## Exercise: What is in a Knowledge Management Strategy? An Example

**Objectives**

1. To read high-level summaries of knowledge management strategies developed by other global health and development agencies
2. To understand the key elements contained within a KM strategy
3. To critically discuss elements of a knowledge management strategy that might be useful for their health program

**Overview**

The purpose of this activity is to provide participants with a real-life example of a knowledge management (KM) strategy so that they can begin thinking about this relates to their context. Participants will review and briefly reflect and discuss aspects of the strategy that might apply to their health project. This will help participants to begin choosing which elements of a KM strategy they might find useful to include in their own KM strategy.

**Time**

Total: 40 minutes

**Advance Preparation**

* Print copies of the KM strategy summary
* Flip chart with discussion questions (provided below)

**Implementing the Activity**

1. The Facilitator will need **5 minutes** before the activity to explain the purpose of the activity and how the activity will work
2. The Facilitator will hand out KM strategy summary to participants to read and reflect on the discussion questions for **20 minutes** (with a larger group of over eight participants, divide them into small groups and have them read and discuss together)
3. Participants report out

**Activity Steps**

Instruct participants to consider these questions as they read the case examples:

* What did you like about the strategy?
* What would be useful to your health program?
* What did you not find useful or relevant to your health program?
* What was difficult to understand? Where did you have the most questions?

Ask participants to report out.

**Case Examples**

While large ([WHO](http://apps.who.int/iris/handle/10665/69119) and [UNDP](http://www.undp.org/content/undp/en/home/librarypage/capacity-building/knowledge/undp_s-knowledge-management-strategy.html)) and medium sized organizations (ECDPM, UCLG) and have KM strategies, there are relatively few publicly available strategies developed for the project level. A nutrition project called [SHOUHARDO II](http://www.carebangladesh.org/publication/Publication_4478768.pdf) led by CARE Bangladesh is an exception. Key parts of the KM strategy are detailed below according to the components of a KM Strategy.

*Note to Trainer:* An alternative to examining the SHOUHARDO II KM is [the Systems for Improved Access to Pharmaceuticals and Services (SIAPS) KM Plan](http://pdf.usaid.gov/pdf_docs/PA00K7QX.pdf) which reads like a KM Strategy.

**SHOUHARDO II Program Knowledge Management Strategy**

[***Nutrition Project led by CARE Bangladesh***](http://www.carebangladesh.org/publication/Publication_4478768.pdf)

To enhance the work of the SHOUHARDO II program, the staff identified a need to set up a formal framework to guide the effective capturing of knowledge, sharing of insights and utilization of key learning. The team proposed a cyclical system in which knowledge was first generated, synthesized and then captured. The collected knowledge would then be shared within the program and used to adapt or modify the implementation approach.

This formal framework, called the SHOUHARDO II Knowledge Management Strategy incorporates existing KM approaches and looks to find ways to collect and share tangible knowledge as well as create opportunities for tacit knowledge to be tapped.

The development of this strategy has drawn on global KM strategies developed by CARE and USAID. The strategy is also guided by the comprehensive findings within SHOUHARDO II’s mid-term review, which advocated for the development of an internal KM strategy that was aligned with the SHOUHARDO II implementation model.

