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Knowledge Management

"The scaling up of knowledge management efforts in public health will be important for translating research and evidence into policy, practice and social transformation."[1]

A quick web search on knowledge management brings up "Knowledge Management and Learning Styles: prescriptions for the future," "Business Technology Management and Knowledge Management Research," and "The Nonsense of Knowledge Management". We see that Knowledge Management (KM) has infiltrated intellectual capital movements and certain "complexity approaches" and that it permeates everything from a filing cabinet to expensive computer software.

KM is one of those terms comprised of very slippery components. What is knowledge, after all? And what is management? How can we hope to manage something that's fluid and ever-changing? While there is some merit to these epistemological questions, fortunately a host of authors and practitioners has reduced KM into very digestible bits. If we think of knowledge as what we can write down *and* what we know in our heads, we can at least visualize what it is we need to start managing. While "what we can write down" has attracted all kinds of funding and attention (e.g. naming conventions, databases), the "what we know in our heads" part has not. And, as the trick to successful knowledge management is in developing ways to knit together both types of knowledge, this chapter will focus on a few straightforward and practical KM tools and techniques designed to help us, as organizations and individuals, to *know what we know.*

To do that we must ask ourselves basic questions like: do we know where to locate a particular file or output? Do we know whom to contact if we require a specific piece of information? *Do we know what our colleagues know? And if not, how can we tap their experience and expertise?* At its core, KM is about creating, identifying, capturing and sharing knowledge. It is about getting "the **right knowledge**, in the **right place**, at the **right time**," particularly in influencing an action or a decision.[2] KM is an intrinsic component of knowledge translation: without a good KM strategy in place, we might lose track of crucial knowledge – *we might not know what we do know or even need to know* – and miss golden opportunities to influence policy decisions. Knowledge is, after all, a society's, an organization's, and an individual's most valuable resource. As researchers, taking this truth to heart will involve rethinking the way we do things, even simple every day tasks.

This chapter will examine two types of knowledge – **tacit** and **explicit** – and ways in which we can understand and capture these and maximize their impact. We'll discuss how to formulate a KM strategy and then offer a suite of tools that can help organizations become fluent knowledge managers. These include: after-action reviews; knowledge audits; identifying and sharing best practice; knowledge harvesting; storytelling; communities of practice; and the peer assist.

Organic Knowledge Management...

KM is "a more organic and holistic way of understanding and exploiting the role of knowledge in the processes of managing and doing work, and an authentic guide for individuals and organizations in coping with the increasingly complex and shifting environment of the modern economy."

Source: Denning S. *What is knowledge management? Definitions.* www.stevedenning.com

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I. Towards a Knowledge Management Strategy

Tacit vs Explicit: what do we mean by knowledge?

Knowledge and information – or "data arranged in meaningful patterns" – are not synonymous.[3] While information is a type of knowledge, its value comes from its *interpretation* within a context. As Davenport and Prusak (1998) explain, transforming information into knowledge involves making comparisons, thinking about consequences and connections, and engaging in conversations with others.[4] According to *Wikipedia*, "knowledge" can be defined as "awareness or familiarity gained by experience of a fact or situation"; Plato formulated it as "justified true belief".[5] Put differently, we might best describe knowledge as "know-how" or "applied action."[6]

Here, knowledge can be divided into two categories: *explicit* or *tacit*. Explicit knowledge is something that we can put our hands on, capture and document – knowledge that can be recorded. This includes research findings, lessons learned, toolkits, and so on. We can easily resort to computers and other information technologies to organize our explicit knowledge. Tacit knowledge cannot be documented as easily; it is subconscious – we are generally not even aware that we possess it. Tacit knowledge is context-specific and includes, among other things, insights, intuitions and experiences.[7] Capturing this is more difficult and involves the key ingredients of time and personal interaction.

> ## Knowledge
>
> "Each of us is a personal store of knowledge with training, experiences, and informal networks of friends and colleagues whom we seek out when we want to solve a problem or explore an opportunity. Essentially, we get things done and succeed by knowing an answer or knowing someone who does."
>
> **Source:** *ABC of Knowledge Management.* 2005.

