

CIDA Philippines Knowledge Management Strategy

Introduction

This paper is a working document that will serve as a guide for CIDA management and staff on the strategic imperative, direction, and steps toward operationalizing Knowledge Management at CIDA. It provides an overview of KM, the rationale of doing KM at CIDA, a framework for action, and some suggested next steps. A more detailed discussion of KM concepts, frameworks, and specific initiatives are treated in the KM Resource Guide.

What is Knowledge Management?

There are many definitions of Knowledge Management (KM) available from literature and the Internet. In simplest terms, KM is about getting the right knowledge to the right people at the right time, or connecting those who know with those who need to know. More fully, KM includes a range of disciplines, techniques, and practices to identify, create, share, and use knowledge for reuse, learning, and innovation and ultimately to better achieve organizational objectives such as efficiency and effectiveness.

The formal concept of KM sprung in the mid-1990s primarily in the professional consulting industry. Today, KM is practiced in many industries, including the public sector and by international development organizations. Knowledge is key for development; effective KM leads to better development results.

Why do Knowledge Management in CIDA?

Knowledge is the lifeblood of modern organizations. Better management of an organization's knowledge (whether it's in people or information systems), can lead to better performance or great performance. As such, knowledge is at the core of the CIDA Philippines program. It is as important to CIDA projects as a farm is to a farmer: without it, we could not add value. There is a tremendous wealth of knowledge in the CIDA Philippines program, but no single person or project has a handle on all of it. Lessons from other projects are not shared widely. Many projects encounter similar challenges in areas such as creating buy-in with communities, reporting on results, mainstreaming cross-cutting themes, disseminating best practices, and institutionalizing results, to name a few; but projects tend to face these challenges on their own. Knowledge of what works in these areas mostly remains tacit among individuals and not shared widely. When projects close and project staff members leave, much of their knowledge is lost.

Although some knowledge sharing takes place between the projects in the CIDA Philippines program, more could be done to make it efficient and effective. This strategy provides a brief overview of knowledge management, why it can be useful, and suggests some approaches to promote better knowledge sharing in the CIDA Philippines program.

The need for knowledge sharing is based on the idea that every project has its strengths and limitations. With effective knowledge management, projects can avoid reinventing the wheel, leverage the experience and learning of others, and focus their efforts on achieving greater results. Furthermore, given its importance to CIDA, knowledge management is an activity that is explicitly recognized and addressed in new contractual agreements with our partners. But KM requires a holistic approach as well as resources, time and effort. At the end of the day, KM benefits must outweigh the cost of going into it, or at least not doing it.

Better knowledge management is also key for improving the CIDA-Philippines program. Where are we getting our best results? What are the gaps in the CIDA program? How can lessons benefit the whole program? Better knowledge management can help in answer these program-level questions and should strengthen the CIDA-Philippines program.

CIDA's projects work to alleviate poverty and promote sustainable development; we are in the business of creating opportunities for the poor. Knowledge sharing is a useful input if it helps CIDA projects produce better results, and strengthens the impact of the CIDA program as a whole.

Knowledge sharing can have many benefits. Project staff may want to share their experience and learn from each other on a topic such as monitoring and evaluation. Projects may be able to complement each other; for example, strengthening local governance in a municipality can help strengthen the local private sector, and vice versa. Projects with different competencies may be more effective by working closely together. And at the very least, knowledge sharing allows for better coordination and avoids duplication.

However, knowledge sharing has its costs. It is not practical for every project staff member to always know everything about every project. Too many meetings can be a distraction from project work. Knowledge sharing has to be worth the time and effort. There must be a system for prioritizing knowledge according to what creates most value for CIDA, its partners and their ultimate beneficiaries, and for selecting the most cost-effective KM tools to source and deploy the most needed knowledge. Currently, project partners have only partial knowledge about other projects, where they work, what they do, their approaches and tools for development, and their lessons learned. The challenge is to find ways to improve knowledge sharing in a way that helps projects achieve better results and strengthens the CIDA program as a whole, without creating an undue burden for the projects.

How should CIDA Implement KM?

There is no one proven checklist, master plan, or set of solutions for KM, within or across any industry it is applied. Organizations implementing KM have had to find their own way and balance their unique needs and own circumstances in order to kick-off and sustain their KM program. However, the lessons of KM pioneers (including those who succeeded and those who have failed) have provided some useful inputs to other organizations interested in implementing or enhancing their KM programs.

