool (different from Knowledge Cafe although there is some overlap) the outcomes where above expectations and the people involved enthusiastic. In Open Space meetings participants create and manage their own agenda of parallel working sessions around a central theme of strategic importance, such as: What is the (KM) strategy, group, organization or community that all stakeholders can support and work together to create? It is effective connecting and strengthening of what's already happening in the organization: planning and action, learning and doing, passion and responsibility, participation and performance.

Open Space works best when the work to be done is complex, the people and ideas involved are diverse, the passion for resolution (and potential for conflict) are high, and the time to get it done was yesterday. It's been called passion bounded by responsibility, the energy of a good coffee break, intentional self-organization, spirit at work, chaos and creativity, evolution in organization, and a simple, powerful way to get people and organizations moving -- when and where it's needed most.

And, while Open Space is known for its apparent lack of structure and welcoming of surprises, it turns out that the Open Space meeting or organization is actually very structured -- but that structure is so perfectly fit to the people and the work at hand, that it goes unnoticed in its proper role of supporting (not blocking) best work.

In fact, the stories and workplans woven in Open Space are generally more complex, more robust, more durable -- and can move a great deal faster than expert- or management-driven designs.

The one thing I would learn relates to the above and that's how to become an effective moderator. If the moderator does not! (to some extend) control the discussions nothing comes out as well.

Daan Boom

DAY 2: TOOLS AND APROACHES: (OPEN SPACE TECHNOLOGY)

Post By: Luis Ernesto Osorio-Cortes

Daan Boom proposed ...

Open space technology (ost) is a way to convene people for a conference, retreat or meeting. "technology" In this case means 'tool' - a process; a method. Attendees are asked to generate the meeting agenda as well as participate by leading small group break-out sessions during the meeting time. There is usually a facilitator, but no official meeting leader who demands compliance...

Any experiences here?

DAY 2: TOOLS AND APPROACHES: (VIRTUAL SPACES AND TOOLS)

Post By: Alison Griffith

OK, thanks for that Ben....

the ONE thing I would like to share is that for our programme virtual spaces and tools have been a great way to get informal and formal sharing going (both ad hoc and routine) but nothing beats face to face encounters. The quality and volume of sharing after making connections between living, breathing human beings seems to really take off (of course this is a big challenge as we all try to reduce our carbon footprint).

As facilitators of market systems involving poor people this has been true too - we have found participatory market mapping a very powerful tool to promote better flows of information between actors - these interactions build-in commitment because people learn together and begin to understand how it all fits, where the blockages and opportunities are and they start to feel part of a process of change.

and the ONE thing I would like to learn is whether people have found incentives a successful way to stimulate learning at a programmatic or organisational level, and if so what? (contests, prizes, recognition, performance appraisal targets)

Looking forward to hearing from others

Alison

DAY 2: TOOLS AND APPROACHES: (KNOWLEDGE STARS)

Post By: Sara Naab Schaff

One of our most successful strategies to help people adopt to the portal was a program I called knowledge stars. It had a few components --

1. I had a list of staff names taped to my door. Everyone who uploaded documents to the portal to share got a gold star next to their name

2. Finding this worked well to motivate people to add documents, I extended the program by naming one or two people in the staff meeting as my "knowledge stars" people who had done things to share knowledge - host a brownbag, write up lessons learned, created new spaces for sharing, etc

4. I then hosted a knowledge star competition where I offered that the person from each department who uploaded the most documents to the portal over the course of a month would get to go out to lunch with the other knowledge stars.

3. Finally, I extended the idea further by creating a "knowledge newsletter" which highlighted new resources available on the portal and writing brief articles about my "knowledge stars" and the work they were doing

DAY 2: DISCOVERING GOOD LEARNING PRACTICES (STOCKTAKING)

Post By: Mike McGahuey

Hello All, my name is Mike McGahuey. I am with the Natural Resources Office of USAID. I manage FRAME, a KM program that has a sister website to microLINKS (www.frameweb.org).

First, let me thank the organizers of this discussion for putting this together and for their facilitation. The discussion has tapped into a lot of worthy experiential knowledge.

My comment pertains to Point Two of Lucho Osorio's list of recommendations for effective learning: "Allow the organization to discover good learning practices on its own." FRAME came across a lesson that I would like to share and to see if others have had similar experiences.

In one of FRAME's major learning activities, we found that "who" does the learning can make a difference in how that knowledge is eventually applied. FRAME supports NRM impact assessments called "Stocktaking." Stocktaking, unlike End-of-Project Evaluations, typically takes place several years after the end of an NRM project. It focuses exclusively on impacts, whether anticipated or not. And, by working backwards from the impacts, those "Taking Stock" typically unearth experiential knowledge that challenges old paradigms and vested interests. We found, not surprisingly, that those who took part in the "Discovery Process" were frequently empowered by the experiential knowledge that they picked up. Since one of FRAME's objective is to strengthen NRM Champions in bringing about reforms, we now ensure that host-country Champions are key players, if not the leaders, of Stocktaking Activities.

I would be very interested in learning of other peoples' experiences by empowering key people by "targeting the learning experience."   Mike

DAY 2: DISCOVERING GOOD LEARNING PRACTICES (STOCKTAKING)

Post By: Luis Ernesto Osorio-Cortes

Hi Mike:

Thanks for your inputs about "Stocktaking".

I would like to know if members of the communities or other "beneficiaries" are involved in this process. It seems to me that to "unearth experiential knowledge that challenges old paradigms and vested interests" and empowering people through "experiential knowledge" are precisely two of the things we need to promote for sustainable development to take place.

Any one else has experiences about "Stocktaking"?

Thanks,

Lucho Osorio - Practical Action

DAY 2: TOOLS AND APROACHES: (STOCKTAKING)

Post By: Tony Pryor

I just wanted to add to the idea that one should look at impact well after the project activity ends. Among other things, often changes occur that are massive and consequential so beyond the time frame of the designers of the activity that the linkages are almost forgotten. FAO's social forestry programme used to look at some of their investments 15 years after the fact, often finding huge, unintended impacts, some good, some bad, and some very good but not for the intended beneficiary. (And from a knowledge point of view, how could one then collect the "right" knowledge in advance, if its significance might change as the actual impacts change?)

In USAID in natural resources management, I remember we tracked change from USAID support over 15 years in about 5 countries, and in each case AID support ended well before takeoff could be identified. Among other things, this led to a focus on the underlying conditions affecting long term change, and that then led to approval to track proxies of impact - those factors/enabling conditions which our knowledge and best practice seems to indicate can lead to long term change. Which then turned the entire evaluation system more into a hypothesis testing and refining process, rather than a tree-counting exercise.

It also led to the dropping of log frames in favor of the results framework (which most others outside of AID assume is just another name for a logframe, which it isn't. Frankly, if it's anything, it's closer to the OM approach in intent, if not in design). When we came up with the RF approach in 1994, which is still a core part of USAID's programming guidelines and procedures (with log frames still not approved, although used informally for activity design), the term "knowledge management" was not in common parlance; that's unfortunate since I think I would have hardwired the concept into the planning framework. The idea was to learn as one went, and refine the logic, not to sit and passively count indicators as if development were as predetermined as a rocket's trajectory (sorry about that, indicator fans - I couldn't help myself!).

The problem though in tracking impact well beyond the investment is who will pay? For most donors, in fact for most groups (since NGOs and community groups also can fall into this trap), tracking impact and tracking money flows often get so intertwined that there's little incentive to track that impact once the funding is gone.

Tony Pryor
IRG

DAY 2: DISCOVERING GOOD LEARNING PRACTICES (STOCKTAKING)

Post By: Mike McGahuey

Lucho:

Thank you for your very good question and Tony for his comments. I would complement Tony's comments by noting that a dynamic Malian NGO used the "Stocktaking" experience to help make fundamental changes in the Malian Agricultural Law. Without going into detail, this NGO "Took Stock" of the impacts of several forestry initiatives, some which had closed over 20 years prior to the study but which had continued to produce results. The results included flourishing farmer and community-managed woodlots that were generating substantial revenues. Following their "Taking Stock" of the impacts and lessons, the NGO were able to make the case to Mali's parliamentarians that such private and community-managed operations were contributing substantially more to the rural economy than people had realized. And, they were able to convincingly demonstrate that such issues as tenure and decentralized control of forestry resources were key to spurring this "new" source of growth! .According to correspondence with the NGO, following their discussions with key Malian parlimentarians, fifteen amendments were accepted that made the above issues part of the Agricultural Law for the first time. Had this NGO followed the typical project cycle and not bothered to track impacts after the projects' terminations or if a team of foreign consultants had ownership over the "Discovery Process", it is unlikely that these fundamental changes in the Law would have taken place.

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DAY 2: DISCOVERING GOOD LEARNING PRACTICES (STOCKTAKING)

Post By: Tony Pryor

Lucho:

Let me respond for Mike, an old friend and client, just to close this part of the discussion. In fact, a hallmark of Mike's approach has always been to have the local communities, local policy makers and researchers drive the entire process, on the basis that learning something yourself always aids sustainability. He doesn't always get a consensus on this from his co-workers, but to his immense credit he's never changed, as long as he's been doing this.

Tony Pryor

DAY 2: TOOLS AND APROACHES: AFTER ACTION REVIEWS (AAR)

Post By: Luis Ernesto Osorio-Cortes

This tool was proposed by Ben Ramalingam:

"After Action Reviews (AARs) seem to be the most simple tool in the world, but in fact the way in which they are used often means that they cannot play an effective learning role. Either they are applied to one-off events, or the key questions are not asked properly, or the learning process is blocked by team hierarchies, so real self-critical assessment doesn't take place. But there are situations where this can be overcome, by paying careful attention to the application and purpose of the tool. Facilitative leadership is, I think, absolutely essential"

"ONE thing I would like to learn relates to the same area, but focuses on the intersection between KM and OL. Specifically, has anyone used electronic systems to store AARs, and then subsequently access and re-use the lessons? In principle this is a great idea, but it is hard to make happen in practice. Does anyone else have any experiences here?"

DAY 2: TOOLS AND APROACHES: AFTER ACTION REVIEWS (AAR)

Post By: Serafin Talisayon

Hi Ben,

My NGO assisted another NGO, the Malampaya Multipartite Monitoring Team, in forming the LO habit of doing a form of AAR which we call Lessons-Learned Meeting or LLM. This organization is composed of 4 geographically separated sectoral teams performing similar administrative and technical tasks (environmental monitoring of a big natural gas extraction and piping project). It is composed of members from civil society, local governments, interest groups and national government representatives that keep changing its membership frequently.

Instead of an electronic database to store AARs, what we helped them develop is a systems manual of operations (to address the knowledge losses and shorten learning curves due to rapid turnover of membership) that is constantly revised according to the results of periodic and sectoral LLMs. They call it a "Learning-Oriented Systems Manual." The manual is not yet web-based but every time a revision is made its latest revised e-copy is emailed to all 4 groups.

A well-known searchable and constantly-updated database of AARs is the Center for Army Lessons Learned (of the US Army). Click here to access the website (of course, only public-domain information is accessible from this Internet website).

Cheers!

Apin

Dr. Serafin D. Talisayon
CCLFI.Philippines
www.cclfi.org

DAY 2: TOOLS AND APROACHES: AFTER ACTION REVIEWS (AAR)

Post By: Luis Ernesto Osorio-Cortes

Hi everyone:

I just uploaded a couple of docs on AARs that you may find useful: a template and a toolkit to facilitate them. You will see them soon in the Documents section of this SC.

We in Practical Action will be testing this tool soon and share results will the future BELO CoP.

Thanks,
Lucho Osorio

DAY 2: TOOLS AND APROACHES: (END OF PROJECT EVALUATIONS)

Post By: Luis Ernesto Osorio-Cortes

I created this "box" for you all to contribute in case you have used END OF PROJECT EVALUATIONS or are planning on using them. Thanks, Lucho Osorio - Practical Action.

