KNOWING IS NOT ENOUGH

A sampling of knowledge management approaches in the nonprofit sector

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Nonprofits are in the knowledge business, whether they acknowledge it or not. A human rights organization translates the reparations approach used in one country to a similar circumstance in a completely different part of the world. A job training center teaches job and life skills to women trying to get off welfare. A foundation leverages its understanding of the field to help bring together organizations working toward similar goals. All of these nonprofits are actively using and sharing knowledge as a core part of their daily work. But because they don't think of themselves as information brokers, these organizations rarely invest adequately in how they manage the knowledge that is so central to their efforts.

Nevertheless, when it comes to managing knowledge, almost every emerging nonprofit has its great success stories: the especially productive staff meeting, the timely memo about lessons learned, the revelations of a late-night brainstorming session, the connections made in the hallway or at the water cooler, or the fortuitous conversation over a cup of coffee or a beer.

But as nonprofit organizations grow, managing knowledge in the ad hoc ways that worked when they were smaller often does not translate into future success at a larger scale. New, more systematic approaches to capturing, sharing, and applying knowledge are needed.

While there are no silver bullet solutions for the challenges of knowledge management in large and growing nonprofits, a number of organizations are experimenting successfully with new approaches that may prove instructive to their peers. To help shine some light on the range of strategies now being used to manage and share knowledge in the social sector, the Monitor Institute conducted a brief exploration of effective practices in the nonprofit space as part of our work with the International Center for International Justice (ICTJ), a rapidly-growing global human rights organization. The study included interviews with more than a dozen foundation, nonprofit, and technology industry experts[1] to explore knowledge management strategies used by international NGOs, foundations, social benefit organizations, and others. The resulting research is intended as a sampling of the leading edge of nonprofit practice to stimulate thinking and discussion, not as an exhaustive compendium of knowledge strategies.

The ICTJ has given Monitor permission to share the generalized findings of the study in the hope that it can provide other nonprofits and foundations with a framework for thinking about how they capture, organize, and share knowledge, and a sense of some of the knowledge management tools, options, and approaches that are now available to them.

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[1] A list of the key experts interviewed for the study is included in Appendix A.

Our investigations highlighted the limited extent of knowledge management practice in the nonprofit sector. While a handful of philanthropic foundations and large international NGOs are currently experimenting with knowledge strategies, none of the experts we interviewed were able to identify nonprofit organizations that they felt were truly exemplary at knowledge management. According to one interviewee, “I think there are a few NGOs that are excited about knowledge management, but I don’t think the movement has actually hit there yet. I know of none that are doing great work on this—not one…at all! Until they believe the practice of knowledge management improves their on-the-ground work, it’s not going to be important. Once they see that it can make their lives easier, it may gain momentum.”

Still, the complex knowledge management challenges that most nonprofits now face are not unique. Organizations from the nonprofit, business, and government sectors are all struggling with the same types of issues, and no one has definitive answers. But looking across these different arenas, we were able to identify a number of promising social practices and technological solutions that may be transferable to the social sector. The strategies we identified are clustered around three primary elements of knowledge management systems:

- **Knowledge creation and capture** approaches focus on how new knowledge is developed and how it is codified to be shared with others.
- **Knowledge organization** systems provide tools for storing, categorizing, and accessing information.
- **Knowledge transfer, sharing, and application** practices highlight the ways that knowledge can be disseminated and applied in the field.

Knowledge creation and capture

In the face of pressing on-the-ground needs, many nonprofits struggle to find the time to systematically capture programmatic knowledge for reuse across geographies and issues. Finding easy ways to document learning without adding a significant burden for program staff is critical. But new technologies are making it simpler to document knowledge, through audio and video capture and through more informal publishing mechanisms like wikis and blogs that circumvent the time and expense of formal publishing strategies.

With these new developments, the emerging challenge is not so much about *how* to capture knowledge, but about *what* knowledge to capture. Few organizations think deeply about how to prioritize what knowledge is worth documenting. In many cases, organizations either capture just basic descriptive information about their work, or they try to document everything, and in frustration at the scale of the enterprise, end up capturing little useful knowledge. Before any system for knowledge capture can be implemented, it is important to develop a clearer sense of what knowledge can be usefully transferred and reapplied, and what should be collected to be shared across geographic and programmatic areas.

