Creating Technical Assistance Libraries to Capture Tacit Knowledge

SUMMARY:

In international nongovernmental organizations such as Pathfinder International, staff often lack quick and easy access to the expertise of their colleagues due to demands on time, competing priorities, and lack of systems to capture this knowledge. To address this issue, Pathfinder created a collection of high-quality technical resources that also includes the experiences of technical advisors in using the resources. These technical assistance libraries enable easy sharing and dissemination of high-quality resources and expertise with all Pathfinder staff worldwide—a form of technical assistance at a distance.

PROJECT DATES:

June 2012 to present

TARGET AUDIENCE:

Program managers, country-based project staff, knowledge management professionals, librarians

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CONTEXT

Pathfinder International is a sexual and reproductive health and rights nongovernmental organization (NGO) working in 26 countries worldwide with nearly 1,000 staff members. Pathfinder, like other NGOs, has an internal library collection and access to a wide range of online resources, but technical staff often face barriers to quickly identifying the best materials to use due to the large amount of information available. Staff also often lack access to the expertise of their colleagues due to demands on time, competing priorities, and lack of systems to capture this knowledge. Identifying which materials are best for a particular setting or task can be difficult without previous experience using the materials.

To address this issue, Pathfinder International created a system to identify and store the best technical resources and capture the experiences of technical advisors on using the resources for various settings and purposes. These technical assistance libraries (TALs) enable the sharing and dissemination of knowledge among all Pathfinder staff worldwide.

Capturing this tacit knowledge and sharing it among staff is important because it enables the organization to better meet its mission. Technical staff possess valuable experience that is beneficial to other staff to learn from and apply in their own settings. Capturing this tacit knowledge and storing it in an accessible manner for other staff is an efficient and effective approach to helping make program decisions that lead to better project outcomes.

SPECIFIC KM ANGLE

Pathfinder International has long recognized the need to manage expertise and experience as knowledge assets. With the introduction of the new SharePoint platform and the development of communities of practice, Pathfinder renewed its focus on creating systems to manage, share, and apply the knowledge of staff. In addition to these activities, Pathfinder created the TALs to store tacit knowledge of technical advisors. The goal of the TALs was to capture technical resources and the expertise of technical advisors using each of the resources, and to share this knowledge in an accessible manner for all staff so they can apply it to their own circumstances. Pathfinder launched the TALs on June 5, 2012, through a series of emails and training sessions.

The TALs aim to provide Pathfinder staff around the world with easy access to the technical information and knowledge they need when they need it—the very definition of knowledge management.[1] The TALs go beyond simple information storage and are not just a repository for documents. They include collections of resources selected by Pathfinder's technical advisors in their areas of expertise—and captured with the resources is their knowledge about why the resource is valuable, the programmatic contexts in which it may be most applicable, and how best to

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[1] The Knowledge for Health (K4Health) Project. Knowledge Management for Health and Development Toolkit. Available from: https://www.k4health.org/toolkits/km.

adapt it. Staff can access this guidance whenever they need it. In this way, the TALs help provide technical assistance at a distance.

The TALs are stored in Pathfinder's SharePoint-based intranet, organized using the organizational taxonomy (the hierarchical list of terms Pathfinder uses to describe and organize content). The knowledge management advisor created the libraries and maintains them jointly with the technical advisors, who can post materials and guidance without the need for specialized information technology skills.

AFTER ACTION REVIEW

Monitoring and evaluation:

Similar to most knowledge management activities, it is difficult to measure the actual use and impact of the captured knowledge. However, a relatively easy way to monitor the TALs is through SharePoint usage statistics. The number of Pathfinder staff who accessed the TALs increased from 126 unique users in the first year (June 2012 to June 2013) to 226 in the second year (June 2013 to June 2014)—an increase of 44%. Approximately 25% of Pathfinder's 1,000 staff members have accessed the TALs.

> ### Technical assistance library use in the field
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> On a recent user survey, 96% of respondents stated they were able to find what they were looking for when using the technical assistance libraries (TALs). A Pathfinder staff member from Tanzania replied that the TALs were full of useful information and were a great way of "getting technical support to field staff."

SharePoint's usage tracking statistics show that there were 4,942 page views in the first year, which more than doubled in the second year to 11,546 page views. From June to December 2014, there were 6,316 page views, suggesting that usage is continuing to increase and may exceed 12,000 page views in the third year.

What worked well?

