

# *The CIDA KM Story*

## **Interim Documentation of KM Project May 2006 – September 2007**

### **Background**

The Canadian International Development Agency (CIDA) in the Philippines ventured into knowledge management (KM) with a simple and clear question in mind: *How can we leverage KM to improve performance of projects and the overall CIDA program in the Philippines?*

Having operated for several decades in the Philippines with dozens of projects going on at the same, CIDA knew that:

- it is in a **knowledge-intensive business**;
- there is a **lot of know-how, experience, best practices, lessons, and new knowledge generated** throughout the organization; and
- many of the knowledge areas are **common (and repetitive)** among projects (e.g. stakeholder consultation, creating community buy-in, project management, doing business in the Philippines, M&E).

The case for better capture, management, and sharing of knowledge was clear. But CIDA also realized that:

- No person, database, or system 'knows' or provides access to what is known, and finding information that's already available elsewhere is very inefficient, sometimes causing duplication of efforts;
- Best practices and lessons from other projects are not being effectively captured and shared widely

Although limited, informal knowledge sharing sometimes takes place between the projects in the CIDA Philippines program, knowledge sharing needed to be more systemic and systematic, more efficient and effective, and a way of doing business.

Several initiatives to promote knowledge sharing have been done in the past by means of the annual CIDA Partners' Forum, roundtable discussions between projects implementing private sector development initiatives, and occasional meetings among like-minded partners. However, these were not sustained due to several factors such as: (1) the lack of systematic way in promoting knowledge sharing and collaboration; (2) appreciation for joint partnerships between projects came at a later stage; and (3) potential benefits of collaboration was recognized only after projects realized that they were working either in the same geographic area or with the same partners/networks, among others.

This is not to say that all previous efforts were wasted. In fact, these proved to be the building blocks from which Knowledge Management emerged from. The enthusiasm of project partners to

share information and learn more from others for better collaboration, was expressed and further articulated in the evaluation done during the most recent Partners' Forum in May 2006.

Thus, CIDA's response was to identify Officers responsible for facilitating, monitoring and reporting (to CIDA and project partners) on collaboration to ensure that action is taken. This was decided during CIDA Post's Retreat with Rob Patzer, Country Program Manager, following the just concluded Partners' Forum. Joe Goodings and Ms. Lynette Corcino volunteered to do the work, together with Ms. Elsa Sumido of PCCO. The initial KM "steering" or "core group" of officers--namely, Joe Goodings, Lynette Corcino, and Elsa Sumido--started brainstorming in May of 2006. They had taken it upon themselves to take on this challenge and be responsible for this initiative as an internal or task-force type of activity. They were early champions of KM and believed KM is a framework in pursuing knowledge sharing and collaboration among CIDA partners. The three worked at learning more on KM and eventually developed a draft concept note and strategy.

This concept note/strategy was shared with Tom Carroll, Head of Aid, and other officers and received wide support. But in order to move forward with their strategy and actually execute the programs and activities, the KM core team decided that it will need experts in the field to provide deeper insights into the concept and share technical advice on strategies and activities according to industry KM best practices.

In August – September 2006, CIDA hired Dr. Serafin Talisayon—a local KM guru—as resource person and facilitator for KM orientations in Manila and Davao among project officers and staff. Based on these meetings, Dr Talisayon also provided initial inputs to CIDA to help craft its strategy. In October 2006, CIDA contracted Joric Maglanque--who had a dozen years of KM work experience with Accenture and the World Bank and as a part-time consultant--as a KM Adviser and to join as a virtual member of the CIDA KM core team. Mr. Maglanque shared his insights and experience to enhance CIDA's appreciation of the depth and breadth of KM, develop a framework for the strategy and programs, and help design and plan pilot programs and activities.

## **Generating awareness and creating buy-in**

The initial stages of the KM effort focused on increasing the awareness of officers and staff in the projects and with the CIDA Post itself. From August 2006 to September 2006, CIDA conducted KM orientations to introduce the KM concept and generate support for the impending KM initiatives.