Harvesting knowledge

“Knowledge harvesting” is an approach that uses an interviewer (or interviewers—often former journalists) to gain access to the tacit knowledge of experts and top performers in an organization and to document that knowledge. The goal is to make better and wider use of knowledge by extracting it regularly from the heads of key staff and making it available to a wider range of people. It is a way to ensure that program staff are able to articulate the lessons they learn in their work without requiring them to spend large amounts of time and effort trying to write-up their experiences. The centralized nature of the interview process also helps establish a standard format across different reports, creates an excellent vantage point for the interviewer(s) to see patterns across different issue or geographic areas, and ensures a consistent approach to categorization of information that will facilitate content management and organization in the long run. While the approach places much of the burden of knowledge management on a limited number of knowledge management focused staff, the approach aims to produce immediately useful and valuable knowledge that encourages buy-in into knowledge management practices over the long term.

- The Robert Wood Johnson Foundation "Grant Results" program aims to share its findings and results and build a record of the knowledge, achievements, difficulties, and lessons learned from the foundation's grantmaking. When an RWJF program or project is completed, the foundation assigns a professional writer who interviews the project/program director and other key stakeholders to glean lessons from the work and to clarify and illuminate important aspects of what was accomplished. The writer then produces a report delineating the important knowledge developed in the project to share with others inside and outside the foundation. The program has allowed the foundation to capture information from its grantmaking in succinct, well-written, and easy-to-understand documents while allowing program staff to focus their attention on their programmatic activities.[2]

- The archiving unit at the Ford Foundation is increasingly moving towards the idea of creating regular liaisons between the archive staff and different program areas. The archivists interview program staff, individually and in groups, to capture information and ideas that aren't a part of the conventional written record. They aim to create a neutral documentation of the knowledge in each program area that is regularly updated and available to be shared beyond program boundaries.

Exit interviews

Exit interviews have traditionally been conducted when employees leave an organization as a way of getting feedback about why they are leaving and how the organization might be improved. More recently, they have been expanded to be used as a way of capturing knowledge from departing staff (beyond human resources information) so the knowledge is not lost to the organization when a person leaves. The interviews aim to capture both explicit knowledge (to ensure the smooth transfer of files, emails, and other documents) and tacit knowledge (to document harder-to-capture practical information, know-how, and lessons learned). The less an organization documents knowledge on a regular basis, the more important it is to capture it when a person exits.

- At the Ford Foundation, the archiving staff interviews program officers before they leave the foundation to capture what formal document might be missing from the written record, what correspondence and tacit knowledge could be transferred, and how language in the issue area may be changing. The interviews were deemed valuable enough that the foundation is now beginning to conduct these types of interviews on an annual basis, even when a staff person is not leaving the organization, to make sure that knowledge is captured on a regular basis.

After action review

In some ways, the After Action Review (AAR) is a group version of the exit interview. It is a structured, facilitated review process that allows a team to come together to do an assessment after a

[2] *Grant Results*, Robert Wood Johnson Foundation, October 2006, http://www.rwjf.org/files/publications/GRRFramingDoc.pdf.

project or major activity. The idea is to document lessons learned before a team disbands, or before people forget what happened and move on to other things. Despite the name, AARs do not have to be performed at the end of a project. They are actually most useful during the course of a project, serving as a live learning process at a time when lessons can be immediately applied. The sessions are undertaken in a spirit of openness and learning—they are not intended to fix problems or allocate blame. They seek to understand what happened in a project, and to make sure that the lessons learned are not only tacitly shared on the spot by the individuals involved, but conveyed to a wider group as well.

- The United States Army's After Action Review process was developed to help crews, squads, and platoons hold professional discussions about events in order to surface the important lessons and to learn from the experience. The feedback compares the actual output of a process with the intended outcomes and identifies strengths, problems, and key lessons. The shared learning has been shown to improve group performance and to promote unit bonding.[3]

Blogging
Internal group blogs represent a new technological option that allow practitioners to codify knowledge and ideas for internal use in a less polished form than might be found in more formal publications. They provide online, searchable forums for information exchange and sharing. In essence, they can be a way to translate the type of exchange that now occurs by email into a form accessible to a broader internal audience. (In some cases, group blogs can be created almost effortlessly by simply adding a designated recipient to personal emails that automatically posts the contents to a blog site.) And new tools like "tag clouds" (weighted lists that provide visual representations of the number of times certain keywords have been used) allow people to quickly identify common issues and topics across the collective blog entries.