One such useful framework is the American Productivity and Quality Center's (APQC) Road Map to KM Results: Stages of Implementation. Below is a quick overview of the road map adapted for CIDA:

1. Get started
 - Find an executive sponsor within CIDA headquarters and country program
 - Determine value proposition or business case and priority areas for KM intervention
 - Develop 'KM message' and strategic communication plan
2. Develop strategy
 - Conduct KM Audit
 - Link KM strategy to business strategy
 - Develop strategy and action plan
 - Communicate story of KM in CIDA
3. Design and launch KM initiatives
 - Develop and design pilots and quick-win projects
 - Develop, design, and roll out KM program, activities, tools
 - Launch and coordinate Learning Groups
 - Design and develop Intranet/website
 - Design and develop program-level reports
4. Expand and support
 - Communicate benefits of KM to management, staff, and stakeholders
 - Expand, replicate and scale up KM initiatives
5. Institutionalize KM
 - Integrate and embed KM into policies, decision rules, business processes, templates, tools and products
 - Support and guide Learning Groups to adopt and embed KM in their own processes
 - Maintain core KM processes (ICT infrastructure and tools, content management, reward
 - Institutionalize KM into CIDA program strategic planning, budgeting, HRD plans and policies, performance management systems, partner contracts, logframe analysis, etc.

Critical Success Factors for KM

Effective and sustained knowledge management programs usually have some or most of the following success factors in place:

- **Clear and common understanding and perspectives of KM across CIDA is critical.** There is a need to communicate what is and what is not KM, and what a full blown KM change journey will entail for individuals, teams, and the organization as a whole
- **A clear business case or value proposition is critical for initial as well as long term success.** The key question that CIDA needs to answer is, what impact and benefits do we expect KM to deliver? Do these benefits outweigh the cost of investing time and resources in KM? Alternatively, what is the cost of NOT doing KM? KM must lead to better development results by improving the performance of individual projects and the CIDA program as a whole.

- **Leadership and sponsorship is necessary.** CIDA top management needs to create a shared vision, communicate this to the entire organization, and model the behavior it expects from staff and partners. Many specific KM initiatives will require top management to think through, deploy, and institute organization-wide changes in terms of roles, processes, and tools.
- **Fostering a knowledge culture is critical.** However, we shouldn't expect to change culture first and then implement KM. Instead, CIDA needs to design KM around the existing culture. Knowledge sharing can result in culture change. We believe that staff and partners, by nature, will want to share knowledge. If negative consequences to sharing have been engendered, we will address these first and break down the barriers. There needs to be a balance intrinsic and explicit rewards and incentives. Knowledge sharing thrives on passion, and withers with compulsion.
- **Communicate, communicate, communicate!** From the first forays into promoting KM, to reporting progress of initiatives, and telling the story to external partners in CIDA, strategic communication plays an important role in ensuring the road to KM is smooth and well-lit.
- **Develop an organization structure for KM, including roles and responsibilities for people at all levels of the organization.** These include KM sponsors, champions, learning group facilitators, knowledge managers/officers, knowledge integrators, knowledge coordinators, knowledge analysts, among others. This doesn't mean that new people need to be hired for all these roles; more often than not, these roles will be naturally embedded in the job description of staff and partners as KM itself is institutionalized and embedded in the organization as the 'better way' of doing business.
- **Information technology infrastructure and knowledge increase the potential, breadth, and scope for knowledge sharing.** However, ICT and tools need to be demand-driven and user friendly in order to be relevant and actually used by people. A KM initiative is not simply an off the shelf software application. ICTs are enablers, but they are not sufficient to make knowledge sharing happen.
- **Measurement.** It is essential to track progress and feed this back to management and employees. Measuring over long periods of time can produce direct links between KM activities and development outcomes. Simple powerful stories, such as case studies of knowledge sharing, are key and can open the floodgates for a systemic and fundamental change in behavior.

Some suggested priority approaches for knowledge sharing:

Based on research, initial brainstorming within Philippines CIDA program, and consultations, the CIDA Philippines KM strategy outlines the following main approaches:

Learning Groups: Promote tacit knowledge sharing

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 the 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.

Learning groups (also more commonly known in the KM discipline as “Communities of practice”) are groups of people who come together to 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. (Koenig, Srikanthaiah)

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.