Even though quite a number of organizations mentioned that they were doing KM but under a different label, the evaluation surveys showed that project partners gained an improved understanding of KM (score 8 out of 10). They also believed that it would be worthwhile to participate in future KM initiatives (score 9.2 out of 10), and all who attended offered to designate a KM focal point person and that they would join at least one Learning Group. Most of the projects believed the draft KM strategy that was shared would be useful for their project, as well as the knowledge-sharing website and program-level reports.

The positive feedback emboldened CIDA program to scale up its KM efforts by hiring Mr. Maglanque as a KM Adviser and forging ahead with its strategy and proposed activities. Mr. Maglanque served as KM Adviser from October 2006 to September 2007.

## CIDA KM Strategy

The CIDA KM strategy is based on a systems point of view of KM wherein KM is seen as a dynamic effort with inter-related technical and social dimensions, including people and culture, leadership and management, processes, and technology. This point of view ensured that various interventions are considered.

The CIDA KM strategy made it a point not to simply objectify knowledge and treat it as a tangible product. Knowledge is either explicit (i.e., tangible and codified) or tacit (i.e., intangible and un-codified). Hence, the strategy calls for efforts to maximize sharing of documents and files using ICT as an efficient enabler; harvesting and codifying tacit knowledge for wider access and dissemination; and also encouraging direct sharing of tacit knowledge between individuals and teams. The strategy also emphasized the importance of tacit knowledge to the CIDA Philippines program.

Thus, the KM strategy includes four core programs:

1. Capturing **project experiences and lessons learned** and codifying this to transfer valuable tacit knowledge to other projects and the program;
2. Developing a **knowledge-sharing website/portal** to improve access to available knowledge assets and information which are used and reused regularly, thus reducing time spent looking for and recreating information that's already available;
3. Developing **program-level reports** as a way synthesizing information from various sources and providing a big picture through a new and more valuable knowledge product; and
4. Cultivating **Learning Groups** to promote sharing of valuable tacit knowledge directly between practitioners and project teams, as well as other development partners and stakeholders.

At the same time, the CIDA core KM team made it a point to pursue opportunities to deepen and broaden their appreciation of KM in order to better steward the KM program. The team shared KM resources, reading lists, and leads for further reading or training. In short, the team made it a point to enhance their knowledge on KM state-of-the-art practices even as they themselves try to help project teams appreciate KM.

## Pilot Program Activities

CIDA piloted and continued to implement the following activities (up to September 2007) based on its strategy and core programs.

### ***Learning Groups: Promote tacit knowledge sharing***

During the planning stage, the KM core group was wary about the “design” and activities of the Learning Group. Through several brainstorming sessions and advice of the KM consultant, the core group agreed that Learning Groups are really self-organizing, voluntary, and the objectives and structure will—in the long run--be determined by the groups themselves. Although CIDA can suggest the initial topics and flow of discussions, the Learning Groups themselves will soon take responsibility for their own discussions and knowledge sharing efforts. Thus CIDA focused on cultivating Learning Groups by providing a 'safe' environment to communicate, enabling them with ICT tools, and organizing and facilitating initial meetings to start the ball rolling.

The **Private Sector Development (PSD, formerly Local Economic Development or LED)** Learning Group was launched on November 2, 2006 at RCBC Plaza in Makati. It was the first Learning Group to be launched and served as a learning experience for the core team on how to facilitate the content, flow, and informal aspects of face-to-face meetings among a network of professionals eager to build and share their knowledge. The launch of the **Peace and Development (P&D) Learning Group** followed quickly in November 15, 2006 in Davao City and learnings from the 1<sup>st</sup> LED Learning Group meeting were applied and proved useful.

In both Learning Group meetings, partners brainstormed and mapped their competencies, projects, and knowledge/information products. Partners also shared their knowledge needs. These mapping of the 'supply and demand' of information/knowledge serves as an input to on-going efforts by each Learning Group to pool together their collective knowledge so they "know what they already know" (as a collective), and in the future work towards addressing the information/knowledge gaps either through research or collaborative development.