Imagine receiving a *Call for Proposals* from an established funding organization. Our explicit knowledge would help us with the mechanics of writing the application – making the case for our proposal by presenting our previous research findings, highlighting relevant publications, an external review on our policy influence, and so on. Our tacit knowledge, however, would help us *shape* the application for our particular audience, recalling that a previous collaborator is now on the organization's board, that they tend to favour proposals in certain formats, cherish Log Frame Analyses and so on. We may also contact a colleague asking for any "inside track" information on the funding organization and what it's *really* looking for. Whatever the case, and whatever our decisions, many of our actions are guided by both explicit and tacit knowledge. The trick is learning how to knit the two together.

What is a KM Strategy?

There is no "one size fits all" or "ready to use" prescription for KM. While it might be tempting to simply copy a strategy that was successfully used by others, this could be a costly mistake. As with any sound strategy, our KM practices should be closely linked to our own assets, needs, mandate, mission, and goals, taking into account our own values and ways of working. In fact, understanding these elements must be the starting point for any KM strategy.

In its most reduced form, a KM strategy (like any other strategy) must answer three questions: where are we now, where do we want to be, and how do we get there?[8]
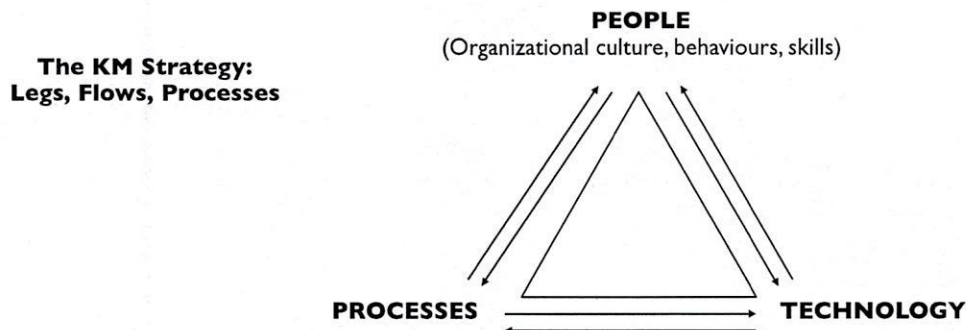- **Where are we now?** What kinds of knowledge do we produce (or gather or store)? What outputs have we created? How do we currently manage our knowledge? How do our organization's culture and systems either serve or hinder sound KM practices?
- **Where do we want to be?** In five years' time, how will a sound KM strategy change our organization? How will we know when we have a sound KM system? How will we measure the value of our efforts?
- **How do we get there?** We need an action plan outlining the three resources of *people, processes and technology*. What specific tools and practices will we use? How will we motivate people to change their practices?

In a slightly different formulation, Denning advises that our KM strategy should ask: *What* knowledge do we want to share (type and quality)? *With whom* do we want to share it (audience)? *How* will our knowledge actually *be* shared (channels)? And *why* will this knowledge be shared (motivations and objectives)?[9]

A useful way to conceptualize our KM strategy is through *people, processes,* and *technology* – memorably visualized as "the legs of a three-legged stool – if one is missing then the stool will collapse."[10] While there is some argument as to which leg is the most important, consensus is emerging in favour of the first – people. After all, it is people –

human resources – who are the ones that create, share and use knowledge. Without taking into account the role people play in generating and sharing knowledge, KM strategies are likely to fail.

It follows that a successful KM strategy requires a change in an organization's culture and behaviour. At the heart of this change would be recognizing *the centrality of knowledge*, and how the organization must improve its means for creating, capturing, sharing and using it.

The KM Strategy:
Legs, Flows, Processes

PEOPLE
(Organizational culture, behaviours, skills)

PROCESSES   TECHNOLOGY

Note: Although it is often tempting to see technology as the "knowledge saviour," its proper role is more as an *enabler* of KM. Technology is a method, not a strategy. The right technological tools can indeed help us organize, store and access our explicit knowledge as well as helping to connect people and furthering their abilities to share their tacit knowledge.[11] However, technology alone cannot be the beginning and end of a KM strategy. The challenge is finding the right technological tools that will serve our broader KM system.

II. The Components of a KM Strategy

In designing a KM strategy, there are quite a few different approaches and tools depending on the resources (human, financial, technological) we have at hand and the type of knowledge we want to capture and share.