- German investment bank Dresdner Kleinwort Wasserstein has set up over 120 internal blogs to promote discussion and distribute information within the company. Several thousand traders and other employees use the blogs as alternatives to mass email, and see the space as a forum to share information and research. According to the company's chief information officer JP Rangaswami, "We think of it as the open-source marketplace for ideas. It lets us expose concepts or issues to a wide audience and discuss them dispassionately."[4]

Knowledge organization

There are a range of ways to approach the organization of accumulated knowledge. Traditionally, systems have focused on codifying knowledge and storing it using technological systems and databases. Other approaches focus, as one expert explained, "less on the codification of knowledge, and more on the highways that get you to the places you need to go." Some emphasize personalization—how you create person-to-person contacts that allow knowledge to be shared.[5] Others focus on the approaches used to "tag" and find knowledge so people can access information they didn't even know existed.

[3] *A Leader's Guide to After-Action Reviews*, Department of the Army, September 1993, http://www.au.af.mil/au/awc/awcgate/army/tc_25-20/table.htm.

[4] The New Companies on the Blog, Rob Mitchell, *Financial Times*, 22 December 2004, http://search.ft.com/ftArticle?queryText=blogs+Dresdner+Kleinwort+Wasserstein+&aje=true&id=041222001180.

[5] For more information on codification and personalization based approaches, see "What's Your Strategy for Managing Knowledge," by Morten Hansen, Nitin Nohria, and Tom Tierney in the March/April 1999 issue of *Harvard Business Review*.

Codification-based knowledge systems
Content management systems are computer software systems that assist users in the organization, control, and publication of documents and other content, such as images and multimedia resources. The systems store an organization's documents and multimedia material, using a relational database to create typologies and taxonomies for organizing content.

SharePoint appears to be the most common system used for doing web-based content management among NGOs and philanthropic organizations, although it requires significant work and investment to maintain the system. A wide range of other collaborative content management systems are emerging, including off-the-shelf systems like Plone and Drupal (which provide a range of collaborative capabilities such as wiki, blogging, and social tagging together with basic content management and search). These systems allow users protected access to centralized web-based content from any location with internet access.

- In 2005, George Soros began to shift the mission of his collection of foundations. They saw themselves increasingly moving toward policy and advocacy and away from the silos they had created over time. Open Society Institute and the other Soros Foundations operate as a network of 6 or 7 core offices and 32 networked foundations, cutting across a matrix of geographies and program areas. Because of the independent structures, the network could be making grants in certain program areas and from several national foundations without being aware of what the others were doing. The various foundations realized that they would need to do more sharing across programs and organizations, so they created a customized technological tool, based on Plone and are now piloting its use. The most basic goal of the new system is to provide a single knowledge backbone to the network of foundations. Until now, there was no centralized repository for information for the network, and several of the larger offices had created their own intranets, while other offices had none at all. The new system created a global intranet that all of the Soros offices could share.

Personalization-based knowledge systems
Content management systems focus primarily on capturing and storing codified knowledge. But it is also important to help people share information through direct person-to-person contact. This "personalization" approach is frequently used at strategy consulting firms. They create systems that help people find one another, and invest heavily in building networks of people and organizational cultures that emphasize cooperation. In the nonprofit world, this often starts with the simple task of creating accessible staff directories that facilitate personal connections.

- One of the most powerful knowledge sharing activities that the Nature Conservancy has undertaken was simply creating a staff directory, complete with pictures, basic information, and details about a person's background, areas of focus and interest, and the communities of practices they are involved in. According to Paquita Bath, a former TNC senior director and now a consultant to the organization on knowledge and learning issues, when face-to-face contact, joint participation in phone calls, and referrals are not possible, a staff directory can be critical. Photos were particularly important to the directory. People were reluctant to contact others without knowing anything about the person they were reaching out to. They needed a more personal connection. Bath explained, "This is really basic stuff, but these basics are often what work the best."