DAY 2: TOOLS AND APROACHES: (MOTIVATING KNOWLEDGE WORKERS)

Post By: Serafin Talisayon

Hi Alison,

Maybe I can share something about your query on incentives, or what works to motivate knowledge workers.

In 2006-2007, I led a team from 9 Asian countries collect good/best practices in KM. From 22 case studies we produced, one of the interesting patterns is that most of them use one or another form of incentives (both material and non-material). I summarize below these various forms, which I quote/lift from the cross-case synthesis paper I wrote (to be published next month by the Asian Productivity Organization, Tokyo):

[**Editor's note:** The following overview may be best read in a PDF excerpt also provided by Dr. Talisayon. This and other documents are also posted on www.microlinks.org/learningorganizations]

- *Rewards and recognition* schemes are often used. Airtel in India instituted the Knowledge Dollar (K$) as the unit of performance credit and the Joint President's and CEO's Knowledge Management Award. A Learning Award for knowledge transfer and an Enterprise Award for intrapreneurship were established by Unilever Indonesia. Wika in Indonesia instituted ten different awards. According to Purnomo, the Learning Award resulted in *"new enthusiasm for learning, confidence in trainers to conduct sessions, new standards of module development... and preservation of knowledge not captured before."*

- Infosys uses *measurable returns* from KM initiatives to demonstrate the benefits and rationale for engaging in KM. Initial positive feedbacks on outputs/benefits of KM were encouraging and provided motivation for the continuing development of KM at Goldsun in Vietnam.

- At the Department of Health in the Philippines, members of the KM Team through a workshop surfaced their personal talents, passions and life goals and each member clarified how he or she can optimize the consciou s *convergence between personal and organizational goals*.

- Management of Qian Hu in Singapore designed a *mix of informal and formal communication* modes to strengthen buy-in from employees and customers. This includes "floor walks", tea sessions and informal gatherings besides more formal modes such as seminars and focus group discussions.

- At SCG Paper in Thailand, a balance of virtual interaction and physical or face-to-face meetings is employed. *Physical spaces for interactions* are provided that can foster openness and trust among employees. Similarly, Bank Negara Malaysia redesigned its library environment to make it more reader friendly, using ergonomics furniture and encouraging a more cheerful mood using paintings and appropriate color scheme for walls and furniture.

- The importance of *senior management commitment* or executive sponsorship was mentioned in many case studies. In a survey of more than 200 organizations in Thailand this factor was ranked highest among critical success factors for KM. At Siriraj Hospital in Thailand, the CKO (Chief Knowledge Officer) was selected on the basis of commitment, leadership ability and recognition from other staff. Leadership and policy was ranked second in a study in Malaysia of success factors in KM. According to Menkhoff, JTC Corporation's managers created *"a motivational organizational culture characterized by a caring leadership behavior which supports active questioning and allows for mistakes... Employees are thus able to trust each other and to share their opinions about work related issues more freely."*

- Learning is a win-win activity for employees and the company. CAPCO in Taiwan established an on-line learning program for its employees, the Multimedia Cyber College. It has motivated its employees by including on-line *training and certification as part of the employee evaluation and promotion processes*.**

- The motivational value of learning through *face-to-face interaction * in a team or CoP is mentioned in many case studies. Unilever Indonesia, SCG Paper and Siriraj Hospital in Thailand, and SAIT in Korea are examples of organizations that set up and nurture many CoPs. To sustain employee interest in KM activities, Bank Negara Malaysia initiated cross-functional teams, benchmarking projects and study visits or attachments. **

- At SCG Paper, the *honor of being a mentor or coach* is seen as a motivating element in tacit knowledge transfer processes such as the buddy system, job rotation and cross-functional group activities. Designating functional heads as the *knowledge champions *and setting up a *community of experts* were instrumental in gaining buy-in for KM at Airtel. Wika and Bank Indonesia created the role of "*begawan*" (sage) for mature and experienced mentors. **

- "Praise Ground," which is an avenue for *peer-to-peer public compliments for exemplary KM behavior*, is an innovative process at Samsung Advanced Institute of Technology. Accordingto Sohn,**

"A member identifies another employee who has done something worthy to be praised and writes a short, but entertaining note about it on the website. That member, then, identifies still another employee to praise and the process is repeated over and over... The Praise Ground is one of the most popular and most frequently visited website at SAIT. Most, if not all, members at SAIT consider it a great personal honor to be mentioned at the Praise Ground."

Cheers!
Apin

Dr. Serafin D. Talisayon
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DAY 2: TOOLS AND APPROACHES: (MOTIVATING KNOWLEDGE WORKERS)

Post By: Stacey Young

Thanks, Apin, these are great! Very useful.

One question: Infosys uses *measurable returns* from KM initiatives to demonstrate the benefits and rationale for engaging in KM
-- do you have any more information on this? How does Infosys measure returns on KM investments?

thanks --

Stacey Young
USAID Microenterprise Development office

DAY 2: TOOLS AND APROACHES: (KM MEASUREMENTS)

Post By: Serafin Talisayon

Hi Stacey and colleagues,

Infosys uses a lot of KM metrics but the case study available to me (see attached) is silent on how they do it.

A summary comparison/synthesis of the various approaches to measurements culled from the 22 KM case studies may be more useful to you (attached too).

[Editor's note: The two documents mentioned here are posted in the documents section of the Speaker's Corner page.]

Cheers!
Apin

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DAY 2: A SUMMARY OF POINTS THAT HAVE CALLED MY ATTENTION

Post By: Luis Ernesto Osorio-Cortes

I would like to thank all of you who have contributed and read the messages so far. (by the way, it is incredible and exciting that in this moment there are 170 people registered in this discussion!)

I would like to highlight some of the points that have called my attention today:

- After a widespread recognition of the importance of senior management buy-in of KM/OL processes, it seems ironic that sometimes the wrong buy-in and push from the senior level can do more harm than good!
- The importance of understanding the difference between KM and Information Management.
- The idea that good KM/OL processes are people-centered, not technology-centered.
- Successful development processes (or projects) seem to emerge organically in response to contextual challenges, opportunities, threats, possibilities, etc. However, there are cases of successful models that are

transferred successfully to other contexts. Are those successes the result of appropriate learning facilitation processes generated knowingly or unknowingly by the activities of a project? Are we and donors putting to much emphasis on the surface (activities, outputs, indicators) and missing the substance (what promotes learning within the stakeholders)?

- The gap between "public transcripts" and "private transcripts" (Massor); which I see as a similar gap between explicit and explicit knowledge. The difficulties of embracing and articulating the private transcripts or the tacit knowledge seem to have led development practitioners in a situation of over-reliance on what we can put in documents or other media (technique without art?)
- The incredible amount of literature available on KM/OL. Can this lead us to paralysis by info overload?
- The difficulties to build a culture of practitioners who accept and share their mistakes or weaknesses openly with peers. Are incentives rewarding successes only and contributing to this problem? Are some organizations rewarding "learning mistakes"? I would love to know if others have experiences about the latter because we want to implement these kind of incentives in our team.
- The classification of tools that Sara Naab Schaff proposed using the categories of space and time.
- Open Space Technology highlighted by Daan Boom sounds very interesting and it could help us (Practical Action's Markets and Livelihoods Programme) to facilitate our backbone process of Participatory Market Mapping will study it further. The definition in Wikipedia looks exciting:

What points have caught your eye today? Why? (Bullet points also welcome!).

Thanks so much again for a fascinating day.
Lucho Osorio
Practical Action

DAY 2: CLOSING THE LOOP

Post By: Jan Maes

Dear Participants,

We are just about halfway this three-day Speaker's Corner, and the wealth of knowledge among all of you is enormous, especially if one takes into consideration that we have 170 people signed up! I think the value of today's discussion has been the sharing of tools, approaches and tricks of the trade, and clearly there are many of them. I thought Ben's idea to trade one thing you know for one thing you want to know more about was great, and please continue doing so, as well as sending any of your tools/approaches to the virtual boxes that Lucho has created for those.

I can also imagine that the flood of information might be overwhelming for those among you who are just interested in improving KM & L within your organization or program, or even ready to roll up your sleeves and get started. And for that reason I want to go back to Lucho's kick-off message this morning, and ask again. How do you get started? Lucho already hinted that there is no recipe, and provided us instead with some very good principles and ideas to take along for the road. But even without a recipe, do any of you have a road map to share with us, or a 10-step approach?

Assuming that we have identified knowledge and learning needs, and obtained some buy-in from senior management, what do you do? What steps to take? Where do you want to end up? (And tomorrow we'll also talk about how we can gauge the results we intended to achieve).

Lastly, within the BELO group we talked a lot about closing the loop, almost as something we had not got to yet. What we meant by that is that after all the efforts of managing our knowledge, improving knowledge sharing (demand-driven) and learning, how do we make sure that in the end this results in better design and implementation of programs, in concrete improvements in development practice? And when should we start seeing the results of our work? After a few years of improving our KM practices and learning processes? I wouldn't think so, but I see a real danger in forgetting along the road what this is all about.

I am looking forward to your thoughts,

Jan

DAY 2: CLOSING THE LOOP

Post By: Susana Pezzulo

Hi,

This is Susana Pezzullo with the International Youth Foundation and I've benefited from your remarks thus far and look forward to the summary.

One issue that keeps coming up for me is context and how that colors our questions, responses and needs. At IYF I've overseen a large-ish learning effort for a regional program (entra 21) and goodness knows, I probably learned more how to learn through that experience than I did about youth outcomes. At a program level it is easier for me to get my head around learning processes, assets, tools, etc. So much of what has been shared applies very well at this level.

As I begin to move into the issue of how to become a learning organization, that is to say as IYF-a 3rd level organization (eg. An organization that supports organizations that work with youth), my clarity of vision begins to blur. At that level I find structure and culture play a huge role as we try to find ways to learn from one another, organized in a series of centers, operating different programs.

One thing that would help me as we continue this rich discussion, is if we could be explicit about the level at which we hope to do KM (learning) ...be it community, project, program, organizational, etc. or all of these levels.

SP

DAY 2: CLOSING THE LOOP

Post By: Stacey Young

hi - Stacey Young from USAID's Microenterprise Development office here again. I really appreciate Jan's and Susana's points about "closing the loop" - Susana's point about needing to be explicit about the level at which we hope to do KM; and Jan's point about need to know whether all of the knowledge that we try to get circulating among people actually gets applied (and I would add, has the impact we intend it to have once it is applied).

In our work in microenterprise development, we try to "do" KM internally within USAID to promote good practice (which we intend to translate into good program design and management; sound definition of objectives and indicators;

and appropriate use of microenterprise interventions (fighting the "microenterprise cures cancer" perception of this one approach as a panacea. We also try to "do" KM externally for a range of audiences - chief among them are practitioners, but we also consider other donors, policy makers, other US government actors, and academics to be important audiences. The way we "do KM" depends on a lot of things, including who the audience is - because for us, doing KM means trying to use information and the exchange of knowledge to get particular actors to do particular things that, at the end of the day, add up to appropriate use of microenterprise good practice to achieve development objectives.

We don't really try to do KM at the level of our program clients, because, like Susana's organization, we're a few steps removed from them and don't consider ourselves to have comparative advantage at that level.

All of this is related to Jan's point about the need to understand whether we're having an effect on program design and implementation, because what we intend to achieve depends on the particular actors and the particular contributions we want to help them make to good microenterprise development practice.

