CAPACITY BUILDING THROUGH KNOWLEDGE MANAGEMENT:
A Toolkit for South African Municipalities
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## ACRONYMS

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<td>AAR</td>
<td>After Action Review</td>
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<td>BCM</td>
<td>Buffalo City Municipality</td>
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<td>CMS</td>
<td>Content Management System</td>
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<td>Growth and Development Strategy</td>
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<td>Group Knowledge Management Strategy</td>
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<td>IC</td>
<td>Intellectual Capital</td>
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<td>IDP</td>
<td>Integrated Development Plan</td>
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<td>IKM</td>
<td>Information Knowledge Management</td>
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<td>IMARK</td>
<td>Information Management Resource Kit</td>
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<td>IP</td>
<td>Intellectual Property</td>
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<td>IRM</td>
<td>Information Resources Management</td>
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<td>IT</td>
<td>Information Technology</td>
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<td>Local Government Sector Training Authority</td>
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<td>JIKE</td>
<td>Johannesburg Innovation and Knowledge Exchange</td>
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<td>KM</td>
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<td>MOU</td>
<td>Memorandum of Understanding</td>
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<td>SACN</td>
<td>South African Cities Network</td>
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Knowledge management (KM) offers a generic approach to leveraging learning and expertise across municipalities. In the context of South African local government, KM is a crucial capability to develop because of:

- High turnover of technical and professional municipal staff.
- Limited resources, and so risk and cost needs to be managed effectively to produce the best development impact.
- In some instances, a strong dependence on consultants, which means municipalities continually have to “re-purchase” advice and intellectual property.

An initiative of the Knowledge Management Reference Group (KMRG), this project is aimed at strengthening the capacity of municipalities to recognise opportunities for discovering and sharing knowledge in a way that assists them to find, harness and manage their knowledge resources.

The KMRG was conceptualised in 2005 to promote a shared-learning partnership around knowledge management in South Africa’s municipalities in support of their good governance. In October 2007, the formation was given new strategic direction and reinforced by a strategic partnership between the South African Cities Network (SACN) and the South African Local Government Association (SALGA). This impetus was underpinned by the recognition that municipalities require deliberate knowledge management capabilities aimed at making them better able to benefit from the know-how they have, thereby enhancing their efficient and effective delivery performance.

The KMRG members are the SACN member cities (Johannesburg, Tshwane, Cape Town, eThekwini, Ekurhuleni, Buffalo City, Msunduzi, Nelson Mandela and Mangaung), SALGA and SACN (participating both as members and facilitators). Additional members include the Sedibeng and Greater Sekhukhune District Municipalities, the Gauteng Provincial Legislature, and the national Department of Cooperative Governance. Other key stakeholders are invited to participate in the KMRG when issues relevant to them arise.

The member municipalities are the main champions of the KMRG, identifying agendas for advocacy and research, and sharing useful knowledge and experiences with other members and stakeholders. Functionally, the KMRG focuses on:

- Sharing knowledge and providing peer support between members
- Promoting common KM platforms for cities and municipalities
- Discussing practical KM approaches and experiences
- Leveraging synergies through collaboration and resource sharing
- Serving as an advocacy and lobbying platform
- Being a conduit for knowledge dissemination and exchange.

The initiative has been funded through support from the Local Government Sector Education Training Authority (LGSETA), which is mandated to ‘develop a skilled and capable workforce supporting a responsive, accountable, efficient and effective local government system’. As such, and within a particular project to assess the impact of its interventions, LGSETA and SACN determined a mutual interest in understanding better how local government can build the competencies to contribute to the growth and development of South Africa’s cities, towns and settlements. This synergy well matched the KMRG intentions, and the project was born.
Municipalities with effective knowledge management (KM) systems are more competitive and better able to serve their citizens. This toolkit aims to build the KM capacities of South African municipalities, which play an essential role in the country’s economy.

Who this toolkit is for

This toolkit is for anyone who has an interest or is involved in KM within municipalities; in other words, everyone who works in the local government sphere. By embedding good KM practice throughout the municipality,

- senior managers assess knowledge that assists them in strategic planning and decision making
- senior managers not only support KM but also contribute to learning and sharing of knowledge
- staff are motivated to contribute to knowledge creation and sharing
- everyone recognises the benefits of knowledge management.