Tagging systems

Just as important as the system for storing content are the systems by which you find and access content over time. New types of "tagging" software and digitization are changing the way people are able to search and find the information they need, but they require a good amount of investment up front to function. According to one interviewee we spoke with, "I find that there is a lack of awareness of content management—how to get at not just known documents, but how to develop descriptors that can provide you with enough information to allow you to see resources you don't know about. For example, a report about helping communities get access to clean water may also have important information about the ways the program did community outreach and engagement that could be extremely valuable to people working in education or health issue areas. But those people might not find the information if you don't have the report tagged right. You need to go beyond attaching the title or the single main concept. Fitting things into just one box is a very limiting concept. The idea is not just to categorize things, but to share the web of relationships. You need a variety of keywords and tags, because words and ideas are constantly changing. The benchmark of a good system is that you shouldn't have to know something to find something."

- Although they haven't yet bought a technological tool for document management, The Columbus Foundation in Ohio is already beginning to rehearse for when their system is up and running. According to senior officer for strategy and organizational learning Sidney Hargro, "We're revising our grantmaking taxonomy and developing a new document taxonomy. Staff will then be trained on categorization and taxonomies. We need to know where things go. We need to be aware of where we place things, even if it's just on the server." By getting people in the habit of placing key files into an unofficial taxonomy on its server, the foundation is hoping to get people thinking about categorizing and filing, in an effort to acculturate people to the process and allow for a smooth transition to a document management system when the organization is ready to put one into place.

Knowledge transfer, sharing, and application

Perhaps the most significant knowledge management challenge at any organization is how to transfer, share, and apply knowledge. This is particularly difficult within organizations that cut across both geographic and issue areas. In most cases, a range of technological and cultural impediments to sharing result in limited supports, processes, and tools for facilitating internal knowledge sharing. And there are typically even fewer vehicles in place for systemically integrating and sharing knowledge from and with partners and sources *outside* the organization. While no one has yet developed the answer to the challenge of sharing knowledge across organizational silos, a number of groups in both the for-profit and NGO sectors are experimenting with approaches to dealing with these issues.

Communities of practice

Community of practice (CoP) are networks of people who share a common interest in a specific area of knowledge or competence and are willing to work and learn together over a period of time to develop and share that knowledge. CoPs are based on the idea that learning is a social activity and that people learn and generate knowledge best in groups. They help people deepen their knowledge and expertise by facilitating interaction on an ongoing basis. CoPs can cut across departmental boundaries and formal reporting lines to help people expand their horizons, gain knowledge, make connections, and explore and test ideas in a non-threatening environment. They can operate using a variety of different learning activities:

- **Face-to-face meetings** allow practitioners to collaborate, share experiences, build trust and relationships, and develop a sense of joint enterprise.
- **Teleconferences** provide opportunities for low-cost information exchange, interactive problem solving, idea generation, and education.
- **Videoconferences** provide opportunities for visual exchange and somewhat greater personal connection, but require a greater technological infrastructure than teleconferences.
- **Virtual conversation spaces** allow for efficient information sharing, question and answer, surveys, and collaborative problem solving that allow for asynchronous exchange.
- **Websites** can contain basic materials, directories and bios, links to resources, case studies, tools and frameworks, and forums for information exchange.

New technologies are making it increasingly easy to capture the output of communities of practice to share with others beyond simply distributing written notes of proceedings. Audio clips and podcast make it increasingly easy to share a verbal record of meetings, while advances in digital video are allowing video recording of important sessions. And advances in cell phone technology may soon allow content to be transmitted even in places where technology and access are more limited. At the same time, wikis and other virtual communication spaces are allowing ongoing dialogue and exchange.

- The classic pioneering example of a CoP is DaimlerChrysler, as described in *Cultivating Communities of Practice*. The company was functionally organized—with departments for design, engineering, manufacturing, and sales. The design department would send a new design to the engineering department, which would send it back for redesign. Then the design would go to the manufacturing department and be returned for re-engineering. The localized focus of the departments limited interaction between units and gave rise to repeated hand-offs, duplication, and delays. So DaimlerChrysler decided to radically reorganize and changed the structure so that each product platform—jeeps, small cars, large cars, trucks, and minivans—possessed each of the necessary functions. So if you were a brakes engineer, you no longer reported to the brakes department, you reported to small cars, or to minivans. But a host of new problems started cropping up across the different car platforms. The company had gained the advantage of product focus, but compromised its ability to learn from its own experiences. So former colleagues from functional areas started to meet informally. The groups provided an important forum for learning, and rather than formalizing the meetings, the company decided to sanction and support the informal structures. "Tech clubs" were born, and progressively established themselves as an integral piece of operations. Engineers discovered that participation helped them do their jobs better, and the time spent together was a good investment. It often saved time later, gave an opportunity to get help with specific problems, helped participants to learn what others were discovering, and offered a chance to explore new technologies. As they changed the organizational structure from function-based to product-based, DaimlerChrysler had lost its functional base. CoPs created a functionally-based "soft" structure to go along with the new "hard" product-based structure.[6]

