

CIDA Learning Groups:

An Intro and Guide to Cultivating and Nurturing Learning Groups

Introduction

In today's knowledge economy, work has become a more collaborative undertaking among individuals and teams with multiple disciplines accomplished less through standard processes and formal structures than through informal networks and relationships. Development work is about bringing about change, which depends on people, communities, organizations, and the local context. Development is not engineering; there is no prescription or silver bullet. Knowing how to effect change requires not only technical competence but also experience, local knowledge, and an understanding of what works and what does not, where, and why. For these reasons, the CIDA Philippines knowledge-sharing strategy will focus on tacit-knowledge sharing. Tacit knowledge contains the highest value knowledge, compared to explicit forms of knowledge. By promoting highly valuable person-to-person knowledge sharing, CIDA will facilitate interactions between projects and the program to make it easy for people to learn about each other and share knowledge effectively.

CIDA recognizes that Learning Groups can help achieve the intended benefits of KM. As such, it is an important part of the CIDA KM Strategy.

What are Learning Groups?

Learning groups are a form of what is commonly called in KM circles as “Communities of practice”. According to early CoP guru Klaus Wenger, CoPs are *people with a passion for something they know how to do and who interact regularly to learn how to do it better* (Wenger, 2002).

In simplest, terms, **CIDA Learning Groups** are:

***networks of individuals
with a common sense of purpose and shared passion
about a common area of professional interest
voluntarily interacting to help improve themselves and their work.***

Learning Group members voluntarily join together to share and create knowledge, collaborate, find solutions, and innovate to enhance their performance as well as that of the organization.

Learning groups members share and learn from one another, face-to-face and virtually. They are held together by a common interest in a body of knowledge and are driven by a desire and need to share problems, experiences, insights, templates, tools, and best practices. Community members deepen their knowledge by interacting on an on-going basis.

These informal groups are voluntary and will form on topics of interest for the projects, or for particular staff members. For example, some projects may see the benefit of having a learning group with a focus on Mindanao. The group can learn about each project's efforts in Mindanao, and explore opportunities for collaboration and sharing experiences. Similarly, a learning group could form on the topic of monitoring and evaluation, in which the M&E staff members of projects could share experience, best practices, and problem-solve. There are many other potential topics: governance, private-sector development, local economic development, rural development, capacity development, adult education, gender equality, environmental sustainability, and others. Groups would form with CIDA support on topics of interest to the projects. The objectives of the learning group would be a) to generate creative thinking and b) to be used for functional purposes (i.e. capacity building processes, improvement of monitoring tools, etc.). Learning groups will form and dissolve as appropriate and based on the interest of project members. The size of learning groups is up to the learning groups themselves, as is the decision whether to admit members from outside the CIDA. Some learning groups will want to meet frequently; others will only need occasional meetings. The learning groups will have a clear vision of what they want to achieve, and then structure themselves accordingly. They will be responsive to the needs of their members. CIDA and the PCCO will provide support and guidance as requested and appropriate. For learning groups to have a more focused direction and thus become more effective, formation of such can either be thematic or geographic.

Characteristics of Learning Groups:

Learning Groups can be characterized by the following:

1. A distinct knowledge domain or topic area
2. Common sense of purpose and mutual benefits
3. Shared professional interests
4. Altruism, trust, and personal relationships
5. Exist in parallel with formal organization structure
6. Voluntary membership
7. Multiple and common channels for communication and knowledge sharing
8. Autonomous and self-organizing (can die a natural death), generally self-policing

