
Knowledge Management for Health and Development Toolkit

Please note: This Toolkit is being revised by a working group from the Global Health Knowledge Collaborative. Changes are underway. If you have questions or are trying to locate something that used to be here, please contact us: toolkits@k4health.org.

What is Knowledge Management (KM)?

Knowledge management (KM) is an umbrella term encompassing the many unique but related facets of creating, organizing, sharing, and using information and experiences. While there is no universally accepted definition of KM, most available definitions have common elements. KM is often described as a “process” rather than one activity or event, and many definitions discuss KM as the practice of delivering the right content to the right people at the right time. Other definitions discuss the specific activities included within KM. For example, one definition of knowledge management is “... the systematic process by which knowledge needed for an organization to succeed is created, captured, shared and leveraged” (Clemmons Rumizen, 2002, p.9).

KM is used within a variety of disciplines and fields, including business, information systems, and library and information science. In recent years, public health and development organizations have been discussing the importance of undertaking KM activities. While raw data are important, it is often more important to focus on “information products that support directly the transfer of useful knowledge to those making decisions” (Goddard et al., 2004, p.112). In other words, if we want our efforts to be effective, we need to share knowledge about what works, why it works, and how others can replicate it.

This toolkit was created to provide practical KM resources and tools for those working in international public health and development; materials come from health and development organizations *or* are applicable to the field and can be easily adapted. This toolkit is updated regularly, and includes a series of case studies highlighting KM activities within health and development projects. For more information on the group that developed this toolkit, visit the [About page](#) and the section on [The Global Health Knowledge Collaborative](#).

Are You??

Click on these links to find information on your topic

Looking for a primer on KM?

- Examine the basics of KM
- See a list of common KM terminology
- Look over a list of toolkit references

Developing a KM strategy?

- View strategic guidance on developing a KM strategy

Interested in knowledge sharing strategies?

- Find examples of knowledge sharing activities that support KM

Interested in how to find knowledge and the best ways to organize it?

- Find information on knowledge capture and organization

Interested in tools to create new insights and knowledge?

- Examine examples of knowledge generation and synthesis tools

Interested in tools for adapting knowledge to inform and improve policy and program decision-making?

- Take a look at knowledge adaptation resources

Evaluating your KM activities or program?

- Find tools to help you to monitor and evaluate your KM program

What are the K4Health Toolkits?

What is the purpose of this toolkit?

Who developed this toolkit?

Who are the publishers of the resources?

What types of resources are included?

Who are the intended audiences?

How do I get started using this toolkit?

How can I suggest a resource to include in this toolkit?

How can I make a comment or give feedback?

What are K4Health Toolkits?

K4Health Toolkits are electronic collections of carefully selected information resources on a particular topic for health policy makers, program managers, and service providers. They are based on a continuous publishing principle that allows them to evolve after publication to capture additional resources and to identify and fill remaining information gaps.

What is the purpose of this toolkit?

The purpose of this toolkit is to assist those working in international health and development who are interested in learning more about knowledge management (KM) and accessing tools and best practices for conducting KM. The toolkit is structured to answer some basic questions, such as: What is KM? Why is it important? How do you do KM? How do you measure it? And, where do you go for more resources?

This toolkit provides practical resources for KM solutions that either come from the field of international public health and development or are applicable to the field and can be adapted. We update the toolkit with new tools as they become available. Stay tuned!

Who developed this toolkit?

This toolkit is was created by members of the Global Health Knowledge Collaborative. Logos of a number of active members are provided in the footer of this toolkit. These organizations hold a

commitment to promoting evidence-based practices in reproductive health through a variety of KM activities.

Organizations and projects who helped developed this toolkit include:

C-Change (Communication for Change)

ChildFund International

Core Group

Elizabeth Glaser Pediatric AIDS Foundation

FHI 360

IBP: Implementing Best Practices in Reproductive Health

Institute for Reproductive Health, Georgetown University

IntraHealth International

Ipas

Jhpiego

John Snow, Inc.

Knowledge for Health Project, Johns Hopkins Center for Communication Programs (CCP)

Social & Scientific Systems, Inc.

University Research Co., LLC (URC)

U.S. Agency for International Development (USAID)

Health Policy Project

World Health Organization/Human Reproduction Programme (HRP)

Who are the publishers of the resources?

The KM Toolkit Working Group casts a wide net for resources to include in this toolkit to ensure that it was of the highest quality and most relevant for policy makers, program managers, and service providers worldwide. Although we made a concerted effort to include resources specifically from the health sector, a number of the publications and resources come from other sectors as well. They were chosen for inclusion based on the fact that they are relevant and adaptable to international health and development. A wide variety of publishers are included.

What types of resources are included?

This toolkit was created to provide guidance and tools to design, implement, and monitor and evaluate KM activities in the field of international public health. It contains:

- Videos, websites, and fact sheets that provide an overview of KM
- Tools and resources to help implement and measure a variety of KM-related activities
- A compilation of the most up-to-date KM networking listservs, communities of practice, events, and websites

Who are the intended audiences?

The toolkit is intended for use by program managers who work in the fields of communications, training, and KM and those working in international health and development who are looking to start KM activities.

We invite you to suggest resources or adapt the resources in this toolkit to suit your local circumstances and languages.

How do I get started using this toolkit?

This toolkit provides information on all aspects of KM, providing an overview and practical guidance and tools on getting started in designing a KM initiative, the variety of KM approaches and tools available, and finally how to monitor and evaluate a KM initiative.

To browse the contents of this toolkit, use the tabs above to view resources related to each topic. Each tab includes a list of a number of high-quality resources selected by the Knowledge Management Toolkit Working Group, further organized by sub-topic. Click on the title of the resource for more information about it, or click on the full-text link to get direct access to the full resource.

We encourage you to alter and customize tools for your own use (please remember to credit the source). If you do use a tool or adapt it, we would love to hear from you. To make a comment about the toolkit or suggest a resource, use the feedback form.

How can I suggest a resource to include in this toolkit?

We invite you to contribute to evolving and enhancing this toolkit. If you have developed or use quality resources that you think should be included in the toolkit, please use the feedback form to suggest them. The toolkit collaborators will review and consider your suggestions.

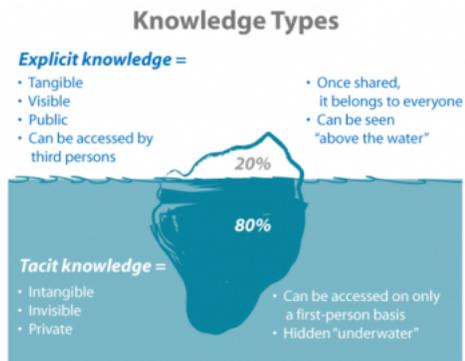
How can I make a comment or give feedback?

If you have comments about the toolkit, please use the feedback form. Your feedback will help to ensure the toolkit remains up-to-date and is continually improved. For example, you can share ideas about how you have used the toolkit in your work so that others can learn from and adapt your experiences.

Related eLearning Courses:

Knowledge Management (KM) in Global Health Programs

About KM



Within global health and development, knowledge management

(KM) is about utilizing and leveraging what is already known to work to achieve the greatest impact and improve outcomes in organizations and projects (see tab on Measuring KM for more on outcomes).

KM involves transforming intangible, tacit knowledge (i.e., information in people's heads) into explicit knowledge (i.e., knowledge in a format that can be stored and shared with others). This graphic depicts the relationship between tacit knowledge and explicit knowledge--while explicit knowledge is more easily visible, most knowledge is tacit knowledge. KM activities often involve capturing and organizing both explicit and tacit knowledge that organizations and programs generate, so as to be applied to maximize an organization's effectiveness and efficiency or to improve an aspect of a health system.

The three main components of KM are: 1) people/culture, 2) process, and 3) technology. Many people focus on technology solutions when they think of KM. However, KM could not exist without the people and processes for which technology serves as an enabling mechanism.

The Knowledge for Health Project created a short video, "Knowledge Management: Strengthening Health Services, Saving Lives," to introduce the concept of KM and its importance for global health and development.

To further introduce you to KM basics, this section includes a compilation of resources that provide:

- A snapshot about KM concepts, both across industries and specific to global health and development;
- An in-depth overview of KM, with additional resources specific for global health and development professionals as well as insights into the history of how KM emerged as a discipline and where we are today; and
- Glossaries of KM terms.