The PSD Learning Group conducted its 2<sup>nd</sup> and 3<sup>rd</sup> meetings in April and June 2007 respectively. These meetings focused on project updates, sharing of workplans, products, and tools, and was a rich venue for discussion of topics such as Capacity Building. The P&D Learning Group conducted its 2<sup>nd</sup> meeting in April in Davao. This meeting focused on sharing of draft annual workplans and knowledge products of the various CIDA projects, and getting an update on the status of GRP-MILF peace negotiations. Discussions focused on sharing of what was going well in the projects and some common challenges.

These succeeding Learning Group meetings helped further build the relationship, trust, and network bond among members—elements that are essential to future knowledge sharing attitudes and behavior. This was emphasized during the 3<sup>rd</sup> meeting by the KM Adviser; but he also reminded members to think of the meetings as milestones in between what should be continuous, virtual, and informal knowledge sharing activity and interaction between members who are seeking answers to real-time implementation issues and challenges in their respective projects, being assisted by others who can share ideas, experience, or expertise on the subject.

Although not a formal Learning Group, the **Gender Equality (GE) Forum** is in fact the broadest multi-institutional community of practice CIDA coordinates. This Forum meets regularly (annually) but also keeps in touch through e-mail and occasional informal, small or face-to-face meetings. For the GE Forum organized on August 9, 2007, the KM Adviser and GE Adviser worked with CIDA to purposefully draw out valuable knowledge and reusable tools, techniques, approaches, and content on GE results monitoring. An input on KM was also given by the KM Adviser during the Forum. The Forum was a success in strengthening the community of practice's networking relationships and in terms of the richness of knowledge shared.

Each Learning Group has developed their own group e-mail distribution list and posted their knowledge products, presentations, and shared documents, meeting minutes online. With a couple of meetings under their belt, it seems there is a lot of potential for Learning Groups to grow into full blown knowledge sharing communities that would steward their own knowledge to improve their individual, team, and project performance. Even simple sharing of workplans among projects has given rise to discussions on areas for collaboration, reducing duplication of efforts, and complementation of resources. These are the concrete KM dividends that can significantly benefit CIDA program overall as well as the Philippine government and Filipino communities.

## ***Knowledge sharing website: Improve access and reuse of information***

The knowledge sharing website was intended as an internal-use only portal for project partners and CIDA program to share news, updates, information, knowledge products, and reusable work documents, templates, tools and methodologies. It is envisioned to also house knowledge assets that might be developed by Learning Groups or project teams and partners in the future, e.g., practice aids, job aids, and sectoral research studies or frameworks. Providing access to such information electronically exponentially increases the potential to disseminate, share, and reuse the information, thereby increasing the value of knowledge (“Unlike other resources, knowledge appreciates in value the more it is used!”).

The KM Adviser crafted the terms of reference for the knowledge sharing website and PCCO crafted and published the RFP in December 2006. This initial RFP failed because none of the bidders passed pre-qualification based on a merit points system. The team believed that given the rich IT skills in the country, the RFP should be reposted whilst ensuring wider dissemination, specifically to target groups. The RFP was reposted in March 2007 but any pre-qualification and decision to award to a contractor was put on hold due to concerns from CIDA headquarters on intellectual property. Apparently, *knowledge products that are produced through CIDA funding belong to the executing agency or consultant – not to CIDA.*

If the IP policy is indeed what it is, or things remain at status quo, sharing documents electronically, even through a secure-access site, could be very problematic. There needs to be a clear resolution of the issue as soon as possible. As of September 2007, clarification and resolution to this issue is still being pursued in Headquarters through various points of contact.

Notwithstanding the roadblocks, a temporary KM Page residing on the PCCO website was developed in May 2007 so as to serve some of the same needs as the KM Website, i.e., posting and disseminating public reusable knowledge products. The static website is maintained by PCCO and serves as a limited information-sharing tool for CIDA partners and Learning Groups.