We'll discuss here some of the below tools in more detail, with a focus on those that capture our tacit knowledge. If knowledge "lives within the minds of our organization" – with around eighty percent of any organization's knowledge tacit – we clearly need good and sounds ways to capture and share it.

A Selection of KM Tools and Techniques

After Action Reviews: A tool now widely used by many organizations to capture lessons learned both during and after an activity or project.

Communities of Practice: Widely regarded as "the killer KM application," communities of practice link people together to develop and share knowledge around specific themes.

Knowledge Audits: A systematic process to identify an organization's knowledge needs, resources and flows, as a basis for understanding where and how better knowledge management can add value. Also called "Knowledge Inventories".

Exit Interviews: A tool used to capture the knowledge of departing employees.

Best Practices: Approaches to capturing best practices discovered in one part of the organization and sharing them for the benefit of all.

Knowledge Centres: Similar to libraries but with a broader remit including connecting people with each other as well as with information in documents and databases.

Knowledge Harvesting: A tool used to capture the knowledge of "experts," making it widely available to others.

Peer Assists: A tool to learn from the experiences of others, especially within an organization, before embarking on an activity or project.

Social Network Analysis: Mapping relationships between people, groups and organizations to understand how these relationships either facilitate or impede knowledge flows.

Storytelling: Using the ancient art of storytelling to share knowledge in a more meaningful and interesting way.

White Pages: A step-up from the usual staff directory, this is an online resource that allows people to find colleagues with specific knowledge and expertise.

Source: *ABC of Knowledge Management.* 2005.

Note: Further information on any and all of these tools and techniques can be found in the *Resources* section at the end of this chapter.

I. The Knowledge Audit

Often referred to as a knowledge inventory, **a knowledge audit** assesses and lists an organization's knowledge resources, assets and flows. It is a critical component of any KM strategy, and often the first step in designing one. If we do not know what knowledge we already have, what our knowledge gaps are and how that knowledge flows within our organization, how can we devise an effective KM strategy? Knowledge audits "reveal the organization's knowledge management needs, strengths, weaknesses, opportunities, threats and risks."[12] These indicate what steps are needed to improve current practices. What do we have, what do we need, and what are the gaps?

> ## Why conduct a knowledge audit?
>
> Knowledge audits can help identify a number of things, including:
>
> - Information glut or scarcity;
> - Lack of awareness of information elsewhere in the organization;
> - Inability to keep abreast of relevant information;
> - Continual "reinvention" of the wheel;
> - Quality and quantity of in-house knowledge and information;
> - Common use of out-of-date information;
> - Not knowing where to go for expertise in a specific area.
>
> **Source:** Wiig K.1993.

What does a knowledge audit involve?

While different approaches can be taken to carry out a knowledge audit, the methodology adopted by the NHS National Library for Health is briefly presented here.[13]

1) **Identify knowledge needs**. Tools including questionnaires, interviews and/or facilitated group discussions are required to answer the central question of: *to be successful, what knowledge does our organization need?*
2) **Conduct a knowledge inventory**. Within an organization, knowledge assets – tacit and explicit – must be identified and located. For tacit knowledge, that means identifying the people we employ, where they are located, what they do, what they know, and what they may be learning. In the case of explicit knowledge, it means quantifying in-house knowledge (papers, reports, databases, etc.) by locating it, understanding how it is organized and accessed, analyzing how appropriate it is, and finally determining whether the resources available are in fact being used. Compared against our needs, this inventory will reveal critical knowledge gaps.
3) **Analyze knowledge flows**. Understanding how knowledge moves within an organization – "from where it is to where it is needed" – is crucial.[14] How do people find the knowledge they need to execute their tasks? This type of analysis will include both tacit and explicit knowledge, and cover people, processes and technologies.
4) **Create a knowledge map**. Though slightly abstract, a visual representation of an organization's knowledge can help show how it moves, how it's accessed, where it's created and how it's shared. This can be done by mapping knowledge resources and assets or, more comprehensively, by adding the details of how it flows from one point to the next.

An audit should ideally lead to some important conclusions. It should trigger recommendations for addressing knowledge gaps, in terms of both content and flow.