Snapshot

For a high-level introduction to knowledge management (KM) and KM concepts across industries, refer to the 2012 article *What is KM? Knowledge Management Explained*. The eClerxServices YouTube channel also contains a repository of about 50 short videos that explain key concepts and strategies in KM (posted between 2009 and 2014). The KM4Dev wiki, the USAID Global Health eLearning (GHeL) course on KM in Global Health Programs, and TechChange's TC112: Practicum in Knowledge Management provide more specific introductions to KM for global health and development professionals.

Resources:

- **Knowledge Management (KM) in Global Health Programs**

The Knowledge for Health (K4Health) Project published the Knowledge Management (KM) in Global Health Programs course on the USAID Global Health eLearning (GHeL) Center. This course provides a basic understanding of what KM is and why it is important to the field of global health. Learners will become familiar with KM practices and techniques to overcome the challenge of getting essential, evidence-based knowledge into programs and practice and facilitating exchange of expertise and experience among health practitioners, programmers and policy makers to improve service quality, program effectiveness, and health outcomes. By the end of the course, learners will be able to:

- Identify the key elements of KM
- List common KM processes
- Describe how KM can address some of today's global health challenges
- Identify the key steps in implementing a KM initiative
- Name at least three KM interventions and techniques
- Recall at least three examples of indicators that can be used to assess KM interventions

To take the course, you will need to register and/or login to GHeL. It's fast, easy, and free and requires only a valid e-mail address.

- **What is KM? Knowledge Management Explained**

This article, published by Michael E. D. Koenig on KM World, provides a basic explanation of KM. It includes definitions related to KM--including communities of practice and explicit/implicit/tacit knowledge--and provides information about the stages of development of

KM.

- **What is KM?**

This wiki is both a working area for the Knowledge Management for Development (KM4Dev) community and a way for them to make their joint work accessible to a wider audience. KM4Dev is a community of international development practitioners interested in knowledge management and knowledge sharing issues and approaches.

In-depth overview

For the professional who wants a deeper introduction to the field of knowledge management and its history, models, and concepts, this section includes a repository of resources that provide more explanation, visuals, and examples to provide that foundation. Three resources listed are specific to applying KM in health programs: 1) Knowledge Management for Public Health Professionals (2005), 2) Managing Knowledge to Improve Reproductive Health Programs (2004), and 3) Leveraging the Power of Knowledge Management to Transform Global Health and Development (2015).

Resources:

- **Knowledge Management Lecture Series**

These talks were presented in March/April 2010 by Dr. Jay Liebowitz, the Orkand Chair in Management and Technology at UMUC. Each presentation is about 30 minutes in length, and contains audio of the presentation, along with slides. The talks deal with three important topics relating to knowledge management: 1) knowledge retention; 2) knowledge management and strategy; and 3) social networking/social network analysis.

- **Notions of Knowledge Management**

This is a brief outline of the basic components of knowledge management (KM). This resource includes many models and charts for KM. On page 2 there is discussion of the model of learning and a diagram describing this idea as well as a chart outlining specific knowledge agents. Page 7 has an intricate Knowledge Management Cycle that includes the balanced knowledge management cycle (page 6).

- **Principles of Knowledge Management**

This is the first chapter of Nick Milton's book, "Knowledge Management for Teams and Projects." This chapter starts by defining knowledge and discussing the difference between tacit and explicit knowledge. The chapter then describes knowledge management, including some simple KM models, the business case for KM, various approaches to KM, and cultural issues.

- **Managing Knowledge to Improve Reproductive Health Programs (MAQ Paper No. 5)**

This brief introduces key concepts and considers how KM tools and approaches can help reproductive health organizations meet the following challenges: 1) sharing knowledge within and between organizations and programs; 2) learning from experience; and 3) coping with too much or too little information. It provides a KM framework as well as tools for addressing common KM problems.

Definitions

Resources:

- **Glossary of Knowledge Management**

Compiled by the Asian Development Bank, this glossary is a list of common KM words defined in simple terms.

History

Resources:

- **The Roots of an Emerging Discipline**

This brief explains the evolution of knowledge management as a discipline in today's knowledge-based economy.

KM Models

Since knowledge management (KM) may mean different things to different people, presenting abstract ideas in a more concrete form can often help organizations and individuals come to a common understanding of what KM means in their specific context.

This section includes a number of conceptual frameworks, which can be useful tools for the design, implementation, and monitoring and evaluation of KM activities. Since no one model is perfect for all organizations, a variety of conceptual frameworks are provided—both designed for health and other sectors. The one pictured below is the Knowledge Management for Global Health Logic Model, developed by the Global Health Knowledge Collaborative Monitoring and Evaluation Task Team in 2013. The model showcases how KM program inputs, processes, and outputs work together to achieve intended health outcomes (Sullivan, 2015).

If you or your organization uses a conceptual model or framework that is not listed here, please share it with us. If you do not currently use one, you can use and/or adapt the models in this section to fit your organizational needs.

KM Models for Health

Resources:

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The Intersection of Knowledge Management and Health Systems Strengthening: Implications from the Malawi Knowledge for Health Demonstration Project

People working within a health system—whether they are health care providers, program managers, policy makers, or others—rely on specific knowledge to inform their decision making, improve the quality of services, and reduce duplication of effort across programs and activities. Knowledge management—connecting the right people to the right data, information, and knowledge at the right time—is increasingly being considered as an effective approach to help strengthen health systems.

The Malawi Knowledge for Health (K4Health) Demonstration Project (2010-2011) was a knowledge management intervention designed to improve the quality of health service delivery in family planning, reproductive health, and HIV/AIDS. At the end of the project's implementation period, an evaluation identified some unanticipated benefits from the project that went beyond the three target health areas to improve the overall health system.

This technical brief explores the value of integrating knowledge management (KM) into health systems strengthening (HSS) efforts, through the lens of the Malawi K4Health Demonstration Project. It is written for health program designers and implementers to build their awareness of the value of KM and to provide a model of how KM approaches can support HSS efforts.

- ## **Knowledge Management System: Research into Practice**

K4Health has developed a framework that illustrates the project's approach to KM, with a focus on putting research findings into practice. The elements of our KM cycle facilitate collaboration and learning, inform policy and advocacy, enhance programs, practice and research, and enhance health training and education programs—all of which contribute to improved family planning and reproductive health (FP/RH) outcomes.

- ## **K4Health's Detailed Logic Model for Monitoring and Evaluating Information Products and Services**

This detailed logic model can be found in: Sullivan, T.M., Strachan, M., and Timmons, B.K. Guide to Monitoring and Evaluating Health Information Products and Services. Baltimore, Maryland: Center for Communication Programs, Johns Hopkins Bloomberg School of Public

Health; Washington, D.C.: Constella Futures; Cambridge, Massachusetts: Management Sciences for Health, 2007.

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- **The knowledge-value chain: a conceptual framework for knowledge translation in health**

This article briefly discusses knowledge translation and lists the problems associated with it. Then it uses knowledge management literature to develop and propose a knowledge-value chain framework in order to provide an integrated conceptual model of knowledge management and application in public health organizations. The knowledge-value chain is a non-linear concept and is based on the management of five dyadic capabilities: mapping and acquisition, creation and destruction, integration and sharing/transfer, replication and protection, and performance and innovation.

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- **Toward a Conceptual Knowledge Management Framework in Health**

This paper describes a conceptual organizing scheme for managing knowledge within the

health setting. First, a brief review of the notions of knowledge and knowledge management is provided. This is followed by a detailed depiction of our proposed knowledge management framework, which focuses on the concepts of production, use, and refinement of three specific knowledge sources?policy, evidence, and experience. These concepts are operationalized through a set of knowledge management methods and tools tailored for the health setting. The author includes two case studies around knowledge translation on parent-child relations and virtual networks in community health research to illustrate how this knowledge management framework can be operationalized within specific contexts and the issues involved. The author concludes with the lessons learned and implications.

- **Knowledge Management Cycle**

This is the knowledge management (KM) cycle that Management Sciences for Health (MSH) uses in their work.

- **Knowledge Management**

How MEASURE Evaluation manages knowledge and increases its availability can be understood by laying the basic elements of the knowledge management cycle into the Data Demand and Information Use (DDIU) continuum.