By August 2007, the originally envisioned KM website project was still on hold pending clarification on said issues. Guidance and support from CIDA HQ was pursued by Joe Goodings but no significant breakthroughs were achieved. The core group decided that a more robust albeit temporary knowledge sharing tool needed to be created due to the increasing demand and clamour for a knowledge base of and a venue for discussion. Hence, the PCCO worked with the KM Adviser to define the initial user and system requirements for a “**CIDA KM Portal**” -- a simple, one-stop shop for knowledge for CIDA and partners. This Portal would be accessible as a secure extranet attached to the PCCO website and would replace the KM Page. The Portal will include the following components and features:

- Main Portal homepage on which news, announcements, updates, new knowledge base and Learning Group products can be promoted
- Searchable knowledge base for relevant and reusable content (project documents, toolkits, guides, manuals, tools, etc.). Search facility can return both public and internal use documents depending on access level of user.
- Electronic discussion forum for Learning Groups
- Homepage for each Learning Group – as a virtual home and information resource for Learning Groups

In September 2007, PCCO subcontracted the development of the KM Portal to Coffey. It is expected to be launched by November 2007. While systems development is ongoing, the KM Adviser crafted strategy documents to help guide and prepare CIDA/PCCO for the roll-out and eventual implementation of the KM Portal: Sustainability and Maintenance Strategy, and Communications and Change Management Strategy.

### ***Capturing lessons learned: Turning tacit knowledge from experience into reusable knowledge***

In the many years it has been operating in the Philippines, CIDA realized it often loses most of the knowledge it gleans from project experience when the project terminates or when a consultant's contract expires. All that's left are the project documents and the various reports. However, such reports, even terminal reports, do not capture the full richness of lessons learned in the field. These require more than a list of bullet points or a paragraph or two as found in many reports.

Initially, the KM Adviser integrated the techniques of case study writing, lessons learned meetings, and after-action review in order to develop a guide and template for comprehensive documentation of the project performance (the basic facts) as well as the tacit knowledge about lessons learned from experience, either from success or failure. The 'case study-lessons learned guide' was shared with CIDA officers and projects. The core team selected PTTAF as the pilot subject to test the process and guide as the project had recently wrapped up and had valuable lessons that had high potential for reuse for other projects and for the CIDA. In coordination with PCCO, the KM Adviser conducted the lesson learned meetings on May 2007 with Ms Nide Bombay, formerly the change management specialist of PTTAF.

The resulting case study/lesson learned document produced comprehensively captured the experience of PTTAF, showcasing its accomplishments but also highlighting and describing many lessons learned stemming from various project challenges. It was shared with CIDA officers and PMOs and received much positive feedback and comments.

From the perspective of the CIDA KM core group, the pilot activity pointed up the pros and cons of this initial approach:

1. There is some overlap of content with existing information sources, especially on basic project information and background;
2. A story of the project per se (as opposed to lessons around a theme, e.g. Capacity building) brings up issues on confidentiality and intellectual property
3. Being several pages in length, the document although rich in content was not as easily digestible, readable, and quickly reusable
4. there could be more details on the "context" for lessons statements

Based on learnings from this, the KM Adviser revised the guide documents in August to focus on

1. highlighting the lessons learned statements upfront;
2. providing a description and context for the lesson statements;
3. adding vignettes, examples, anecdotes from the project as as sidebars or boxes in the lesson learned document.

Likewise, the lessons learned document is now envisioned to be a compendium of related lessons from various projects synthesized in one product. This approach to synthesizing project experience for a program-level perspective gives CIDA more flexibility to successfully manage concerns about confidentiality and intellectual property.

The lesson learned process and guide was also envisioned to be used by projects themselves. The CIDA KM core team decided to test this new approach with the JURIS project, which was also about to wrap up and was interested in capturing its rich learnings. From July to September 2007, JURIS consulted with the KM Adviser to prepare for a lessons learned meeting and documentation process for JURIS to be undertaken by the PMO themselves.

### ***Program-level report: Synthesizing various information sources to create new knowledge***

Program-level reports are intended to provide a big-picture view of the CIDA Philippines program, the main contributions of each partner, highlight successes and lessons learned, and communicate future directions. These reports were designed to be succinct but very informative and highly readable. They highlight the overall picture of outputs and outcomes, and possible intervention areas for knowledge sharing and collaboration.