1. **Creating an enabling environment.**
   One of the biggest contributing factors to the success of the TALs was the high level of commitment by both management and the technical advisors. Management support enabled the technical advisors to prioritize their work on

the TALs. Technical advisors believed strongly in the TALs and regularly referred their colleagues to them and trained staff on them during technical assistance trips.

2. **Capitalizing on recent improvements to the intranet to launch the TALs.**
   Pathfinder created the TALs within the organizational intranet, which was going through a series of improvements that enabled easy navigation and quick page loads. Other improvements included awareness raising and internal communication efforts around the intranet, which led to an increase in traffic to the TALs as one of the more robust sources of information on the intranet.

3. **Designing the TALs specifically for SharePoint.**
   Pathfinder specifically developed the TALs to fit a SharePoint platform. This approach was more efficient than trying to manipulate or re-create an existing system to fit SharePoint. Using one SharePoint library, they tagged the resources with metadata based on the organizational taxonomy, and created individual views based on those terms, enabling users to access resources across TALs with multiple pieces of guidance.

4. **Supporting technical advisors to understand knowledge management and promote the TALs.**
   During the development process of TALs, technical advisors learned about knowledge management activities such as using the intranet, the reason for tagging, and the importance of sharing and capturing knowledge. The knowledge management advisor ensured that the technical advisors received support, such as TAL marketing materials (emails, handouts, and how-to guides) and training sessions that provided guidance on how to use the TALs, how to speak about them, and how to access the intranet. This support enabled the technical advisors to showcase the TALs during their technical assistance trips and with their colleagues.

5. **Simplifying the maintenance process.**
   The TALs require little maintenance. Because they are collections of resources that technical advisors have already vetted and selected, the TALs do not require maintenance unless a technical advisor finds and uses a new resource. It is then relatively easy to edit or add resources during the course of a technical advisor's work. When technical advisors find a new resource on a particular topic, they vet it, compare it to what exists in the TAL, and replace the older material if needed. This level of maintenance makes the TALs efficient for

both the knowledge management advisor and the technical advisors, which enables them to focus on other projects while still providing a valuable and important resource to Pathfinder.

Challenges:

1. Competing priorities.
Initial buy-in and support for the TALs faced the challenge of competing priorities. All organizations struggle with prioritization and in the face of competing demands, it is difficult to prioritize capturing tacit knowledge and take time from the other work of technical advisors.

2. Access.
Pathfinder's country offices had difficulty accessing the TALs due to slow Internet bandwidth. In some field offices, each page or document took three to five minutes to load. This made internal communication efforts about the TALs challenging because staff couldn't access them efficiently.

3. Learning curve.
Before the launch of the TALs, many technical advisors had not used the intranet. Because the intranet was new, training technical advisors to add their own resources required far more than anticipated—it required a comprehensive overview of working with SharePoint. This additional training meant that it took longer than expected for most technical advisors to become comfortable with the system.

4. User experience.
Because Pathfinder created the TALs before any other knowledge management system on the intranet, it developed separately from other repositories of technical information on the intranet. For example, the TALs were built as one repository, then the institutional archive was built as another repository, and the general library collection was built as another repository, not to mention the separate repositories for project and country documents. Although having multiple repositories for separate types of information is important, especially to meet the technological requirements

of SharePoint, there is confusion among users about what the repositories are for, what they contain, and where to find the information they need.

RECOMMENDATIONS

1) Obtain buy-in.
Explain the value of the effort to both the organization at large and to the management and staff you are working with. Showcase the value by explaining that the TALs will provide technical assistance at a distance and reduce the burden on technical advisors in sharing materials. Highlight to managers and staff that investing time in the effort now will pay off later.

2) Ensure the platform is easy to use and maintain.
Ensure that the platform suits the project, is easy to maintain, the organization supports it, and technical advisors know how to maintain their own resource collections. Ensure also that the backend of the platform is easy to modify to allow for additions to the library.

3) Support technical advisors to use and promote the TALs.
Create a how-to guide for technical advisors to use the TALs and marketing materials so they can promote them. Train technical advisors based on a training of trainer's approach on how to use, speak about, and train other staff on using the TALs.

4) Streamline the user experience.
Exploit other organizational activities that improve the user experience of using your repository. Ensure that separate knowledge management systems and repositories work together seamlessly for the user. Communicate clearly what the disparate systems are for, how to use them, and how to find them. Create a search mechanism so users can search across repositories to find what they need. Work with the group responsible for the intranet to ensure page load times are reasonable and that the navigation is user-friendly.

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