KM Models for Other Sectors

Resources:

- **Knowledge Management - Managing Tacit and Explicit Knowledge**

YouTube video that depicts the SECI model by Nonaka and Takeuchi, which is a model of the dynamic knowledge creating process.

- **Levels of Knowledge Management Maturity**

APQC's Levels of Knowledge Management Maturity provide a road map for moving from

immature, inconsistent knowledge management activities to mature, disciplined approaches aligned to strategic business imperatives. In this article, the authors outline the different levels of maturity, offering organizations a road map with milestones and checkpoints to guide their KM efforts.

- **Knowledge Translation: Introduction to Models, Strategies, and Measures - Framework in Evaluating Knowledge Use**

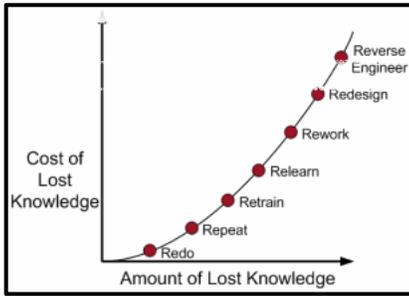
Knowledge use is not a single discrete event occurring at one point in time. Rather, it is a process consisting of several events (Rich, 1991). Therefore, evaluating the use of knowledge can be complex and requires a multidimensional and systematic approach. Having a framework to guide the process when designing activities to evaluate the use of knowledge can be helpful.

An example of a comprehensive framework that can be used to guide the evaluation of knowledge use is that developed by Conner (1980). Conner proposed a conceptual model for research utilization evaluation, with the emphasis on four general aspects that are important for the evaluator to consider: (1) goals, (2) inputs, (3) processes, and (4) outcomes.

- **Knowledge Management: Everyone Benefits by Sharing Information**

FHWA's knowledge cycle examines the four basic elements of the knowledge management: find/create, organize, share, and use/reuse. Under "find/create," especially as it operates in a transportation organization, knowledge is gained through a variety of means, including publications, conferences and meetings, project experiences, research, and industry expertise. In the next step in the cycle, "organize," the knowledge is filtered and catalogued, and links to the outside are created. Then the information is shared for wide availability, making use of high-tech computer tools such as the Internet and other techniques such as conferences, journal articles, and the natural communication channels created in a collaborative work environment.

Making the Case for KM



We live in a knowledge-driven economy and society (Yelden, 2004). Knowledge and the management of it has a significant impact on an organization's processes and outcomes.

Research indicates that the average company loses over 12% of its productivity annually from recreating explicit knowledge and data that it already possessed but could not find. Searching for the information alone accounts for a third of that time. And when people leave a project or position, knowledge loss approaches 90% (episTree, 2010). As shown in the figure to the right, this knowledge loss carries many negative consequences, much of which has to do with redoing what had already been completed in the past. For all of these reasons, knowledge management (KM) has become an important focus for organizations and programs that want to be successful.

Despite its importance, KM practitioners are often asked to justify investments in KM programs and initiatives. Therefore, it is important to secure buy-in from management early on and to collect data to support the need for KM activities. These data may come from a knowledge assessment or from monitoring and evaluating a pilot project. Linking your justification to existing internal KM activities can also strengthen management buy-in.

Elevator Speech

This elevator speech was developed by the Knowledge Management Working Group (now the Global Health Knowledge Collaborative (GHKC)) to provide an effective and adaptable argument and pitch for the development and implementation of a knowledge management (KM) strategy for a project or organization in global health and development. Target audiences for the speech could include organizational CEOs and CFOs, senior management, project managers, donors, and even, in some cases, co-workers. The matrix of the elevator speech provides quick and easy access to the key components of the speech. The matrix is organized by audience and focus area with key points and statistics to support each focus area. The "How Good is Your Elevator Speech?" guide is designed specifically for USAID-funded programs.

Resources:

- **Business Case for Justifying KM to the CEO - Thirty-**

Second Elevator Speech

This elevator speech includes a series of points and arguments that could be included in a short informal discussion about the importance and value of knowledge management (KM). Identify which arguments will resonate the most with your audience and use them to generate interest in what KM has to offer. The points include:

1. Organizations don't realize what a big impact KM can have.
2. Most organizations are already implementing some KM, but they may not realize it.
3. Key areas where KM can add value include increasing efficiency and effectiveness, and encouraging innovation and empowerment.
4. Because most important organizational knowledge is experiential and tacit, organizations need to find creative ways to support sharing tacit knowledge.

- ## Matrix for 30-second KM Elevator Speech

Use this matrix for the KM elevator speech to quickly reference key components from the speech that can help you persuade a range of different audiences that KM is worth the investment. The matrix presents arguments by audience. Audiences include CEOs, CFOs, president, board member, project director and COTR (acronym for a USAID project manager).

- ## How Good Is Your Elevator Speech?

This guide was developed by the Public Health Institute (PHI) to help users make their conversations about their work in informal situations (the elevator speech) more compelling. It focuses on both preparation and practice. Preparation to know what to say, but also practice to help improve what you are saying so that it comes across and useful, concise and intelligent. It includes a useful checklist to help develop the content of an elevator speech as well as another checklist to use in critiquing an elevator speech.

Resources for Making the Business Case for KM

Resources:

- ### Aligning Knowledge Management Drivers With Business

Strategy Implications

This paper attempts to answer the following question: What are the drivers of knowledge management needs at organizations today and how are they related to business strategies?

- ## Discover What You Know

This is a two-minute YouTube video that provides a good argument on making the case for knowledge management. It might be helpful to show at the beginning of a "making the case" presentation. Key points include:

1. Information becomes knowledge as part of the act of sharing it and is more valuable when it is shared.
2. Knowledge is experience and sharing what works and what doesn't.
3. Using and reusing knowledge can create a ripple, or bigger impact.
4. Organizations need to create spaces where people can share, work, learn, brainstorm, collaborate...and create context for information.
5. KM can help put the minds of many to work for you, create value, learn from experience.

- ## The Business Case for Knowledge Management

This journal article presents guidelines to help knowledge champions justify a knowledge management program. The authors argue that to make a convincing justification, it is necessary to clearly identify all the options available and the risks associated with each choice. A KM strategy must be clearly aligned with an organization's business strategy and goals. Clearly delineating the expected benefits of each aspect of the initiative can strengthen the argument. The authors also discuss in detail why KM initiatives are important.

- ## Estimating Return on Investment (ROI) for Knowledge Management (KM) Initiatives: An Information Technology (IT) Perspective

If you are trying to come up with an estimate of the actual return on investment in KM, this paper may be helpful to you. It presents a methodology for estimating ROI from an IT

(information technology) perspective because investment in technology is often central to the justification, purchase, and implementation of a variety of KM tools. The authors propose a mix of traditional and non-traditional methods. The paper looks at a variety of valuation models that could be useful in estimating ROI of a KM initiative. These include the intellectual capital model, the Skandia Navigator, the Balanced Scorecard model, the Intangible Assets Monitor and the Knowledge-centric Organization model used by the US Navy.

• **Our take on ?how to talk about Knowledge Management?**

The way we talk about knowledge affects what we do about it. Many KM efforts get bogged down because people have a different understanding of KM. This paper aims to help you get past the point of debating what it is, so you can focus on what to do. We have been involved in KM for many years, and throughout the paper we provide ideas based on our experiences, mixed with references to the people and documents that have influenced our thinking.

Statistics for Making the Case

- The typical productivity cost of an employee leaving is 85% of their base salary due to their replacement's mistakes, lost knowledge and lost skills (Beazley et al, 2002). (Yelden, 2004)
- Related to this is the concept of knowledge half-life, from which it is found that knowledge reaches obsolescence, on average, in 500 days, but can be much quicker in some areas. This lost knowledge obviously has a cost. It has been estimated that \$115 billion sits idle in lost knowledge affiliated with production technologies. An astounding example of this is the loss of the original computer source code, written in the 1950's, that spawned the Y2K software crisis, has cost businesses worldwide an estimated \$1 trillion (Petch, 1998)." (Yelden, 2004)
- Most tacit knowledge is an invisible line item in corporate budgets. However, it is tacit knowledge that plays a key role in leveraging the overall quality of knowledge (Wah, 1999)
- Companies like IBM and Xerox Corporation transform databases and information into useable formats that are readily shared and accessed. These databases are also used to create new knowledge. To illustrate, IBM consultants who used knowledge sharing cut proposal-writing time from an average of 200 hours to 30 hours (http://www.uky.edu/~gmswan3/575/KM_roles.pdf)
- Research estimates indicate that hiring and training a replacement worker for a lost employee costs approximately 50% of the worker's annual salary (Johnson et al. 2000) - but the costs do not stop there. Each time an employee leaves the firm, we presume that productivity drops due to the learning curve involved in understanding the job and the organization.

