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A young girl with dark hair, wearing a white school uniform with a red collar, is sitting and reading a colorful book. She is looking down at the pages with concentration. The background shows a window with metal bars and a plain wall.

Designing a KM Strategy that Fits Your Needs

A decorative graphic in the bottom left corner consisting of several overlapping circles in purple, red, orange, and blue.

Experiences from Save the Children's Department of Global Health

Speakers



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Agenda

- Background & Context
- 10 Tips for KM Strategies
- Questions and Discussion



Background & Context

Historical KM Challenges

- Major initiatives on KM in the past, but not all have been successful
- Challenges identified include:
 - Insufficient resources
 - KM not perceived as a priority
 - Lack of ownership
 - Lack of buy-in from management and staff to leverage frameworks that were created
 - Changes in KM systems (e.g., intranet platforms) distracting from strategic movement on larger knowledge exchange and learning efforts



Three Kinds of KM Strategies



Save the Children's Department of Global Health (DGH) has recently developed three kinds of KM strategies:

1. **Organizational:** DGH KM strategy

- Addressed KM processes within the department, within Save the Children US, and among health & nutrition staff working for Save the Children globally

2. **Project:** Saving Newborn Lives (SNL) KM strategy

- Addressed KM processes within the project, within Save the Children, and among global newborn health stakeholders

3. **Country:** SNL country-specific KM strategies (7)

- Addressed KM processes within the country-level project, within the country office, and among country-level newborn health stakeholders

10 Tips for KM Strategies

Lessons learned from Save the Children's experience

Tip 1: Focus on Organizational Improvement & Efficiency Rather than KM



- Link the strategy directly to organizational/project/country goals; emphasize that KM is a tool to reach those goals
- Show how interventions will lead to program improvement and make staff more effective in their work
- Avoid KM jargon where possible

Tip 1: Focus on Organizational Improvement & Efficiency Rather than KM

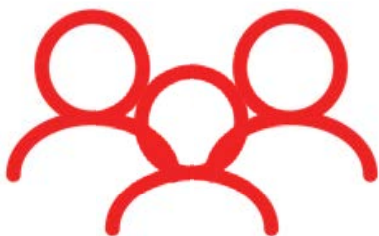
Our experience

- Organizational strategy directly linked interventions back to specific items in the organization's goal tree
- Strategies are always introduced by linking them to overall organizational/program/country goals
- Capacity building for KM always emphasizes that the goal of KM is the same as the program goal
- Terms like “knowledge management” avoided when possible; strategy linked directly to everyday staff work

Our challenges

- Difficulty getting buy-in on KM as part of a normal workstream leading to program efficiency rather than as additional work

Tip 2: Consult & Involve Staff at All Stages



- Consulting and involving staff from the beginning ensures the strategy is directly linked to their needs and incorporates the interventions that they feel would be effective
- Staff are more likely to participate in and even lead interventions that they suggest and feel strongly about
- Remember that program staff often understand best what will work for their contexts (especially for country and project staff)

Tip 2: Consult & Involve Staff at All Stages

Our experience

- Country strategies involved a week-long in-country consultation with staff with 3+ hours of working sessions each day and 1-hour consultations with individual external stakeholders
- Project strategy involved 90-minute consultations with each project unit and 1-hour consultations with individual external stakeholders
- Organizational strategy used interviews with selected staff and leveraged an advisory group with representatives from all thematic teams

Our challenges

- Difficulty getting staff time for feedback, especially for the organizational strategy

Tip 3: Think about Audience Groups & Their Needs



- KM strategies are intended to ensure that people have the information that they need when they need it
- Consider the following questions:
 - Who needs information?
 - What information do they need?
 - How can they best receive knowledge?
 - What can you do to ensure that their knowledge needs are met?
- KM methodologies should be focused on the intended knowledge user

Tip 3: Think about Audience Groups & Their Needs

Our experience

- Project & country strategies included an audience analysis matrix:

Audience	Audience Type	Priority	Information Needed	Use of Information	Current Practices to Reach Audience	Effectiveness in Reaching Audience	Reasoning	Ways Audience Could Be Better Reached
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Our challenges

- The audience analysis process is important but can be tedious for staff with limited time

Tip 4: Be Specific about Proposed Interventions

- KM is a concept many people have heard of, but many are unclear on what it means for their work
- Specific interventions make the strategy concrete, understandable, and actionable



Tip 4: Be Specific about Proposed Interventions

Our experience

- Each strategy listed specific, actionable intervention suggestions (e.g., “Create a list of KM responsibilities for coordinators and guidelines on KM responsibilities for all staff”)

Our challenges

- Identifying discrete activities takes time but is necessary and saves significant time later