Why this KM toolkit?

Many South African municipalities already record and share their experiences and practices with different stakeholders and with other local and international municipalities. However, the degree of integration of KM into the core business of the municipalities varies. In some municipalities, senior managers do not recognise the potential of KM to improve efficiency and productivity. Yet research shows that managing knowledge resources within municipalities can improve governance and service delivery. KM can help create, apply, store and share knowledge within the municipality, empower staff and improve service delivery. This ensures that institutional knowledge is retained and challenges (and successes) are recorded. Effective KM also allows work done by consultants to be stored and used for future activities, thereby reducing long-term dependence on consultants.

Key aspects of effective KM are establishing and entrenching a knowledge culture, enhancing knowledge generation, storage, dissemination and sharing, enhancing operational effectiveness and promoting knowledge exchange and organisational learning. There is no generic approach to KM for municipalities, given their different contexts and responsibilities. This toolkit provides guidelines for implementing KM within a municipality and tools for integrating KM into work practices, applicable for municipalities with different levels of resources.

How the toolkit is organised

This toolkit is based on research conducted for SACN KMRG in 2012. It is not a blueprint for developing and implementing KM in municipalities. It is a learning tool, designed to be browsed and dipped into rather than read in a linear fashion. The tools included can be combined and are practical, not prescriptive.

The toolkit is divided into four sections:

1. KM Basics – looks at the key KM concepts and definitions
2. Steps to setting up KM in a municipality
3. Common KM tools or methods
4. Glossary of terms and additional resources

1 The current and future of knowledge management in South African cities Toolkit; Capacity building through Knowledge Sharing, Background research report, by Felicity Kitchin Research Consultants, 2012.
WHAT IS KNOWLEDGE MANAGEMENT?

“The most effective organisations in the knowledge economy will be those which recognize and best harness the crucial role that knowledge plays both inside and outside the organisation.”

Knowledge management (KM) is a concept that entered the mainstream in the 1990s. In essence KM describes the process of capturing, distributing and effectively using knowledge.

For the purpose of this toolkit, KM is understood to be the creation, identification, collection, organisation, sharing, adaptation and use of internal knowledge and best practices.

KM is not simply IT systems and databases or information management. KM also emphasises culture and work practices, adding value to information stored in an accessible manner on databases, and interpreting information by people.

KM is a strategic function, not an end in itself or a compliance issue.

KM is an incremental process, which means that municipalities can start small and build up. A sophisticated and expensive system is not needed from the outset.

Shift from supply to demand

Knowledge managers should explore the demand side (what knowledge managers require) before focusing on the supply side (the systems that make knowledge available to users and the sharing of knowledge and information).

Therefore, knowledge managers need to be in continuing dialogue with municipal managers to understand the municipality’s strategic decision-making processes, to ensure that the KM system generates useful and relevant information to support these processes.

The systemic view of KM, as illustrated in Figure 1, takes into account the dynamic nature of municipal governance and the need to incorporate data and information from both inside and outside the municipality.

Figure 1: Systems approach to KM

- What are we going to achieve? (Strategy, goals, vision)
- What is (or is not) working? (Lessons)
- What new (or old) questions do we have?
- What do we need/can we discover?

- Knowledge
- Wisdom
- Information
- Data

Inputs:
- Performance inputs
- Learning inputs

Outputs:
- Performance outputs
- Learning outputs
What is Knowledge Management?

To be fond of learning is to be at the gate of knowledge. (Chinese Proverb)

KM involves both learning and sharing, internally and externally, as illustrated in Figure 2.

**FIGURE 2** Learning and sharing in the overall knowledge management context

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Explicit and tacit knowledge

In KM, understanding the difference between explicit and tacit knowledge is important. *Explicit knowledge* is knowledge that can be captured and transformed. For example, IT systems transform data into useful information formats that are presented in the form of reports to municipal managers. *Tacit knowledge* is knowledge that people carry in their heads and is less concrete than explicit knowledge. It comes from experience, engagement and dialogue with others. It is knowledge that is implied but not expressed and is not easily captured in IT systems but requires a work environment and culture that supports (and rewards) sharing and learning.
FIGURE 3 Effective knowledge management

Key to effective KM is developing a **KM culture** that ensures people understand the value of sharing what they do and of learning from others.