Furthermore, the loss of intellectual capital adds to this cost, since firms not only lose the human capital and relational capital of the departing employee, but competitors are also potentially gaining these assets. (cite: Voluntary Turnover: Knowledge Management Friend or Foe Meaghan Stovel, Dr. Nick Bontis with link to <https://www.emeraldinsight.com/doi/full/10.1108/14691930210435633>)

Getting Started



If knowledge management (KM) is new to you, the first set of tabs in this toolkit will help you understand what KM is and provide guidelines on how to make the case for including KM in your program or organization.

Once you have a basic understanding of KM, you may then ask yourself: ?Where do I start?? This section provides you with some basic information and tools to answer that question. Here are the steps to follow:

First, you need to understand the knowledge gaps and the intended goal of the KM program. Any new initiative requires a culture shift, or in some cases, a complete change. KM is no different. Organizations and networks are challenged to create an environment where individual knowledge is valued, *and* to articulate the value of sharing that knowledge with the entire organization. Implementing a KM system takes time and effort.

Next, you can proceed by doing a knowledge audit, figuring out what kind of KM intervention(s) is needed, securing resources (financial, technical, and human), conducting pilot tests, measuring and evaluating the pilots, and sharing lessons learned along the way. In reviewing the results of the knowledge audit, it is important to reflect on your KM model and the pathways to your intended outcome(s).

Implementation involves more than simply handing off the project to information technology specialists or external software vendors who promise results. As mentioned on the About KM page, KM relies on people first, then process, and then technology. Implementing KM is a broad endeavor that cannot be accomplished with technology and equipment alone.

A KM effort also benefits from an in-house champion who is responsible for furthering the initiative and promoting its merits to management as well as to all staff. He or she works with the organization or network to provide resources, offer support, and encourage people to participate. See the making the case section for more on securing buy-in from management.

Resources:

- **K4Health Needs Assessments**

List of needs assessment undertaken by K4Health which provide insight into the design and implementation of health information programs at the global, regional, and local levels

- **Knowledge Management Tools**

This is a knowledge management site covering the theories, frameworks, models, tools, and supporting disciplines that are relevant to both the student and the practitioner. The goal of this site is to provide a comprehensive overview of knowledge management by examining its objectives, scope, strategy, best practices, knowledge management tools, and so on.

Where do I start?

Now that you have an introduction to knowledge management (KM) and have begun to articulate your business case for KM, it is important to consider your next steps. Below are resources to help you in getting started with your KM activities.

Resources:

- **The Knowledge Translation Toolkit: Bridging the Know?Do Gap: A Resource for Researchers**

The Knowledge Translation Toolkit provides a thorough overview of what knowledge translation (KT) is and how to use it most effectively to bridge the ?know?do? gap between research, policy, practice, and people. It presents the theories, tools, and strategies required to encourage and enable evidence-informed decision-making.

- **Levels of Knowledge Management Maturity**

APQC's Levels of Knowledge Management Maturity provide a road map for moving from immature, inconsistent knowledge management activities to mature, disciplined approaches aligned to strategic business imperatives. In this article, the authors outline the different levels of maturity, offering organizations a road map with milestones and checkpoints to guide their KM efforts.

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KM Assessments, Audits, and Benchmarking

An effective KM process starts with identifying needs for both tacit and explicit knowledge. To design and tailor KM efforts, it is important to establish a clear understanding of roles and action foci among key audiences at the individual (e.g., health care providers, program managers) and organizational (e.g., health agencies, NGOs) levels. Readiness of actors in capturing and applying knowledge needs to be assessed. It is also useful to conduct a knowledge audit or mapping exercise and environmental scan of existing information to understand gaps and unmet needs. Questions to assess knowledge needs include: What challenges do the clients seek to address? How can knowledge contribute to addressing these challenges? What and where can relevant and useful knowledge be found? What needs are already met and can these needs be met better?

Resources:

- **Where Are You Now? A Knowledge Management**

Program Self-Assessment

This short, 15-question assessment is designed to help you determine the current state of knowledge management (KM) at your organization.

- ## **Benchmarking Alignment Worksheet**

For benchmarking to truly benefit an organization, benchmarking projects must align with organizational strategy and be connected with actual work. APQC's Benchmarking Alignment Worksheet provides a simple format for you to link your benchmarking activities to work processes, strategic goals, and measures. This download includes both the template and instructions.

- ## **Auditing Knowledge**

Knowledge audits help organizations identify their knowledge-based assets and develop strategies to manage them. This brief provides the key questions that most knowledge audits should include and address.

- ## **Implementing Knowledge Strategies: Lessons from International Development Agencies**

This study synthesizes existing research on knowledge and learning in the development sector, and draws out eight key questions for examining related strategies and systems in development agencies. Together, these questions make up the comprehensive Knowledge Strategies Framework, which bears close resemblance to the framework used by the ODI to assess complex processes of change within the development and humanitarian sector. The dimensions of this new Knowledge Strategies Framework are mapped out as: organisational knowledge, organisational links, organisational contexts, and external factors. The section "Findings from Organisational Profiles" (pages 14-28) has a list of questions for your knowledge audit as well. There is also a section on "Measuring the costs and benefits" on pp. 24-25, which is relevant to those looking for monitoring and evaluation tools.

- ## **SDC Knowledge Management Tools**

This webpage - developed by the Swiss Agency for Development and Cooperation (SDC) - presents a variety of methods and tools to use in knowledge management activities. There are tools for planning and reflection of activities, as well as resources to help with sharing insights and applying knowledge. It features a selection of more than 20 methods and tools for knowledge sharing and learning, from basic to more advanced tools, applicable at personal, team and organizational level. The resources are available in English, German, French, and Spanish.

Developing a KM Strategy

KM focuses on systematically creating, gathering, organization, sharing, adapting, and using knowledge both from inside and outside the organization. KM gets the right knowledge to the right people at the right time so they can work more efficiently and effectively. A KM strategy outlines how KM processes take place, and helps organizations better implement KM activities.

Resources:

- **The Art of Knowledge Exchange: A Results-Focused Planning Guide For Development Practitioners**

The Art of Knowledge Exchange Guide takes the guesswork out of the process of designing and implementing knowledge exchange initiatives, which can be a big undertaking. This guide provides simple steps and tools to help one play a more effective role as a knowledge connector and learning facilitator. The guide will help you:

1. Identify & Assess capacity development needs
2. Design & Develop an appropriate knowledge exchange initiative that responds to those needs
3. Implement the knowledge exchange initiative
4. Measure & Report the results

- **Knowledge Management Lecture Series**

These talks were presented in March/April 2010 by Dr. Jay Liebowitz, the Orkand Chair in Management and Technology at UMUC. Each presentation is about 30 minutes in length,

and contains audio of the presentation, along with slides. The talks deal with three important topics relating to knowledge management: 1) knowledge retention; 2) knowledge management and strategy; and 3) social networking/social network analysis.

- **Global Knowledge Management Strategy: Empowering Local People and Rural Development through Telecenters DRAFT**

This is an example of a draft strategy plan laid out. It was developed by the United Nations Economic and Social Commission for Western Asia.

- **Implementing Knowledge Strategies: Lessons from International Development Agencies**

This study synthesizes existing research on knowledge and learning in the development sector, and draws out eight key questions for examining related strategies and systems in development agencies. Together, these questions make up the comprehensive Knowledge Strategies Framework, which bears close resemblance to the framework used by the ODI to assess complex processes of change within the development and humanitarian sector. The dimensions of this new Knowledge Strategies Framework are mapped out as: organisational knowledge, organisational links, organisational contexts, and external factors. The section "Findings from Organisational Profiles" (pages 14-28) has a list of questions for your knowledge audit as well. There is also a section on "Measuring the costs and benefits" on pp. 24-25, which is relevant to those looking for monitoring and evaluation tools.