Once we've figured out who our audiences are, and what our objectives are for each of them, there remains the question Jan raises of how we assess the impact of the KM we do with them. In our KM work with QED and IRG, we conceive of a 4-part knowledge cycle that includes the following:

1. knowledge generation (rooted in our technical understanding of microenterprise development problems)

2. knowledge capture (capturing the most useful knowledge in forms that we hope will be easily digestible by our key audiences, and to a degree capturing that knowledge through processes that are embedded in our work)

3. knowledge sharing and dissemination (one or the other or both depending on objectives, audiences, opportunities)

4. knowledge application - with feedback to further knowledge generation, as the application reveals refinements that are needed in the knowledge we have, and gaps/additional knowledge we need

We haven't focused much thus far on the fourth component of the knowledge cycle - and I don't think we're alone - but we intend to really focus on this a lot more in the next phase of our knowledge management work, so that we can test our hypotheses about what kinds of KM are most effective, ground-truth the investments we're making, and also build our understanding about what makes KM work in order to help build a business case for KM.

In thinking about it, though, it has seemed to me that addressing this component requires a significantly different knowledge base than the one that the KM field has developed in focusing mainly on the second and third components of the knowledge cycle. As a field, I think KM is getting pretty sophisticated in capturing knowledge, disseminating it, and supporting the sharing of it. But as a field, I don't get the sense that KM really has grappled a lot with how learning takes place; nor do I get the sense that the KM field really understands when, how and why learning gets translated into action. Without understanding these processes, and also developing methods to measure their impact, I don't think we can know whether we're really being effective with regard to that crucial fourth component of the knowledge cycle.

I'm hoping I'm wrong about this and someone can talk about their experience in this area, or point us toward some work that's being done on this (possibly in other fields -- adult learning, maybe? sociology? something else?). Any experience, ideas or sources to share?

Thanks, again, for a really rich discussion.

Stacey

DAY 2: CLOSING THE LOOP

Post By: Mehrul Islam

Hi All,

All these are really very rich discussions! Can someone shed lights on the following issues of KM and learning

Question 1: Individuals are the learning within any organization; therefore to become effective in learning and becoming a learning organization, it is critical that individual transformation leads to individual learning and eventually organizational learning. The question for us is " how can we establish and facilitate a process of individual transformation to make individuals motivated and effective learners" Can anyone share with us some simple and practical tips on this some.

Question 2: We had a library in our Head quarter based at the Capital city, which was cramped with a number of valuable reports and book, and unfortunately the knowledge seems to be eaten by bacteria and fungus. We recently conducted an assessment to get staff opinion and perceptions and the findings are very interesting actually, since people in the past were not using the resource library but a vast majority are still in favour of having a resource library at the office. Now we need to motivate and get buy in form the senior management, Any suggestions, thoughts on the outlook of the resource center - not so sophisticated but still user friendly and productive as a resource library (Space and budgets are currently limited as well).

with best regards,

Mehrul

DAY 2: CLOSING THE LOOP

Post By: Sybil Chidiac

Mehrul,

Thank you for your questions. I would like to share with you some of our experiences at CARE that can hopefully provide some concrete things that can be done to address your challenges.

Q1. " how can we establish and facilitate a process of individual transformation to make individuals motivated and effective learners" This is a hard question to provide one good answer, but I think there are a list of things that can be done.

First, I think that it is important for the organization to have a committeemen to establishing and facilitating a process for individual learning. This is what I like to call the "culture and behavior." With this in place led by senior managers and exemplified by key staff and KS&L champions, this can set the tone for the whole organization.

Second, I think it is key for the organization to have in place key policies and incentives. This will enable individuals to feel rewarded and valued for their work and focus on learning. The key here of course is that the individual learning is to the benefit of the organization. When the organization does not have incentives in place there are some things that can be done. In our case, we implemented a practice that had all of our VS&L practitioners incorporate a KS objective on their annual individual operating plans. This provided a strong link to their performance to which they would be held accountable. Another practice we implemented was to send formal certificates to individuals from the President/CEO of CARE congratulating an individual's effort in KS&L. This was a huge success as we sent the certificate and letters out in a strategic fashion. They were sent out to the Country Director of a CARE office, who then presented the certificate to the individual at an all staff meeting. Thus providing external recognition and demonstrating the value of that person's contribution.

Third is actually creating the physical environment to learn. So setting up libraries, quiet work spaces (with comfortable tables, chairs or couches), half work days - where individuals can leave their daily tasks to focus on learning on a self identified topic, there could be weekly meetings where individuals on a rotating basis present learning that they want to pass on to the rest of the organization, lastly, there could also be KS&L retreats, where the organization or a program within the organization focuses on a theme for a couple of days and learn from various internal experiences.

Q2. This is a really good question that I will post again tomorrow when our discussion focuses on measuring results and building support. Maybe you could scan (have an office volunteer or intern do the scanning so little or no cost) all the documents in the library (as you mentioned that they are getting musty and fungi filled...)then house them on one of your shared computer drives and then establish 2-3 computer workstations in the area once called the resource library and rename it the resource workstation. This way staffs and outsiders (if you let them) can come to this location away from their desk and everyday activities and just focus on gathering some internal knowledge that can help them with their work. I guess this would be a modern type approach at redesigning your center. This general drive with all the resources could also be hooked up to a VPN (Virtual Private Network) so you could access it away from the office... But the key question you will get from Senior Management is why should we invest in such an initiative given that the books are getting dusty, musty and fungi filled and the additional point of the resource library not even getting used in the past. You may need to understand why the current resource library is not being used. What the barrier to usage is for staff and try addressing that first. For example, staffs may find the concept and the actual resource library useful, but just don't have the time to go there and search for the knowledge they seek. Another example could be that individuals find the library as a key resource but in fact find it very difficult to search through the materials and extract the valuable pieces of knowledge. Another could be that staffs just don't have the time to physically visit the library... etc...

What do you think? Also, let's be sure to discuss your obstacle of obtaining senior management buy in tomorrow!

Sybil Chidiac
Technical Advisor, Knowledge Sharing and Learning
Economic Development Programs
CARE USA
http://edu.care.org

DAY 2: CLOSING THE LOOP

Post By: Serafin Talisayon

Hi Alison and Lucho,

Besides triggering group reflection, what is the key feature of Stories of Change? Does it also seek to generate group energy when discussions focus on "what went right" (ala appreciative inquiry)? What reading do you recommend so one can understand the SOC process? Muchas gracias.

Hi Tony,

What is "OM"? In what ways is the results framework superior to the common logframe?

Long-term tracking of project/program impacts, as you said, requires resources long after project/program accounts had been closed. The benefit of long-term tracking goes beyond the timeframe of the project. The same is true with learning in projects: the benefits from learning can accrue to the NEXT project (i.e. cross-project learning). So again, the limited time and accounting boundaries of projects/programs cannot capture these "positive external economies." Another factor that militates against cross-project learning is when projects are implemented bycompeting firms or NGOs. Why should I share my knowledge to another contracting agency when that knowledge can be my competitive advantage in the next bidding/tender where both of us may be competing against each other? For example, CIDA is experiencing this kind of hurdle to knowledge sharing across their projects in the Philippines.

Hi Sybil,

Evaluations tell donors if their project/program objectives have been met, and so donors of course fund evaluations. Benefits from KS&L, on the other hand, accrue more to development practitioners and only indirectly to donor institutions. Also, donors are concerned more with learning about good project/program design -- a very institutional or top-level "public transcript" (thanks for that new language, Masood), but practitioners are concerned more with learning about effective execution in the field -- a very contextual, less predicatable "private transcript". So, here is another gap. How do we address these gaps! ?

Cheers!

Apin

Dr. Serafin D. Talisayon
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DAY 2: CLOSING THE LOOP

Post By: Tony Pryor

Really good questions. And I found the response so far to be very helpful.

Just a couple words of caution: individual growth is a key element for building a learning community, but from a purely "corporate" perspective (and I mean this in terms of core business, be it a community group, CARE, or BP) it would be preferable if this individual learning were in some way directed towards better achieving the entity's objectives. For instance, USAID has a contract with an online training provider, which makes content available to employees all over the world. The overwhelming majority of users of that material seem to be Foreign Service Nationals in-country, who are taking these fairly generic courses to improve their skills; what's not as clear is whether all of these courses actually help the employees do their work better, or rather help them in seeking another job elsewhere (I'm not saying it's one way or the other, but as far as IO know, the Agency doesn't have the data to say). And in the case of BP, while they strongly supported communities of practice, at some point they had to reign in individual learning to that learning that had some direct relationship to the person's work objectives.

Besides the question of intent, there's the opportunity cost involved in having people learning things not related to their work. HOWEVER, somehow building proactive learning into employee evaluations can prove to be a very potent incentive.

DAY 2: CLOSING THE LOOP

Post By: Alison Griffith

Hi Mehrul,

Thanks for your inputs. I was actually thinking about the topic of your first question on my way into the office this morning! I like the fact that you are asking for simple practical tips to get the process of analysis and learning going with individuals. We ask similar questions in Practical Action because we realise that project staff necessarily have their focus on implementing activities and hitting project targets (the dreaded log frame again!), so there is often little time or mental space (or incentive?) for reflection about what is working and what is not. The Stories of Change methodology mentioned earlier by Lucho has potential to provide the opportunity for periodic reflection and encourages analysis about processes of change. If conducted well it should value the disappointments as much as the successes and capture unexpected changes. We introduced SOC as part of an internal annual review process under the QA unit - this might have been a mistake because it is linking it with upward accountability and could mean there is less emphasis on learning loops at project level.

Alison

DAY 2: CLOSING THE LOOP

Post By: Peter West

Mehrul and others,

In response to your statement linking individual transformation to learning ...

(Recall that Mehrul wrote "*Question 1: Individuals are the learning within any organization; therefore to become effective in learning and becoming a learning organization, it is critical that individual transformation leads to individual learning and eventually organizational learning. The question for us is " how can we establish and facilitate a process of individual transformation to make individuals motivated and effective learners" Can anyone share with us some simple and practical tips on this some.*")

Learning plans are a simple yet powerful trigger for learning. The process of developing the plan encourages the individual to think critically about their skills and to identify work- and goal-related learning targets that are relevant, meaningful and motivational. There is even an evaluation component. A key to the success of learning plans is that the individual takes responsibility for learning and the organization makes a commitment to resource and support them. The outcome is both individual and organizational transformation. Everyone benefits.

I have sent a document ("Your Personal Learning Plan") to Anna van der Heijden to be placed on the Speaker's Corner page. The document was prepared by the Government of Canada as part of its Learning Organization strategy. (As an aside, I was on secondment to the government at the time and got to experience the implementation.)

[**Editor's note:** This document is posted on the Building More Effective Learning Organizations Speaker's Corner Page.]

Hope this helps,

Peter West
Management Consultant
Canada

DAY 2: CLOSING THE LOOP

Post By: Jan Maes

OM stands for Outcome Mapping, and I am sure several among us have experience with it. You can find a lot of information on http://www.outcomemapping.ca/

Jan

DAY 2: CLOSING THE LOOP

Post By: Sybil Chidiac

Apin,

I noticed your message way below and wanted to comment on your points of learning. Our learning goes into our evaluations. As you stated in different words, donors fund the programs on the ground that change the lives of the poor. The evaluations that we produce tell not only if the original program design was followed and if the objectives were met, they also tell them what are the current needs on the ground, what program designs did not work and why and how to structure programs in the future. I do believe that the evaluation and other reports that are submitted to donors are used to fund better developed programming. Findings, challenges and the recommendations from the ground are used for donor learning to improve the funding of quality programs.

The learning to improve program implementation on the ground is as you mentioned very individual practitioner focused. But from yesterday's discussion, I think we have found some ways forward to improve learning on the ground that could translate to better program implementation. To me it is a question of organizational commitment. If an organization is committed to resourcing KS&L then they will set forth policies that will enable funding to come in to support the costs. For example, organizations set their NICRA and this is standard. Some other organizations have standard support costs built into a budget. If uniform and applied to all funding requests this could be a way to support the costs associated with KS&L at the field implementation level.