2. Knowledge Harvesting

How can we truly capitalize on the knowledge of our organization's experts? How do we capture what is in their heads and then share it with others in an accessible and understandable format? How do we make tacit knowledge explicit? Knowledge harvesting is not a catch-all solution, but it is one way to capture, document and subsequently use the knowledge of experts and other top performers. As Eisenhart (2001) explains, "the ultimate goal of knowledge harvesting is to capture an individual's

decision-making process with enough clarity that someone else guided by it could repeat the steps of the process and achieve the same result."[15]

What does knowledge harvesting involve?

Most approaches to knowledge harvesting follow a set of careful steps. Here, we adapt an eight-step process as presented by Knowledge Harvesting Inc.[16]

1) **Focus.** What specific knowledge and expertise are we looking for? The answer to this question will affect the overall strategy for capturing that information.
2) **Find.** Locate the experts whose knowledge we want to harvest. We can go through a staff directory, look at key documents and find out who authored them, or simply ask around.[17]
3) **Elicit.** Harvesters, or interviewers, can get experts to talk about their knowledge – even when they are not aware that they possess it. It is important for skilled harvesters to get the dialogue started.
4) **Organize.** Once the knowledge has been gathered, it must be arranged in a coherent and systematic form that is easy to access.
5) **Package.** As discussed in several other chapters of this *Toolkit*, we must think about our audience and its needs. Which format will best serve our audience with the knowledge we've elicited?
6) **Share.** Connected to 5) is the question of: what is the ultimate purpose of sharing this knowledge? Why and for whom have we packaged what we know? Again, the exact means for doing all of this will depend on a careful appreciation of the audience. Generally, we start by making our knowledge available in an on-line repository.
7) **Apply.** This will be done by members of an organization in their every-day work. It is important to keep track of whether, and *how*, that knowledge is being applied and to record any feedback.
8) **Evaluate and adapt.** Based on the feedback of users, the effectiveness of our efforts must be evaluated and adapted to the changing needs of an organization.

Sample of Expert Questions

• Describe a time when…?	• What is the most important thing to remember when you're doing this?
• What's the first thing you do?	
• How do you know to do that?	• Can you describe how you help others learn how to do this?
• How do you know when to do it?	
• What do you do next? Why?	• What are the main obstacles that prevent them from achieving the same results as you?
• What usually happens?	
• What happens if something else is done?	
• What would happen if…?	• What would make this process easier to understand?
• Who else is involved?	
• What are some common mistakes or misconceptions?	• What would make this process easier to achieve?

Source: *ABC of Knowledge Management.* 2005.
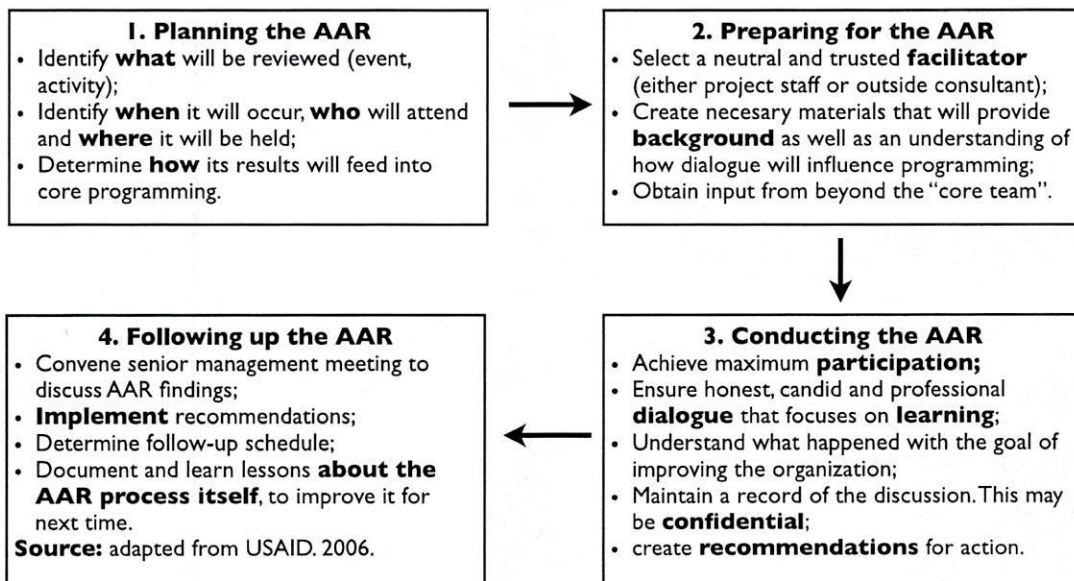
3. The After Action Review