- **Developing a KM Strategy**

The KM4Dev Wiki provides answers from its community on the following questions:

- How do you monitor the success of the strategy?
 - What are the elements of a KM strategy?
 - Where do you start and what is the process to develop a strategy?
 - Why would you develop a KM strategy?
-

Knowledge Translation Training and Tools

This resource shows a structured approach to developing a Knowledge Translation (KT) plan based on the evidence base in KT.

Involving Stakeholders and Gathering Support

In order for a KM initiative to succeed, the early support of key stakeholders is crucial. Below is a list of resources that can help you to garner stakeholder support and buy-in. For more information on creating a convincing argument, look at the elevator speech and making the business case for KM.

Resources:

- **The Knowledge Translation Toolkit: Bridging the Know?Do Gap: A Resource for Researchers**

The Knowledge Translation Toolkit provides a thorough overview of what knowledge translation (KT) is and how to use it most effectively to bridge the ?know?do? gap between research, policy, practice, and people. It presents the theories, tools, and strategies required to encourage and enable evidence-informed decision-making.

- **Multi-stakeholder management:Tools for Stakeholder Analysis: 10 Building Blocks for Designing Participatory Systems of Cooperation**

This resource presents 10 building blocks for stakeholder analysis.

The KM Team: Roles & Responsibilities

In establishing an effective KM team, it is important to understand the characteristics, roles, and responsibilities that are needed. Below are resources for assigning roles and responsibilities to your KM team.

Resources:

- **The Role of the Chief Knowledge Officer**

The Report of a National Review of NHS Health Library Services in England: From Knowledge to Health in the 21st Century recommends that every NHS organisation should have a Chief Knowledge Officer. The purpose of this role is to provide leadership and oversight to enable all NHS staff to access and apply the best available evidence in supporting every aspect of the clinical care of patients. This document has been created to help NHS organisations implement this recommendation, and establish this role and its responsibilities. This record includes a link to a role description for a CKO as well as a context document to explain why these roles are necessary (from record).

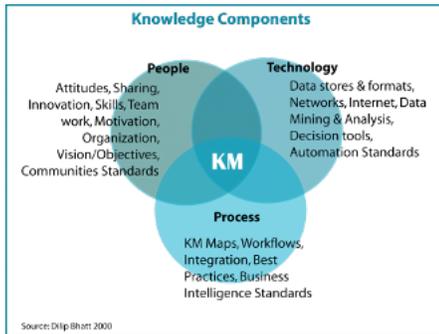
- **Knowledge Management and Knowledge Sharing Job Description**

A sample of a KM job description.

- **Selecting and setting up a KM Implementation Team**

Overview of the people, skills and resources needed on a KM implementation team.

KM in Practice



Knowledge management (KM) practitioners speak of the three

main components of KM: people/culture, process, and technology. While there is general agreement on this concept of KM components, there are varied thoughts on exactly how to put KM into practice in an organization, project, or group in order to reach measurable objectives. This section presents a variety of tools and ?how to? information to help operationalize KM, organized by four key KM processes: knowledge capture & organization, knowledge generation & synthesis, knowledge sharing & communication, and knowledge adaptation.

Resources:

- **Knowledge Management Special Issue: Connecting theory and practice**

This special issue of JEMI (the Journal of Entrepreneurship, Management and Innovation) was conceived to explore the relationship between KM theory and practice, and to provide insights to the KM research and practitioner community about how to advance this relationship. This issue was edited by Patrick Lambe.

Background

How do you operationalize knowledge?

Resources:

- **How Do You Operationalize Knowledge?**

Simply put, to operationalize something means to bring it down from a high-level logical concept into something you can actually work with and do something about. This tool provides background explanations about what it means to operationalize knowledge.

Cross-Cutting Approaches

Resources:

- **A Synthesis of Knowledge Management Failure Factors**

Knowledge management (KM) was once a very popular buzzword. However, failure of KM projects contributed to its drop in popularity. This paper aims to synthesise and organize the failure factors that have been discussed in KM literature since the discipline began to gain popularity in the late 90s.

The failure factors are organized into two broad categories: causal and resultant. Causal factors refer to the broad organizational and managerial issues that are required to implement KM successfully. Resultant factors on the other hand deal with specific problems and can be regarded more like the symptoms rather than the disease.

- **ABCs of Knowledge Management**

This document provides an overview of knowledge management, as well as tools and techniques for getting started with KM activities.

- **Knowledge Management Postcards**

This set of postcards highlight simple, easy to follow Knowledge Management (KM) tools and techniques that help individuals, teams or organizations manage knowledge. The different tools and techniques are portrayed on a set of color-coded postcards. The postcards are developed to mirror the Knowledge Management framework.

The postcard set includes the following components:

Facilitated Learning

- Before Action Review postcard
- Peer Assist postcard

- After Action Review postcard
- Retrospective Review postcard

Collaboration

- Collaboration postcard

Knowledge Assets

- Knowledge Assets postcard
- Knowledge Harvesting postcard

Knowledge capture & organization

Knowledge can be gained through a variety of means, including products and services (e.g., publications, websites, conferences and meetings, project experiences, research). KM facilitates the selection, organization, and storage of knowledge in systems and tools designed for specific purposes (e.g., searchable database on best practices, directory of evidence-based medicine). It is also possible to organize information to enable access to tacit knowledge?where to find it and who has it. Connecting individuals with such knowledge with those who could benefit from it is sometimes the most?and the best thing?that we could contribute.

Resources:

- **The Power of a New, Web-Based Collaborative Tool to Deliver Essential Information to Health Professionals in Developing Countries**

Limited access to information remains a barrier to evidence-based health care in developing countries. The INFO Project at Johns Hopkins and partner organizations developed online collections of essential information vetted by public health experts for use by health professionals in developing countries. These toolkits required considerable resources due to the collaborative work flow and programming for the interface. The follow-on project, Knowledge for Health (K4Health), endeavored to use information technology to improve efficiency in and simplify the work flow. An inter-disciplinary team at K4Health worked together to develop an easy-to-use, web-based, collaborative tool, called the K4Health

eToolkit Application, that public health practitioners without specialized IT skills could use to create these electronic libraries or websites.

- **Knowledge Fairs**

A number of KM4Dev members have used Knowledge Fairs as a way to explicitly share knowledge within and across communities. This FAQ is to share methods for Knowledge Fairs, along with stories of use.

- **After Action Review**

The AAR is a simple process used by a team to capture the lessons learned from past successes and failures with the goal of improving future performance. It is an opportunity for a team to reflect on a project, activity, event or task so that the next time, they can do better.

- **Knowledge Management Lecture Series**

These talks were presented in March/April 2010 by Dr. Jay Liebowitz, the Orkand Chair in Management and Technology at UMUC. Each presentation is about 30 minutes in length, and contains audio of the presentation, along with slides. The talks deal with three important topics relating to knowledge management: 1) knowledge retention; 2) knowledge management and strategy; and 3) social networking/social network analysis.

- **Creating Case Studies**

This is a page from the KM4Dev site, focusing on formats and templates for case studies.

Knowledge generation & synthesis

KM aims to create insights and new knowledge as well as synthesize existing knowledge. For example, evidence-based guidance or programmatic approaches can be synthesized and tailored into actionable and readily adoptable formats to meet the needs of various audiences in different contexts (e.g., job aids, fact sheets, summaries, policy briefs, distance learning modules, and mobile messages).

Resources:

- **A Guide to Knowledge Synthesis**

CIHR has regular RFAs for knowledge syntheses relevant to the needs of the Canadian health care system. The purpose of this chapter is to discuss the rationale for knowledge syntheses, outline current approaches and methods for syntheses, and highlight available resources to aid potential applicants.

- **Knowledge Synthesis and Exchange and Implementation Research**

With the overall aim of assisting WHO Member States in implementing best practices in a sustainable manner, the Department has adopted a knowledge-to-action framework as the conceptual basis for fostering integration and coalescence of several of the Department's activities. In addition, a comprehensive approach to knowledge creation and application in maternal and perinatal health has been developed. This approach, named "Guideline development, Research priorities, Evidence synthesis, Applicability of evidence, Transfer of knowledge" (G.R.E.A.T. project), reflects the dynamic relationship between the various components of the above-mentioned framework.