- Beginning in the late 1990s, the World Bank began to develop a range of internal structures to ensure that knowledge was shared across its traditional regional units. It developed a set of five formal "networks" (Financial and Private Sector Development, Human Development, Operations Policy and Country Services, Poverty Reduction and Economic Management, and Sustainable Development) that cut across the regions, and encouraged the development of a range of internal

[6] *Cultivating Communities of Practice*, Etienne Wenger, Richard McDermott, and William Snyder, March 2002.

communities of practice that brought together informal groups of practitioners to share knowledge about common development problems. These communities of practice, called Thematic Groups, have widely been considered the "heart and soul" of knowledge sharing at the Bank. The Groups undertake a range of functions, from the development of "knowledge collections" about good practices and sector statistics to the dissemination and outreach through brown bag lunches, workshops, websites, and newsletters.[7]

- The UNDP uses its system of subregional resource facilities (SURFs) to support an existing network of communities of practice. The SURFs act like help desks for local field staff. Staff can pose questions via phone, fax, or email to the regionally-located SURFs, who then solicit responses from UNDP staff, other UN agencies, regional commissions and professional networks, and available knowledge databases around the world. Over the course of a few days, the SURFs generate a "consolidated response" for the person requesting information that synthesizes the experiences and answers that were received from other locations. This type of asynchronous networking tool allows on-the-ground staff to get real-time responses about pressing issues from other team members, partners, and experts from around the globe. A UNDP staff person working on agricultural issues in Mongolia, for instance, would be able to solicit feedback from around the world about how the governments in different national contexts approach pastureland monitoring. Time differences around the world make it difficult for the UNDP (and other international organizations) to use simultaneous communications techniques like teleconferencing and videoconferencing to share this sort of experience. But the SURF system allows staff to pose questions and get responses in a relatively short space of time that may also be replicable in less intermediated and resource intensive wikis and knowledge sharing spaces. While extremely practical, these types of systems require a responsive culture, a commitment to collaborative give-and-take, and a significant time investment from staff to function effectively.[8]

Going beyond the organization: The power of networks

A growing understanding of networks—collections of individuals or organizations working together to use their knowledge, experience, and resources to achieve shared goals—has opened up new frontiers in helping people innovate, act, and learn together. The use of networks is creating a broad range of new possibilities as the widespread adoption of the Internet and other new communications technologies (such as Skype); the development of wikis, blogs, social tagging, and other "Web 2.0" tools; and social network analysis allow individuals and organizations to connect, coordinate, and collaborate in new ways.

Many of the same strategies and technologies that are used to help individual organizations co-create new knowledge and information, search for ideas and patterns, and generate new ideas and approaches to complex tasks are now also being used by networks to learn and act together. Communities of practice and collaborative Web 2.0 technologies like wikis and blogs are optimally designed to facilitate innovation, knowledge creation, and learning. And while using these tools in networks may raise real issues about sharing power and control, it can help create strong coalitions of advisors and implementers with the knowledge and capacity to leverage the impact of each individual partner.

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[7] Communities of Practice Questions and Answers, World Bank, http://siteresources.worldbank.org/WBI/Resources/CoP_QA.pdf.

[8] Regional Centres and SURFs, United Nations Development Programme, http://www.undp.org/energyandenvironment/regsurf.htm.

Thinking about networks will be particularly important for growing nonprofits where the capacity and partnership of other implementers can be critical to the success of projects. As one expert we interviewed explained, “The people who hold knowledge and can take action don’t necessarily correspond with the boundaries of any organization. It’s about the boundaries of the knowledge—where it rests and where it needs to be applied. You need to think strategically, in terms of impact. Who needs to have the knowledge to take effective action? What is the legacy left in the places where you work? How can you embed capabilities in those areas? It’s great to be firefighters who parachute in, but how do you inculcate the ideas you’re promoting into the place?”

Some of the ways that people are now using networks and new technologies to work collaboratively may hold important insights for how an organization engages partners in their work, builds and applies collective knowledge, and shares important learning.