Originally designed and developed by the U.S. military, the After Action Review (AAR) is a flexible approach for assessing a past event, project or process. As an **open and participatory process**, an AAR helps us understand "what happened, why it happened, and how it can be done better".[18] Group discussion gives a comprehensive snapshot of the many technical and human factors at play, resulting in a set of key lessons learned. These lessons can identify failures, with the group discussing ways to modify or improve sub-standard performance; they can also highlight successes, with the group making recommendations on how to sustain or expand upon them.

An AAR brings teams together in a spirit of evaluative thinking. By working to promote accountability – of individuals and the organization – an AAR brings events into an organization's "learning cycle," providing evidence and experience for modifying future practice and goals. As USAID (2006) summarizes, an AAR tends to provide:

- candid insights into specific strengths and weaknesses from various perspectives;
- feedback and insight critical to improved performance; and
- details often lacking in evaluation reports alone.[19]

In general, there are two types of AAR. One is **formal** – typically with a facilitator and strong logistical support – and the other **informal** – usually occurring on the same day as the   event or program under review. Each type tends to answer four different sets of questions: what was planned? what really happened? why did it happen? and what can we do better next time?[20] Subjects discussed can include technical performance, techniques, communications, lessons learned, roles and responsibilities, organizational issues, stress impacts, and so on.

The Formal AAR Process

1. Planning the AAR	**2. Preparing for the AAR**
• Identify **what** will be reviewed (event, activity); • Identify **when** it will occur, **who** will attend and **where** it will be held; • Determine **how** its results will feed into core programming.	• Select a neutral and trusted **facilitator** (either project staff or outside consultant); • Create necesary materials that will provide **background** as well as an understanding of how dialogue will influence programming; • Obtain input from beyond the "core team".
4. Following up the AAR	**3. Conducting the AAR**
• Convene senior management meeting to discuss AAR findings; • **Implement** recommendations; • Determine follow-up schedule; • Document and learn lessons **about the AAR process itself**, to improve it for next time. **Source:** adapted from USAID. 2006.	• Achieve maximum **participation;** • Ensure honest, candid and professional **dialogue** that focuses on **learning**; • Understand what happened with the goal of improving the organization; • Maintain a record of the discussion. This may be **confidential**; • create **recommendations** for action.

4. Best Practice

The term "best practice" need not be too literal: it does not declare a champion nor reign supreme over a competition of practices. Rather, best practice indicates a strong or useful case study, and describes an approach that, in a certain context, has had some success and may helpfully inform future activities. Identifying, capturing and sharing best practice generally involves both tacit and explicit knowledge: explicit knowledge about the practice captured in such "sharing" tools as databases, and tacit knowledge that can be disseminated via, for instance, communities of practice.[21]

One useful way of identifying and sharing best practice has been developed by Skyrme:[22]

1) **Identify user requirements.** Do we need a database of best practices or should we instead be sharing select aspects of this knowledge through storytelling and face-to-face interactions?

2) **Discover best practices.** Tools to do this include: identifying individuals who are performing well and understanding how they work; communities of practice; after action reviews; knowledge harvesting and exit interviews.

3) **Create a dossier of good practices.** Databases are typically used to store best practices in a standard format. Items to be entered in the database include: title; profile; context; resources; description; improvement measures; lessons learned; and links to resources.

4) **Validate best practices.** Review identified best practices to reaffirm their validity. This can be done by a panel of subject experts and peers.

5) **Disseminate and apply.** We must go beyond the database to ensure face-to-face dissemination of best practices. Ways include: communities of practice; peer assists; improvement groups or quality circles; visits to other departments or organizations with good performance; organized learning events; job secondments or exchanges, etc.

5. Storytelling

The ancient art of storytelling has much to tell us. The importance of storytelling as a tool to share knowledge within organizations is increasingly being recognized and deliberately used — especially when attempting to share *tacit* knowledge.