What do you think? Am I unrealistic?

Sybil Chidiac

DAY 2: CLOSING THE LOOP

Post By: Serafin Talisayon

Hi Sybil,

I am not familiar with NICRA. Does it cover generic overhead costs?

Perhaps one way to obtain budgetary commitment for KS&L from upper management is to use the findings of Pfeffer and Sutton of Stanford U. I said "perhaps" because I have not tried this myself.

Pfeffer and Sutton wrote a book on "Knowing-Doing Gap" (Harvard Business School Press, 2000) after a 4-year study. They concluded: ""...one of the most important insights from our research is that knowledge that is actually implemented is much more likely to be acquired from learning by doing than from learning by reading, listening, or even thinking."

This means that knowledge from training or any learning that happens outside the work context, is less likely to be actually used in the workplace than knowledge from KS&L within the work context. Most corporations set a maximum of 2 weeks per year in training time per employee. That means they are willing to forego 2 weeks worth of pay and productivity for training which is often outside the work context (e.g. classroom style). Now, KS&L is closer to the work context, and therefore (following Pfeffer and Sutton's findings) yield knowledge that is more likely to be actually used and hence impact on productivity.

If management can follow this logic, then KS&L should be devoted MORE resources than 2 weeks worth of payroll per year. Does this make sense at all?

Apin

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DAY 2: CLOSING THE LOOP

Post By: Sybil Chidiac

It does and you provide an exciting proposition. What does everyone else think of Apin's proposition?

NICRA is the generic overhead cost as you mentioned.

Sybil Chidiac
Technical Advisor, Knowledge Sharing and Learning
Economic Development Programs
CARE USA

DAY 2: CLOSING THE LOOP

Post By: Stephen Claborne

Hi:

I appreciate the thought and discussion from the all the contributors. One of the challenges we face is how to integrate learning across the agency so that it is directly (not indirectly) connected to performance. If "on the job" learning has the greatest impact, then how can we create methods and systems to provide knowledge when it is needed, where it is needed, and in a size and form that can be directly applied. A "google-like" approach for learning and application where it is learner driven (not supply driven). The second challenge is to convince donors to fund the systems and infrastructure needed for that kind of approach. Using ICR is tricky, and not well understood. If donors were willing to accept a direct "fee" for knowledge sharing and learning, perhaps as a percentage of staffing costs, that would be a huge step forward. If we can link that expense directly to quality of the program, then it can be justified as a direct cost of implementation. We needto find a way to make a better case of "causality" that learning has on performance and ultimately the impact in the communities we serve.

Steve

Mercy Corps

DAY 2: END OF DAY 2 – GOING TO DAY 3

Post By: Jan Maes

Dear participants,

I want to use this occasion to thank Lucho for facilitating today's discussion and sharing so much of his own experiences at Practical Action. And I am most grateful for his summary of today's highlights, which makes my job easier! I will just add one important issue that was brought up by Stacey afterwards, a bit sobering really, that the KM field still has to learn a lot about the processes of learning and translating that learning into action. This last part of the knowledge cycle, applying learning to our practice, is what this is all about, and we owe it to ourselves as much as to our donors or managers, that we demonstrate clearly what the payoff (results, impact) of KM&L is. As you remember from my introduction at the start of this Speaker's Corner, much of this discussion is about to take place during Day 3. But I will leave it to our next guest facilitator, Sybil Chidiac of CARE-US, to provide us with an overview of what promises to be another interesting discussion.

Before giving the floor to Sybil, I also want to encourage each and every one of you, but especially for those of you who are relatively new to the field of knowledge management and learning, to suggest ANY topics or issues that you want to learn more about. After all, we want to practice what we preach, and make learning (in this case about learning) a demand-driven process. The supply of knowledge in this Speaker's Corner is huge, overwhelming even, so please let us know what topics you want to know more about. But don't despair, if you don't have all your questions answered by the end of the Speaker's Corner either, because we have plans to continue the BELO Learning Network and invite anyone who is interested to join a thriving Community of Practice. I will provide you with more details about this by the end of Day 3.

I look forward to another day of knowledge sharing and learning, and I would now like to give the floor to Sybil.

Thanks,
Jan

DAY 3: MEASURING RESULTS AND BUILDING SUPPORT

DAY 3: ATTACHMENTS/RESOURCE SECTION

Post By: Anna van der Heijden

Hi everyone,

As we move into Day 3 of our discussion, I just want to remind everyone that if you have documents you want to share, please send them to us and we'll post them in the documents section on the Speaker's Corner page (www.microlinks.org/learningorganizations). Documents you attach to your emails won't be sent out to all the participants.

The resources that were earlier mentioned as "being attached" are all posted in that documents section. These are the current documents there, and we look forward to your additions!

- **Image of the Knowledge Pyramid**

- **Overview of KM Measurements in some APO Member Countries**

- **Infosys KM case study**

- **Excerpt: Motivating Knowledge Workers: Attending to both "Heart" and "Head"**

- **Putting Information Technology, Information Management, and Knowledge Management into Context**

- **We're Too Much in 'To Do' Mode: Action Research into Supporting International NGOs to Learn**

- **Organisational Learning in NGOs: Creating the Motive, Means and Opportunity**

- **Implementing Knowledge Strategies: Lessons from international development agencies** & nbsp;

- **Learning for Development: A literature review**

- **Learning for Change: Principles and practices of learning organizations**

Anna van der Heijden
avanderheijden@irgltd.com

DAY 3: WELCOME MESSAGE AND KICK OFF POINTS

Post By: Sybil Chidiac

Good Morning to all!

It has truly been an exciting two days on Speaker's Corner. We have shared knowledge and gained new perspectives from each other that can help us move our work forward. Once again, I would like to thank Jan for the well written introduction describing the realities of knowledge sharing and learning in development as well as thank Sara and Lucho for facilitating the past two days of honest, energizing and stimulating discussions.

Welcome to all of you who have contributed to this discussion over the past two days and welcome to those of you who are joining us for the first time today! I really hope to hear from you all regarding this last topic we will discuss here at this Speaker's Corner. My name is Sybil Chidiac, I am the Technical Advisor of Knowledge Sharing and Learning within CARE USA's Economic Development Programs. I have served as the Knowledge Manager of the CARE Building a More Effective Learning Organizations (BELO) project over the past 20 months. Today's discussion will allow us to focus on another reality we all face which is gauging the effectiveness, measuring the results and demonstrating to others the benefits of increased and improved knowledge sharing and learning processes.

So, from the past two day discussions can we come up with salient elevator talking points on why knowledge sharing and learning is useful? What can an organization achieve differently by instilling new processes to collect, store, make available and utilize knowledge and learning content? What is the benefit that we seek to gain by all this? I have started out with these rhetorical questions in the aims of bringing up some of the past discussions we had on days 1 and 2 and to help your minds focus on these evidence probing questions. The questions noted above are the types of concerns that come from senior management and donors when you want to make the case that knowledge management is part of the picture. In addition to the above noted concerns, it is important that we are able to demonstrate that what we learn gets translated to our work; that it impacts the quality of programming that we implement on the ground. Have we developed methods to capture the learning that gets translated into action? Today's discussion comes at us on the last day as it can provide a summative view on how to convince others of the benefits of knowledge sharing and learning initiatives that we are taking or planning to take. Knowledge sharing and learning is not a new concept, we should keep in mind that it is only through the knowledge that we have gained from our experiences that our organizations and programs have arrived in the positions that they are in today. Knowledge is a means to improving our effectiveness at ending poverty and the challenge remains in convincing others that there is a need for knowledge sharing and learning as a key enabler for the work we accomplish in international development and not an end. Let's start this discussion by laying out some of the important points related to a favorable environment to knowledge sharing and learning activities (since we are economic development practitioners, why not call it the KS&L enabling environment):

a. Culture and Behavior - Knowledge sharing and learning can only occur if there is an organizational culture and linked behaviors. If the culture exists in some form, it can serve as a leverage point with senior management. Understanding Senior Management vision or position regarding KM or a donor's understanding of the benefits of knowledge sharing and learning can also help you position yourself to answer the questions when they come up and make the case to mobilize resources for KS&L.

b. Policy and Incentives - Knowledge sharing and learning must be rewarded in order for practitioners to understand the value of their contributions. Knowledge shared with no reward can make an individual feel demoralized or even robbed after contributing tacit or explicit knowledge. In the initial phases of demonstrating commitment and participation, incentives would need to be designed to keep the learning exchange and action going. This may sound odd, but some staffs may feel that since there is no current senior management buy-in they too should not be engaging their time on related matters. But in fact, this stage is vital as it ultimately will create the culture and behavior needed to continue KS&L without the need for incentives.

c. Governance - Forming a working group or steering committee representing different parts of an organization can help build champions who can also demonstrate concrete examples and benefits of knowledge sharing and learning. Part of the key here is demonstrating results. With evidence, donors and senior management will pay attention.

To jump start the discussion, I would like to throw out some questions:

1. What have been some of the challenges you have faced convincing senior management or boards about the importance of building effective knowledge sharing and learning efforts?

2. What are some other underpinning aspects that need to be in place in your context in order to enable knowledge sharing and learning to take off in your organization?

3. If you were to put a value on the knowledge your organization generates would you be able to? Would you be able to assign it a figure in a program budget? If so, how did you come up with the figure?

4. Even if when we have clear practices and processes in place for KS&L, why is it that evaluations get funding in our program budgets but KS&L activities do not?

Sybil Chidiac
Technical Advisor, Knowledge Sharing and Learning
Economic Development Programs

CARE USA
http://edu.care.org

DAY 3: WELCOME MESSAGE AND KICK OFF POINTS

Post By: Mehrul Islam

Many thanks, Sybil Chidiac, for facilitating a process of tremendous learning for us. Can we share our experience on the following issues:

Topic: Measuring results and building support

Question 1: In our organization we are facilitating a process of learning and are in the process of implementing a number of interventions. We are interested to know more about the current wisdom and mechanisms to monitor learning and eventually ensuring accountability of individuals at all levels within the organization?

With best regards,

Mehrul

DAY 3: WELCOME MESSAGE AND KICK OFF POINTS

Post By: Daan Boom

In my previous organization (Asian Development Bank) we have raised awareness for learning and development, culture change, KM by addressing and discussing the following:

Where are we going?

· Money (or lending) alone is not enough to sustain without increasing the knowledge and innovation value chain. Knowledge or proven experience comes first followed by money.

Projects – An increasing amount of our work is performed as projects. These usually involve complex interactions in cross-functional teams, which also now include vendors, and often customers. Teams form, and disband at the completion of the project.

· Speed – Technology is moving rapidly. Too rapidly for one individual or group to keep abreast of. It is a simple fact that people need to share and leverage knowledge to keep up.

· Complexity – Many projects are complex in nature. People have been taught to manage complexity by investing heavily in creating certainty through analysis, planning and the management of details. The opposite is needed in the face of complexity. Using principles as a way of charting a course through complexity is a fundamentally different response. This requires groups of people who can engage in a conversation at this level, and can resist the temptation to 'get on with it' People need to integrate well in order to get mutual understanding and alignment on principles. They need to collaborate.

· Intangible value – Most organizational value is increasingly intangible. We are increasingly finding ourselves in the knowledge business. On one level, an organization is a bunch of information, which through social processes becomes knowledge, which leads to action, and which delivers results. All of our physical resources are an embodiment of that knowledge (i.e. the result of our knowledge)

· Me brand, and the importance of strategic intent – People are increasingly looking to employers to provide an opportunity to add value to their personal brand, and to take part in something worth while. In talking to teams in the business that have performed remarkable feats, one thing that is abundantly obvious is the power of strategic intent. Most people want to participate in something that is important.