Web site: Improve access to knowledge through intuitive, user-friendly web tools

Sometimes project staff members need to find relevant information quickly. Which projects are working in Negros Occidental? Who is working in rural development in Mindanao? Which projects have experience in providing marketing advice? What have other projects achieved in promoting gender equality? How do other projects build capacity? Often the first step to learning the answers is to search available information. The current challenge is finding that information efficiently. Some opportunities for knowledge sharing and problem solving may not require the formality of a learning group. A project may need help with a specific problem, such as marketing a product or working with a particular organization. Sometimes a project may only need enough information to know who to contact. Easy-to-search information can assist the personalization strategy by making it easy for projects to know who to contact among the various CIDA projects.

Easy-to-search information can also support the learning groups. Members may have written information that they think is of value to other members. Learning groups may want to keep a virtual library of tools and documents. Some members may wish to use communication tools like discussion groups to solve a problem.

The PCCO will create a Web site that allows projects to search the key documents of other projects -- such as progress reports, work plans, PIPs, newsletters, and so on – with key words (such as “Negros Occidental” or “marketing and handicrafts” or “gender equality and private sector”). Projects would need to agree to make key documents available on a secure PCCO Web site. Sensitive information such as budget information may be left out. The results of an information search may not fully answer every possible question, but it should provide some useful information that can be followed up with a phone call or e-mail. The Web site would also allow for learning groups to share information and initiate electronic discussions in ways to support the functioning of the learning groups. PCCO will assess which Web tools would be most useful to support the learning groups. The objective really is to have a “common brain” for all CIDA projects and lodge useful information in the web site which can easily be accessible.

Lessons Learned: Harvesting lessons and experience from projects and convert into reusable knowledge products

When a project closes, CIDA often loses most of the knowledge. Lessons learned need to be captured in way so that people can actually learn lessons from them. This may require more than a list of bullet points. Mini-case studies which describe how key challenges were addressed would be more useful. New projects can then benefit from the knowledge learned from previous projects with the least amount of time/learning curve. The idea of providing useful end-of-project knowledge products needs to be explored with the above projects. A sample case study template for this purpose will be developed by December 2006.

Program reporting: Pulling together information to create the bigger picture

The goal of program-level reporting is 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. Such reports should be readable, reasonably short, and provide a snapshot of what each project is doing and where they are going. Program-level reporting can highlight the overall picture of outputs and outcomes, and possible intervention areas for knowledge sharing and collaboration.

Timelines:

- 1) **1st program-level report:** The first report focused on the PSD projects only. Expanding the scope of program-level reporting to include all the Philippines projects will depend on the success of the pilot effort with the PSD projects. The first report was completed in September 2006. At the time of writing in October 2006, the release of the report to partners was pending approval by CIDA headquarters.
- 2) **Learning groups:** At least two learning groups will have formed and held their first meeting by the early November 2006.

3) Easy-to-search information tools: A Web site for easy information-sharing will be designed and operational by the end of February 2006.

Feedback:

There will need to be constant feedback from all stakeholders if knowledge sharing is to stay demand-driven and responsive to users needs. There will also be a review of accomplishments to date, solicitation of feedback on the entire effort, and a mapping of the next steps to improve knowledge sharing.

Resource allocation:

Knowledge sharing will not likely be expensive, but it won't be free either. Resources will need to be estimated by CIDA and PCCO to support the learning groups, the Web tools, program-level report, and sharing of lessons learned from finished projects.

Conclusion:

For the short draft strategy on knowledge sharing to be useful, it needs feedback. The above rationale and suggested approaches are a start. They can be changed, dropped or expanded upon as needed. Some other possible knowledge sharing strategies (forums, annual award ceremonies, knowledge fairs) may also be explored. This strategy is merely a first step in a winding path towards more effective knowledge sharing. It will need fine-tuning or more to ensure that knowledge sharing serves the purpose of reducing poverty and promoting sustainable development in the Philippines.

The aim is to start small with a pilot program-level report, a couple of learning groups, and basic Web infrastructure. As CIDA and project partners gain experience in knowledge sharing, the number of learning groups may grow and the tools for knowledge sharing may expand to meet the demand.

With a learning orientation on the part of CIDA and its partners, the knowledge sharing strategies and process can be continuously checked in terms of usefulness and workability and then continuously improved upon.