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Bureau for  
Development  
Policy (BDP)

KM Group

External  
version

## **Knowledge Strategy**

Enabling UNDP to share and leverage its knowledge and experience.

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## List of acronyms and terms

APLAWS	Open source content management system
Atlas	UNDP Enterprise Resource planning system
BCPR	Bureau for Crisis Prevention and Recovery
BDP	Bureau for Development Policy
BOM	Bureau of Management
CD	Country Director
CIS	Commonwealth of Independent States
CO	Country Office
CMS	Content Management System
CTA	Chief Technical Advisor
EDM	Electronic Data Management
eRBM	Electronic Results Based Management
ExO	Executive Office of the Administrator
HLCM	High Level Committee on Management
HR	Human Resources
ICT	Information, Communications and Technology
K&S	Knowledge and services
KM	Knowledge Management
KMG	Knowledge Management Group
KMSC	Knowledge Management Service Centres
LDAP	Lightweight Directory Access Protocol
LMS	Learning Management System
LRC	Learning Resource Centre
MD	Millennium Declaration
MDGs	Millennium Development Goals
MYFF	Multi-Year Funding Framework
NGO	Non-governmental organisation
NPO	National Programme Officer
OG	Operations Group
OHR	Office of Human Resources
OIST	Office of Information Systems and Technology
OSG	Operations Support Group
PB	Partnerships Bureau
PO	Project Officer
POPP	Programme and Operations Policies and Procedures
RBM	Results Based Management
RC	Resident Coordinator
REDHAT	Open Source Content Management System
RFP	Request for Proposal
RSC	Regional Service Centre
SNAP	Solution Networks of Asia-Pacific
UNCT	UN Country Team
UNDAF	United Nations Development Assistance Framework

## EXECUTIVE SUMMARY

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### **Background**

Great challenges lay ahead for the world as a whole and especially for developing countries. UNDP, through its vast knowledge networks and experienced staff and advisors is uniquely positioned to take a leading role in tackling the new crises ahead. Assisting development partners in responding to these challenges, contributing to the achievement of the MDGs and fostering human development is UNDP's core mandate.

### **The Strategy**

Given the degree of the complexities we face today, UNDP must be better organised to respond. The organisation currently suffers from a "cognitive surplus" of experience, talent and knowledge which often goes unleveraged or unrecognised. This strategy captures prior organisational challenges and achievements and presents a new way forward to share and utilize UNDP's global expertise. It does that by collecting, contextualising and distributing the enormous amount of knowledge available, positioning UNDP as a "knowledge organisation" in the true sense of the word. It hopes to produce a realistic, brighter 'light at the end of the tunnel' for developing countries by putting forth the best the organisation has to offer, more effectively and in a shorter time frame.

### **Who will implement this strategy?**

This corporate strategy sees each and every staff member as key users and contributors. BDP is the corporate sponsor of this strategy, through its Knowledge Management Group (KMG), which is charged with managing it and enhancing UNDP's existing communities of practice and user groups.

### **How will this strategy be implemented?**

This will be accomplished through a coordinated set of initiatives encompassing cultural changes and new technologies. Through a five-prong approach, the strategy creates a human and technical infrastructure to enable staff and practitioners to learn, share, connect and contextualise knowledge by enhancing collaboration and creating a cultural change with regards to the organisation's approach to knowledge management. The technical platform proposed, Teamworks, is a secure internal and external collaboration network in line with the new corporate Content and Collaboration Architecture.

### **What will Teamworks offer?**

Teamworks is a system designed to facilitate knowledge sharing and active collaboration in a cost-effective manner. It is comprised of three core elements: people, projects, and knowledge and services.

1. *People*: Each user can create a profile presenting user information, contributions, and become a member of one or more communities of practice. Individuals can also create *ad hoc* groups on subjects of interest and to invite others to contribute.
2. *Projects*: The system will display read-only project information and will allow users to attach contextual knowledge, including lessons learned, project documentation and reviews.
3. *Knowledge and services*: This is the entry point to policy services, communities and knowledge assets.

### **Why will people use a new system?**

The system is common to the organisation, while distributed to its staff and partners and easy to use. Teamworks places a special emphasis on the recognition of individuals for their contributions to knowledge, while improving their visibility. It strives to foster a rich collaborative environment to deliver the most relevant knowledge where it is most urgently needed while keeping knowledge connected to the individuals who shared it.

### **How will the content be vetted?**

For structured, institutional knowledge, BDP has developed a framework and standard for vetted knowledge from the experience of field staff and policy advisors known as the Service Delivery Model. The strategy also envisages user-created ad hoc groups and contextualised spaces to capture free-flowing knowledge and foster innovation, communication and collaboration.

*Best practice knowledge organisations spend 3.5 % of turnover on Knowledge Management, separate to their IT budgets. Rory Chase, Managing Director of Teleos,*

### **How will Teamworks facilitate the transfer of information?**

Teamworks will allow staff to join communities of practice and to start small and dynamic user groups thereby making knowledge available to the rest of the organisation. Regardless of where or by whom the information was created in the first place, Teamworks will make local experience available globally and global experience available locally while still respecting the original context under which the knowledge was generated.

### **How will this be phased?**

The strategy will utilize a phased implementation process to match UNDP's capacity to absorb and use the system. Both the technical and human components of the strategy are introduced in four phases from 2009 to 2011.

### **How much will the implementation of this strategy cost?**

The cost will be determined based on system development estimates. In order to ensure successful implementation and the continuum of operations, the strategy's operational costs — including help desk, system maintenance and upgrade, training and advocacy, and other non-salary items — are supported by corporate funds. The salary costs of the core KMG are covered through re-allocation of Global Programme funds related to knowledge management. The implementation is based on a funding strategy that considers synergies within UNDP, including cost-savings arrangements, and avoids foreseeable duplication by other units involved in the project.

### **Conclusion**

Implementing this strategy and bringing UNDP's knowledge under a common roof is vital to the organisation. In more than one way, the organisation's knowledge is its future and it cannot be lost, wasted, or go under-capitalized. This strategy brings together the tremendous capacity that UNDP's knowledge can generate and puts it at the fingertips of the organisation's human infrastructure: those who need to know and who, in turn, provide their knowledge to their colleagues and clients.

## SECTION I – VISION AND GOALS

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This document illustrates UNDP's knowledge management strategy for 2009 – 2011, sponsored by the Bureau for Development Policy (BDP). It supersedes the previous strategy documents presented to UNDP's Operation Group (OG) prior to this session. The strategy incorporates the recommendations of the OG session of December 19th, 2008. The principles in this strategy have been endorsed by the RBM Board and the ICT Board in January and February 2009, respectively.

### VISION

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The vision of this strategy is for UNDP staff members, affiliates and experts to respond to business demands and anticipate business trends by leveraging the collective knowledge of the organisation in a cost-effective manner. This strategy enables UNDP to dramatically improve the impact of its work at the country level by accessing its global knowledge, to foster human development, to develop capacity, to contribute to the achievement of the MDGs and, finally, to closely cooperate with other UN Agencies to serve clients and partners with result-oriented and proven development solutions.

### GOALS

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The key goals of this strategy are to:

1. Enable rapid business responses, effective project preparation and service delivery to our development partners;
2. Leverage the knowledge of the entire organisation's assets, wherever located, so that UNDP can benefit from the experience of staff, partners and experts;
3. Expand the ability of members of UNDP's communities of practice<sup>1</sup> to find experts, share insights and innovative solutions and apply UNDP's knowledge;
4. Enable the rapid and easy development of groups and thematic spaces around emerging topics and needs;
5. Strengthen internal and external collaboration;
6. Support the RC system and wider development effectiveness within the UN reform agenda and the "One UN" initiative;
7. Improve the learning continuum<sup>2</sup> and policy coherence while improving the types, distribution and quality of content;
8. Decrease cost, duplication and fragmentation of knowledge initiatives; and,
9. Enable effective analysis and reporting of UNDP's knowledge-based services.