A pilot program-level report was developed by Joe Goodings on the Private Sector Development program. This was circulated to CIDA Asia branch management and headquarters. Unfortunately, Communications Branch in HQ raised concerns that the report looked too much like an official publication and would therefore need approval from headquarters. The report was not allowed to be shared publicly. To date, CIDA officers in the Philippines are trying to get clear guidelines and direction from Communications Branch about what kind of CIDA publication or report can be shared with project partners and other stakeholders (i.e. the public). Without clarity, CIDA runs the risk of producing a program-level report that can't be shared, which would significantly reduce its usefulness as a reusable information product.

### ***Other Activities***

The KM core team also pursued the following activities:

#### **KM Resource Guide**

The KM Adviser developed a KM Resource Guide to serve as a reference on KM for those new to the concept of KM or seeking to enhance their appreciation of the concept and CIDA's KM framework.

The Resource Guide was continuously refreshed with new or updated content from various activities undertaken by CIDA KM core group or KM Adviser. In September, the Resource Guide was augmented with a KM Model, KM Systems Framework, and Guide for Cultivating and Nurturing Learning Groups.

#### **KM Audit**

The KM Adviser developed a KM Audit Guide that includes tools, templates, and methodologies for assessing the 'KM health' of project organizations. KM Audits were proposed to be initially conducted for volunteer projects, such as Pearl2. There were initial discussions with Pearl2 in organizing the KM Audits but scheduling conflicts have subsequently put off this activity.

Nonetheless, CIDA core team sees the value of project teams undergoing knowledge assessment and building their own capacity to conduct regular (annual) KM Audits. Thus the KM Adviser intends to conduct KM Audit orientation and training for all projects, and will provide on-going technical support, mentoring and coaching to the projects as they do their KM Audits. Likewise, some tools from the KM Audit Guide, such as knowledge mapping, have already been used in Learning Group activities.

### **KM Logical Framework Analysis, workplans, meetings**

The KM core team developed its own LFA to clarify its intended objectives for KM and outline the outputs and performance measures relevant to these. The team also held periodic meetings to assess progress, plan activities and next steps, brainstorm on new ideas, and redirect its strategy as needed. Hence, workplans were regularly reviewed and updated as necessary.

### **Participation in KM4Dev Forum**

Through the KM Adviser, CIDA also participated in the **KM for Development Forum** (KM4Dev) held in ADB on Feb 8-9, 2007. The Forum is a venue for KM4Dev practitioners worldwide to share experiences, lessons, and best practices with colleagues and help develop their practice. This was useful for CIDA in validating its approaches and strategies against industry best practices.

### **KM Orientation for NEDA Officers and Staff**

Upon an earlier request of NEDA, CIDA held a KM orientation/RTD with selected NEDA officials and staff. Prof. Talisayon served as resource person while Lynette Corcino presented CIDA's KM strategy and experience. CIDA officers and KM Advisers also engaged with NEDA in an open forum to discuss challenges, lessons learned and best practices in implementing KM in their respective organizations.

### **KM at CIDA Post**

Meanwhile, KM continued to be promoted at the CIDA Post itself. The core team drafted communications that was sent out by Tom Carroll on January 9, 2007, which included updates on the then on-going pilot activities and shared the KM strategy, a KM resource guide, a primer on Learning Groups, and the KM Adviser's presentations at the Learning Group meetings.

A meeting facilitated by the KM Adviser was also held with CIDA officers and staff on November 30 in which the group shared their past efforts, experience, and lessons learned in post-level KM. The major issues raised by officers and staff on why KM is slow on the uptake was the perception that KM needs a lot of effort to sustain and a KM point person needs to drive it. They also cited the accepted benefit of KM but were wary of the added burden on daily tasks.

The KM adviser shared some ideas, suggestions, and recommendations for reinvigorating interest and activities in KM at post, such as:

- re-instituting “Intelligence Coordination Hour” – i.e. regular brownbag knowledge sharing sessions
- adopting an IT policy on the use of common shared folders on the network drive
- use of shared Contacts Database
- conducting a Knowledge Fair and holding Learning Group-type knowledge sharing sessions at the Partner's Forum

- knowledge transition policies where resigning staff are required to completely transition explicit and tacit knowledge before leaving
- including in contracts with Executing Agencies a clause to capture lessons learned and other forms of knowledge

The CIDA office in Manila continues to implement regular brown-bag sharing sessions and many of the above approaches to support knowledge sharing in the office.