| **KM Strategy Component** | **Component in the SHOUHARDO II KM Strategy** |
| --- | --- |
| Alignment with the overall mission of the activity, project, or organization | The SHOUHARDO II staffs have developed a comprehensive KM strategy that aligns with the SHOUHARDO II implementation model and works to both collect explicit knowledge and leverage the rich tacit knowledge within the staff, volunteers and community members. The SHOUHARDO II program staff and partners believe in taking a systematic approach to KM and leveraging the knowledge generated to help the program effectively achieve its overall goal of “Transforming the lives of 370,000 Poor and Extreme Poor (PEP) households (HH) in 11 of the poorest and marginalized districts in Bangladesh by reducing their vulnerability to food insecurity”. |
| Supporting stakeholders | Government ministries under a coordination mechanism called the Program Advisory Coordination Committee (PACC). CARE Bangladesh staff across all levels, including managers. Beneficiaries at the field level. |
| Audience(s) | 1. The most socially, economically and politically marginalized women 2. Extremely poor people in rural areas 3. The people and communities prone to disasters and environmental change |
| Supporting theory(ies) | Without knowledge, we are not able to produce evidence of impact. Greater focus and having a concrete KM strategy will foster individual and professional growth among the SHOUHARDO II staff including its key partners. Having a KM focus within the program assists program staff to remain accountable to the communities the program serves. |
| KM definition | Globally there are a number of definitions of KM covering the acquisition and sharing of knowledge and key lessons. Within CARE the following three definitions guide the work of the SHOUHARDO II Knowledge Management Unit. These definitions highlight the importance of creating synergies between data and information to help drive innovation and empower communities to make changes. The three guiding definitions are:   1. "KM refers to the critical issues of organizational adaptation, survival and competence against discontinuous environmental change. Essentially it embodies organizational processes that seek synergistic combination of data and information technologies, and the creative and innovative capacity of human beings.” - Yogesh Malhotra 2. "Knowledge is information that changes something or somebody - either by becoming grounds for actions, or by making an individual (or an institution) capable of different or more effective actions." - Peter Drucker 3. “Processes of empowerment which are associated with rights-based approaches and which seek to promote social justice for vulnerable and marginalized groups (the poor, women, the disabled). Knowledge and learning are important elements of empowerment in that they provide the basis for strategic decision-making and life choices by individuals. Given that empowerment is recognized as “the driving force of people-centered development.” - Andrew Bartlett |
| SMART objectives | 1. Build a sound, robust and secure evidence base of information (Our information) 2. Develop and preserve SHOUHARDO II program experience and expertise (Our knowledge) 3. Help people (staff and communities) to apply information and knowledge in their daily work (Our tools) 4. Build an environment where taking time to network, share, reflect and learn is encouraged and valued with strong leadership from all levels (Our culture) |
| Implementation process and staff roles | Learning occurs at different levels within the system. Systematic learning successfully occurs when each individual takes responsibility to promote a learning environment. The SHOUHARDO II management believes learning is not solely confined to the KM team but rather is an integral job function of each staff person irrespective of position. As such, the management works to build connections between all team members to ensure the smooth flow of information to and from the field level staff. The KM team supports this exchange by leading the roll out of the KM system and monitoring the level and type of information being generated. When necessary they provide support to other program staff to enhance both the data collected and improve the analysis being undertaken. |
| Budget, timeframe, and human resources | Small Senior Management Team (SSMT): This small team includes regional level managers and program decision makers (SMT: Senior Management Team) and is tasked with providing feedback on strategic issues and the sharing of best practices from a programmatic point of view. During the regular one-day meetings held at the country office, senior managers share issues of concern and identify solutions to address key problems with senior decision makers.  Large Senior Management Team (LSMT): Every quarter, a large SMT meeting, composed of both field and headquarter staff is held at the regional level and includes joint field visits. The field visits and subsequent reflection sessions provide an opportunity to observe existing interventions at village (program) level and discuss techniques for improving interventions at site and at program level. This expanded LSMT is seen as important in providing a management forum for key field staff to raise concerns and share ideas, and ensure senior managers remain connected with their regional operations. |
| KM approaches | Knowledge Capturing and Organizing   * Shared Network Drive * Website * Community Action Plan * Landscape Analysis * Case Studies/Human Interest Stories * Impact Studies * Program Evaluation * Gender Analysis   Knowledge Sharing   * Technical Training * Cross Visits/Peer Learning * Newsletter * Learning and Sharing Platforms * Email Groups and Guidelines   Knowledge Generation and Synthesis   * How to Guides * Village Grading * M&E System |
| Supporting ICTs | Shared Network Drive: The CARE Bangladesh and SHOUHARDO II program and management staffs have access to the existing I-drive (shared network drive), which stores and categorizes existing program information. The system allows staff members to retrieve existing knowledge and share updated information across the program and organization.  Website: SHOUHARDO II maintains an external website (www.carebangladesh.org/shouhardoII/), which stores and disseminates information.  The SHOUHARDO II M&E system: To monitor progress and track outputs and impact, both quantitative data and qualitative information are collected on the Indicator Performance Tracking Table indicators, Operational Plan (OP), and Standardized Annual Performance Questionnaire (SAPQ) - monthly, quarterly and annually (depending on the type of indicator), from a statistically significant sample in each region. |
| Ensuring Sustainability | N/A |

## Worksheet

Use the worksheet below to guide you through the initial process of developing a KM strategy.

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| **Component** | **Notes from Example KM Strategies** | **Ideas for Your KM Strategy** | **Areas for review (via documents or colleagues)** |
| Alignment with the overall mission of the activity, project, or organization |  |  |  |
| Supporting stakeholders |  |  |  |
| Audience(s) |  |  |  |
| Supporting theory (ies) |  |  |  |
| KM definition |  |  |  |
| SMART objectives |  |  |  |
| Implementation process and staff roles |  |  |  |
| Budget, timeframe, and human resources |  |  |  |
| KM approaches |  |  |  |
| Supporting ICTs |  |  |  |
| Ensuring Sustainability |  |  |  |