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<sup>1</sup> More than 100 communities of practice exist today at UNDP on subjects of interest to Regional Bureaus, the Bureau for Crisis Prevention and Recovery, the Bureau of Management, BDP and Regional Service Centers.

<sup>2</sup> In cooperation with and support of the Learning Resource Centre.

## SECTION II – CONTEXT AND BUSINESS NEEDS

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### OVERALL CONTEXT FOR SHARING KNOWLEDGE

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MDG achievement is becoming more complex and demanding as the world faces new development challenges such as worsening food shortages, stressed global financial markets, climate change, rising energy costs as well as the ongoing development challenges of poverty, conflict and epidemics. As a result, there is increased pressure on development organisations to adapt and respond. With less than seven years remaining before the MDGs deadline, UNDP and other development agencies face a mounting sense of urgency. UNDP's Strategic Plan (2008-2011) recognizes this in urging the acceleration of progress toward the achievement of the MDGs. If there was ever a time to rapidly capitalize on the knowledge of UNDP's field experience, capacity development efforts and policy expertise, this is it.

UNDP has best served national needs when it brought to its partners the added value of its experience and knowledge needed for crafting policies by implementing quality development solutions and ensuring that national capacities are developed. UNDP has talented people on the ground, capitalising on its history in each location and time-tested relations that have led to trust and mutual respect. This bottom-up, experience-based knowledge is central to the capacity of UNDP's staff members' ability to contextualise the organisation's global pool of knowledge to serve clients effectively.

At the global level, UNDP has put in place extensive expertise that provides strategic leadership and guidance, and distils diagnostics, perspectives, and good practices. UNDP provides high quality, evidence-based and timely interventions and engages in global dialogue and partnerships with other development actors. This knowledge perspective is essential to guide the development agenda in many of the substantive areas of UNDP's engagement.

Such comprehensive knowledge is the backbone of UNDP and its comparative advantage in development. Combining policy with practice creates a "virtual loop" of knowledge reinforcement where UNDP's staff members, no matter where located, are both the users and producers of knowledge, reinforcing and supporting each other. The challenge facing UNDP is to make its experience readily available to ensure effective operation and foster additional business opportunities.

To support the achievement of the MDGs, UNDP needs to enhance and leverage its knowledge pipeline. Its communities of practice provide a limited conduit for members and share experience effectively. More modern and comprehensive tools are needed to provide linkages between HQ, regions and country teams in order to learn and help each other, prepare for the implementation of initiatives, identify expertise, develop capacity, and add knowledge gained in the field to UNDP's collective expertise. In short, many within the organisation are looking every day for knowledge somebody else has. This strategy is designed to address the need of connecting UNDP staff and external partners to their knowledge and solutions, in order to deliver effective services and with greater beneficial impact. Specifically:

1. Learn from their collective experience in the field to deliver effective solutions to country offices;
2. Identify good practices that can be used in other field offices;



3. Share their insights and knowledge assets; and,
4. Surface new, innovative approaches to the development challenges facing UNDP staff.

UNDP must act swiftly to ensure that an effective knowledge environment is created for those who are implementing programmatic initiatives, their advisors and partners within and outside the organisation itself. This is particularly important given the amount of extremely useful knowledge that is produced, but not always used, throughout the organisation.

## THE EVOLUTION OF KM AT UNDP

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UNDP has a long tradition in Knowledge Management (KM), primarily in research, publishing and advisory services. Over the last two decades UNDP has initiated a number of changes specifically focused on increasing the value and use of the organisation's knowledge. The first phase focused on increasing UNDP's ability to operate as a "learning organisation," including:

- 1998-2003 Small units were set up in sub-regions – SURFs (Sub-Regional Resource Facilities) – to provide policy support to country offices;
- 1999 Knowledge "communities of practice" were established to enable staff to ask advice from colleagues around the world both within and outside UNDP; and,
- 2001 Practice areas were created to establish a tighter link between experts and practitioners.

A second phase of KM began in 2003 which focused more on decentralization, including:

- 2003 Policy advisors were decentralized to streamline management of BDP advisory services and regional programmes serving Country Offices (COs);
- 2004 The "Knowledge Management Roadmap: a corporate strategy for deploying KM within the UNDP" was approved. The 2004 KM Roadmap outlined a strategy to transform UNDP into a professional, knowledge-based service organisation that could leverage its wealth of experience and knowledge into a competitive advantage in the development marketplace;
- 2004 KM was established as a service line in UNDP's Multi-Year Funding Framework (MYFF), 2004-2007; and,
- Contributions to knowledge management are also made by a number of bureaus, business units and individuals. These include BCPR (Knowledge Management Toolkit), the Partnerships Bureau (Intranet, UN Knowledge Sharing), the Bureau of Management (OIST and the Learning Resource Centre), the RBLAC platform and conceptual knowledge framework, the Bratislava and Bangkok (SNAP pilot) platforms, Solution Exchange and informative websites and 2.0 tools such as the Water wiki and several staff-created blogs. Details can be found within each of these initiatives' websites and Intranet entries.

In 2004 UNDP approved a Knowledge Management strategy with limited scope and funding. Available funds were used to support small-scale, catalytic pilot activities in a range of disparate areas and locations, including some of the initiatives above.

UNDP's email-based communities of practice have persisted throughout these shifts and are regarded by their members as a valuable source of insight and solutions as measured by the community's consistently high ratings in member surveys. Combined with regionalization, they have linked policy more closely with field experience. For example, as a result of numerous queries on the Democratic Governance Practice Network, regarding working with Political Parties, an E-discussion was launched to examine the issue in more detail. The discussion received the most responses that had ever been received to an E-discussion, at that time, and generated a deep dialogue on a topical policy issue. A "Handbook on Working with Political Parties" was subsequently developed, based on the content of the discussion. This was an example of a policy issue that was identified at the field level and incorporated into the practice agenda as a result.

However, the technology currently being used limits the communities of practice's ability to share knowledge, collaborate, and fully tap the potential of its members. Furthermore, there is little room for topics that are not covered by the existing communities.

This strategy builds on lessons learned both from previous knowledge management efforts and other organisations. While some components of the 2004 Knowledge Roadmap did succeed, the subsequent approach of supporting disjointed pilots and catalytic initiatives has resulted in fragmentation and duplication of knowledge systems and approaches.

As a result, what was flagged in 1999 still applies today: "UNDP doesn't know what UNDP does."<sup>3</sup>

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## CURRENT MANDATE FOR A NEW KNOWLEDGE STRATEGY

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Accelerating the achievement of the MDGs is not the only reason for UNDP to pursue improved knowledge management in UNDP.

The **UNDP Strategic Plan 2008-2011** identified four mandates for knowledge management:

1. Building on the knowledge of others is one of UNDP's comparative advantages and a necessity for the delivery of UNDP's agenda – including development results;
2. Effective knowledge management must be part of the improved business model (p.15);<sup>4</sup>
3. Establishing knowledge systems that integrate with other UN organisations is critical for UNDP to lead the development of a strengthened Resident Coordinator (Annex II, Results Area IV);and,<sup>5</sup>
4. UNDP must improve existing communities of practice, open them to other UN staff members, and implement knowledge management frameworks, products and services required to support the policy, programming and project cycles.

In addition, improving UNDP's knowledge management capability has been identified as highly important in many current corporate initiatives. Chief among these are:

- The "One UN" initiative identifies increasing access to knowledge as a key driver to the achievement of the "one UN" vision;<sup>6</sup>

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<sup>3</sup> 1999, UNDP Administrator Transition Team knowledge management findings.