· Knowledge Workers - As organizations outsource operational roles, they will be left with an increasing percentage (of total employee population) of knowledge workers. Knowledge workers integrate information to produce outcomes. Given that each individual is not all knowing, knowledge workers will rely on each other to fill in bits of the puzzle.

I found the attached article on the Coca Cola experience worthwhile reading. What are the implications of these trends?

It is clear that we are entering a period where mutual reliance between people in organisations is increasing. People need others to deliver outcomes, for the good of the whole. Some would say that this has always been the case, and this is true. However! , it is more important now, and deserves stronger focus and enquiry.

The implications are as follows:

· We need to manage and leverage our know-how. To be successful, people will need to stop hoarding information and begin to store it in a format and place that makes it useful to others. If a company knew, what everyone in the company knows, then the company would be unstoppable.

· We need to manage and leverage our Know-Together. To deliver serious business benefit, we need to question how HR frameworks support collaboration. Online collaboration, e.g. newsgroups etc. enables people to offer what they know, and a way of finding out who to speak to about an issue. It enables horizontal communication, which can be stored and used by others after the event.

· We need to connect within more – Studies of biological systems show that systems with a greater number of internal connections than others exhibit significantly more robustness, resilience and speed of change. Organisations need to connect with themselves more effectively. We need far greater numbers of successful cross-functional teams, more horizontal communication, and many more spontaneous 'casual collisions' being created. This will deliver greater flexibility, robustness, speed and innovation.

· We need to increase our rate of innovation – Innovation is largely a group activity. That is groups make a clever idea come into being. Teams make or break innovation.

DAY 3: WELCOME MESSAGE AND KICK OFF POINTS

Post By: Sybil Chidiac

Daan,

Thank you for your insights and sharing your experiences from the ADB. I especially liked the way you demonstrated the biological system and how when working together is stronger and more resilient. I think this is a great analogy of the human body to our work in Knowledge Sharing and Learning. Can I ask you to elaborate on the who part of your comments below? You mentioned that "we have raised awareness for learning and development," is this senior management or staffs? What specific practices or processes have been put in place at the ADB to specifically move your last three points: manage and leverage your know together, connecting more within and increasing your rate of innovation? What propel the resource commitment from ADB to support activities/ practices?

Thanks!

Sybil Chidiac
Technical Advisor, Knowledge Sharing and Learning
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DAY 3: WELCOME MESSAGE AND KICK OFF POINTS

Post By: Sonali Gamampila

Hello all,

To be honest, I haven't been able to go through the plethora of emails I received. I'm sure they provide some very useful insights. I just felt like sharing some thoughts that came to mind when I read Sybil's questions.

1. Learning not just for the sake it - Organizations needs to identify and prioritize what areas of learning are important and relevant.

2. Culture - As Sybil mentions this is very important. Senior management needs to play a pivotal role to establish a culture which promotes learning and knowledge sharing. Sometimes you come across cases where the management only pays lip service to the idea and sends the wrong signals e.g. ridicules certain ideas or gives the impression that learning has to be recorded merely to evade repercussions of not recording them. Instead the management could praise and recognize people who share their learning at different fora.

3. Rewards- These provide very effective incentives for people to share knowledge. These need not be monetary. Recognition is often a strong motivator.

4. Valuing knowledge- I agree it is very difficult to put a value on knowledge and yet we all know that without it the organization cannot improve and may very well have to close down.

5. Informal knowledge sharing - As individuals inquisitiveness prompts us to learn and we share these with interested colleagues informally. These may be at very basic level of learning but nevertheless very important. This is not valued but is often the most effective way of sharing.

6. Systems - Effective systems depend on the context and culture of each organization. It may be possible to learn from other organizations and implement their systems in bits but the system should ideally be context specific.

These are just some thoughts. I hope I'm not totally off track.

Sonali Gamampila
Project Manager- Information and Research
Practical Action
Sri Lanka

DAY 3: WELCOME MESSAGE AND KICK-OFF POINTS

Post By: Sybil Chidiac

Mehrul,

I think you raise an excellent point. At CARE, we have a number of programs in varying sectors and some of them are doing a good job of sharing knowledge amongst their communities of practice. Some of the things that I have seen that help build awareness, understanding and knowledge in area are simple events organized by the knowledge generator. Some of those events can be brownbags or half day meetings. Brownbags are especially nice because you can invite all parts of the organization and give a short presentation then open up with a Q&A or reflection period. Also, you can get more people to attend brownbags because it is during lunch and you can have some small snacks or drinks available. If there is food, they will come....The other very focus and more formal event can be a half day meeting. I recently was invited and participated in our Sexual and Reproductive Health's half day meeting focusing on Social Action and Analysis (SAA!). This approach helps CARE staff identify and address the social, economic and cultural factors that influence reproductive health. This event was focused on S&R health but by attending this meeting was able to come out with specific ways that this could be adapted to the Economic Development context. So the next step is for follow up by the Sexual and Reproductive health team to provide more knowledge and support if we decide to formally contextualize the SAA approach. So no formal monitoring but just an open dialogue and connection to support for adapting the knowledge learned.

But I would have to stress that individuals will not learn from other interventions unless they see a direct link to what they are doing. So if you have some great knowledge on food aid, and there is no direct link made to economic strengthening strategies, a practitioner may not learn from what is being shared with them no matter how valuable.

Sybil Chidiac

DAY 3: WELCOME MESSAGE AND KICK OFF POINTS

Post By: Daan Boom

Dear Sybil:

1) We raised awareness through specific information (meetings, flyers) to top management of the ADB. The VP responsible for HRM was open for further communication on the issue of L&D. It resulted ultimately in a bonus/reward system ifor teamwork in the HRM policy. Teams or teamwork could be nominated by senior management for certain documented and tangible achievements. The team or teams could receive an financial incentive to be shared among the teammembers. From the KM Center we

have tried to influence that the bonus should be spent on a learning event (attending a workshop/ conference/ seminar, summerschool event) but that did not make it.

2) Identification of knowledge gaps. Review of staff retirement the years ahead and map these to the strategic agenda and highlight potential knowledge gaps as a result of retirement. The Knowledge harvesting program/method was developed as result of this analysis with the aim to capture the specific knowledge assets specialized senior staff has.

3) Restructuring of our Communities of Practices with a twofold task: Looking at strategic developments and propose/endorse/recommend L&D expenditure in their area of expertise as well as raising awareness of staff knowledge gaps the years ahead.

4) For a development bank innovation is extremely important. Not only innovation for financial products to be able to support the demand from borrowing countries but also new products/ approaches aimed at poverty reduction in sector/thematic areas. New approaches develped elsewhere in the world which may work in an Asian context or bridging supply/demand for knowledge between countries (Intermediaire role). ADB is piloting so called Knowledge Transfer Hubs.

5) What propelled management attention is the report of a high level eminent persons group 2007. In their report to the President of the ADB they wrote a specific paragraph on the importance of knowledge and thjat ADB should do more in this area to remain relevant for the region.

You can read about backgrounders at ADB website/ Topic Knowledge: http://www.adb.org/Knowledge-Management/default.asp Eminent Report: Towards a new Asian Development Bank: http://www.adb.org/ltsf/default.asp

DAY 3: LESSONS LEARNED BY PRACTICAL ACTION DURING THE AMAP-BELO PROJECT (PART 1)

Post By: Luis Ernesto Osorio-Cortes

Dear all:

I recently posted a document that distils some provisional lessons from our participation in the AMAP-BELO project. For a sneak preview of its contents see below:

1. Introduction
2. Organisational structure
3. Becoming a learning organisation is not easy but it is worthwhile and necessary
4. Transform and create routines and spaces
5. Create routines for individual reflection and cater for different learning styles
6. Promote communities of practice
7. It can be disappointing
8. Try, try and keep on trying
9. The internet is not perfect (yet)
10. Learning should be promoted incrementally
11. Follow the energy of the team:
12. Learning should empower people
13. I am wrong and proud! (Or even better: we are wrong and proud!)
14. Talk, talk and talk more…
15. People should feel that they are part of something important
16. Learning should not create extra work loads
17. Understand your team
18. Sacrifice quantity for quality (if necessary)
19. Talk about learning everywhere you can
20. Protect your most valuable asset: 'learning staff'
21. It is problem-solving, stupid!

II. Modeling and scaling up

1. Research questions
2. Iterative learning
3. Learning projects and Discrete Learning
4. Four learning loops model
5. Peter Senge's learning model and the importance of wisdom
6. Downward accountability
7. Institutionalisation

ANNEX 1

Moving from priority projects to learning projects: Using project cycles as a learning process

ANNEX 2

IA2 MoU FOR LEARNING PROJECTS: MoU #1: Key milestones during the design of a Project Idea

DAY 3: LESSONS LEARNED BY PRACTICAL ACTION DURING THE AMAP-BELO PROJECT (PART II)

Post By: Luis Ernesto Osorio-Cortes

Dear all:

I recently uploaded the second document with insights and lessons from our process in the AMAP-BELO project. It contains the following:

1. What is our approach?
2. Why did we choose this approach? Is it delivering as we thought it would and why?
3. How to implement it? Would we recommend this approach to others? How to share it? How should others structure the same or a similar approach?
4. What have we gained from it? Are there ways to structure and manage the approach we took for greater returns? Have we had any unexpected returns?
5. What have been the lessons learned? Tips for implementing learning approaches. Do's and don'ts

I hope these two docs help.

Lucho Osorio -Practical Action

DAY 3: LESSONS LEARNED BY PRACTICAL ACTION DURING THE AMAP-BELO PROJECT (PART I)

Post By: Serafin Talisayon

Hi Lucho,

I like your catchy chapter titles! I wanted to download this document but I cannot find it in the list at http://www.microlinks.org/ev_en.php?ID=21337_201&ID2=DO_COMMUNITY#discussion

Where can I download it?
Apin

Dr. Serafin D. Talisayon
CCLFI.Philippines
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DAY 3: LEARNING FROM OUR INTERVENTIONS LONG AFTER THEY FINISHED

Post By: Kath Pasteur

*Kath Pasteur is not registered in this Speakers Corner but she asked me to post the **following message about a long-term, ex-post evaluation** she is involved in. It focuses on some of our most important food security/income generation projects in different countries. She is also the author of the literature review "Learning for Development" (see the documents section above):*

"I would like to stress the challenge of long term tracking of projects principally because it is very difficult to get funds for this purpose from external sources. Ultimately it has to be funded through internal / flexible resources which are not always available particularly in smaller agencies. In Practical Action our current financial situation is such that some funds have been allocated to just this kind of ex-post evaluation – but I think it is a first of its kind!

Although our study is currently in progress so we do not have results yet, the process itself is proving hugely valuable. We are evaluating food security projects with a particular focus on the factors of success for community based extension services. It is a massive learning opportunity for newer staff who are working on current food security projects to revisit the experiences of past projects: not only are they learning the lessons from successes and failures, but where impacts have been sustained it has given a huge boost to their enthusiasm for their current work, knowing that they in turn are contributing to these kinds of long term impacts.

Using our own staff to carry out the evaluations means that lessons can almost immediately start to be drawn on an incorporated into current work. We are also facilitating learning exchanges as part of the evaluation process so staff from one country participate in the evaluation in another country.

On the other hand we are facing methodological challenges with this kind of work. When looking at wider impact on livelihoods and wellbeing it is very hard to attribute change to our project interventions. After 5 to 10 years there can have been many, many changes both positive and negative in the wider context. Given that two of our studies will be in Zimbabwe and North Darfur, you can imagine that we may not expect to see great improvements in livelihoods. How to assess whether people are "less badly off" is not ideal nor very easy! Even finding past beneficiaries can be a challenge: in Bangladesh 2 project communities had simply been swept away in floods.

We hope that these studies will give us much needed evidence that our approaches are successful and do have long term impact. Otherwise we could be replicating project approaches again and again based on assumptions that the end of project evaluation findings are sustained in the long term.