For years now, Steven Denning — a renowned KM expert — has used stories as a KM tool, and more specifically as a way to effect change within organizations. Specifically, he uses what he calls *springboard stories* that enable "a leap in understanding by the audience so as to grasp how an organization or community or complex system may change." Beyond the important target of spurring change, storytelling can also work to capture tacit knowledge; embody and transfer knowledge; innovate; build community; enhance technology; and contribute to individual growth. [23]

Stories and Tacit Knowledge...

Version A	Version B
In our evaluation of a project in Bangladesh we noted a wide variance in the competence of individual villages to develop sustainable and effective solutions to problems encountered, for example in replacing broken parts or developing low cost products such as new latrines. The lessons to be learned from this evaluation are that we should: • work against over-dependence on donors; • note and encourage entrepreneurial approaches to problems; • identify existing and repeatable good practices; • build and strengthen communication between villages to assist cross-fertilization of ideas at the grassroots level.	Bangladesh is a really impressive place... in a positive sense. I was in a village last year work- ing in water and sanitation. We were trying to promote the use of improved latrines, but could not produce concrete slabs and rings locally for a low cost. Somebody told me to visit the latrines of a lady in the village, so I went along and said, "Can I see your latrines?" She had made a latrine out of a clay pot with the bottom cut off. Then with a potter from the area she developed a small local production of bottomless pots, and they became the latrines. Ingenious. A few weeks later I was in another village and saw a hand pump; it was broken, just a small piece missing. So I said to the villagers, "Why don't you repair your pump?" And they said, "oh, we just wait for another donor to bring a new pump." So I said, "Why don't you visit the lady in the village over there? She finds ways of getting things done for herself."

Source: The Swiss Agency for Development and Cooperation. 2006. *Story Guide: Building Bridges using Narrative Techniques.*

A good story

According to Prusak, a good story should possess the following attributes:[24]

- **Endurance.** While stories are likely to change over time, the lessons they are meant to convey should stay the same.
- **Salience.** Good stories should appeal to their audience, be witty, pithy and touch an emotional chord. The story must be short enough for people to remember it.
- **Coherence.** Stories should explain something and make sense. They must also be believable – avoid exaggeration.
- **Character.** Stories tend to hinge around the values and actions of characters the audience can easily identify with.

In addition, stories should be simple and concise but with sufficient background information; be plausible, lively and exciting; be told with conviction; and, always end on a positive note.[25]

The Strengths of Storytelling

- Storytelling allows us to communicate: quickly; naturally, clearly; truthfully; collaboratively; persuasively; accurately; intuitively; entertainingly; movingly; feelingly; and interactively.[1]
- Stores are funny, interesting and memorable. Their language is real and personal. Stories simplify complex events. Stories are concrete and accessible. The audience readily identifies with the story. Stories inspire us to take action. Stories foster a sense of community. They promote the development of human relationships.[2]
- "In providing the broader context in which knowledge arises, storytelling can increase the potential for meaningful knowledge sharing. By grounding facts in a narrative structure, learning is more likely to take place, and be passed on."[3]
- Stories communicate ideas holistically, conveying a rich yet clear message, and so they are an excellent way of communicating complicated ideas and concepts in an easy-to-understand form. Stories therefore allow people to convey tacit knowledge that might otherwise be difficult to articulate; in addition, because stories are told with feeling, they can allow people to communicate more than they realize they know".[4]