## **KM for Development**

KM for Development refers to the practice of applying KM to the specific field of development work and which encompasses multiple development institutions as well as their partners and stakeholders. Although KM has traditionally been a corporate, intra-organization concern, development institutions and practitioners have increasingly applied KM to the unique ways of working and challenges of development, especially in developing countries (or regions within countries) where many donor organizations simultaneously operate. One such region in the Philippines is Mindanao.

Upon learning of CIDA's efforts and innovations in this area, the Philippine country office of the World Bank approached CIDA to assist in conceptualizing and planning to leverage KM for peace and development in Mindanao, primarily through the Mindanao Trust Fund and the Mindanao Working Group of the Philippine Development Forum. The WB and CIDA collaborated to develop a framework and strategy for leveraging KM and planned for building a network of development practitioners composed of project management officers. On January 29, 2007, the first Peace and Development Roundtable Discussion (RTD) was conducted in Davao City and attended by more than 30 project management officers from more than 20 aid organizations and development partners. This was a successful way to engage with and network the various development practitioners from different institutions and share valuable experiences and lessons from their respective projects. A workshop also determined the 'knowledge map' of 3 sub-networks (Communities of Practice): Community-driven Development, Internally Displaced People, and Local Governance. These 3 groups are being cultivated to become long-term CoPs.

There was consensus among those who participated that more knowledge sharing can and should be done between and during meetings. Some of the measures planned are:

- white pages or directory of each CoP, with full contact details
- e-mail distribution lists or discussion forums
- knowledge base or website/portal

The success of the KM for Peace and Development RTD and the relevance of this type of work as seen by CIDA, WB, and AusAID point to this area as a high-impact area for CIDA's KM interventions. The key is in ensuring that these efforts are aligned with CIDA's own goals and objectives (e.g., via Philippine Development Forum and Mindanao Working Group). As such, CIDA continued to engage with WB and AusAID in promoting KM4Development activities in Mindanao.

In August 6, 2007, a 2<sup>nd</sup> CoP RTD meeting was held, this time focusing on Peacebuilding. Based on learnings from previous RTDs and CoP meetings, this activity was approached differently:

- MEDCo was the lead coordinator/chair of the RTD
- the activity was specifically designed to draw out knowledge and ideas that could lead to rich and interesting discussions
- presenters were given ahead of time some guide questions to cover

The meeting was a success due to strong and active participation of a wide range of participants from various donor organizations/PMOs, other development partners, and MEDCo itself and the amount and richness of knowledge shared. It was also a successful effort in guiding MEDCo to take a leadership role in cultivating and nurturing these CoPs and themselves organizing and facilitating the meetings and activities.

Upon request, CIDA also assisted the Office of the Presidential Advisers for the Peace Process (OPAPP) by having the KM Adviser to provide a 2-day KM training-workshop to its key staff. The focused discussion and design of the training programme was intended to provide OPAPP staff with important inputs to allow them to (1) develop their business system outputs effectively, and (2) be convinced and committed to pursue KM for the long-term. Feedback from OPAPP indicates that the input on KM was very useful and timely. OPAPP expressed an intent to request for further assistance on KM from CIDA.

## **Accomplishments**

The initiatives of CIDA post in the past six (6) months have resulted in greater awareness, support for KM within post and among project management offices and development partners, and actual impact in terms of KM benefits and institutionalization.