<sup>4</sup> UNDP Strategic Plan 2008-2011

<sup>5</sup> UNDP Strategic Plan 2008-2011

- The forthcoming renovation project explicitly calls for the definition of a KM platform;
- Developing a KM platform, accessible to the UN and other external partners, was a key recommendation of the current **global programme**, which also calls for development of a knowledge platform as a key output;
- The **Greentree senior management retreat** in 2008 included a discussion of knowledge legacy, knowledge fragmentation and silos;
- In the **Country Office Demand Survey**, KM received the highest demand rating, along with capacity development; and,
- **The 2006 Knowledge Management Update Report**, based on extensive interviews with country offices, highlighted developing common knowledge services as a key concern”.<sup>7</sup>

Input collected in formulating this strategy confirms the importance of KM to the organisation.

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## BUSINESS NEEDS ADDRESSED

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UNDP’s comparative advantage is the hands-on field experience of its staff. This is the key to UNDP’s contribution to the achievement of the MDGs as prescribed by the current Strategic Plan. Several specific gaps in UNDP’s knowledge model must be addressed to improve the use of the organisation’s high value experience.

### Advisory services and programming

1. While the field experience of staff is UNDP’s comparative advantage, field feedback on policy happens largely in an unstructured manner;
2. No corporate, common system is currently available to improve the research and preparation phase of project design directly drawing from people’s experiences and lessons learned;
3. Regional experiences are not systematically communicated globally;
4. Policy and advisory services are often delivered on a one-on-one basis and not always shared intra-regionally;
5. Access to communities and knowledge assets is not systematised for use and input by all field staff, including Chief Technical Advisors (CTAs) and external partners. It is not always possible to identify emerging topics of interest to others and expand service offerings accordingly.

### Knowledge sharing

6. Fragmentation across many local systems and platforms has made it difficult to source, integrate, contextualise and leverage knowledge produced by staff, experts and partners;
7. Global communities of practice have served well in each respective topic, but there are many contexts which lie outside their scope, such as those of interest to small groups of people, limited geographical reach or special circumstances<sup>8</sup>;

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<sup>6</sup> The High Level Committee on Management (HLCM) on United Nations System-Wide Coherence Report.

<sup>7</sup> Knowledge Management at UNDP: An Update, Elisabeth Clemens, January 2006, p.31.

<sup>8</sup> For the purpose of this document, communities of practice are large electronic networks, facilitated by an expert moderator created to support main strategic topics of interest to the organisation and its practitioners. Groups are smaller, user-generated, ad-hoc communities rotating around issues of localized or personal interest.

8. Communities and other knowledge sharing activities are not fully built into everyday operations, making knowledge sharing a “second step” activity;
9. Search across all current knowledge sharing sites is fragmented and difficult;
10. Instant communication tools (e.g. Skype) based on public platforms do not provide usage analysis, social mapping,<sup>9</sup> security, and do not offer a common directory of UNDP staff members and partners; and,

#### Governance

11. A corporate architecture and governance mechanism for knowledge and information sharing is needed to ensure integrity across UNDP and between the organisation and its external partners.

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## SECTION III – LOCALLY FOCUSED, GLOBALLY CONNECTED

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This strategy enables staff to learn from colleagues in different regions of the globe. It gives field staff easy access to vetted thematic policies and guidelines, verified good practices and innovative ideas, even if they are untested. It provides staff the opportunity to join established strategic communities that have a proven record delivering value to their members and to start their own ad hoc discussion groups. This strategy makes the knowledge of staff both in headquarters and the field accessible to the rest of the organisation. By making local experience globally available and global experience locally available, it enables UNDP staff and partners to draw from a wider base of knowledge to achieve their missions. Finally, it enables UNDP staff and partners to sharpen their edge as developers of capacity and promoters of human development, by drawing on a wider and more dynamic base of knowledge to achieve the primary mission of the organisation: help UNDP’s clients accelerate their progress toward the MDGs.

It does this by combining the best of knowledge management as it has developed over the last decade – communities, good practices, innovative and organized knowledge - with new emerging trends of self-generated discussions, connections, and collaboration. It draws UNDP’s trusted partners into the UN’s development dialogue and challenges country teams and policy analysts to better use the collective “brain power” of UNDPs communities, groups and individuals.

This strategy has five prongs:

1. Establish a corporate Knowledge Management Group (KMG) to support both the human and technology infrastructure;
2. Endorse, support and enhance UNDPs existing communities of practice. Current and future communities and user groups are the human infrastructure for sharing knowledge;
3. Implement an ICT-based Extranet (codenamed Teamworks), in line with the new corporate Content and Collaboration Architecture<sup>10</sup> that will simplify and enhance collaboration. This is the platform to enable staff to learn, share, connect and organize knowledge;

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<sup>9</sup> Social mapping allows mapping the interactions between people to assist in identifying degrees of separation between individuals. It is a very beneficial and powerful feature of 2.0 extensively leveraged by corporations.

<sup>10</sup> An exhaustive explanation of this Architecture is not within the scope of this document. However, further details are given in Annex III.

4. Support the distribution of vetted policy and good practice through the BDP Service Delivery Model; and,
5. Recognize and encourage user participation, through training and visibility.

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## ESTABLISH A CORPORATE KNOWLEDGE MANAGEMENT GROUP (KMG)

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To support the breadth of the knowledge system, a Knowledge Management Group (KMG) was established at BDP. The KMG will focus on the business needs and gaps outlined above. The KMG will sponsor and be responsible for the organisation's knowledge management activities, and focus particularly on managing collaboration and distribution for knowledge for UNDP and its external partners. The following core knowledge services will be provided:

1. A corporate service for ensuring ubiquitous access to knowledge created at all levels of the organisation to all staff members;
2. Support to country offices, organisational units and affiliate users;
3. Development of knowledge policies, including those related to collaboration, development of knowledge products and services, and knowledge systems and technology;
4. Reports and analyses of knowledge usage and availability, cost, return on investment, ongoing business needs for knowledge services, identification of current development trends and innovative solutions;
5. Strategic partnerships for KM with other UN Agencies and development partners to promote and advocate KM approaches globally; and,
6. Cost-recovered services to interested partners on an individual agreement basis.

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## SUPPORT EXISTING AND NEW COMMUNITIES OF PRACTICE

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Communities of practice are the human infrastructure for sharing knowledge and collaborating across offices, regions and departments. This infrastructure is largely in place at UNDP. Since their inception, UNDP's communities of practice have been one of the primary vehicles for UNDP staff to share experience between country offices and between the field and HQ. From UNDP's latest quantitative and qualitative assessments in 2007 and 2008, member satisfaction with the value and quality of the information received from UNDP communities remains high, though it dropped somewhat in the last year measured. Even with limited electronic access (email lists), members were able to ask for and receive advice and share experiences with other members in distant offices. Users report that communities of practice helped them learn from the experience of others, improve the quality of the decisions they made, and saved time. In the model communities UNDP's policy advisors actively participate and work with the full-time community facilitators who are embedded in the same unit to bring policy and practice together under one roof.

Given the effectiveness of communities as vehicles for sharing knowledge on MDGs and other cross-cutting issues, this strategy proposes that functional units, in partnership with the KMG continue to support, fund and expand the role of communities in sharing field experience to accelerate achieving MDGs and cross-cutting goals and foster human development. This continues the use and support of facilitated communities that has been in place for more than ten years. Identifying these as strategic communities builds on the lessons learned from other organisations; communities that contribute to

organisational performance are well integrated into the organisation. To help UNDP's strategic communities sustain their activity over time, this strategy proposes the following:

1. **Goals.** Goals are a primary way to integrate communities into the organisation. Community goals are different from typical team goals in that they require sharing knowledge or collaborating across country offices. UNDP's communities of practice are intentionally formed around UNDP's thematic areas of focus and related cross-cutting issues. Community developed goals focused on accelerating progress toward MDGs will integrate communities more fully into the organisation;
2. **Sponsorship.** When applicable, strategic communities will be sponsored by Practice Advisors or Group Leaders. The role of the sponsors is to serve their communities with timely material, analyses, policies, and advice, while constantly enhancing the membership base and quality of the collaboration;
3. **Annual review.** Strategic communities will engage in an annual review in which the sponsor will review the community's accomplishments, participation and other statistics, and key network indicators. Communities sponsors are expected to engage in an annual strategic community review and provide feedback on community activity virtually or whenever possible through face-to-face meetings.