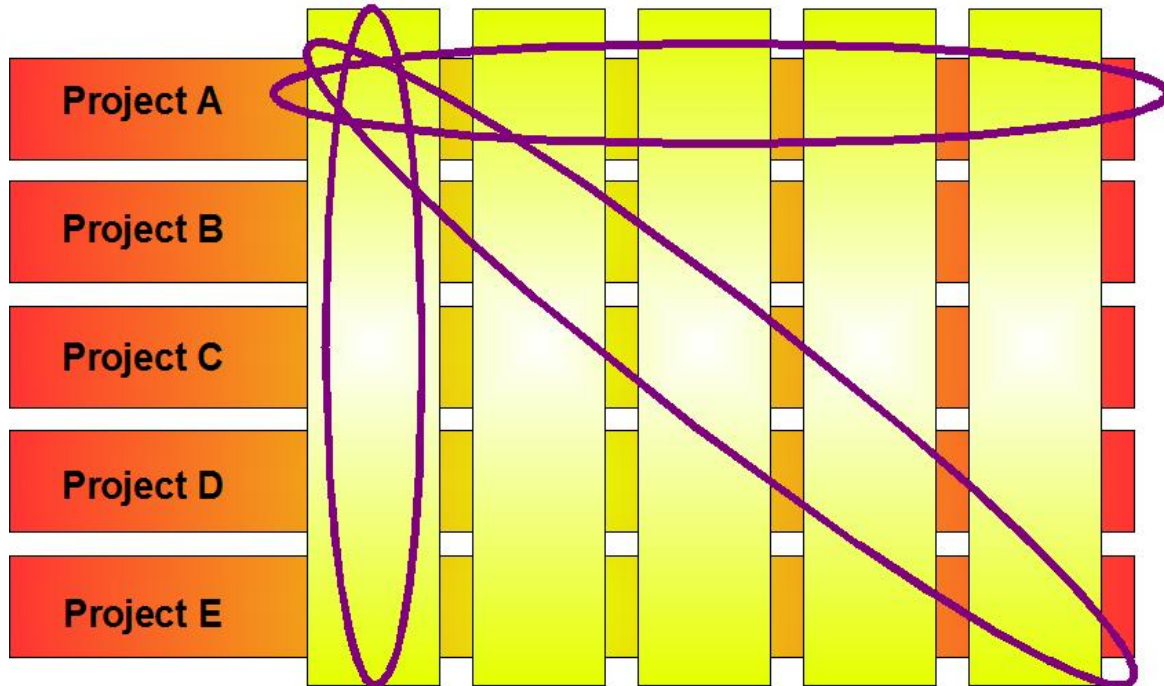
What do Learning Groups look like?

Learning Groups can co-exist in parallel with formal organizational structures. They can form:

- Horizontally – along projects and activities. Such Learning Groups form around specific projects, activities, tasks (e.g. committees, task forces, working groups)
- Vertically – along organizational units, programs. Such Learning Groups typically form around formal/semi-formal structures in the organization due to shared, long-term mandates are focus areas.
- Diagonally – cutting across both horizontal and vertical groupings.

Sectors/Programs/Org Units/Partners/Stakeholders

(eg, Governance, PSD, Peace, Program Management, Communications, CEA/PMOs, GOP, CSO/NGO)



Benefits of Learning Groups

Learning Groups have short-term and long-term impact on organizations and its people.

... to individuals

Benefit to individuals in the short term include: help with real work challenges; access expertise; build trust; camaraderie with colleagues; build confidence. The long-term benefits include: personal development; subject matter expertise; build professional identity, credibility, and reputation; network of experts and practitioners; and marketability.

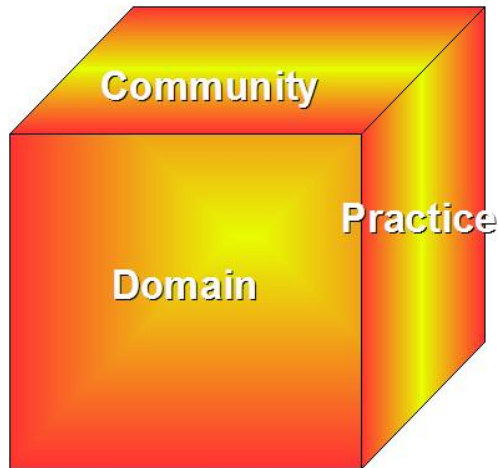
... to the organization or community

For the organization, the short term benefits include: problem solving; save time; knowledge sharing; synergies across units; reuse of resources. The long-term benefits for organization include: enhanced strategic capabilities; keeping abreast of what's going on within the organization and outside; innovation; retention of talents; and new strategies (Wenger, 2002). Learning Groups are one of among many other approaches to knowledge sharing. Compared to other approaches, Learning Groups focus on people and their tacit knowledge, instead of databases, technology, or codified knowledge. Learning Groups are powerful tool for knowledge sharing, collaboration, and innovation but is also, however, one of the most dynamic, fluid, and challenging of all KM approaches.