Includes links to Knowledge to Action (KTA) Framework and the G.R.E.A.T. Project

- **Knowledge checklist for project planning and proposal writing**

For any project knowledge is both a necessary input and a valuable output. As you plan or propose a new activity, project, or program, make the most of knowledge by asking yourself these 10 questions. This checklist was prepared for the INFO Project by Center of Communication Programs, Johns Hopkins Bloomberg School of Public Health.

Knowledge sharing & communication

KM fosters knowledge transfer among specific groups of people with common interests and goals (e.g., CoPs?communities of practice). While knowledge sharing and communication can occur in more informal settings, collaboration and networking opportunities via activities both in-person or online (e.g., forums, training sessions, etc.) can enhance this process and/or enlarge their scope. Methods can include dissemination of knowledge through mass media, interpersonal communication, and social networking outlets.

Resources:

- **The Art of Knowledge Exchange: A Primer for Government Officials and Development Practitioners**

In an inter-connected world, policymakers and development practitioners are eager to connect with peers in other countries who have overcome similar real-world challenges, learn from their experiences and build horizontal partnerships based on equity, trust, mutual benefit, and long-term relationships. Mounting evidence suggests that such exchanges can contribute to broadening development options, accelerating reforms and strengthening local ownership.

The Art of Knowledge Exchange Primer is for government officials and development practitioners who are involved in such knowledge exchanges. Identifying the right partners, planning for the exchange, making it happen and sharing the lessons can all be a major undertaking. This Primer takes the guesswork out of the process, by breaking the complexity of knowledge sharing lifecycle into simple steps and summarizing good practices.

Whether you are involved in the planning, funding, implementation, or evaluation of a knowledge exchange, look no further. [Click here](#) to access a step-by-step framework with concrete tips that can make your next knowledge exchange relevant and impactful

- **CDC's Guide To Writing for Social Media**

This guide is designed to provide guidance and to share the lessons learned in more than three years of creating social media messages in CDC health communication campaigns, activities, and emergency response efforts. In this guide, you will find information to help you write more effectively using multiple social media channels, particularly Facebook, Twitter, and mobile phone text messaging. The guide is intended for a beginner audience, although

some readers with an intermediate level may find it useful too.

- **The Art of Knowledge Exchange: A Results-Focused Planning Guide For Development Practitioners**

The Art of Knowledge Exchange Guide takes the guesswork out of the process of designing and implementing knowledge exchange initiatives, which can be a big undertaking. This guide provides simple steps and tools to help one play a more effective role as a knowledge connector and learning facilitator. The guide will help you:

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3. Implement the knowledge exchange initiative
4. Measure & Report the results

Behavior change communication strategies

Resources:

- **C-Modules-A Learning Package for Social and Behavior Change Communication (SBCC)**

Resources have been developed over the years to build capacity in topics related to social and behavior change communication (SBCC). The C-Modules package, developed by the C-Change project, complements and consolidates what is already available in SBCC application and makes it easy for facilitators to apply and access materials created by others. The modules focus on essential SBCC competencies for each of five key stages in the development of an effective SBCC program (*Understanding the Situation, Focusing & Designing, Creating, Implementing & Monitoring, and Evaluating & Replanning*); feature a number of practical SBCC tools; use actual field examples for teaching; and create opportunities for participants to apply what they learn to their own programs.

The C-Modules package can be downloaded at <https://www.c-changeprogram.org/focus-areas/capacity-strengthening/sbcc-modules>.

- **Tools for Behavior Change Communication**

The tools in this issue of INFO Reports are meant to help with planning and developing a BCC component in family planning programs. The same tools can be used, however, for any health- or development-related BCC program. This report is part of a set of publications on behavior change communication.

- **A Field Guide to Designing a Health Communication Strategy: A Resource for Health Communication Professionals**

The purpose of this strategic communication Field Guide is to provide practical guidance to those who are in a position to design, implement, or support a strategic health communication effort. The emphasis of the guide is on developing a comprehensive, long-term approach to health communication that responds appropriately to audience needs. The guide is based on the idea that effective strategic communication is based on the convergence of "senders" and "receivers" in which the differences between the two begin to disappear. It is also based on the recognition that communication, to be effective, must not be treated as a "spare" wheel, used only when the efforts start to falter or fail, but as a "steering" wheel that can serve as a basis for making informed choices. Strategic communication is collaborative and participatory in nature, follows a sound decisionmaking process based on science, and creates sustainable efforts that improve health outcomes.

Communities of practice

Resources:

- **UNICEF Communities**

The Communities Project started in mid-2008 by an active team that created the opportunity for people to connect and collaborate. They mobilized an unprecedented demand to engage multiple groups at the global, regional, and country level. To further expand the connection the team introduced a platform that integrates Web 2.0 technologies and social networking in August 2009: people are now using blogs, discussion forums, document and photo libraries, webinars. Some groups pioneered online wiki spaces to co-create resources in real time and micro-blogging to communicate immediately. This project is expanding rapidly with more than 25 groups and 2400 people forming an online presence, actively sharing knowledge and ideas, learning from each other.

eLearning

Social media

Resources:

- **The Health Communicator's Social Media Toolkit**

This toolkit is designed to help you get started in social media by providing information for developing governance for social media, determining which channels will best meet your communication objectives, and helping you create a social media strategy. You will also learn about popular channels you can incorporate into your plan ? like blogs, video-sharing sites, RSS feeds, and mobile applications.

- **Social Media versus Knowledge Management**

This article contrasts social media with knowledge management (KM). While both involve people using technology to access information and involve information sharing, there are important differences. The authors of this article are the co-authors of the book *The Social Organization: How to Use Social Media to Tap the Collective Genius of Your Customers and Employees*.

- **Working Wikily**

Most nonprofits use social media like Facebook and Twitter as an ancillary part of what they do. A few organizations, however, are using these tools to fundamentally change the way they work and increase their social impact. This journal article describes a case study and guidelines for how to get started using a network and social media approach to generating and sharing knowledge.

Training and facilitation techniques

Resources:

- **Programming for Training**

This resource package provides an overall approach to programming for training, as well as information, methods, and tools for designing, developing, planning, implementing, and evaluating training. It also provides tools and information for strengthening training systems.

- **Tips for Trainers**

Presents useful training tips, such as creating a positive training environment and opening activities.

- **Transfer of Learning: A Guide for Strengthening the Performance of Health Care Workers**

Clinical knowledge and skills are critical factors in sustaining quality health care services. However, there are many factors which influence the ability of providers to apply these skills when offering services. This handbook shares strategies and techniques that those involved in training or performance improvement efforts can use to support the transfer of knowledge and skills to on-the-job performance.

Additional knowledge sharing tools and approaches

Resources:

- **Using Social Analysis and Action in Madagascar to Break From Family Planning "Business as Usual"**

This is the seventh issue of the *Voices from the Village* case study series from CARE. This case study explores CARE Madagascar's pilot experience integrating discussions about family planning, gender, and health equity into the SantéNet project ? a USAID-funded integrated maternal, child and reproductive health program where CARE is implementing the community-based component. Using the Most Significant Change technique, the initiative found greater acceptance of family planning, increased communication between couples

about sensitive household issues, and improved dialogue between parents and their adolescent children. This case study is available in both English and French.

- ## Curriculum for Knowledge Translation

This comprehensive curriculum is a teaching and learning resource. It includes fully resourced lesson plans and provides a thorough overview of key concepts, conflicts, and methods in Knowledge Translation (KT). Grounded in philosophy, political science, and health research, the curriculum explores the complex ideas and theories that shape intersections among research, practice and policy processes.

Why is it useful?

KT can narrow the gaps between health research, health practice and health policy. KT concepts are universal and broadly applicable; yet teaching and learning about how to do effective KT has long been a challenge. As a useful tool for understanding major concepts, principles, and practices in KT, this curriculum fills the urgent gap between the practice of KT and its teaching. Recognizing there is much to learn from effective KT practices around the world, many examples feature evidence and experience from resource-limited settings.

Who is this Curriculum for?

Both knowledge users and knowledge producers will find this curriculum helpful. Students, instructors, researchers, knowledge brokers, health systems decision makers, health professionals, and others will find valuable learning in this curriculum.

How is the Curriculum structured?

The curriculum is organized into three modules, and then divided into lessons that can be taught individually, as a whole, or combined with other material. Lessons include a reading list (all available as PDFs), lecture (with modifiable presentations), review of major literature, diagrams and graphics, relevant quotations, and ideas for guiding group work or leading discussion.