- 6 Learning Groups/CoP meetings with rich sharing of experiences have been successfully conducted. Feedback from Learning Groups show that this is an effective way to share information and knowledge, identify and work on areas of collaboration, reduce duplication of efforts as well as mistakes. Connections and knowledge have been brokered and opened up opportunities for innovation.
- There is increasing demand from partners (e.g., World Bank, AusAID, MEDCo, OPAPP, ILO, NCRFW) for CIDA to provide technical advice and leadership in KM for development
- Although not yet officially published and disseminated, program-level reports were developed and generate a lot of interest from CIDA project partners and from GOP (i.e., NEDA). The program-level PSD framework became very useful for the Results Based Management workshop with NEDA.
- Continued enhancement of the PCCO KM page while developing requirements definition and initial design/architecture for KM Portal; also supporting sustainability and maintenance and communications & change management strategies.
- Developed tools for KM Audit and capturing lessons learned and laid initial plans for conducting these with pilot projects.
- Developed LFA for KM program and included KM in new project's LFA/contract (e.g., E3)
- Participated and harvested experiences and learnings from KM4Development Forum

# Challenges and Lessons Learned

## ***What worked well...***

Listen to your clients. The genesis of the KM program and team at Post tells the classic lesson of 'listening to your clients'. The Post had a retreat/meeting in May 2006 and discussed how to address a message that was clear from the just concluded Partners Forum: PMOs want to: (1) collaborate more, (2) share information/knowledge with each other, and (3) see this happen systematically coordinated at the program level by CIDA. The Post listened, brainstormed, and decided that KM was the best tool and framework to pursue collaboration and knowledge sharing among the PMOs. The feedback so far seems to indicate that the Post was able to respond to the articulated needs of the PMOs. At the same time, CIDA looked at KM as one more strategy for going from “Good to Great” - - a phrase borrowed from the famous management book by Jim Collins and which served as a tenet of the team at the time.

You can't manage (well) what you don't know (well). The CIDA KM core team's strategy was to consciously study and appreciate the full meaning of the concept of KM. This included research for relevant resources internally and externally, actively participating in KM orientations, seeking out experts, reading books on KM, and exploring opportunities for training or continuing education (e.g. KM training, conferences). This avid interest in the concept helped the team understand the true scope and challenges of KM. This helped the team focus their attention on critical and high-return areas for intervention and understand the subject enough for themselves to become 'qualified' and capable managers and stewards of this new organizational initiative. The CIDA KM core team also used a Systems Thinking approach to the KM program, treating KM as an organic, dynamic system with inter-dependent components. With this mindset, the team made sure that important components of the system are considered as possible levers or at least not overlooked and also avoided over-emphasizing one component as being 'more important' than others.

Leverage social networks and collaborate with willing partners/champions. During implementation of KM activities, one of the things that worked, especially in the Mindanao KM for Peace and Development initiative, was coordinating with other donors/projects and leveraging social networks to build momentum for action. In the case of the Mindanao KM for Peace and Development, CIDA pursued this initiative because it knew that KM can be an effective tool for MEDCo in their work as Convenor of the Mindanao Working Group. It helped a lot that there were contacts from existing social networks that could be leveraged to 'ease' the process of collaboration, such as AusAID/PAHRDF, who is working with MEDCo in the area of institutional strengthening. This was a case of applying one of KM's basic tenets: “connecting those who know with those who need to know”. In true KM fashion, this really created an opening for CIDA to work directly with important partners like MEDCo and gain the opportunity to create significant impact even with humble resources.

Grassroots approach to Learning Groups works. In the Learning Groups program, the team consciously targeted multiple participants from the PMOs, i.e., not just project directors or managers but also experts and specialists. The Post understood that the greatest desire, flexibility, and value-add in sharing knowledge was at the ground level of PMOs. The Post knew that sharing knowledge progressively got more diluted and difficult as it moves up to an institutional level and through formal channels-- from one PMO to another, or—more so--from one CEA to another.

Communications and change management. From the start, the CIDA KM team was aware of the major behavior/attitudinal challenges in institutionalizing KM within CIDA and with its partners. Although the culture for sharing was generally conducive, CIDA sought to enhance this by preparing communications and designing activities to ensure that the overall effort and specific interventions were understood in order to achieve a higher degree of success and adoption. This included communications to CIDA and PMO partners from Tom Carroll, the CIDA Head of Aid; regular communications, meetings, updates and feedback from Learning Group coordinators/sponsors; and designing activities with partners like MEDCo to ensure their commitment and contribution to joint activities (e.g. PMO Convergence Meetings).