"In the development context, an interesting case study is that of the *Development Executive Group*, a "social networking site launched in early 2008 that connects over 90,000 freelance consultants, NGO workers and aid agency employees working in international development. Site members can, depending on their level of access, post projects, form or join networks based on common interests, browse and monitor upcoming bids, find job opportunities and get in touch with experts on the ground. Looking for an English-speaking agricultural specialist in Columbia with at least five years of experience? [www.devex.com](http://www.devex.com) gives you a choice of 28. At the heart of the site, though, is its massive projects database, which currently lists more than 47,000 projects on everything from rural sanitation in Bangladesh to policing in the Palestinian territories – searchable by region, country, donor, project type, or status." **Foreign Policy Magazine, Nov/Dec 2008, p.90**

These measures should help UNDP's strategic communities sustain their activities, visibility and value.

## IMPLEMENT A CORPORATE KNOWLEDGE SYSTEM

As highlighted by the fit-gap analysis (Annex II) conducted in 2008-2009, UNDP does not have a corporate platform to support functionalities of collaboration, knowledge sharing and distribution and networking. This is important to position UNDP as a "knowledge organisation" and leverage the enormous amount of knowledge it produces. If knowledge is not organised and made available it is either lost or not leveraged outside the context which created it. Hence, for UNDP it is imperative to establish a global knowledge collection and distribution mechanism, to address the issue comprehensively and across the globe. A corporate knowledge system - Teamworks - will be implemented to provide new methods for sharing and locating knowledge, and the individuals and contexts behind it, in a cost-effective manner. Teamworks will be the collaboration, "Extranet"<sup>11</sup> component of UNDP Content and Collaboration Architecture as defined by OIST. This Architecture has

<sup>11</sup> A network to access information that is shared by users within and outside the organisation. Typically, extranets can be accessed through a web site that have levels of security and that must be accessed by a logon and password.

been formulated as a by-product of the discussions leading to this strategy and it is work in progress. (See Section VIII and Annex III for more details). The KMG will assume the responsibility for the sponsorship and the technical management of this component.

Teamworks will benefit from the experience of the KM 1.0 approach and add the contextual and dynamic environment of KM 2.0. (See Annex I and III for more details.) It is expected to encourage knowledge production and sharing by ensuring visibility of the people behind it, and to foster a richer collaboration environment to deliver the most valuable knowledge where it is needed. The benefits of such an approach are numerous, and range from improved team-building among staff, to easier knowledge access, expertise mapping and business process efficiency improvements.

#### **KEY FUNCTIONS OF THE KNOWLEDGE SYSTEM: TEAMWORKS**

Utilising KM 2.0 collaboration approaches and technologies – collaborative spaces, social networking and instant communication tools – Teamworks will connect people together with their knowledge and experience. Built around and for people, Teamworks will leverage the knowledge accrued through operation and offered through practices’ services. Teamworks provides a collaboration and networking platform including:

- Profiles for users to display skills and knowledge while connecting with other user’s knowledge;
- Protected collaboration spaces supporting moderated, institutional communities of practice and ad hoc groups across staff, partners, and external subject matter experts worldwide;
- Instant communications for rapidly connecting to colleagues across the globe;
- Real-time tools for people in different locations to keep common documents updated (such as Blogs and Wikis<sup>12</sup>); and,
- Tagging for users to add descriptive keywords to any knowledge asset, creating their own taxonomy as useful to them.

Teamworks is designed around three core elements: people, projects and knowledge and services.

1. The people component displays public profiles describing the staff member’s universe and presents it to others. It also enables individuals to create small groups on subjects of interest and invite others to contribute.
2. The project component includes project information when a new project is added to Atlas, containing a read-only view into the basic award data. Teamworks also allows the manual creation of activities pages for items not recorded in Atlas (conferences, workshops, etc).
3. The knowledge and services (K&S) component acts as the entry point to the practice work, according to the service delivery model and related advice.

#### **KEY FEATURES OF TEAMWORKS**

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<sup>12</sup> A Blog is a web space maintained by an individual with regular entries of commentary, news, events, photos, videos and input by other readers. A Wiki is a web application designed to enable anyone who accesses it to contribute or modify content. Most often used for collaborative efforts where content is constantly updated, such as [Wikipedia](#).

Teamworks provides several core features to respond to the business needs highlighted in this strategy, including but not limited to the following:

1. A common, secure system to protect and distribute knowledge and intellectual property;
2. Access to expert knowledge and advice in managed, contextualized thematic spaces;
3. Global service request tracking;
4. Project oriented collaboration spaces with access to project-related knowledge products;
5. Communities of practice and users' groups, both formal and ad hoc;
6. Secure, real-time online instant messaging;
7. Ability to invite members of, and collaborate with, other agencies and external partners;
8. Integrated collaboration tools such as blogs and wikis;
9. Staff members' profiles, location, social mapping and contact information;
10. Content contextualized to user preferences, user-friendly navigation;
11. Multilanguage capability (as optional feature, depending on cost);
12. User feedback and content flagging, tagged and contextualised searches;
13. System usage metrics and reporting;
14. Seamless navigation of corporate content through integration with other systems and customisable home page; and,
15. Facilitated reports on knowledge activities (e.g., new groups, user statistics, area of focused activity, etc).

(See Annex for a more detailed description of Teamworks, its organisation, functions and place within the corporate architecture)

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## SUPPORT VETTED POLICY: THE SERVICE DELIVERY MODEL (SDM)

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The Service Delivery Model (SDM), established by BDP, is a framework for vetted knowledge products developed from the experience of field staff and policy advisors. It establishes a standard for policy advisory services. The model entails steps based on the good practice of policy advisors. It is designed to help Country Offices deliver development results by:

- 1) Ensuring utilisation of policy advisory services, providing guidance on how to access them;
- 2) Improving the quality and reliability of policy advisory services; and,
- 3) Expanding the number of experts who can deliver advisory services.

Definition of core knowledge products is, therefore, integral to the SDM. The KMG will provide practical guidance to policy staff, as well as other producers of UNDP knowledge products, on how to develop "mission critical" knowledge products, in support of the SDM, with the aim of bringing improved quality and consistency, as well as greater relevance and coherence to UNDP's knowledge products. The responsibility for the content of the knowledge assets and its need, usability and applicability will remain with the producer.

The intent of the SDM is to save the time and energy of advisors and specialists by providing readily accessible knowledge so that field staff can engage with policy advisors on questions and challenges that



demand a higher level of expertise, while being able to access immediately answers to frequently asked questions, terms of references, toolkits, etc.

The service delivery model will ensure that there is focused, vetted and quality-controlled core content built around UNDP's commitment to deliver on the Strategic Plan. Publications and products, cleared through the corporate quality assurance process, will be featured on thematic pages developed for each outcome in the Strategic Plan. Standardized core content will include programming guidance tailored to the needs of country offices.

The SDM will also help to ensure that, for each service area, there is a dedicated Advisor working together across practices and bureaus to respond to country office requests. To improve responsiveness and quality, the Advisor will cultivate a 'resource team' of select field practitioners, consultants and UN counterparts. Members of the resource team will be familiar with UNDP's approach and provide peer support.