- ## Introducing Knowledge Sharing Methods and Tools: A Facilitator's Guide

A Facilitator's Guide, developed under the ENRAP programme, is intended, in particular, for Knowledge Facilitators (KFs), IFAD CPOs and other people within the IFAD Asia and Pacific Regional Network that ENRAP supports who may have a responsibility to train others on knowledge sharing (KS) tools and methods.

- ## Tools and Strategies for Sharing Knowledge

This presentation presents the tools and strategies necessary for sharing knowledge.

- **Tools for Knowledge and Learning: A Guide for Development and Humanitarian Organisations**

The aim behind this toolkit is to present entry points and references to the wide range of tools and methods that have been used to facilitate improved knowledge and learning in the development and humanitarian sectors.

- **Knowledge Sharing Toolkit**

This toolkit is a living knowledge repository about knowledge sharing. It was created to be a resource both for KS workshops and as an ongoing place to learn about, improve upon and generally share our knowledge sharing practices. There are other KS toolkits out in the world - many of them listed in the acknowledgments section of this wiki. Most of them, however, are static - not updated. This toolkit provides an exhaustive list of tools and methods as well as example contexts, tasks you might need to achieve in those contexts, then suggested tools and methods.

- **SDC Knowledge Management Tools**

This webpage - developed by the Swiss Agency for Development and Cooperation (SDC) - presents a variety of methods and tools to use in knowledge management activities. There are tools for planning and reflection of activities, as well as resources to help with sharing insights and applying knowledge. It features a selection of more than 20 methods and tools for knowledge sharing and learning, from basic to more advanced tools, applicable at personal, team and organizational level. The resources are available in English, German, French, and Spanish.

Knowledge adaptation

KM promotes adaptation of knowledge to inform policy, improve programs, enhance training and education, and promote research efforts. Uptake and application of knowledge will be accelerated if knowledge is adapted to fit the needs and circumstances of the audience (e.g.,

value, geographical and cultural differences, personal and organizational readiness, etc.), particularly if it makes the task easier and a successful outcome more certain. Furthermore, who undertakes and promotes the adaptation can have important implications for use. Knowledge adaptation can and should target internal staff and external audiences that organizations serve.

Resources:

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The Registry of Methods and Tools

The Registry is a searchable, online collection of quality-assessed, evidence-informed methods (processes) and tools (instruments) for knowledge translation in public health. The Registry's goals are to help public health practitioners:

- communicate new knowledge to clients and colleagues;
- support innovation uptake in their organization;
- synthesize and appraise public health related research;
- apply a new technique for working with community partners; and
- summarize relevant evidence for public health policy decisions.

The Registry contains summary statements of knowledge translation methods and tools to help busy practitioners use evidence in their practice. The Registry identifies and describes effective resources for knowledge translation, making them easier for you to find and use. Like all NCCMT products, the Registry is available for free in both English and French.

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Knowledge Management and Organisational Learning for Development

While the ultimate objective of knowledge management and organisational learning might be seen as being quite similar, the paths and methods to achieve that end vary considerably according to the theoretical perspective within which thinking or practice is founded.

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Implementing Knowledge Strategies: Lessons from International Development Agencies

This study synthesizes existing research on knowledge and learning in the development sector, and draws out eight key questions for examining related strategies and systems in development agencies. Together, these questions make up the comprehensive Knowledge Strategies Framework, which bears close resemblance to the framework used by the ODI to

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• **World Report on Knowledge for Better Health**

Knowledge for Better Health reviews the current state of global health research and concludes that: much more investment is needed for a new, innovative approach to research on health systems, health research must be managed more effectively if it is to help strengthen health systems and build public confidence in science, and stronger emphasis should be placed on translating knowledge into action to improve public health by bridging the gap between what is known and what is actually being done.

Measuring KM



Especially when budgets are limited, it is crucial for KM practitioners

to show the value ? i.e., the impact or outcomes ?that KM activities bring to their respective organizations. In the field of global health and development, outcomes may relate to knowledge, skills, attitudes, behavior, health condition, or health status. For example, KM might contribute to better health outcomes through increased service utilization or improved health behaviors.

Measuring KM outcomes is often beyond the scope of health and development projects, due to the high resource investment required and the difficulty of attributing such outcomes directly to KM programs. However, measurement of KM impact should be considered from the onset of developing a KM strategy.

In this section, you will find manuals, tools, and articles related to measuring the impact of KM initiatives. You can also refer to the section on KM models, which will provide information to help you to think through your monitoring and evaluation (M&E) plan and your expected outcomes. KM models can help you understand your organization's baseline performance before implementing KM efforts.

Tools for Measuring KM

Monitoring and evaluation (M&E) of any program or project is extremely important. In order to justify continuing interventions, projects, and programs, you must have some measurement for their success. Funders and customers also request to see the success and have indicators to evaluate effectiveness; without results to report, it is difficult to secure continued donor support. Within an organization or project, knowledge management (KM) also needs to be monitored and evaluated. Constant monitoring and evaluation can ensure success and allow for adjustments where necessary. Below is a list of tools that are useful in planning and implementing your monitoring and evaluation strategy. To reinforce the need for monitoring and evaluation visit evidence of monitoring and evaluation activities.

Resources:

- **Guide to Monitoring and Evaluating Knowledge Management in Global Health Programs**

This newly-updated Guide offers comprehensive guidance including a unique logic model and 42 common indicators to measure the process, reach, usefulness, and learning/action outcomes of knowledge management (KM) activities in the context of global health and development programs. It is the successor to the 2007 Guide to Monitoring Health Information Products and Services.

- **After Action Review**

The AAR is a simple process used by a team to capture the lessons learned from past successes and failures with the goal of improving future performance. It is an opportunity for a team to reflect on a project, activity, event or task so that the next time, they can do better.

-

K4Health's Detailed Logic Model for Monitoring and Evaluating Information Products and Services

This detailed logic model can be found in: Sullivan, T.M., Strachan, M., and Timmons, B.K. Guide to Monitoring and Evaluating Health Information Products and Services. Baltimore, Maryland: Center for Communication Programs, Johns Hopkins Bloomberg School of Public Health; Washington, D.C.: Constella Futures; Cambridge, Massachusetts: Management Sciences for Health, 2007.

- ### **Monitoring and Evaluating Information and Communication for Development**

While behavior change and social change are clear focuses of these guidelines for information and communication M&E, the content is clearly applicable to knowledge management activities which seek to bring about organizational, sector-wide and individual behavior change. Chapters address: Planning and Budgeting for M&E, Formative Appraisal, Process Evaluation, Measuring Impacts and Outcomes, Tools of Good Practice, and Useful Websites and Further Reading.

- ### **Smart Toolkit for Evaluating Information Products and Services**

This comprehensive guide addresses multiple aspects of M&E of information products including: Exploring the basics of evaluation, exploring key issues and methods in evaluation, and delivering simple how-to instructions for the evaluation process including recommended tools and indicators.

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dimensions of this new Knowledge Strategies Framework are mapped out as: organisational knowledge, organisational links, organisational contexts, and external factors. The section "Findings from Organisational Profiles" (pages 14-28) has a list of questions for your knowledge audit as well. There is also a section on "Measuring the costs and benefits" on pp. 24-25, which is relevant to those looking for monitoring and evaluation tools.

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Evidence of Monitoring & Evaluating KM Activities

Below are resources that reinforce the need for monitoring and evaluation. For more information on implementing M&E in your organization or project look at tools for measuring KM.

Resources:

- **KM Impact Challenge Synthesis Report**

The central feature of the KM Impact Challenge has been the public call for case stories, to compile short, experience-based documents of up to 1200 words each. The KMIC call for case stories has been an important mechanism to engage the international practitioner community within a specific time period and focus attention on sharing experiences and lessons learned that may not have been previously documented. A total of 47 case stories met the basic eligibility criteria and were approved as official case stories between December 2010 and January 30, 2011. All case stories that were approved before the January 30th deadline were put through a transparent

peer-review process, with each case story reviewed by at least 5 members of our Technical Advisory Group. We used four core criteria of Clarity, Analysis, Creativity and Replicability. The scores and the comments from the TAG were used to select a pool of top finalists (24 case stories) and from that pool, six case story authors were selected to receive travel awards to share their experience at the upcoming KMIC unConference planned for May 5/6, 2011.