I can see the problem for donors in funding this kind of study within the original project budget as it would mean that projects would not close for many years until the ex post evaluation is done. However it would be nice to be able to access specific funds allocated for this kind of activity, perhaps linked to new projects on a similar theme as part of the assessment process."

DAY 3: LEARNING FROM OUR INTERVENTIONS LONG AFTER THEY FINISHED

Post By: Jan Maes

Thanks, Kath, for sharing this. Involving staff in these evaluations rather than an external consultant is the difference between a glossy report collecting dust (or eaten by fungi!) and real learning by staff, which also requires that you take other activities/responsibilities of program staff's already hectic schedules. The kind of studies that you are conducting are absolutely vital in my opinion, but you are right that funding them is quite challenging. Funding such studies within short-term project funding is indeed difficult for donors, but especially when a donor is in there with you for the long term, these types of studies are in their own interest as well. We have already had some interesting discussions with one donor, i.e. USAID (represented by a very visionary Stacey Young), on this within the BELO learning network and this conversation will be ongoing. Any ideas from other participants on how to fund an structure such long-term learning efforts?

Thanks, Jan

DAY 3: A MESSAGE FROM RAMONA MIRANDA – PRACTICAL ACTION, SRI LANKA

Post By: Luis Ernesto Osorio-Cortes

Dear all,

I have read with interest some of the postings from the previous two days of discussion – I unfortunately was not available to participate but would have liked to have joined you.

Unfortunately it looks like it is too late to officially join the discussion, so I am doing so indirectly, but getting someone else to post this on my behalf.

The questions posed by Sybil Chidiac on – 'What can an organization achieve differently by instilling new processes to collect, store, make available and utilize knowledge and learning content? What is the benefit that we seek to gain by all this?' & that 'it is important that we are able to demonstrate that what we learn gets translated to our work; that it impacts the quality of programming that we implement on the ground' are both questions I have struggled with at different stages as a Communications aka KM person within Practical Action's regional office in Colombo for years.

So I am going to try answering/ commenting on Sybil's questions:

1. What have been some of the challenges you have faced convincing senior management or boards about the importance of building effective knowledge sharing and learning efforts?

- The attitude that this is implicit in the work done by the projects, that there is no need for special emphasis on ks
- That if there are social mobilisers then there is no need for knowledge or communication specialists
- It has been more difficult to convince project staff rather than senior management that a culture of ks & l is important – as coming from a 'pilot' organisation it is understood that learning is an important part of piloting for scaling up by senior management (at least they pay lip service to it), but not always the implementers. There is a new system we are trying at the moment – to get senior management and the field level staff to buy in is easier than project managers.
- The difficulty in attributing change due to better ks

2. What are some other underpinning aspects that need to be in place in your context in order to enable knowledge sharing and learning to take off in your organization?

- Indicators of individual/project success based on ks & l. We have been trying to do this. E.g. Each project manager is expected to write/report on a story of change at least once a quarter & this is supposed to go into his/her personal review system.
- Finding easy ways for project staff to record things they have learnt & share it – often a lot of learning is in people's heads & this is lost when the project ends or they leave the org.

3. If you were to put a value on the knowledge your organization generates would you be able to? Would you be able to assign it a figure in a program budget? If so, how did you come up with the figure?

- I'm not sure I can put a value, but I dare say it is very high. The good thing is we pride ourselves on being a learning organisation – that we learn from our successes & failures in our projects & this we try to translate into documented knowledge.
- I have been trying desperately to value ks work, but am not sure this value can be given monetary value – not even sure I want to. Instead I would like if we can give value it using other forms. Am experimenting with these, not sure I/we've got very far.

4. Even if when we have clear practices and processes in place for KS&L, why is it that evaluations get funding in our program budgets but KS&L activities do not?

- That is because donors want to see us show concrete evidence that ks has made the difference. As this is difficult for us to separate from the rest of the project work often, we don't even attempt to find this evidence. However it is possible to find stories of change – due to the knowledge shared – not easy, but possible. But it is time consuming & time in turn means money – which we don't always have or get!!
- Further, ks & l activities are often times seen only as knowledge products – a publication at the end of a project, which oftentimes only the already converted read (that is those who have that knowledge already). & as a result – finding the change a book brought about is a nightmare. In recent times videos & other creative KPs are used for ks but even with these difficult to assess impact. If anyone has wonderful methods & tools for this – I would love to get these.

Having said all this, I must say Practical Action has over the past few years put an increasing emphasis on ks work, and it finds a fairly central place in our way of working, so this is very heartening.

Ramona Miranda
Communications Team Leader
Practical Action

DAY 3: A MESSAGE FROM RAMONA MIRANDA- PRACTICAL ACTION, SRI LANKA

Post By: Sybil Chidiac

Ramona,

Thank you for answering some of the questions I posted this morning. I have been really excited to read your responses. I think they are right in line with our challenges. Does anyone have solutions to some of these challenges Ramona has posted below? What are some ways that your organization has addressed and overcome some of these challenges? Do any of your organizations have internal pools of funds to support key KM positions or activities?

Sybil Chidiac

DAY 3: A MESSAGE FROM RAMONA MIRANDA- PRACTICAL ACTION, SRI LANKA

Post By: Susana Pezzullo

Hello.

Again, another day of rich discussion and reflection. I'm so glad I signed up.

I am hearing questions at several levels including how to create organizational change...that is to say how to create a culture of inquiry, curiosity, learning, etc.

Another level is more operational, that is to say, how to do it, once you have some degree of consensus that learning/KM is vital and finally, another level of tools, approaches, cases. Comments and thoughts on all of these levels are extremely useful.

With respect to Ramona's question, in IYF several things seem to be helping raise our level of interest in KM.

1. Donor pressure: For one of our larger programs, a particular donor is highly interested in learning (aka KM)...that improved practices, performance and accountability.

2. Time: After 15 years, we have matured, have more experience, more to learn from.

3. Board impatience: A few corporate members on our board are pushing for lessons, nuggets of knowledge.

4. Accountability: While not KM per se, the pressure to report on "so what" can help create an appetite for KM.

The challenge ahead is to try to bring these different strains together and create a common understanding of the value of learning/KM. I believe these 4 factors could become mutually reinforcing however they also create the potential for tension.

Thank you,

Susan

DAY 3: FROM INDIVIDUAL TO ORGANIZATIONAL LEARNING: AN EMERGENT PROCESS?

Post By: Luis Ernesto Osorio-Cortes

"YOU DO NOT NEED SOMETHING MORE TO GET SOMETHING MORE... THAT IS WHAT EMERGENCE MEANS" Murray Gell-Mann (Nobel Laurate)

See this short video clip at: http://www.youtube.com/watch?v=ONiWmzrmfuY

I wanted to share with you this idea of EMERGENCE because I find it illuminating when I face the challenge of social/organizational change.

"Emergent complexity can arise from simple interactions between agents following rules. The complexity that arises is suprising and challenges our assumptions about whether order comes from the top or the bottom. Life and consciousness are examples of emergent phenomena" (description of one of the videos below in YouTube).

If this idea can illuminate us for KM/OL, then **the rules are important...** in fact, they could be the only factors that are really important for the design of strategies to promote organizational change. So, what are those rules? I can imagine the following (in a hypothetical and not very good organization):

1- Please the donor, your boss, and the board

1a- If you made a mistake, try to minimize or hide it

1b- Exaggerate success

2- Show that your job is necessary

2a- Retain your status as an expert

3- Write your reports before the deadline

What are the rules that underlie the learning dynamics in your organization?

Are they really contributing to that process of emergent learning or are they moving us away from it?

Think about this: What would happen if donors, our bosses or our board are suddenly pleased with mistakes that take the organization to a higher level (learning mistakes)?

How should those rules change for the org to become more effective at learning?

Other two videos on Emergence that I found in teresting are "Emergence: Complexity from Simplicity" (parts 1 and 2)

http://www.youtube.com/watch?v=gdQgoNitl1g

http://www.youtube.com/watch?v=S5NRNG1r_jI

Thanks,

Lucho Osorio-Practical Action

DAY 3: FROM INDIVIDUAL TO ORGANIZATIONAL LEARNING: AN EMERGENT PROCESS?

Post By: Sybil Chidiac

Lucho,

Thank you for your message. Very insightful... I think whether we want to admit it or not, we have to write our reports before the deadline we struggle to do so and tend to exaggerate the success. We do it because this is what the donors want to hear and they also press us for more context on the successes. It is a reality but when things go wrong and it is documented, there doesn't tend to be the same amount of focus on when things go bad and are documented and shared.

The learning dynamics at CARE focus on program quality, innovation and the underlying causes of poverty. Most of our knowledge exchanges are successful when then can practically present examples or ways forward for practitioners around these focal points. These focal points represent our mission and our strategic focus. This is why we have buy in from Senior Management and understanding of the value of knowledge. Without knowledge we cannot demonstrate our programming impact good or bad to the world donors and other stakeholders.

I think if we were rewarded or recognized in some way for demonstrating our challenges and failures if you want to say, we would be more open to share and actually invest more in collecting and learning from our experiences. Are we moving in this direction? We do tend to write recommendations in a program report and focus on what didn't work... What more needs to be done in order to demonstrate that what didn't work will not happen again and will be internalized by the organization or program?

Sybil Chidiac

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DAY 3: FROM INDIVIDUAL TO ORGANIZATIONAL LEARNING: AN EMERGENT PROCESS?

Post By: Katia Diaz

Hi everyone,

I just get in to the forum today, I was so excited to follow up the discussion from the first day, but unfortunately I was so busy and not available to attend. Thanks to everyone for all the excellent points and ideas that you have done. There are a lot of comments that I am willing to read and learn from, thanks so much for everyone sharing their thoughts and experiences. I'm finding it really helpful to have this kind of discussion where we can share out thoughts trying to move on getting the challenge to our organizations to become a more effective one in the knowledge-sharing learning process.

As the regional office of the World Health Organization, with focus in the improvement of the health of peoples in the Americas we are making an effort to build a knowledge management base organization, that allow us to position PAHO as an authoritative partner in public health in the region in order to better network with other stakeholder/interested parties. As knowledge management encompasses human-based processes for accessing, generating, and sharing explicit and tacit information it is important the way that we can create and share knowledge and the access to information needs where the capacity and resources to access information and knowledge should be available to all levels of our organization.

Thanks again for share yours thoughts, I passionately will read it and I'm willing to be in touch with some of you sooner. I am attaching a presentation from our knowledge management area about establishing a network to better access to public health information to enable the social development of countries.

My best,
Katia

Katia Diaz
Information Systems Adviser
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DAY 3: MONEY VALUE OF LEARNING

Post By: Serafin Talisayon

Hi Sybil and colleagues,

Sybil asked: *If you were to put a value on the knowledge your organization generates would you be able to? Would you be able to assign it a figure in a program budget? If so, how did you come up with the figure?*

Today I will venture to do something risky and tricky (maybe foolhardy): try to answer Sybil's question. This may also invite brickbats, but (heck!) a bruised ego is all it will cost me.

One of the questions I often ask my participants in KM/OL workshops is: *Estimate what percent of your total knowledge (now) came from your formal schooling.*

Almost all answers are below 50%. The average hovers around 20%, depending on the ages of the participants. Then I ask: *Where did the 80% came from?,* and generally the consensus is: it came from learning from doing/working and learning from life/others.

But the shocking thing is, while so much resources, time, planning, systems and institutional supports were spent to gain the 20%, the remaining 80% were gained without planning, without system and -- lets admit it -- unconsciously. If our learning while doing/working had been systematic and deliberate, the percentage would have been greater (the rationale for KS&L!).

Let us crunch some numbers based on the 80% figure and see what we get.

Let us invent a reference case: A 40-year old knowledge worker, with 20 years of working experience and earning $120,000 a year.