Teamworks, equally supports the implementation of the service delivery model by enabling colleagues to more easily engage, share and innovate. Importantly it will also enable advisors to bring UN colleagues with similar responsibilities into their core communities – multiplying the capacity of all agencies.

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## RECOGNISE USERS PARTICIPATION

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### UNDP STAFF

Users of strategic communities and ad hoc groups will have a much better understanding of the use of their contributions (number of downloads, views, flags, etc) through the social networking characteristics of Teamworks. Recent research indicates that recognition and rewards which build people's visibility, highlight quality and acknowledge participation are effective for encouraging and reinforcing staff engagement.<sup>13</sup>

UNDP has piloted a number of approaches to incentivise participation in the existing global Knowledge communities of practice. These include:

- Featuring top contributors on the homepage of the community;
- Supporting exchanges of experience from one country office and from one region to another to share expertise (Mutual Support Initiatives), linked to contributions; and,
- Public recognition at events such as the Global Staff Forum.

Building on these efforts, to encourage staff engagement, the KMG will develop a programme that will recognise UNDP staff and partners for their contributions and use of the global knowledge of the organisation. This will include recognition for:

- Adding significant, useful content to the global knowledge base;

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<sup>13</sup> "Six ways to make Web 2.0 work", Michael Chui, Andy Miller and Roger P Roberts, The McKinsey Quarterly: The Online Journal of McKinsey & Co, February 2009

- Reusing knowledge developed by others;
- Discussing learning from failures, mistakes or other “negative” lessons; and,
- Demonstrating the value of reusing global knowledge.

For a certain proportion of staff, however, contributing to the organisation’s knowledge base is built into job descriptions. For these staff the Results Competency Assessment will remain an important tool for encouraging participation. The soon to be launched, updated, UNDP Competency Framework will support this through a strengthened section on knowledge management competencies.

For other staff, contribution to the organisation’s knowledge base is likely to enhance their visibility and reputation. The KMG will promote this notion. Through the knowledge system, staff will have the opportunity to display their expertise, interests and contributions publicly on their individual profiles. Staff will be able to take advantage of this improved visibility in their work as they pursue a particular career path within the organisation. Individuals will gain recognition for their product development and participation in communities. Typical knowledge-based scenarios and a complete outline of the business features and benefits of Teamworks can be found in Annex I.

#### **TRUSTED PARTNERS**

For trusted partners who are participating in the communities and are registered into the system, different incentives to participate apply. Access to the resources and capacity within both strategic and ad hoc communities is a strong motivator. Membership will be dependent on a predefined level of participation and this access will be dependent on maintaining membership. For consultants and project staff an internal marketplace exists whereby raising one’s profile through contributions is crucial for securing consultancies and project posts.

#### **TALENT MANAGEMENT**

This structure also provides a potential opportunity to support UNDP’s approach to Talent Management spearheaded by the Learning Resource Center. Teamworks will enable managers to find people and their knowledge-based profiles, thus facilitating the review of individual’s expertise to feed into workforce planning. It will also be possible to map relevant expertise outside the boundaries of the organisation and rate it according to user satisfaction. Social networking mechanisms, by bringing users’ profiles to a visible space, engage the entire community in vetting individuals’ capacity and products. Examples of this approach are flourishing within professional networking sites. It is recommended that once Teamworks is rolled out, further dialogue should take place with the Office of Human Resources on utilizing it more systematically for this purpose.

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## **SECTION IV – SUPPORT TO THE DEVELOPMENT RESULTS FRAMEWORK**

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This strategy focuses on enabling and enhancing knowledge sharing between countries and regions, linking experiences to inform policy development and technical and advisory services and blending expert and experiential knowledge to support the organisations goals. In addressing these issues, it will enable UNDP to deliver on a number of key outputs outlined in the Development Results Framework.

## ENHANCED KNOWLEDGE SHARING BETWEEN UN COUNTRY TEAMS

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It is expected that this strategy will enable UNDP to bring trusted partners into communities and groups, deliver services and connect with colleagues from other UN Agencies and partners. Currently UNDP is limited by email-only capacity to enable trusted partners to exchange and collaborate. This roadblock to external knowledge collaboration will be removed with the introduction of Teamworks. This platform will create a tangible mechanism for engagement with other UN Agencies, donors, partner governments, non-government organisations, academia, experts and practitioners, facilitating achievement of outputs such as UN-wide responses, aid co-ordination, South-south cooperation and partnership building. This extended collaboration is a key focus of this strategy and it is expected to position UNDP as a “knowledge provider” while maximising the impact of its work at country level.

## LINKING POLICY AND PRACTICE

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In complementing and building on UNDP’s successful knowledge networking model, Teamworks will further enhance policy and technical advisory services and programme design and management, through increasing links between policy and practice. Teamworks will facilitate the sharing of knowledge across Strategic Plan’s thematic areas and across operational units wherever located. Teamworks will integrate into the same contextualised space development policy, advisory services and communities, groups and individuals-based content.

## BLENDING EXPERT AND EXPERIENTIAL KNOWLEDGE

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Teamworks will enhance current knowledge management capabilities, another key output within the development results framework, by enabling UNDP to more easily connect with people and experiences, tapping into the expertise of global communities of UNDP staff and trusted partners. The enhanced functionalities of Teamworks will facilitate peer-to-peer collaboration and will allow a more direct connection with advisors and experts to satisfy service demand. By providing access to an integrated knowledge base, staff time will be redirected from searching for basic information to building knowledge and capacity through higher value added activities. This creates a more conducive environment for innovation than UNDP currently has.

## ANALYSIS OF TECHNICAL AND IMPLEMENTATION CAPABILITIES

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Review of contributions and communities and groups activity will be available through Teamworks, which will enable analysis of the content being discussed, knowledge gaps, relevance of communities of practice, areas where policy guidance is needed, needs to be updated or is satisfactory according to users’ feedback. This information will then be available to inform management decisions, strategy development and practice agenda setting.

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## SECTION V -UN SYSTEM WIDE APPLICATION

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This strategy recognizes that the UN-dimension is a crucial component of UNDP's knowledge management strategy, especially in the context of UNDP's role as manager of the Resident Coordinator system. In this regard, the Teamworks approach responds to the call by Member States for the UN development system to use advanced information and communications technology, including knowledge management, to facilitate its contribution to UNDAF's and other planning frameworks. This call was further reflected in UNDP's Strategic Plan (2008-2011), which mandates UNDP to lead the development of a strengthening Resident Coordinator knowledge system that integrates other United Nations organisations as partners. This objective has already been partially addressed through the UN Knowledge Sharing Project to enable unhindered and secure access to Intranet-based resources of other participating agencies (projected to five by the end of 2009). In January 2009, the undg endorsed the Project's work to allow provisional access to the intranet based resources of the wider UN system.

In the UN context, Teamworks can further contribute to the goal of strengthening UNDP's role in supporting the promotion of coordination, efficiency, and effectiveness of the United Nations system as a whole at the country level. In this context, those UN entities that are interested in joining the Teamworks platform may do so based on a mutual interest of improving, integrating and collaborating on an exchange of information and knowledge across participating UN agencies. The inclusion of UN agencies into this knowledge management platform may create a basis through which UN agencies can develop a partnership in promoting a common UN knowledge system to assist UN Country Teams in effectively "delivering as one" at the country level. The inclusion of interested UN agencies into Teamworks should ultimately strengthen the performance of the UN Country Team in making available the relevant knowledge and expertise to national partners, and providing a dynamic platform through which participating UN entities can exchange knowledge and expertise that will be instrumental in contributing to the MDGs. The participation of interested UN agencies would be on the basis of a cost-recovery mechanism.

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## SECTION VI – COST SAVINGS AND BENEFITS

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Some indicative cost savings around three parameters commonly used by organisations to assess the cost benefit of implementing new knowledge systems are outlined below, as well as some additional strategic benefits.