Tip 5: Understand KM-Related Needs & Provide Justification for Proposals



- Strategies based on the needs that staff are feeling acutely will move forward with stronger momentum and buy-in
- Proposals should be linked directly to staff needs and can be organized by overarching gaps related to KM
- If you need to make the case for your strategy, illustrate specific pain points related to gaps identified

Tip 5: Understand KM-Related Needs & Provide Justification for Proposals

Our experience

- Project and country strategies were based on in-depth needs assessments done in consultation with staff and external stakeholders
- Organizational strategy was based largely on past in-depth needs assessment and more recent individual staff interviews
- All strategies were organized according to overarching KM gaps explained with examples
- All strategies identified benefits and challenges specific to each intervention

Our challenges

- Identifying specific pain points was challenging, and management found them unnecessary, as they were well aware of the issues, and there was already buy-in among management for the strategy

Tip 6: Be Ambitious but Realistic



- KM strategies should be ambitious and outline methodologies for program improvement and increased efficiency and effectiveness
- Staff can get excited about KM once engaged, and they often have big ideas for KM
- Strategies must keep in mind staff time, money, and available resources and identify actionable interventions

Tip 6: Be Ambitious but Realistic

Our experience

- Needs assessment workshops for project and KM strategies always began with a reminder to think about the realities of staff time, money, and resources
- Organizational strategy identified interventions that can be implemented now as well as other, more ambitious interventions that need additional time and resources

Our challenges

- Difficulty balancing ambition with reality
- Difficulty staying open to creative and new ideas while being grounded in practical considerations

Tip 7: Be Clear about How Your Strategy Can Be Resourced



- Showing what level of effort is required from which staff and what additional money or other resources are required:
 - Helps make the strategy digestible and useable by management and other staff
 - Ensures that management are aware of resources needed to implement the strategy
 - Ensures that expectations for all staff are clear

Tip 7: Be Clear about How Your Strategy Can Be Resourced

Our experience

- Organizational strategy showed level of effort and timeframe for each intervention
- Organizational strategy interventions were separated into three categories: current systems/current resources, current systems/additional resources, and system changes/additional resources

Our challenges

- Estimating level of effort and cost of additional resources was subjective and difficult

Tip 8: Consider Sustainability



- Focus not just on set-up (e.g., policy changes, system creation) but also on long-term maintenance (e.g., checks and balances, integration into workplan, continuous check-in)
- Address past challenges and failures related to KM

Tip 8: Consider Sustainability

Our experience

- Organizational strategy looked at why past KM efforts had not been successful and specifically addressed those issues
- All strategies include long-term activities
- All strategies are designed to be implemented by multiple staff so that they do not rest on one or a few champions

Our challenges

- Remains to be seen whether our strategies are sustainable over the long term

Tip 9: Prioritize Key Interventions

- Strategies with specific interventions can result in a number of proposals
- Identify priority interventions to focus management and staff attention



Tip 9: Prioritize Key Interventions

Our experience

- Organizational strategy priority activities were organized into a draft workplan for presentation to management
- Project and country strategies were incorporated into pre-existing project workplans

Our challenges

- Most proposals seem important; difficult to determine which ones should move forward first
- Difficult to balance most important interventions with those that are most resource-friendly

Tip 10: Consider Monitoring & Evaluation



- A monitoring and evaluation plan will enable you to know which interventions are proving effective and where strategy adjustments may be needed

Tip 10: Consider Monitoring & Evaluation

Our experience

- Following project and country strategy development, KM indicators were incorporated into project performance measurement plans
- A structure for monitoring and evaluation was included as part of the organizational strategy

Our challenges

- Developing a small number of strong and useful indicators for KM work can be difficult, especially if support from M&E staff is inaccessible

Other Tips



- Take the time to understand staff/organizational needs and develop a useful, implementable strategy
 - Our strategies each took 3-6 months
- Consider bringing in an outside perspective
 - For the organizational strategy, we used 16 hours of a respected outside consultant's time
- Consider the level of detail needed
 - Our strategies contained a significant level of detail, but it is unclear whether that level of detail is useful to staff and management
- Use pre-existing information where available
 - Our strategies built on existing information to avoid re-inventing the wheel

Questions and Discussion

Summary of Tips for Questions and Discussion: Designing a KM Strategy that Fits Your Needs

1. Focus on organizational improvement and efficiency rather than KM
2. Consult and involve staff at all stages
3. Think about audience groups and their needs
4. Be specific about proposed interventions
5. Understand KM-related needs and provide justification for proposals
6. Be ambitious but realistic
7. Consider sustainability
8. Be clear about how your strategy can be resourced
9. Prioritize key interventions
10. Consider monitoring and evaluation



Thank you!

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