- The Myelin Repair Foundation is a nonprofit medical research organization that uses a new collaborative research process to accelerate innovation in Multiple Sclerosis research by creating an environment in which disparate scientists can work together on a shared research plan. The Foundation is also consciously involving pharmaceutical companies to ensure that their work leads directly to the treatment of patients, rather than just journal publications. By overcoming these barriers, the MRF believes that researchers will be able to develop and implement treatment targets in 5 years instead of 15-20 years under the current system.[9]

- Wikipedia is the largest reference encyclopedia in the world, built on a “wiki” platform that allows anyone with access to an Internet-connected computer to view, add, delete, or edit information throughout the encyclopedia. The content of Wikipedia is free and written collaboratively by people around the world—a collective knowledge base built on the individual contributions of many different participants. This collaborative approach to knowledge development and sharing is now spreading widely. The Packard Foundation, for example, recently used a wiki to get broad input into the development of their program strategy related to nitrogen pollution.[10]

- Blogs can also be an important way of sharing ideas externally. The Pioneer Portfolio of the Robert Wood Johnson Foundation, for example, which aims to promote innovative projects that can lead to fundamental breakthroughs in health and health care, maintains a well-read blog called Pioneering Ideas to discuss emerging issues and efforts in the field and to share information about the foundation’s work with the broader public.[11]

- Digg.com is a website that allows users to post links to content they find interesting. Content—including news articles, blog postings, and websites on any topic—are submitted by the community of users, and can be *dugg* or promoted by other users. Highly promoted items gain a more prominent status on the site. Digg allows users to share content that is especially interesting, and uses the wisdom of crowds to help bring the most important information to the attention of others.[12]

[9] http://www.myelinrepair.org/about.

[10] http://en.wikipedia.org/wiki/Wikipedia:About and https://nitrogen.packard.org/default.aspx.

[11] http://rwjfblogs.typepad.com/pioneer/

[12] http://digg.com/about.

Creating an enabling culture

Building a supportive culture is essential to any knowledge management effort, regardless of the specific approach an organization takes. In many cases, cultural barriers to knowledge sharing can be significant. While people are typically extremely committed to accomplishing individual and organizational goals, they often fail to recognize the key role that building the collective knowledge of the organization can play in a nonprofit's success. Knowledge sharing is rarely considered an explicit part of people's jobs, and individuals are typically resistant to doing the extra work required to benefit others if there is not a clear personal return. In most organizations, there are few, if any, incentives to promote sharing (or disincentives to not sharing).

The knowledge management experts we spoke with have emphasized that developing an enabling culture is critical to the success of any knowledge management strategy. They suggested a number of key issues to consider when thinking about launching new efforts:

- **Start with small successes.** For a knowledge management system to work, people need to see the value of a commitment to leveraging what they know right from the start. According to one interviewee, "Everyone's so busy; they don't have time to do these things. If someone goes to a collaborative site and doesn't find what they want, they simply stop using it." Adoption of knowledge management practices is largely based on people's initial experiences. "Providing access to the day-to-day stuff people need was critical at the beginning. If I can get all the day-to-day stuff—forms and benefit information and such—then I start to see there's all this other stuff up there. If you don't get the basic stuff right, then it's hard to get anyone on board. People need to get used to using the system for simple things." Many experts recommend starting with a small pilot to generate and demonstrate immediate victories, and then ramping things up from there. They explain that trying something big across the board right from the start could be fatal to an effort.

- **Make it easy.** According to one interviewee, "The problem with most knowledge management systems is they don't take into account human nature and people's real-life behavior. If someone can't be bothered to fill out their expense reports, why would you think they'll do the added work of sharing more substantive knowledge?" Knowledge management solutions can't be seen as "extra" work, or they will be ignored in the face of enormous workloads. Knowledge systems have to help people do their work better. As another expert explained, "Things that are logistically complicated don't get done. The urgent drives out the important, and if it's not easy to do, workloads, time demands, and emerging crises will take priority."

- **Facilitate personal relationships.** Every expert we spoke with highlighted the importance of building personal relationships as an essential ingredient of implementing successful knowledge management strategies. The relationships that are formed through personal contact build the trust and sense of community that facilitate other forms of exchange and make knowledge sharing happen. According to one source, "Electronic communication is very effective; but getting people together face-to-face is what really builds trust. That's what really drives knowledge management. An annual get-together is usually a much better investment than any website or technology." In addition to making time for regular convenings, the simple physical layout of an organization can also be critical to the flow of knowledge. One interviewee explained, "The actual physical space can go a long way to facilitating communication and breaking down barriers. There are places where people will email their neighbor next door. You can do a lot simply by creating communal spaces where people can talk and share."