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### TIME SAVED

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Staff time saved in non-disruptive<sup>14</sup> research for project/programme preparation is estimated to be USD1.38 M/year. Non-disruptive searches decrease workload by allowing staff to source knowledge, talent and services without input from other parties until needed. For the purposes of this calculation it is assumed that Teamworks will save at least one hour of time per search per project manager in a

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<sup>14</sup> Non-disruptive searches are defined as the most information that can be gained through a knowledge platform without disrupting the work of others.

country office. Assuming that a staff member conducts 20 searches per year, and using a P4 staff level as an average to calculate the per hour cost to the organisation, the return on investment per staff member per year is USD1,388. The total dollar value of expected time saved (assuming that 1,000 staff members per year conduct substantive searches) due to Teamworks would then be USD 1.38 million per year.

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## EFFICIENCY GAINS

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Savings through accessing and re-using work already done by a consultant is estimated to be \$3.15M/year. Teamworks will provide a mechanism, when applicable, for reusing work (project document sections, reports, toolkits, checklists, etc.) already done by experts and consultants. It is estimated that around 5 % of work done by consultants will be recycled and reused in similar situations in other countries. The figure provided is based on taking the net salary (without benefits) of a P4 staff member to calculate the salary of consultant per month at UNDP. For the purpose of this calculation we are assuming that 1,000 consultants might work on programme implementation, policy development and knowledge related initiatives. Therefore, the total cost of consultants to UNDP, in this scenario, would be US\$5.25 million/month. A 5 % saving, as outlined above, would equate to US\$3.15 million/year. This does not include additional savings in shortening the time looking for consultants.

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## SAVINGS THROUGH RETIRING LEGACY SYSTEMS

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The implementation of this strategy will lead to the retirement of some legacy systems. This is estimated to save approximately \$200,000/year. The APLAWS CMS, the current document repository for the Practice Workspaces, will be retired. Knowledge related applications of this system account for around 50% of the cost of providing the system - \$156,000/year. Lyris list serve software, which currently hosts UNDP's communities of practice, will be retired, leading to a savings of approximately \$35,000/year.

Although some efficiency gains in dollar amount are offered in this strategy, a recent study by the global consulting company Accenture showed **returns of investment of more than \$25 per \$1** investment in Knowledge Management (KM) 2.0. In the for-profit and non-profit sectors it is estimated that more than 10,000 global Organisations have adopted KM 2.0 approaches within the past five years. "Measuring the Impact of Knowledge Management", 2008

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## STRENGTHENING DEVELOPMENT RESULTS

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The establishment of a corporate knowledge platform will have benefits that reach far beyond UNDP itself. The ability to come to establish ad hoc thematic spaces and to use them to record collective and creative solutions by using or reusing the best knowledge from recognized experts in the field will have a significant impact. 'Delivering as One' will become a more realistic and attainable goal when UN Country Teams all have access to the common information in real-time. This ability is critical particularly during the present period of instability in a number of areas, from financial to environmental.

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## ENHANCING INDIVIDUAL AND ORGANISATIONAL PERFORMANCE

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In May 2007, UNDP participated in an International Benchmarking Study undertaken by the Knowledge & Innovation Network (KIN) at Warwick Business School. Through this study, members of eight of its global

Knowledge Networks were surveyed on the extent to which they supported individuals and their team/department/ business unit as well as the organisation. The top five areas in which the communities were reported to be beneficial were in learning, identifying opportunities for collaboration, increasing commitment to sharing knowledge, saving time and supporting knowledge transfer into the organisation. The average scores for all of these top five parameters were also higher than the average of the other organisations benchmarked in the study, which were leading global private sector organisations. The operational enhancements that Teamworks will provide are likely to increase these benefits substantially.

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## ENHANCING EFFICIENCY AND PERFORMANCE

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Business analysis will be fostered through global service and activity tracking, by monitoring the emergence of new business areas and development trends, and through the ability to quickly identify similar projects in a specific field, as well as the people and expertise behind those projects. Decision support services will be available as Teamworks' business analysis functionalities will enable identification of trends, opportunities, gaps and disconnects for improved decision-making and planning.

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## SECTION VII – INTEGRATION: ORGANISATION MAP

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This strategy integrates knowledge sharing into operations through the relationship individuals and their communities can weave. It describes indicative examples of links with business processes and of how people in different roles would connect and collaborate.

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### MAP TO BUSINESS PROCESSES

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The strategy enables staff to leverage UNDP's global resources within the programme/project cycle. This ensures that previous experiences are taken into consideration at the beginning of a project and that lessons learned are fed back into the system for the benefit of others at the close. The KMG will assist users in learning the capabilities of Teamworks in conjunction with project preparation and related business processes.

Teamworks is expected to strengthen UNDP's programme and project management cycle with minimum disruption to current business processes. At the preparation stage of the programme/project cycle (see image below), Teamworks provides the support necessary to enable easy access to people and expertise through profiles; vetted and dynamic research, information and solutions through knowledge and services; and project information from systems of record. In particular when:

- Designing a programme/project staff can access UNDP policy and advisory services through the Knowledge and Services thematic spaces in Teamworks;
- Defining a programme/project, collaboration with others who have implemented similar activities is facilitated by sourcing relevant individuals and their communities and groups; and,

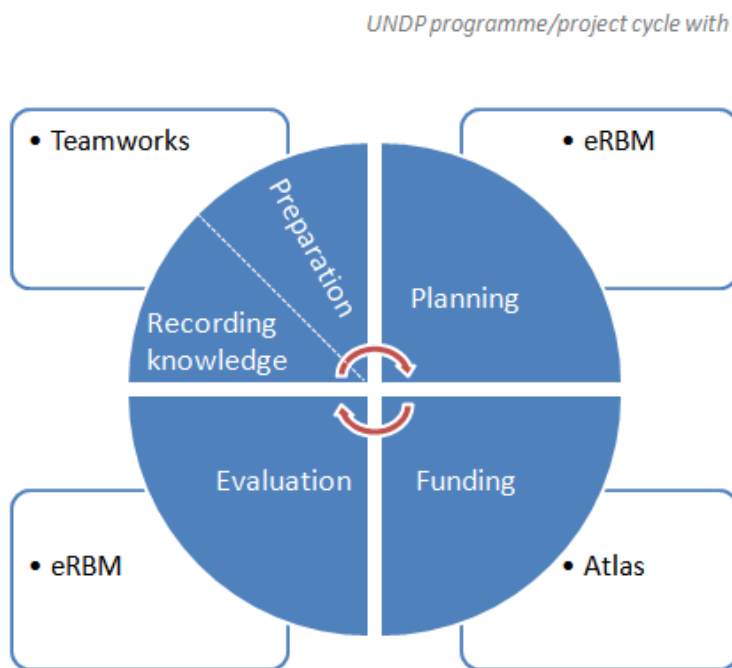
- Closing a programme/project, consultants with relevant expertise in evaluating similar projects will be easily sourced.

In order to maximize the benefits of Teamworks, it is important that current entries in the Programme and Project Management Sections of UNDP’s Programme and Operations Policies and Procedures (POPP) will be eventually updated to both reflect the availability of Teamworks and to strengthen programme management.

For instance, the current suggested actions such as “During the project cycle at least one query should be launched on relevant knowledge networks” should reflect that existing policies and experiences can be evaluated through the knowledge available in Teamworks, once available, at key points in the programme and project cycles.

## MAP TO DIFFERENT PARTS OF THE ORGANISATION

### CLIENT-FACING STAFF<sup>15</sup>



This strategy provides a mechanism for client-facing staff to quickly build their capacity on a given subject area. Whether in times of crisis, preparing for a last-minute meeting with a government counterpart, or developing a new project, UNDP staff will be able to draw upon services, communities, people and projects globally with much greater ease than under current systems.