In a way, Learning Groups do for knowledge what the matrix does for decisions, without the hassles. Learning Groups help address and solve unique problems that would otherwise not fit within the limited and varying mandates of formal groups. They also help manage the explosion of information, make it easier to execute the knowledge strategy (bypassing formal bureaucracy), enable rapid communication and shared understanding, create a culture receptive to innovation, provide the locus of identification and transfer of best practices, and act as stewards of knowledge.

Dimensions of Learning Groups

All Learning Groups can be analyzed and managed using the following dimensions:



Domain – common topic and scope of the community; gives community its identity

Community – the relationships and interactions among members; the social fabric of learning

Practice – body of knowledge (ideas, documents/content, best practices, tools, methods, lessons learned)

Cultivating and managing Learning Groups are best approached from the perspective of any of the inter-related dimensions. Some of the issues and possible approaches used in each dimension are outlined below:

<i>Issues per Dimension</i>	<i>Possible approaches</i>
Domain – is the current scope of the topic area interesting to all members and aligned with the important issues? Need to expand or focus?	Define scope and type of community, vision, goals, next topics
Community – how to find more of the right people who already network on this topic; promote value of increased networking and knowledge sharing; fulfill key roles	Identify and involve key players – sponsors, champions, coordinator, sources, brokers, and users of knowledge
Practice – identify knowledge supply and gaps/needs; plan activities; promote knowledge sharing	Promote on-going Q&A on operational/implementation challenges and concerns; Document discussions, knowledge Share knowledge, resources, tools Maintain virtual contact Collaboration on knowledge products Use CoP tools (website, forums)

Evolving Types of Learning Groups/CoPs

Learning Groups are not static entities; they can actually evolve depending on the common felt need of its members.



Info-sharing/Helping Communities -- The Learning Group can initially start off as a simple information sharing community, with members helping fellow members seeking information or solutions to their respective questions and work problems.

Best practice sharing communities – Over time, Learning Groups may find certain solutions and answers to problems as having wide applicability and successful reuse. Learning Groups can focus on developing a body of knowledge on such best practices, tools, techniques, approaches, strategies, and solutions and linking pro-actively with subject matter experts who can provide context to documented best practices or lessons learned.

Knowledge stewarding communities – Learning Groups that have a considerable stock of information, documents, and knowledge can aim to consciously map, identify gaps in, and build its “knowledge capital”. These communities also invest in structuring its knowledge base for greater ease of access and reusability.

Innovating communities – Learning Groups that have structured knowledge bases may focus on multi-disciplinary collaboration to spark 'innovation' and 'knowledge creation' from among members and groups.

Challenges of Distributed of Learning Groups

CIDA's Learning Groups are essentially virtual/distributed communities. Distributed CoPs present their own unique challenges, outlined below. Some approaches and strategies to address these challenges are also given below.

<i>Challenges</i>	<i>Approaches and Strategies</i>
<ul style="list-style-type: none"> ● Geographic (distance, connections, visibility), cultural, language, institutional (priority, Intellectual Property) differences make it more challenging to agree on domain, build community, activity, visibility, and practice ● Harder to ensure value-add for various members ● Bigger size harder to manage and make personal connections connections 	<ul style="list-style-type: none"> ● Greater effort and patience in building consensus on domain, network, trust and relationships ● Achieve stakeholder alignment ● Create structure for local variation/diversity with larger connections ● Encourage sub-CoPs (thematic or geographic) and designate coordinator ● Organize face-to-face meetings ● Use and integrate tools (web,

Stages of development of Learning Groups

Like any social unit, Learning Groups are not static: they are established, thrive, and sustain or decline and can die. It is thus useful to think of Learning Groups in terms of a life-cycle, and approach the unique challenges and requirements of each stage as the focus of KM efforts.