Assuming she looks forward to 20 more years of productive employment, one estimate of her human capital is the present value of her income stream for the next 20 years. Assuming a flat salary profile to age 60 (a deliberate underestimate) and a discount rate of 6% p.a. then her human capital is worth nearly $1.5 million today.

If she acquired 80% of this amount through work experience over the last 20 years, and assuming a straight knowledge accumulation curve (another deliberate understimate), then at age 40 the annual value of her (largely unconscious) learning from doing/working is nearly $60,000 or 6 months worth of salary (I can email my Excel workfile to anyone interested.)

If she shifts to a conscious KS&L learning mode, how much would this figure increase compared to the unconscious learning-from-doing mode? 50% more? double?

If double, then the value of KS&L to her (not to the organization) would be equivalent to about 6 months salary. If only 50%, then 3 months worth.

Now, if we use these order-of-magnitude guesses (it is all guesswork really), then the value of a mature programmatic KS&L to an organization would approach 3-6 times its monthly payroll.

What do you think?

Apin

Dr. Serafin D. Talisayon
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DAY 3: HOW MUCH SHOULD WE INVEST IN KM/OL-RELATED ACTIVITIES? A PRELIMINARY RESEARCH

Post By: Luis Ernesto Osorio-Cortes

Despite the caveats of the methodology, we concluded that investments between 7.7% and 5% of total project budget are sufficient to produce a perception of high impact of KM/OL-related activities in both projects and teams. Some of the problems of the methodology would be minimized if it is applied as a M&E tool to identify trends of impact through time.

Dear all:

I have been reading some messages that refer to the question of how much to invest and how to measure impact of KM/OL-related activities.

After the AMAP-BELO project we did a short survey to our team leaders to get some insights about this issue. I will upload a working draft in the Documents Section that shows how we did this research. It is a very raw draft and I am sure the methodology can be improved or destroyed through a process of peer-review. (And the usual disclaimer applies: I am thesole responsible for the mistakes and stupidities in the paper!). However, we hope this draft generates a fruitful debate about an issue we consider fundamental:

Investments in KM/OL-related activities that have an impact on projects and organizations should be an integral part of project budgets and of any support to development/MF organizations.

We discovered that the ratio of investment to project cost is not very high (7.7-5%) and it is very likely to diminish even further with time, which hopefully supports the case for these type of investments.

There is a world benchmark that OECD countries use to define the ideal investment in international aid (0,7% of GDP). Can we as a group advocate for a similar international agreement on invetsments in KM/OL? Maybe something like "the rule of the 5%"? Can the most important donors and NGOs agree on such benchmark? Maybe not (or maybe not in one go) but I think it is worth trying and I think this group has the potential to take this discussio n further and eventually influence the rules of the development "game". What do you think?

Thanks a lot,

Lucho Osorio-Practical Action

DAY 3: HOW MUCH SHOULD WE INVEST IN KM/OL-RELATED ACTIVITIES? A PRELIMINARY RESEARCH

Post By: Sybil Chidiac

Thanks all for your wonderful insights. This last topic has proved to be one where all of us face a challenge. We have some experience on the senior management side but the donor side appears to be where we don't have enough evidence to make the case. I would like to reassure those of you who have wanted to jump in the discussions that we are all learning from each other and in no way have the right answers to each of the discussions taking place over these 3 days. If you haven't done so, I would encourage you to join the discussions, demonstrate your experience and share your challenges.

I think to maintain the format used in the past two days of discussion I will open up two threads for your input and experiences. Since Lucho already formulated a great title, this will be the first thread focusing on how much we should invest in KM/OL related activities. I think we should also point out the investment needed from different levels of the organization. From field staff to senior managers. Feel free to ask for resources you need regarding this topic or share your lessons in investing in KM/OL.

For the second thread I will create, I think we should focus convincing senior management on the benefits of KM/OL at the strategic level. Please use both threads of discussions to share your experiences, ask questions, solicit feedback and provide your input regarding this topic.

Sybil Chidiac

DAY 3: WHAT DOES IT TAKE TO CONVINCE SENIOR MANAGEMENT AND DONORS OF THE IMPORTANCE OF KM/OL AND MEASURING FOR RESULTS?

Post By: Sybil Chidiac

As mentioned in the previous email, I would like to open this thread to focus on the second pertinent question for today's topic: What is needed to convince senior management and donors of the importance of KS&L? What tools do we have to measure for results and use the evidence to convince others?

Please use this thread of discussions to share your experiences, ask questions, solicit feedback and provide your input regarding this topic.

CARE's Experience on measuring for results:

One thing that we did through the BELO project implementation is launch a website to house our knowledge content and provide a forum for our VS&L practitioners to share programming highlights, lessons learned and challenges faced during implementation. This website is based on the Microsoft Sharepoint software and allows for a lot of function out of the box. We had some initial challenges with the site regarding connectivity and usage but in the end, practitioners saw the site as a welcome resource to their work. One of the capabilities of the site is to allow the knowledge manager to see what content is being used frequently and what parts of the site are being visited the most. With this data, some analysis was performed in order to determine what was view as pertinent knowledge and what could be deemed as not useful in the context of our programming. In sharing this practice (website) and related processes (processes for contribution, retiring and archiving knowledge!) that were created, we were able to start the measurement for results of knowledge sharing. The next step which was not fully implemented in the project is to tag documents, so a practitioner who visited a document write a brief summary 2-3 sentences on what was useful in the document, how they used it and where to find it exactly (page #). This process will provide some measurement of what KS is actually taken up and used for improving program quality. We look forward to implementing it fully as I described above, but it will take some work on the part of practitioners. Does anyone have any ideas on how to make it streamlined and for it not to add another task on a practitioner's already full plate?

CARE's experience on convincing Senior Management:

The methods we used to convince Senior Management of the importance of KS/OL through the BELO project was to involve them in the strategy development and implementation of the project. I think what is key to highlight here is that Senior Management although management, benefit from the increased knowledge generation, exchange and uptake. They too can learn about what works on the ground and use those learnings in their meetings with other stakeholders. In the BELO project Senior Management had input in the design of the KS&L strategy. Senior Management attended our launch workshop and had input in the strategic objectives and activities of BELO. Second, Senior Management was involved in project implementation by serving on the leadership committee. The leadership committee during the project was tasked to oversee the project steering committee and project implementation carried out by the knowledge manager. In addition, the leadership committee was tasked to link the project implementation successes and failures to strategic parts of the organization. The leadership committee was a valuable senior level group that provided the leverage needed to convince the importance of KS&L to the other parts of the organization.

I would like to hear from you!

Sybil Chidiac

DAY 3: WHAT DOES IT TAKE TO CONVINCE SENIOR MANAGEMENT AND DONORS OF THE IMPORTANCE OF KM/OL AND MEASURING FOR RESULTS?

Post By: Jan Maes

Thanks, Sybil, for asking both questions: how to convince donors/management about the value of KM&L, and how to measure results of KM&L? Of course, if we can show tangible results, donors and management would be easily convinced, and I agree with Steve that "we need to make a better case of "causality" that learning has on performance and ultimately the impact in the communities we serve." Not an easy challenge, even though intuitively we all know very well how important learning is for achieving our mission and goals.

But just the fact alone that quite a few of you have stressed the importance of learning from mistakes implies that we have no shortage of failures in our field. Yet somehow these don't end up in our public transcripts (thanks again, Mamood!) and business continues as usual. (When for-profits make mistakes, their very existence is threatened, and if they hide their mistakes, they make the evening news.). But I am intrigued by this interest in failures, or put a bit more mildly, less-than-perfect outcomes. It might be easier to focus on those to show the value of learning and making our case to donors and others alike. If we seriously take the time, and conduct a proper investigation as to why we didn't achieve what we had planned in our original project proposal or plan, then we should be able to point out a series of mistakes or areas for improvement, that could be phrased as "if we had learned this or that, we would not have made that mistake". Not everything that goes wrong will be related to lack of learning, of course, as not everything (or better: very little) is within our control, but that too is useful knowledge for future project planning.

Moreover, we shouldn't limit ourselves to looking at direct causes why certain things did not go as planned (single-loop learning), but also look deeper at our organizational systems, behaviors and limiting assumptions (thanks, Serapin!) that determine how we approach development issues (double-loop learning). I am sure we would be learning a lot about how better knowledge and better learning applied to our programs would have made very significant differences, and if we compare actual outcomes with projected outcomes, we might be able to measure this as well.

Does anyone have any further thoughts on this? Are there better ways to look at results of KM&L investments?

Thanks,
Jan

DAY 3: WHAT DOES IT TAKE TO CONVINCE SENIOR MANAGEMENT AND DONORS OF THE IMPORTANCE OF KM/OL AND MEASURING FOR RESULTS?

Post By: Tony Pryor

This question of how does one talk about not-quite successes is not an easy one. Everyone wants to be able to say "well, almost perfect, we could make it EVEN better next time". This fear of showing failure can go up and down organizational structures, but it's self-deluding, and essentially does not often lead to improvement.

I remember that Denning talked about this in terms of story telling; telling stories about perfection, or times when everything worked right may inspire, but they don't necessarily instruct. When essentially the puzzle is put together, all is set - the best you can do is admire it and try to memorize it. But since life isn't so repetitive, it's more instructive to get the learner to try to tease out what went wrong and what could be better.

But when we first met with the Bank 4 years ago, at the very beginning of Microlinks, they said one thing that was extremely powerful. I asked them how they shared failures, and one staffer said "we don't; if we did we stop getting funded. Instead we keep it to ourselves and try to improve internally". How this fits into an evaluation-crazy donor world, I'm not sure.

This then brings up After Action Reviews, which we are increasingly doing as a matter of course, especially after things such as workshops, trainings, etc that are relatively specific and time-bound, and that will be repeated. A very powerful tool. When the former USAID CKO was asked how it worked in the US Army - why were people comfortable talking about what went wrong - she replied "well in most cases it was too late to worry about that; you already got yelled at for what went wrong, but now it was up to your team, not a supervisor or an outside reviewer, to make it better". The key here is it's learning for ongoing improvement, not just for long term impact far after the event.

DAY 3: LEARNING FROM MISTAKES

Post By: Serafin Talisayon

Hi Tony,

How to learn from mistakes, or merely how to discuss them, is a continuing challenge to me and my colleagues in my NGO. I cannot say we have the solutions, but perhaps we have some useful insights that I want to compare with others who are struggling with this knotty issue in team learning:

1-- High and sustained levels of personal awareness and candidness are needed to check the persistent tendency in most people to shift to DEFENSIVE mode when mistakes are being discussed. The shift is automatic; the person himself is unaware he is doing it. Personal issues -- most of them stemming from childhood experiences -- that the person himself/herself are often unaware of, often get in the way in discussing what went wrong.

2-- Most Asians seem to be less able than North Americans, for example, in dissociating their actions from their persona. In other words, when you criticize, or even scrutinize, their actions then they feel you are criticizing them. The alternative, which is "tiptoeing carefully around the ego-tulips" is anti-learning.

3-- Most Asians also tend to defer to authority. It is an unconscious habit enculturated in them. And so, learning has a better chance to happen among peers. Throw in a superior in the discussion group, and learning often stops.

4-- Among my colleagues, we keep reminding ourselves: talking about "what worked well" can at best lead only to best practices, but talking about "what did not work well" can possibly lead to something even better: NEXT practices.

5-- We have a Managing Director who is so obsessed with learning and continuous improvement and who "walks her talk" by modeling in her personal behavior the readiness to keep her ego at bay for the sake of learning, persistent in finding out WHY what went wrong did so yet constantly cheerleading the "little children" inside all of us. In other words, a leader with no appreciation of KS&L and worse, with personal issues, can kill KM/OL in the organization.