#### **POLICY ADVISORS – HQ AND REGIONAL LEVELS**

Policy advisors will realize immediate benefits of having

easier access to initiatives conducted throughout the organisation. At present, policy advisors spend a considerable amount of resources to identify initiatives and good practices in a given thematic area. It is anticipated that Teamworks will enable policy advisors to spend their time on higher value-added tasks, such as analysis, policy development and advice, rather than on data collection.

<sup>15</sup> For example, staff managing relations with external partners to UNDP, such as Country Directors, programme/project officers and partnership staff.

Similarly, this facility will enable them to easily strengthen their own capacity and learn from country offices experiences while reducing their travel time and budget. As planned under the Service Delivery Model, Advisors will use Teamworks to help improve and “sell” advisory services to programme/project officers in the field who can in turn offer them to their clients in an entrepreneurial fashion. Policy advisors will be responsible for selecting, providing and maintaining links to top resources for their respective spaces in the Knowledge and Services section of Teamworks. If applicable, they will moderate the dialogue over the community for their area of expertise. This responsibility may be shared across teams of policy advisors along individual service lines.

#### MANAGING HUMAN RESOURCES

Whether conducting performance evaluations, recruitment or periodic assessments, managers will be able to easily access and track the previous and ongoing work of staff members. This will increase accountability for results and will facilitate the oversight of staff. Managers will be able to search the system to learn more about staff knowledge contributions and the available talent pool. Individual staff members will be responsible for posting knowledge assets, advisory responses to communities, news items, events reports, etc. related to the initiatives they are engaged in.

### MAP TO THE TECHNICAL INFRASTRUCTURE: CORPORATE KNOWLEDGE ARCHITECTURE

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Teamworks is the collaboration “Extranet<sup>16</sup>” component of UNDP “Content and Collaboration Architecture”, (see Annex III) as defined by OIST<sup>17</sup>. As such, its architecture is based on the Web-Based Business Tools Portfolio (WBT). This architecture synthesizes a wide range of UNDP’s content and collaboration functionalities into three enterprise-wide components: Internet, Extranet and Intranet.

The architecture assigns different profiles to three distinct environments:

- The **public external communications environment, the Internet**, requiring a very high level of control and formal approval process automation;
- The **Extranet environment (Teamworks)**, see Annex I) allowing for wide and secure access, as collaboration often includes other UN Agencies and external partners, while remaining flexible to support a full range of collaborations types and knowledge-related content; and,
- The **Intranet corporate tools and processes**: internal use platforms with internal-only usage, including regional and business unit platforms for process automation, custom applications, and records management.

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<sup>16</sup> A network using Internet protocols to access information that is shared by users within and outside the organisation. Typically, extranets can be accessed through a web site that have levels of security and that must be accessed by a logon and password.

<sup>17</sup> ICT Board submissions, February 2009.



## SECTION VIII -IMPLEMENTATION

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### CHANGE, THE HUMAN SIDE

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The technical and human infrastructure must be balanced to work in synergy and create value. The strategy emphasises the importance of both components. Especially in the sensitive area of knowledge, the shift to new technology approaches must be as soft and as respectful as possible, ensuring that appropriate capacity is developed as the technology is rolled out. Furthermore, research indicates there are two dimensions of change to attend to when developing an implementation plan, the logical – goals, software installation, training, support, role definition, demonstrating value – and the emotional. Most organisations concentrate only on the logical. The emotional component of change is the one in which a staff member is encouraged to express an idea or solution. To harness or inspire this side of change, researchers<sup>18</sup> suggest creating an urgent vision for the change, a strong cadre of change supporters, engage staff in key parts of the organisation, work with early adopters, and show convincing demonstrable results. This implementation plan accounts for both the logical and the emotional. Since implementation is a dynamic process, the implementation plan will evolve as implementation proceeds.

### IMPLEMENTATION ELEMENTS

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There are two dimensions to the implementation; supporting individuals and their communities, the human infrastructure, and developing the technical infrastructure. This will be done through the five-prong strategy, specifically:

**Management:**

1. Establishing a corporate Knowledge Management Group to guide the process;

**Human infrastructure:**

2. Strengthening the communities of practice and enabling the capacity of users to create collaborative support groups.
3. Recognizing and encouraging user participation, through training and visibility.

**Technical infrastructure:**

4. Implementing Teamworks through a phased approach.

**Services and quality:**

5. Implementing the methodology of the Service Delivery Model.

#### HUMAN INFRASTRUCTURE

The KMG intends to review the current communities and identify how they can be better integrated with the goal setting process of the organisation. This includes establishing goals, reviewing progress and helping individuals to focus on the most important parts of their work. More specifically, this entails:

- Training users to take full advantage of Teamworks and integrate it in their daily workflow
- Identifying practices, service areas and business units to engage as early adopters of Teamworks;

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<sup>18</sup> Kotter, John, The Heart of Change, Harvard Business School Press, 2002

- Reviewing the current health and impact of selected communities of practice, their current goals, and recent accomplishments;
- Supporting selected communities and groups in identifying particularly engaging issues to begin the use of Teamworks discussions;

#### TECHNICAL INFRASTRUCTURE

The KMG intends to follow standard UNDP procurement process to identify vendor/s best able to work with UNDP to assist in delivery of the Teamworks solution. The vendor/s will be contracted by the KMG to:

- Deliver a functioning Teamworks prototype; and,
- Deliver a comprehensive Teamworks platform.

In a parallel effort, the KMG will be leading organisational change efforts, focusing on successful user adoption:

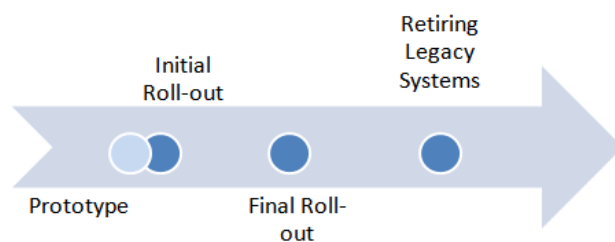
- Produce a detailed rollout plan for the comprehensive platform;
- Develop and execute an internal marketing and communication plan;
- Determine process optimizations available with the new solution in place;
- Develop training material and a Learning Resource Centre-delivered course.

#### CHANGE MANAGEMENT

To support this, the KMG intends to:

- Provide a clear vision of the benefits of the strategy and solicit strong and visible support from senior management. Additional support among thought leaders, managers and staff in the regions and corporate groups engaged will be sought;
- Optimize resources in ensuring that synergies between this strategy and other relevant mechanisms are leveraged and aligned effectively (this work has already begun with the dialogue on the corporate Content and Collaboration Architecture); and;
- Once implemented, track and communicate evidence on how processes are improved through the cross-collaboration this strategy fosters and provide ongoing feedback to senior managers on the process of the implementation and impact of Teamworks.

#### PHASED IMPLEMENTATION



The strategy can be implemented at a varying pace to match the organisation's ability to absorb and use it. In order to manage the user adoption challenges associated with a large scale organisational change, the KMG intends to pursue a phased rollout for the Teamworks solution.

A more detailed plan will be established as part of the Teamworks implementation project, but at least four phases are envisioned – a prototype phase, an initial roll out, a final roll out and a legacy systems closeout phase.

## **1. PROTOTYPE PHASE**

The purpose of this phase is to rollout a prototype of Teamworks to targeted groups. This phase will take approximately six months. This phase is concurrent to the procurement of the full system (see initial roll-out phase below).

### **HUMAN INFRASTRUCTURE**

Identify participants to use of prototype. In addition, invitations will be open to individuals interested in participating in Teamworks as “early adopters.” Basic “getting started” training will be conducted. The KMG will use this phase to advertise Teamworks to early adopters, communities of practice and groups to be identified across the organisation. The KMG will collect and document stories illustrating the value of cross-field collaboration through Teamworks.