Collison and Parcell (2004) offered the following stages in the lifecycle of a CoP. This lifecycle framework and some of their inputs thereto are offered below and adapted for the CIDA Learning Group program:

1. Planning and organizing
 - Determine demand and need for Learning Group and identify potential benefits
 - Identify specific Learning Group topic areas (e.g. Mindanao, Local Economic Development, Monitoring and Evaluation, etc.)
 - Determine visions, mission, goals or TOR of each Learning Group The process of creating these 'shared artifacts' are more important to the social network than the artifacts themselves! (Note: Defining VMG and TOR may also be done at the launching/initial Learning Group meeting)
2. Launching
 - Launch Learning Group/ Hold initial meeting
 - In the launching activity/initial meeting, provide enough time for socializing and networking. Don't cram the agenda.
 - Develop a membership list with complete contact information and profiles and list of subject matter specializations and interests (a preliminary White Page)
 - Create an electronic discussion forum on the web (linked to e-mail)
 - Develop a website containing the Learning Group's shared documents, outputs, knowledge products, FAQ, etc.
 - Develop an electronic newsletter, bulletin, or postcard (depending on the need and resources that can be committed; this can also be done later when there is a critical mass of members, sufficient roles, and known demand)
 - Conduct other periodic knowledge sharing events and activities
3. Building momentum
 - Define Learning Group roles and responsibilities and designate people to perform those roles
 - Promote and advertise the Learning Group in other venues in order to generate broader and increased membership
 - Introduce new members to the group in general and to those with whom he or she shares subject matter expertise/interest, or in his or her general location/area

- Encourage members to ask questions to the Group; Enjoin others to answers (and possibly pursue or press for answers from specific experts/practitioners if they are not quickly forthcoming)
 - Develop incentives for members to ask questions, and answer questions of others. Embed rewards for knowledge sharing behaviors (both seeking and sharing knowledge) into the organization's/organizations' formal performance management systems, etc.
 - Communicate success stories to sponsors, top management, and the whole Group
 - Maintain and enhance Group tools
 - ✓ White Pages and distribution lists should be continuously updated
 - ✓ Discussion forum features may be enhanced depending on available software/updates
 - ✓ Website design and features can be improved based on feedback from members
 - ✓ Electronic newsletter, bulletin, or postcard can be produced more frequent (or less) as deemed by the Group; Content focus can also be determined by the Group depending on demand
 - ✓ Face-to-face and virtual meetings should be conducted regularly in order to refresh and build personal relationships and trust
 - Conduct regular meetings and other activities, such as:
 - Technical training sessions
 - Brownbags and seminars
 - Distance learning (using advanced technology and tools)
 - Mentoring, coaching or peer assists
 - Develop more sophisticated, mini-KM systems
 - ✓ Knowledge audit/self-assessment
 - ✓ Knowledge capital needs and plans
 - ✓ Content management system/Help Desk
 - Measure and evaluate in terms of membership (actual total, increase/decrease over time, demographics, specialization, etc.), usage of tools, participation, or actual content of knowledge sought/shared
4. Sustaining
- Confirm commitment of membership (including those with specific roles)
 - Bring focus on urgent, important, and common organizational issues, instead of multiple, variegated concerns
 - Publicize more success stories of knowledge sharing within the Learning Group
 - Revisit vision, mission, goals, and TOR; Communicate and celebrate if successful; Consider revising VMG and TOR, or creating sub-communities, if necessary
5. Closing
- The possibility of shutting down the Learning Group can test the members' resolve for it to continue
 - Close the Learning Group by celebrating its success and acknowledge key contributors

For more inputs on developing and nurturing CoPs, see Annex

- “CoP Start Up Guide” http://www.ewenger.com/theory/start-up_guide_PDF.pdf
- “How to Make CoPs Fly” <http://www.knowledgeboard.com/cgi-bin/item.cgi?id=378>

Learning Group Roles and Responsibilities:

Establishing, coordinating, and sustaining Learning Groups do not happen by accident. Members of the Learning Group perform specific roles (consciously or not) at different stages of the lifecycle. These roles and their responsibilities include the following