6-- Our educa tional system is excellent in giving us cognitive skills, but practically zero in helping us in emotional and people skills. I observe that most people are unprepared in navigating the emotional shoals in team learning, such as in discussing and learning from mistakes.

Cheers!

Apin

Dr. Serafin D. Talisayon

DAY 3: LEARNING FROM MISTAKES

Post By: Tony Pryor

Your point on culture as it addresses criticism is really interesting. It's clearly true that different cultures react differently to praise, criticism, etc., and frankly it's those differences which lead to management issues, personality clashes, and poorly managed programs in places with multicultural teams, if those differences aren't acknowledged and addressed.

It's also true that people do gravitate naturally to certain types of jobs, and whether or not you believe much in such constructs as Myers-Briggs, it's pretty amazing how people do clump by affinity type within larger organizations. People who thrive in management, and like to supervise may not be as good at training, or technically specific work, but the reverse also holds. In every USAID Mission where I've seen it done, people eerily split up by personality type into certain clusters of jobs and professions. It's never planned, but it's just a question of what one has an affinity for, and excels at. Why does this matter? Just think of the implications in trying to manage cross-office teams, and then you add different cultures...?

So in thinking about this, add to that my own belief that it's not very useful to talk about "knowledge" as if it is free-standing. Knowledge without people to use it is... But knowledge with people who don't see it as knowledge (but see it maybe as criticism, or gossip, or too simplistic, or...) is also not effective knowledge. For me, the effectiveness of knowledge - the ability of something to be learned, relates as much to the receptivity of the person seeking knowledge as the qualities of the knowledge itself. If a sociologist prepares an analysis, will an economist believe it? If you come from a group other than my own, will I distrust your technical advise even though I know you have the requisite training?

You really opened up a fascinating line of discussion. Any other takers?

On point 4, I think this is superb. The whole issue of "best practice" is a pet peeve with me, since most often it describes "some practice that seems to work better than others and one that I'd like to tell you about". In engineering or hard science parlance, a best practice implies some benchmarking and testing. But the irony in development work is that "best practices" almost always are self-proclaimed, and if there's any basis or value it's the numbers of people who also think it's good. But what bothers me is that for some sectors/problems - biodiversity, AIDS, etc. - the idea of defining a "best practice" after a five year project seems to be misplaced, since how do you know, yet, whether in fact it leads to its ultimate objective? It's like defining a boat design as the best because the keel looks well-built...

And by the way, the only way self-criticism works in the Army example is where there is trust. A team, even with a leader (captain, major, whatever) is still fundamentally a team of peers. "Peer" doesn't necessarily imply doing the same job, at exactly the same level, but rather in my mind it implies feeling comfortable using the word "we" to describe themselves. The number of reforms, team-based programs, etc etc which fall on their face when the big boss decides to be "just one of the guys" is legion.

And on the issue of emotional intelligence, your last part, for me EI is a powerful tool at the most senior level for marshalling knowledge, for making that knowledge effective. But it's amazing the numbers of groups in the development world who promote and recognize managers, not leaders. Whereas certain "lines of work" (complex big business like BP, or the military - usually/primarily the land forces) which have the most creative team-based use of knowledge, seem in my view to have a more sophisticated understanding of the importance of solid management coupled with leadership to move people forward. To paraphrase your 4th point, managers tend to want to structure best practices, while leaders tend to marshal the human potential dealt to them to develop even better next practices.

I hope we can get back to the Tearfund discussions from about 3 years ago in KM4DEV, where some of the approaches followed by BP were transferred to a disaster relief NGO. Truly fascinating, and worth reviving.

Tony Pryor
IRG

DAY 3: LEARNING FROM MISTAKES

Post By: Tony Pryor

Apin:

It would be interesting now to have BELO and other parts of the microenterprise family keep in touch with folk like Ben and others who are KM specialists but also broader in their training. I know that Stacey would like to get into the whole question of impact - how do you show that knowledge sharing has an impact on MED; data on knowledge flows really tells little about adoption, and impact.

That discussion gets us into just about every topic we've just covered, including: is "knowledge" affected by cultural perceptions? How critical a variable is trust, and how do you help develop it? And what other variables, such as EI, help drive effective use of knowledge?

That "effectiveness" term can be handy, by the way, if I remember my dim, distant economics texts. Some area COULD grow high value fruit crops, but without a road nearby to a market, it is not "effective" orchard area. In the Sudan the gum Arabic areas were defined like that, the physical area with acacia senegal trees was much larger than the effective area of trees which could be tapped (which was affected by all sorts of factors - price, alternatives, etc). Thinking this way, there may be factors which make potential knowledge effective knowledge, and these are factors which we seldom try to describe.

We plan to dig into this more in a number of ways. We'll work with BELO to summarize these 3 days (what a task THAT will be...), and we are planning to have me start up a blog to cover a few of the more interesting items in more depth in the KMlab space on microLINKS.

Plus I hope we can share some of these dialogues with three other communities: the km4dev crowd of donors and development agency KM types, the learningtofly email list, which is heavily influenced by BP and has a wide number of commercial firms involved, and finally, if I can figure out a way to keep some distance between the communities, some of the Army KM folk over in Company Command (the last one I will do though with care, and we'll ask folk if they wish to participate before doing so. But at the least we'll try to being over some of their thinking, which is really pretty amazing stuff).

Cheers - Tony

DAY 3: LEARNING FROM MISTAKES

Post By: Serafin Talisayon

Dear Tony,

How true, how true.

Let us continue to keep in touch to compare notes on this very interesting and practical issue.

I am even willing to see if maybe KM is barking at the wrong tree. Some indications:

-- Academic research in the Philippines shows that performance of front-line bank employees are explained more by EQ (27%) than by IQ (only 1%!). Many other EI research point to the same general conclusion: performance is correlated more with EQ.

-- A recent bestseller by Stephen Covey's son, "Speed of Trust", makes a clear point that low trust levels slow down performance and increase business costs.

-- Another new book on "Egonomics" brings together a lot of data to show that high ego is good for competitiveness but becomes counterproductive in moving further to excellence and breakthrough performance.

With warm regards,

Apin

CONCLUSION

DAY 3: CONCLUSION

Post By: Jan Maes

Dear Participants:

I want to thank all of you for a very rich and inspiring discussion. There have been more than 100 posts over these three days, all offering very unique insights and experiences about building more effective learning organizations. Quite honestly, I am exhausted after all this learning, as I am sure anyone else is who was able to keep up with the discussion. For those of you who weren't able to, please be on the lookout for a synthesis of this quite remarkable Speaker's Corner discussion, which should be coming out soon. By the way, even though I am writing my conclusion at this time, you will still be able to post any last messages or share resources/documents throughout Friday.

I also want to announce once again that the BELO learning network has decided to go public! Given the tremendous interest in KM&L within the microenterprise development community and the international aid sector in general, we believe that there is a lot of value in continuing this and widening this learning network to include anyone interested in this topic from a range of players, including practitioners, donors, training institutions, NGO networks, and so on. We believe that this BELO Community of Practice can play a crucial role in providing a rich resource base for those of you who are about to take this path of making KM&L a core function in their organizations or programs, provide a fertile forum for KM&L practitioners to exchange ideas and experiences, as well as engage different players (especially donors and practitioners) in a much needed discussion on how to improve KM&L, measure its results in terms of organizational performance, and find the resources to make KM&L a lasting feature in our joint efforts to make this world a better place for all. If you are interested in joining this CoP and sharing its future, please send me a simple e-mail and make sure to mention your name, organizational affiliation and country of residence. We will keep you posted, and will officially open the BELO CoP sometime in April. If you like, you can state in a few sentences what you hope to obtain from this community of practice, but you will be able to do so at a later stage as well. And of course, please extend this invitation to anyone else you think might be interested to join as well.

I want to extend my special thanks to all the people who have made this Speaker's Corner a reality: these include the three facilitators, Lucho, Sybil and Sara, who did an excellent job of balancing their thought-provoking questions with their own insights and experiences. I think it is especially commendable that they were in no way reluctant to also share their failures and challenges. I also extend my gratitude to Ben Ramalingam, who agreed to participate in and write the synthesis document for this on-line discussion, even though we only asked him two days before the start. I also want to recognize both Carrie Keju at PACT and Stacey Young of USAID/MD for thinking up the BELO grant, which gave four organizations (Freedom from Hunger, CARE-US, Practical Action, and WOCCU) the resources to experiment with becoming better at KM&L, an initiative which has in my opinion exceeded its anticipated outcomes and was in every sense a very worthwhile investment (but don't ask me just yet to demonstrate the causality of it all. :-)). Lastly, my special thanks goes to the Anna van der Heijden, who has worked very hard, mostly behind the scenes, to make this on-line discussion so smooth and successful, though I think she might be looking for ways to attract fewer than 170 participants for next Speaker's Corner.

Wishing you all a lot of learning..

Jan

DAY 3: CONCLUSION

Post By: Lynn Black

Dear Jan,

I missed the first day of discussion. Is it possible to recover the discussion from Day 1 with Sara Naab Schaff?

Lynn

DAY 3: CONCLUSION

Post By: Stacey Young

Many thanks from those of us here at USAID to Jan, Sybil, Lucho and Sara for doing a wonderful job hosting this Speaker's Corner, and many thanks also to all of the participants for a huge number of extremely interesting and useful posts! As Jan said, we'll be sending out a summary of the event by Ben Ramalingam (thank you, Ben), and we'll also be sending out notice when the BELO COP opens up to those of you (and your colleagues) who would like to join.

We believe that effective knowledge management is crucial to getting the impact we need, at the scale we need, from the programs we support. Events like these help all of us to get closer to that goal. We hope that all of you will continue to participate in the wide range of knowledge sharing activities available through microLINKS, our seminars,

and our other knowledge sharing activities. (If you aren't already, you may wish to subscribe to microLINKS Connections, so you can get our monthly updates.)

I wish you all the best in your KM and international development endeavors!

best,
Stacey Young
Senior Knowledge Management Advisor
USAID Microenterprise Development office

DAY 3: CONCLUSION

Post By: Anna van der Heijden

Hi everone,

Thanks for a wonderful discussion. To complement Jan Maes' and Stacey Young's closing messages, here are a few links and resources that you may be interested in.

1. Connections newsletter: As mentioned by Stacey, signing up for this monthly newsletter will be the best way to continue to receive news about upcoming events, including future Speaker's Corners. www.microlinks.org/connections
2. microLINKS resources: Speaker's Corners are just one of many knowledge sharing activities within microLINKS. Check out the www.microLINKS.org Website for more microenterprise resources, communities, events, and opportunities. Including:

a. Seminar series (you can participate remotely), **www.microlinks.org/afterhours** and **www.microlinks.org/breakfast**

b. Communities of Practice, **www.microlinks.org/communiti es**

c. Conversations, **a series featuring interviews with microenterprise practitioners and experts, www.microlinks.org/conversations**, and

d. Notes from the Field, updates from ongoing projects: **www.microlinks.org/notes**

3. KM Lab:. To learn more about the ideas behind microLINKS and its knowledge sharing activities, check out our new KM Lab at www.microlinks.org/kmlab.

4. CoP: Don't forget to e-mail Jan Maes if you are interested in the Becoming More Effective Learning Organizations Community of Practice.

And finally – Jan thanked me for all the behind-the-scenes work, but I have to admit that it was pretty crowed here behind the scenes, with all my colleagues at both IRG and QED helping out at odd hours to make it all happen. Thanks Lisa Laegreid, Amanda Hawkins, Natalie Greenberg, Anne Speca, Catherine Horn, Radha Arunkumar, Alex de Jong, and Eric Stephan.

When the summary document is ready, we'll post it to the main discussion page, where you can also find the resources posted during the discussion, plus the links I just shared above. www.microlinks.org/learningorganizations

Have a great weekend,

Anna

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