### **TECHNICAL INFRASTRUCTURE**

A prototype version of Teamworks will be deployed to offer basic functionalities for testing according to the Teamworks intended scope<sup>19</sup>.

## **2. INITIAL ROLL-OUT PHASE**

(Approximately 1 Year)

### **TECHNICAL INFRASTRUCTURE**

The purpose of this phase is to procure and roll out a functionally complete version of Teamworks to targeted communities of practice, groups and early adopters. This allows for debugging of Teamworks functionalities and the adoption approach before moving to widespread usage. The procurement process of the full version of the system, including qualification of vendors, review of proposals and contract is expected to take approximately six months. The process has already been started following the endorsement by the ICT Board.

### **HUMAN INFRASTRUCTURE**

- Identify the thematic and business units to participate in the initial roll-out. Given the nature of the application any staff will be free to participate as early adopters.
- To support their participation, the KMG will work with managers to build local interests in cross-country collaboration and develop the “pull” from the organisation for participation;
- The KMG will provide support to new ad-hoc groups, individuals and partners spaces;
- Individual “opt in” users will be migrated to Teamworks from the prototype environment as a target group representing a cross section of the end state user community. The marketing, communication, training, and adoption strategy would be executed on the target group; and,
- Assess the roll-out for wider adoption, with participation of the KM Team Leaders at the regional level, which will oversee training and support services in their respective regions.

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<sup>19</sup> The implementation of a prototype was identified in the June 2008 submission to the OG.

### **3. FINAL ROLLOUT PHASE**

(Approximately 1 year)

Based on the extent of the learning curve and the resulting adoption rate, Teamworks will be adopted UNDP-wide and extended to external partners.

### **4. LEGACY SYSTEMS CLOSEOUT PHASE**

(On-going from anytime possible)

During the aforementioned rollout phase, existing KM applications would continue to be supported as users migrate to Teamworks. After the entire organisation has access to Teamworks, a final phase will manage the decommissioning of existing systems.

#### Migration

The bulk of the data to be migrated to Teamworks is in one of two current KM systems – Lyris and APLAWS. The KMG does not intend for users to blindly migrate all existing data to Teamworks, but to use this opportunity to “clean house” and migrate only pertinent, valuable information into the correct context with Teamworks. The only systematically migrated information will be communities and knowledge products created in the Teamworks prototype during the prototype phase.

Practice advisors, with assistance from knowledge facilitators, will continue to improve the content of Teamworks. This will include selecting, reviewing, and migrating content from Lyris and appropriate knowledge products from APLAWS into the correct Teamworks spaces. Other users will migrate pertinent assets into Teamworks in the same manner.

Membership of the Teamworks communities will be enabled starting from a notification sent to current Lyris communities’ members that their community will be upgraded to Teamworks, and asking to register. Ample time will be given to ensure that interested users will be able to register. This “soft switch” will ensure no disruption of the activities of each community of practice.

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## **SECTION IX - GOVERNANCE AND MANAGEMENT**

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BDP will be the corporate sponsor of this strategy and responsible for its implementation. The governance of the implementation of this strategy is divided in two parts. The first is related to the governance of the knowledge strategy itself, the second to the governance of the “Extranet” component of the corporate content and collaboration architecture.

The governance of the implementation of this strategy has three sub-components, designed to provide a reporting channel to senior management, to ensure proper guidance in the implementation of Teamworks and to open a broad-base mechanism for advice and improvement of knowledge services. These components are illustrated below.

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### **REPORTING TO THE OPERATIONS GROUP**

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At the discretion of the Operations Group, the KMG will report on issues related to:

1. Implementation;
2. Funding;
3. Partnerships;
4. Strategic directions, work plan;
5. Information relevant to and in support of the Strategic Plan;
6. Major system improvements; and,
7. Other issues of concern to the OG.

Each session will be preceded by the submission of an annual report.

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### TEAMWORKS PROJECT BOARD

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The implementation of Teamworks and related items will be guided by a Project Board meeting semi-annually. The Project Board will guide the implementation of the corporate system, enhance coordination between stakeholder units and facilitate decision-making on key stages of its implementation. The Project Board will include senior staff members from service, programme and business units. These are envisaged to be senior managers from OIST, LRC, OC, OSG, OHR, BCPR, RBs. The Board will be chaired by the Deputy Director of BDP and the KMG will act as the Secretariat. Minutes of each meeting will be distributed and filed for the record.

The project board will:

1. Provide guidance and monitor the implementation of the Knowledge Strategy, including usage, policy and technical issues;
2. Review work plans and changes to the strategy;
3. Advise on issues which may arise from implementation, ensure consistency with other strategies and suggest solutions; and,
4. Ensure that the strategy remains on course and receives adequate supports from relevant business units.

Decision-making will be by consensus. A detailed Terms of Reference for the Board will be developed as part of the Implementation Plan.

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### KM CONSULTATIVE COMMUNITY

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An open Knowledge Management Community will be established within Teamworks to ensure a broader path for suggestions, concerns, improvement and solutions proposed by users. This community will be monitored by the KMG which will engage users to ensure:

1. Uptake during and after initial roll-out;
2. Quality of service;
3. Improvement of current features;
4. Planning of future features;
5. Adequate reporting functions;

The Community will be provided with an issue tracking function and with a repository for documents, guidelines, policies and other relevant materials.

## THE CORPORATE CONTENT AND COLLABORATION ARCHITECTURE

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As agreed with the stakeholders of the corporate Content and Collaboration Architecture (Annex III), the KMG will be part of the ICT Board managed by OIST on the technical side and by the RBM Board, managed by OSG on the business side (TOR to be defined) to oversee issues related to the architecture. The architecture has, to date, three components (see Annex III): Intranet, Extranet and the public Internet. The KMG is the corporate sponsor of the Extranet component. The Board will ensure that the three components will stay within a common framework, and linkages and coherence are properly managed.

## KNOWLEDGE MANAGEMENT GROUP (KMG)

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The KMG will serve as the corporate sponsor of knowledge services. Corporate knowledge services and user support will be managed by KMG at UNDP Headquarters and within Regional Service Centres.

The KMG, reporting to its Director, will oversee the successful implementation and management of this strategy. KMG services will focus on effective knowledge management, providing a vehicle for knowledge and collaboration to extend throughout the entire organisation, as outlined in Section III, point 1. The core group at BDP/HQ will comprise, similarly to other BDP Practices, a Director, a group Manager, six KM Team Leaders located in Regional Service Centres, a Project Officer, a Technical Officer and a Client Services Officer. During the roll-out stage additional assistance may be provided to Regional Centres through service contracts where needed and subject to budget availability. Consultants will be hired by the KMG for the provision of technical services.

The core client services of KMG will be provided directly by Knowledge Management Team Leaders. These services will include:

- Assisting country offices in the successful and effective uptake and use of the KM system, Teamworks;
- Establishing a help desk for Teamworks; conducting training; and,
- Identifying implementation issues and improvement needs; and providing regional client knowledge services.

The Knowledge Management Team Leaders will play a crucial role in extending the reach of the KMG directly to the field level to both support implementation of the new strategy and system and to ensure that the realities of implementation on the ground are fed back into the ongoing roll-out and evolution. Having capacity to deliver flexibly at the field level will be crucial to a successful roll-out, for the ongoing development of the Teamworks system as well as to uptake of the system by a wide range of staff. Proximity to a wide range of Country Offices for physical and remote support, within the same or close-by time zones, will be crucial to enable the KMG to provide the support necessary to underpin the successful implementation of Teamworks. In addition, these positions will play an important role in feeding local and regional experiences, into the global knowledge strategy as well as delivering region specific services to country office clients.

Location in Regional Centres is the most logical and cost effective solution to enable the proximity and flexibility required for these functions.