This is supported by **institutional structures** and systems that facilitate the capture, storage and sharing of information and knowledge.

Underpinning all this are **IT systems** that enable accurate, reliable and useful information to be captured, disseminated and accessed.

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**KM culture**

- KM is considered everybody’s business and is publicly acknowledged.
- People are treated like assets and feel free to offer an opinion or idea.
- People see themselves as members of multiple communities and routinely share their ideas, technology or methods within and among departments.
- Failure is considered an opportunity to learn, success an occasion to share.

**Institutional structure**

- KM policy and framework are established and broadly supported by senior management.
- A group/person leads the KM effort, and KM techniques are integrated into strategic planning and reports.
- Processes for sharing knowledge exist. For example, exit interviews, post-project meetings (also known as After Action Review or AAR, see page 25), face-to-face interactions and electronic communications.
- A municipal programme is in place to recognise knowledge contributions made by staff.

**IT systems**

- A fully integrated IT platform ensures seamless information flow across the municipality.
- All staff are able to search across a wide variety of applications and databases.
- Requests for knowledge posted to the intranet or discussion forums are easy to understand.
- The formation of different, cross-boundary networks of people is promoted.
KM AND LOCAL GOVERNMENT

“Knowledge management, knowledge workers, and a learning organisation are key to the future of our cities.”

At local government level, knowledge is already shared in different ways but often in a scattered and fragmented manner, not through recognised KM practices. KM systems enable municipalities to build up organisational knowledge through the systematic capturing and organising of the wealth of knowledge and experience of staff, clients, stakeholders, beneficiaries and partners. In other words, it leverages knowledge and expertise that already exists within the municipality and makes this knowledge readily accessible.

Municipalities with effective KM systems have been shown to be more competitive than others and better able to serve the needs of their residents. KM ensures that the right information gets to the right people at the right time to make the right decisions. It empowers and motivates staff and supports innovation and learning.

What is important is that KM is aligned to the municipality’s overall strategy and that a culture of sharing and learning is encouraged.

What KM improves

- **Decision making**, by harnessing global knowledge, lessons learned and good practice.
- **Service delivery**, by enabling innovation, productivity and problem solving.
- **Efficiency**, by sharing knowledge and learning, thereby shortening the lag time between ideas and implementation and making information accessible, which reduces costs.
- **Responsiveness**, by increasing the quality and speed of communication between employees and managers, as well as with the public.
- **Learning**, by creating the opportunity for employees to develop their skills, performance and experience, thereby building employee satisfaction and motivation.
- **Institutional memory**, by preserving, developing, using and sharing knowledge, which is not lost when experienced employees leave.
- **Democratic governance**, by providing accessible information to the public, who feel more connected and involved with governance systems.
- **Accountability**, by ensuring transparent, open systems that reduce the potential for corruption and unethical behaviour.

KM in SACN member cities

The location and resources dedicated to KM vary among the cities. *Knowledge Management in South African Cities* – 2013 provides an overview of the status of KM in the nine SACN member cities and explains in greater detail the argument for municipalities to adopt KM.
What are KM resources?

People create, share and use knowledge, and so an important step is to identify a KM champion within the municipality and to allocate a budget to the KM function. What is important is having motivated and committed people driving the KM process.

Why are KM resources important?

The key to successful KM is people, not cutting-edge technology. These people need to be enthusiastic about sharing knowledge, learning from each other and other institutions, and be well placed to carry forward the strategic use of knowledge. Equally important is having senior municipal officers who support the KM champion.

Components of KM resources

The way in which the KM function is organised varies from municipality to municipality. However, all effective KM processes contain a variant of the following components:

1. **KM champion**
   The KM champion is responsible for driving the KM processes and may be employed from outside the municipality or be appointed internally with the role being incorporated into their existing job description. Many municipalities may not be able to set up an entire department or to employ someone who is solely responsible for KM. What is important is that the person or people who work on KM have the following characteristics:
   - are enthusiastic and committed to developing the sharing and learning functions of the municipality,
   - have an understanding of the strategic goals of the municipality and the importance of knowledge in achieving these,
   - have the ability to see the integrated nature of work across municipal departments and to assess what information is needed to create useful knowledge for departmental officials and senior management,
   - are good communicators who can motivate for and assist in entrenching a KM culture in the municipality.