- **Metrics for KM and CM**

Metrics are a concrete way of defining what a knowledge management or content management project will achieve, and whether it met those goals. In an environment of tight budgets and high expectations, metrics are an appropriate next step for an industry that prides itself on delivering big benefits. Defining metrics is not easy, however, and much study and further practical experience will be needed before implementing such measures becomes simple or commonplace. This article reviews the benefits of metrics, outlines some commonly used measures, and presents some practical tips and tricks.

- **How Do You Measure the Knowledge Management (KM) Maturity of Your Organization? Metrics That Assess an Organization's KM State**

This paper explores practical ways to measure the KM state of an organization. This paper further examines accepted KM initiatives used throughout the KM community and determines useful metrics for those KM initiatives from a military stand point. Non military organizations will also benefit from this approach. Useful metrics are metrics that a Chief Knowledge Officer (CKO) or Knowledge Management Officer (KMO) can take and immediately adapt to measure the state of KM at his/her organization.

Measuring the Impact of CoPs

"A Community of Practice (CoP) is an informal, self-selected group of people who share expertise and who are brought together to solve problems and share knowledge" (Murphy, 2008). CoPs are becoming common practice for sharing knowledge and knowledge management (KM) activities within organizations and projects. As we use CoPs more frequently, it is important to have a plan for measuring their impact and success. Below are resources for measuring the

impact of CoPs. For more general information check out Communities of Practices and Listservs, Evidence for Monitoring and Evaluating for KM, and Tools for Measuring KM.

Resources:

- **Measuring the Impact of Communities: How to draw meaning from measures of communities of practice**

As communities become integrated into organizations, they usually need to demonstrate measurable value. Community development, like other KM efforts, often starts with a gut-level conviction in its value. But to become more than an initiative, KM efforts need to operate within the language of the business. This paper provides a framework and way to think through this measurement.

KM Case Studies

KM practitioners have a lot to share ? and a lot to learn from each other. In this section of the toolkit, you will find KM case studies, collected by members of the Global Health Knowledge Collaborative (GHKC). Informed by real life experiences implementing KM activities within health and development organizations, these case studies highlight strategies, challenges, successes, lessons learned, and recommendations for others.

If you have a KM case study you would like to contribute, please let us know!

Resources:

- **Creating Technical Assistance Libraries to Capture Tacit Knowledge**

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.

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Supporting Communities to Encourage South-to-South Knowledge Sharing and Product Improvement (KM Case Study)

CapacityPlus is a USAID global project, led by IntraHealth International, with the goal of strengthening human resources for health (HRH) in low- and middle-income countries. The project uses the Integrated Human Resource Information System (iHRIS) to help countries capture information on their health workforces and maintain high quality systems for planning and management. In addition to launching the open source iHRIS software program, the CapacityPlus team has also supported the development of a community of practice (CoP), through which iHRIS users can share experiences and help obtain feedback on the software. Continuous facilitation of south-to-south learning and engagement has led to increased usefulness and reach of the iHRIS software.

- ## **Using Knowledge Management to Maximize the Impact of a Film (KM Case Study)**

An engaging film promoting the U.S. President's Emergency Plan for AIDS Relief's (PEPFAR's) HIV prevention programs supporting voluntary medical male circumcision (VMMC) in It to Save Lives: Scaling Up Voluntary Medical Male Circumcision for HIV Prevention for Maximum Public Health Impact serves as an advocacy tool, encouraging national commitment to rapid scale-up of male circumcision programming and features interviews with international experts capturing the successes and challenges of policymakers and implementers in Swaziland and Kenya. The AIDSTAR-One project's knowledge management (KM) efforts helped ensure the film delivered on its goals by sharing and distributing the film to target audiences using various electronic, social media, and traditional communications channels, as well as tracking the progress and leveraging outreach to further increase distribution.

- ## **Applying KM Lessons Learned from an Online Discussion Forum (KM Case Study)**

The Measurement, Learning & Evaluation (MLE) Project hosted an online discussion forum and a tweet chat between 5-9 November 2012, titled "Advocacy for Family Planning Programs Beyond the London Summit." A follow-up survey was conducted, and a number of lessons were highlighted. Namely, a responsive after action review after an online forum led to significant increase in participation and engagement in subsequent forums. In addition, it is important to be adaptable and to focus on format, relevance, language, timing, and

promotion in order to conduct successful online events.

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Using an Online Community of Practice to Encourage Peer Learning and Knowledge Exchange Among Health Professionals in Diverse Settings (KM Case Study)

The University of North Carolina's Global Learning Program (GLP) established a community of practice for mid-level health professionals in diverse settings, allowing them to share experiences through a peer-to-peer knowledge exchange forum. This was preceded by a two-year period of conventional online coursework that provided participants with foundational tools, resources, and instruction. This innovative approach—transitioning from coursework into a community of practice—shows the promise of using online communities to build capacity, connect health professionals across diverse settings, and encourage knowledge sharing with the ultimate goal of improving health programs.

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Health Care Providers Gain Access to Up-To-Date Guidelines (KM Case Study)

Kenyan health professionals often lack ready access to the latest reproductive health policies, guidelines, and references needed to deliver high-quality health services. In addition, the general public lacks awareness about reproductive health services provided by the Kenya Division of Reproductive Health (DRH). The DRH responded to these knowledge gaps by redesigning and updating their national website.

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Applying KM Techniques to Promote Learning: The Uganda National Quality Improvement Conference (KM Case Study)

The Ministry of Health of Uganda held its first ever National Quality Improvement (QI) Conference in February 2012. The event, funded by USAID and other donors, brought together stakeholders from over the country and featured work supported by 17 different implementing partners. A key challenge in organizing the conference was to ensure that the design of the event emphasized peer-to-peer learning. The conference organizing committee structured the conference to include plenty of interactive sessions, which opened avenues for participants to learn from each other. Purposefully using interactive formats enriched the event and built capacity among organizing committee members to design similar conferences in the future.

- **Using Knowledge Management to Improve the Performance of Global Fund Recipients: The Grants Management Solutions Project (KM Case Study)**

Some grant recipients from the Global Fund to Fight AIDS, Tuberculosis, and Malaria have limited capacity in governance, project oversight, grant and financial management, or compliance issues. To address this knowledge gap, over five years the Grant Management Solutions (GMS) project provided urgent shortterm technical support to Global Fund grantees in 78 countries, supporting 360 grants and affecting \$5.1 billion of the total signed value of the Global Fund portfolio. To reach this scale, GMS developed a robust knowledge management system focused on developing the technical competency of consultants around the world as well as on creating, sharing, and revising tools. Other technical assistance programs can benefit from this highly effective and streamlined KM system.

- **The New Partners Initiative Timesheet Module: E-Learning to Support Knowledge Management (KM Case Study)**

The New Partners Initiative Timesheet Training Series e-Learning modules were designed to allow US Government (USG) partners, and any organization seeking to implement best practices, to establish a timesheet system compliant with USG requirements. Improved financial management systems will enable organizations to be better prepared to receive USG funding to implement future programs. E-Learning was used to transmit training in a consistent way and enable learners to proceed at their preferred pace, while also practicing the concepts.

The Global Health Knowledge Collaborative

The Global Health Knowledge Collaborative (GHKC)

The Knowledge Management for Health and Development Toolkit builds on the knowledge sharing of the Global Health Knowledge Collaborative (GHKC), which began in 2010 (originally called the Knowledge Management Working Group) as a collaborative forum for sharing and synthesizing knowledge. The goals of this community of practice are to: serve as a platform to share ideas and KM research findings, collect case studies documenting experiences with KM in global health, ask for feedback on KM-related products and services, promote KM-related products and services use, and advocate for the importance of KM for organizations and projects.

This group meets face-to-face several times a year (in Baltimore or Washington, DC, with the option to join via phone) to discuss KM approaches that are new to them by inviting guest experts and providing an opportunity to learn and practice these new approaches.

For more information on the GHKC, please visit the GHKC website. The GHKC also has a moderated listserv for members to share announcements and discussions. You can send a message to the group at: GHKC@knowledge-gateway.org

Join the GHKC Listserv

Source URL: <https://www.k4health.org/toolkits/km>