Sources:
[1] Groh K. *What are the potential benefits of storytelling?* www.creating21stcentury.org
[2] CIDA. 2003. *Knowledge Sharing: methods, Meetings and Tools.*
[3] Ramalingam B. 2006. *Tools for Knowledge and Learning: A Guide for Development and Humanitarian Organizations.* London: ODI.
[4] *ABC of Knowledge Management.* 2005. NHS Natinoal Library for Health: Specialist Library Knowledge Management.
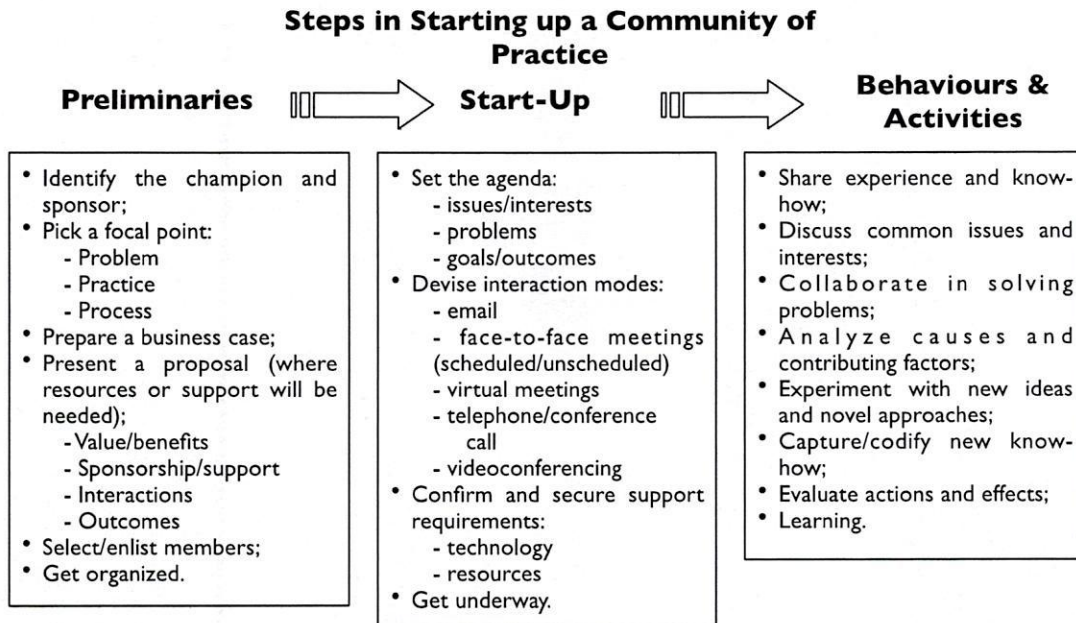
6. Communities of Practice

All of us have learned how to solve a particular problem or perform a specific task, not from a manual or text book, but from talking to a colleague. Face-to-face discussions are not only effective ways to share existing knowledge, but can also lead to innovation and the creation of more knowledge. Communities of practice (CoP) – "groups of practitioners who share a common interest or passion in an area of competence and are willing to share the experiences of their practice" – are ways of formalizing such exchanges.[26] They are based on the assumption that the acquisition of knowledge is a social process, and that knowledge and information can best be shared and learned within communities.[27] As opposed to working groups or task forces, CoP are not formed around a specific assignment and are not time-bound: they exist "indefinitely for the promotion of the issue or issues around which the community is formed."[28] In addition, membership in a CoP is entirely voluntarily and the group's composition and mission are meant to be fluid, flexible and informal. Their mandate can include stimulating interaction, fostering learning, creating new knowledge, and identifying and sharing best practices.[29] They can be an extremely useful way of capturing and sharing the elusive but essential tacit knowledge of our colleagues.

How do we get started?

We can form a CoP within our own organization – if it's large enough – or we can form one across organizations, and even continents. Whatever the case, a CoP must focus on a single issue or area of expertise around which people are willing to share ideas, find solutions, and innovate. Their exact format and modes of operation will depend upon what kind of knowledge people need to share, how tightly bonded the community is, and how closely new knowledge needs to be linked with people's everyday work.[30] The first questions when setting up a CoP include: what is the knowledge focus? who can

contribute? what are the common needs and interests of the group? and what is the group's ultimate purpose?[31] In his CoP start-up kit, Nickols (2003) provides a very useful step-by-step view of the process:

Steps in Starting up a Community of Practice

Preliminaries	→	Start-Up	→	Behaviours & Activities

• Identify the champion and sponsor;
• Pick a focal point:
  - Problem
  - Practice
  - Process
• Prepare a business case;
• Present a proposal (where resources or support will be needed);
  - Value/benefits
  - Sponsorship/support
  - Interactions
  - Outcomes
• Select/enlist members;
• Get organized.
		• Set the agenda:
		  - issues/interests
		  - problems
		  - goals/outcomes
		• Devise interaction modes:
		  - email
		  - face-to-face meetings (scheduled/unscheduled)
		  - virtual meetings
		  - telephone/conference call
		  - videoconferencing
		• Confirm and secure support requirements:
		  - technology
		  - resources
		• Get underway.
				• Share experience and know-how;
				• Discuss common issues and interests;
				• Collaborate in solving problems;
				• Analyze causes and contributing factors;
				• Experiment with new ideas and novel approaches;
				• Capture/codify new know-how;
				• Evaluate actions and effects;
				• Learning.