Learning about learning. The effort of capturing lessons learned and organizing and designing CoP/Learning Group meetings continue to be enhanced. The CIDA KM core group consciously adopted the approach of applying KM to its own processes and activities, to ensure lessons and good practices are known, documented, and new and better ways of doing things are followed.

### ***... and not so well***

Look ahead and watch for possible speed-bumps. One of the tougher learnings of the CIDA core team was the need to ensure that relevant policies, rules, and guidelines don't present an impediment to activities. For example, an RFP for a web developer was published (and proposals were indeed received) without clear feedback from CIDA HQ on intellectual property rights for intranet websites and review. Likewise, a draft PSD program-level report has yet to be published and disseminated for lack of clearance because it is considered as an external communications product and needs to abide by CIDA Headquarters' external communications guidelines.

Out of sight, out of mind. The Post is also realizing that KM needs to be a conscious, on-going operation in order to be consistent and eventually institutionalized. Periodic and seasonal work demands tended to push back KM in the back-burner and caused some delays in the KM workplan. Without a KM point person responsible for day-to-day operations, the KM program was at the whim of the schedules of the core KM team.

A champion for KM at CIDA HQ would help address issues and challenges such as those mentioned above (e.g. communications policy as well as intellectual property) . There is a need to validate how much CIDA HQ is supportive of the KM initiative, and if they will be willing to help in addressing issues that reside in their domain of influence. Without adequate CIDA HQ support, initiatives to develop a KM website, program-level reports, and others will run aground.

## **Conclusion**

There is no silver bullet or one-size-fits-all solution to knowledge management. As was learned from participating in the KM4Dev Forum, no one institution has the ultimate answer or solution for the KM challenge and that the approaches, strategies, and activities being conducted by CIDA are state-of-the-art, not necessarily in terms of technology only but also in terms of processes like knowledge mapping, social network analysis, capturing lessons learned, and communities of practice (Learning Groups). The correct approach is whatever works for the specific organization. Also, KM takes time to take root and grow. Changes in systems, culture, and people are inter-related and need to be nurtured; they are not like projects that can be “planned”, “designed”, and “executed.”

Going forward, CIDA needs to ensure that key principles and success factors are observed:

- Keep engaging and checking for buy-in and support of sponsors and champions within CIDA. The issues faced on program-level reports and the KM website test how much buy-in has been gained and how much more buy-in is needed. Strategic communications through success stories might help hurdle these challenges.
- Learning Groups should be slowly pushed into more self-governance and knowledge stewardship. Members should be encouraged to ask (especially virtually via e-mail) their Learning Group real questions about real project issues and problems which other members will hopefully have some ideas and suggestions for. Face-to-face meetings should be occasional events between what should be regular communications and knowledge sharing by members done virtually or directly among themselves without CIDA-facilitated meetings.
- CIDA should explore ways to further institutionalize KM in its and that of its partners' operations. Including KM in LFAs and contracts is a major achievement but other measures may include:
  - including KM during program/project conceptualization and design, strategic planning, budgeting, peer review, and M&E;
  - making knowledge sharing skills and behaviors as a competency requirement in staffing, training, and performance management system ;
  - identifying or designating KM point person (at the program and project level) whose primary role is to manage the KM program and activities on a daily basis; since it is integral to the business of CIDA, KM should not have “off-seasons” depending on availabilities and workloads of key staff (e.g., KM core team);
  - ensuring that documented lessons and best practices are used to update, change, or enhance policies, processes, guidelines, tools, checklists, and standard operating procedures which should be benchmark for performance so that lessons aren't “re-learned” over and over in various parts of the organization
- Strategic communications about what is going on in the program should be continuous and should build confidence in the value and forward-motion of the KM program.

The most recent country performance report of the Post has started to include achievements on the KM front. Country Program Manager Rob Patzer glowingly complimented the strides made so far in KM and confirmed its increasing importance and relevance to CIDA's business, as evidenced by its inclusion in the new program-level logframe (during the RBM workshops with NEDA). Still, there is still a lot that can be done. The more that CIDA is able to manage the above challenges, and build on gains as well as past lessons, the more KM can increasingly benefit CIDA in improving project performance and overall program performance for development impact.