2. **Supporters of the KM champion**
   These are people, usually senior municipal officials, who are able to serve as a reference group, to support the knowledge champion and to promote the concept within the municipality. Two types of people are necessary in such a group: those who are able and willing to do the investigative and motivational work involved, and those who are strategically placed within the municipality and can encourage support among senior leaders.

   It is not necessary to have too many people involved or to meet too often. What is important is to have people who take their involvement in the reference group seriously, provide practical support to the knowledge champion, and play an advocacy role across the municipality.

   This reference group could possibly become the KM Steering Committee. Such a committee would have terms of reference (the reason for and aims of the committee).
3. **Senior leadership buy-in**

The development of a culture of sharing and learning that can promote effective KM starts at the top. With senior leadership buy-in, the implementation of KM will be quicker and smoother, and sufficient financial resources are more likely to be found.

**Questions to consider**

- Who is (are) the knowledge champion(s)?
- Do we need to employ someone externally or can we find someone suitable internally?
- Will it be a full-time or part-time position?
- Will there be a KM department? If yes, where will it be located?
- Which senior managers can help promote the concept of KM across the municipality?
- Has a compelling case been made to the municipal manager?
- Who is available to serve on the KM steering committee and working group?

### CASE STUDY

**MANGAUNG KM PROCESS**

The experience of Mangaung demonstrates how the various components of KM resources work together. Mangaung recognised and institutionalised KM relatively early. The municipality initiated a KM process back in 2003. The purpose was to empower municipal officials and embed best practice in the work of the municipality. KM is understood as a management system meant to store, share, preserve institutional knowledge for reference and safe keeping.

Mangaung’s 2006/7 Service Delivery and Budget Implementation Plan (SDBIP) included a KM budget of almost R2 million and a number of KM activities. In the 2009/10 SDBIP, KM appeared on the strategic scorecard for the office of the Chief Operating Officer, under the goals of institutional excellence, civic leadership and a common approach. This involved ‘tracking and monitoring effective and efficient implementation of Knowledge Management strategy and activity plan’.

The KM function is located in the Office of the City Manager. Key municipal officials involved in KM include the City Manager, a deputy executive director (operations) and a general manager (HR department). There are currently three staff members in the unit. The role of the Manager: Knowledge Acquisition and Exchange includes the following responsibilities:

- Managing the organisational knowledge by making sure that it is properly packaged.
- Forging partnerships with both internal and external Communities of Practice (CoP).
- Continuously updating any relevant information of the institution for sharing and storing purpose.
- Being directly involved in coordination of knowledge.
- Researching best practices to improve organisational efficiency.
- Facilitating knowledge exchange programmes.

Although the KM unit suffered a recent setback, with the departure of the KM manager and institutional reorganisation, these challenges are being addressed. The current City Manager is supportive of KM and agrees with the process being followed, and departments are cooperating. The municipality’s plan is to ensure that departments are closely involved in KM, that KM champions will be trained and that the KM budget will be increased.

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1. Mangaung SDBIP 2009/10
What is a KM strategy?

A KM strategy is simply a plan that describes how a municipality will manage its knowledge better. It refers to the entire process of developing and evaluating a KM implementation plan, including continuous adapting and monitoring of the plan to improve municipal performance. A KM strategy should be closely aligned to the municipality's broader strategy.

Why is a KM strategy important?

A good, clear KM strategy helps increase awareness and understanding of KM in the municipality and communicates good practice. By providing a plan about where the municipality is, where it wants to go and how it plans to get there, the KM strategy gives the municipality a basis against which to measure progress.

Components of a KM strategy

A KM strategy consists of different components, which are not necessarily completed in consecutive order. The order in which they are completed will depend on the needs and resources of the municipality. The recommended components of a KM strategy are:

1. Establish principles
   These principles provide a vision for KM in the municipality. They do not need to be complicated but should spell out how the municipality views KM.

2. Identify the strategic objectives
   The KM objectives should link to the strategic objectives of the municipality by referring to strategic plans such as the IDP, interviewing key stakeholders or through the reference group.