- **Create incentives for knowledge sharing.** While many experts emphasize the sheer potential of improving work processes and products as the most important drivers for knowledge sharing, most organizations are still grappling with how to provide appropriate incentives to encourage collaborative learning. According to one expert, “Performance management is key. The corporate world often builds in incentives for reflecting and sharing. We haven’t been able to figure that out in the nonprofit world yet.” In the for-profit sector, many companies integrate employee contributions to the firm’s knowledge base into annual performance reviews and bonus calculations. Contributions to and utilization of the knowledge assets of the firm are one of the key dimensions of staff performance. At other businesses, executives and program staff are evaluated in part on the amount of direct help they give to colleagues.

- **Consider knowledge in human resource activities.** Knowledge sharing can also be integrated into the hiring process. Many organizations now try to include knowledge sharing in job descriptions (as well as performance reviews), and view knowledge management as a key skill for new hires. According to one source, “The process starts in recruiting people—hiring staff who are open to sharing and who are able to use new tools. But it also extends to staff learning: what do you impart to staff when they first come on board. If you don’t have an orientation that helps people understand how knowledge is valued and shared, there is a cost.” Another interviewee added, “Think about knowledge sharing as one of the essential competencies of the people you’re hiring. If you care about knowledge management, you need to hire people who are willing to share. Knowledge management efforts are way easier if you hire people who have those values.”

- **Get buy-in from the top.** Efforts to change knowledge management practices must have support from organizational leadership. Executives need to use the systems just as much as program staff. As one expert explained, “Anything that is done needs to be embraced by leadership. They need to be part of the experiment itself—using it, not just blessing it. Management that is part of the experiment can have a huge impact.”

- **Be inclusive.** A good deal of the knowledge that is used by any organization comes from partners, researchers, community members, experts, and other external sources. As organizations grow, it is important to cast the “knowledge” net broadly, drawing information from a wide range of sources and transferring knowledge outside the organizational walls. Balancing broader participation with security and intellectual property concerns will be an ongoing process.

Finding the right knowledge management strategy

All of these examples serve as illustrations of just a few of the many knowledge management options available today. No single strategy will provide a comprehensive solution to all knowledge management challenges; but elements from different approaches may represent important tools within an organization’s larger knowledge management toolbox. The right strategy, or set of strategies, for each nonprofit will be different, depending on the scope, scale, technologies, operations, and culture of the organization—but they all hold the potential to help organizations use knowledge in new ways to facilitate the day-to-day work of their staffs and improve the quality of their outcomes.

Appendix A

Experts interviewed during the Monitor Institute research:

- Paquita Bath, former Senior Director, The Nature Conservancy
- Sharon Burns, Chief Information Officer, MacArthur Foundation
- Jamais Cascio, founder, WorldChanging.com
- Roberto Cremonini, Chief Knowledge and Learning Officer, Barr Foundation
- Marcy Goldstein, Head of Research Services and Archives, Ford Foundation
- Sidney Hargro, Senior Officer for Strategy and Organizational Learning, The Columbus Foundation
- Tom Kern, Senior Associate, Annie E. Casey Foundation
- Ron Kim, Information Officer, World Bank
- Tom Moroz, Director of Special Projects, Open Society Institute
- Ariel Pablos-Mendez, Director of Knowledge Management and Sharing, World Health Organization
- Joe Saunders, Deputy Program Director, Human Rights Watch
- Denise Shephard, former CEO and founder, Collaborative Standards
- Bill Snyder, author, *Cultivating Communities of Practice*
- Hirotaka Takeuchi, Dean, Graduate School of International Corporate Strategy, Hitosubashi University, Tokyo

Monitor Institute

Monitor Institute works with today's most imaginative leaders to surface and spread best practices in public problem solving and to pioneer *next practices*—breakthrough approaches to addressing pressing social and environmental challenges. In addition to its own unique set of expertise and capabilities, the Institute draws on the intellectual, human, and financial resources of a leading global professional services firm—the Monitor Group—to help promising social innovators in all sectors grow their impact and transform existing systems for addressing social inequities and environmental degradation.

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