- **Sponsor** – acts as the representative to and champion of the Learning Group to top management, able to elicit support for policy, operational, HR, and financial decisions in favor of the Learning Group; must have personal interest and stake in the Learning Group topic and, ideally participates (even if occasionally) in regular Learning Group activities and knowledge sharing
- **Subject Matter Experts (SMEs)** – members with particularly deep or specialized expertise and knowledge recognized to be valuable to the community; SMEs Provide thought leadership, and guidance on new ideas, state-of-the-art, industry best practices, areas for research and content development, and advise on knowledge capital development and build-up plans; SMEs can also assist in rating knowledge contributions for their relevance, usefulness, and value to the community.
- **Leader or Coordinator** – an SME or member who is particularly well-known or accepted as being credible and approachable by the members, a connector of and knowledge-broker for people who know and those who need to know; champions the Learning Group to the organization and middle/top management, and facilitates discussions and meetings (face-to-face and virtual); is responsible for promoting the growth and sustainability of the group, as well as enjoining knowledge seeking and sharing behavior among members; a Sponsor may also be its Leader (if he/she has the time!)
- **Member** – regular practitioners who've voluntarily signed up to be a member; can have specific topic interests and sign-up for sub-communities
- **Knowledge Integrator** – develops, synthesizes, and packages content for, and maintains, Group tools (discussion forum, website, newsletter/bulletin/postcard, distribution lists/White Pages); helps collate, post, and organize contributions to knowledge base; can be a member who has been designated and given adjusted works schedule to perform the task; can also be a 3rd party individual with the appropriate skills and sufficient general knowledge of the topic to perform tasks

Principles for Success

Following are some guiding principles for moving forward to successful Learning Groups

- Define the knowledge domain or topic area in order to have focus and impart 'exclusivity' in being a member
- Develop a clear vision and value proposition for its benefit to members and the organization
- Promote visible management support without micro-management or “oversight”
- Link Learning Group focus areas to important organizational issues and concerns
- Focus on collaborative problem-solving rather than simply sharing 'best practices'. This gets more passion, commitment, and involvement from members and draws out 'best practices' as an input in discussions and as a by-product anyway
- Quick wins come from sharing what we or our partners already know. Focus on knowledge that is already seen as useful by individuals or teams and share this with others.
- Trust and personal relationships are often the reasons why people share, not just altruism. Recommend team-building, open workspaces, brownbags and other informal sharing events, etc. For distributed members, meet face-to-face regularly at least once a year to establish and maintain relationships.
- Designate a skillful and reputable leader or coordinator
- Ensure that requests for information are answered quickly. This communicates and creates the impression of value-add and vitality of the network

- Synthesize answers to frequently asked questions into an FAQ and post on a website or sticky as a thread
- Develop website as a 'home' for members to increase sense of belonging and camaraderie
- Develop a knowledge base as a group memory and content management tool
- Keep it simple – ensure tools and Group processes are user-friendly and are useful
- Actively generate content, news, updates and ensure relevance to community
- Allow fun stuff like polls and humor to break down barriers
- Develop communication tools to allow for two-way, peer-to-peer communication, not just between the Learning Group leadership and members
- Create management awareness of value and benefits through metrics, success stories, and testimonials

Evaluating Output and Impact

Two levels of evaluation measures or success indicators for the Learning Groups can be considered:

1. Activity indicators
2. Outcome indicators

Possible **activity indicators** include:

- Growth in membership over time
- Amount of content contributions, inquiries, responses, FAQs
- Breadth of topic areas
- Strong sense of identity to the Group
- Quick diffusion of info/know-how

Possible Learning Group program **outcome indicators** include:

- Enhanced overall appreciation of CIDA program overall by management and staff
- Improved program and project planning, management, and decision-making
- Increase in multi-disciplinary collaborative initiatives
- Faster time to competency for staff and partners
- Increased innovation

Ultimately, the Learning Group itself needs to decide what measures it would like to judge itself by. This will be guided by its original TOR and vision, mission, and goals. It should be noted, however, that outcome indicators are also attributable (if at all) to the overall KM effort, not just Learning Groups, and are by nature hard to attribute solely and directly to KM.

Conclusion

Effective employees of today are true knowledge workers, dynamically managing information and using knowledge to make decisions and act flexibly. Even so, many knowledge workers seek and require access to more valuable albeit elusive tacit knowledge elsewhere in the organization. Networking employees and partners through Learning Groups is an effective tool for connecting those who know with those who need to know. But although Learning Groups can create powerful outcomes – they can also have negative consequences. Employees can be overloaded, as with information, with too many contacts and 'conversations' to manage; face-to-face and virtual meetings can drain time and energy; and overly collegial processes can delay decision making and confuse responsibility. More connectivity isn't necessarily always better. Management cannot simply hope that collaboration will

spontaneously occur in the right places at the right time. CIDA management needs to develop a strategic and practical view of Learning Groups and establish networks that best fit the organization's goals supported by the right incentives and tools that will nurture the right degree of connectivity.