Source: Nickols F. 2003. *Communities of Practice: A Start-Up Kit.* Distance Consulting.

7. Peer Assist

We often struggle to find solutions to what we think are *new* problems. But in most cases, somebody, somewhere – likely within our own organization – has had to deal with similar issues in the past. By turning to them for assistance and advice, we can often find solutions, or at least good starting points. Pioneered by BP Amoco in 1994, the Peer Assist technique – tapping into our peers' experience and expertise – saw the company save US$750 million over its first three years of use.[32]

When is Peer Assist useful?

• You are starting a new assignment. You want to benefit from the advice of more experienced people.
• You face a problem that another group has faced in the past.
• You have not had to deal with a given situation for a long time. You are no longer sure what procedures to follow.
• You are planning a project that is similar to a project another group has completed.

Source: CIDA. 2003. *Knowledge Sharing: Methods, Meetings and Tools.*

What does a Peer Assist involve?

A Peer Assist takes the form of a half-day to two-day meeting where a group of peers comes together to discuss a particular problem. The meeting should take place prior to the launch of a new project, though it may also prove useful throughout the project's lifecycle. The project leaders are typically the ones to convene the meeting, carefully

selecting the participants whose advice and knowledge is particularly sought. The project leaders must manage the entire meeting (or set of meetings).[33]

Steps in conducting a Peer Assist

1) **Purpose:** Clearly define the problem we're seeking assistance with and ensure that our aim is to learn something.
2) **Background research:** Find out whether others have previously tackled a similar problem.
3) **Facilitator:** Getting someone from outside the team often helps ensure the process runs smoothly.
4) **Timing:** Make sure the results of the Peer Assist will be available in time and on time.
5) **Participants:** Invite four to eight people who have the relevant knowledge, skills and experience. Avoid hierarchies and ensure people feel free to share their views.
6) **Deliverables:** Know what's wanted and plan accordingly. Deliverables should be options and insights as opposed to "answers".
7) **Socializing:** People will work better together if there is time to get to know each other before and during the meeting.
8) **Ground rules:** At the start of the meeting, make sure that everyone is on the same footing and is clear about the purpose and individual roles.
9) **Context:** The host team should present the context, history and future plans with regard to the problem being presented.
10) **Questions and feedback:** At this point, the host team should take a back seat and allow the visitors to discuss what they have heard and share ideas.
11) **Analysis:** The visiting team should now analyze and reflect on what they have learned and look at different options.
12) **Actions:** The visitors present their feedback to the host team. Time should be allowed for questions and clarifications. The host team should agree on a timeline for implementation.

Source: Adapted from *ABC of Knowledge Management*. 2005.

Key KM Resources

- NHS National Library for Health. 2005. *ABC of Knowledge Management*. www.library.nhs.uk/knowledgemanagement/. This is a superlative and utterly comprehensive resource for anyone interested in KM issues. The place to start.
- Ramalingam B. 2006. *Tools for Knowledge and Learning: A Guide for Development and Humanitarian Organisations*. London: ODI. http://www.odi.org.uk/rapid/publications/Tools_KM.html
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Comments? Questions? Criticisms?

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Research Matters (RM) is a collaboration of the International Development Research Centre (IDRC) and the Swiss Agency for Development and Cooperation (SDC). RM was launched in 2003 to examine and enhance the specific KT dynamics within the field of health systems research. From these founding connections with both a research funder and a bilateral donor, RM has occupied a unique vantage among health researchers and research-users. By working directly with both the producers of research and with its consumers, RM has developed a range of activities and modalities designed to hasten the movement of research results to the policy arena, to database and access those results, to communicate them, and to expand an appreciation of research itself. RM builds capacity among researchers to perform their own KT; RM responds to the priorities of major research-users; and RM actively brokers both research results and research processes. As an active, ground-level embodiment of KT, RM has helped to shape how health research is demanded, created, supplied, and ultimately used.

Endnotes

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