3. Identify KM activities
   For each KM objective, the key issues and knowledge needs of the municipality and its stakeholders should be summarised, creating in effect a wish list of KM activities to improve performance and meet objectives. Activities will require people, processes or systems, and technology, like websites, databases or email. Some activities will focus on connecting people with information (to share explicit knowledge – see page 8), and others will focus on connecting people with people (to share tacit knowledge – see page 8).

4. Do a gap analysis
   A knowledge assessment identifies what knowledge exists in the municipality and the gaps. If an assessment has not been done, it should be carried out as part of the KM strategy. Knowledge mapping can be used for such a gap analysis. See step 3 for more information.
5. **Outline core KM aspects**

As discussed on page 9, KM involves developing three core aspects:

- **A knowledge culture.** For example, developing mechanisms to change institutional and individual behaviour; developing materials; and managing information sources.

- **An institutional structure.** For example, establishing a KM steering committee to promote the development of a KM system across the municipality, deciding whether or not to have a KM department and where such a department will be located.

- **An IT infrastructure.** For example, establishing what IT systems exist in each department, whether they are compatible, and if not how they can be made to speak to one another.

6. **Identify potential problems**

Potential barriers and bottlenecks in the flow of knowledge should be identified in the knowledge assessment (see step 3) or during the stakeholder engagement. For example, lack of buy-in, silo mentality, and fear of change. A good idea is to put in place a troubleshooting procedure, so people know where concerns may be raised. This can be a simple process, such as identifying the appropriate contact person, or holding regular sharing sessions.

**Questions to consider**

- What is the most significant strategic objective of the municipality in the short term? (E.g. to achieve a particular policy objective? To improve service delivery?)
- What are the municipality's other main objectives?
- What do we need to know to achieve these objectives?
- What knowledge will help us move from where we are now to where we want to be?
- How do we know what to ask, how to get the answers and how to use the answers we get to achieve our vision?

**CASE STUDY**

**CITY OF JOHANNESBURG GROUP KM STRATEGY**

The City of Johannesburg was one of the early adopters of KM in South African local government, establishing the Joburg Innovation & Knowledge Exchange (JIKE) in 2002. In 2012, the city produced a draft Group Knowledge Management Strategy (GKMS), which is informed by the Joburg 2040 Growth and Development Strategy (GDS).

The **vision of KM** in the City of Johannesburg is ‘To establish an effective and efficient knowledge management system in the City of Johannesburg which involves the capturing and sharing of information and experiences across all the City’s departments and entities to ensure that Johannesburg becomes a world class African city, by being a learning institution able to share its knowledge with others, learning from its own experiences and those of others to achieve its strategic objectives and improve service delivery’.
**Principles**

- KM is a cultural issue, as people need to be convinced of the value of KM and of the benefits to them personally in their work environment.
- KM needs to be simple and user-friendly.
- KM strategies should not be driven by technology but by the KM decisions.
- KM strategies should be linked to the longer term strategies of the organisation.
- KM is evolutionary, which means that KM strategies need to be constantly reviewed.
- KM needs to avoid information over-load.

**Strategic objectives**

The GKMS is driven by the city’s vision, strategic and operational objectives as outlined in the Joburg 2040 GDS and 2012/16.

The GDS presents a clear vision, of ‘Johannesburg – a World Class African City of the Future – a vibrant, equitable African city’ and identifies four outcomes to achieve by 2040: (1) Improved quality of life and development-driven resilience for all; (2) Provide a resilient, liveable, sustainable urban environment – underpinned by infrastructure supportive of a low-carbon economy; (3) An inclusive, job-intensive, resilient and competitive economy; (4) A leading metropolitan government that pro-actively contributes to and builds a sustainable, socially inclusive, locally integrated and globally competitive Gauteng City Region. The IDP effectively operationalises the GDS and assists the city to allocate resources in pursuit of set development objectives. It serves as a bridge between the city’s long-term strategic planning and its operational plans.

The IDP includes Innovation and Knowledge Sharing as a sub-programme, highlighting the significance of KM in contributing to the realisation of the city’s strategic objectives. Although located within the governance cluster, this sub-programme is applicable to all clusters, departments and municipal entities.

**The KM key objectives are:**

- To build a cross-cutting, city-wide learning and knowledge sharing capability.
- To institutionalise an effective and efficient KM system across the City of Johannesburg that documents and supports the implementation of the Joburg 2040 GDS.
- To institutionalise the value and culture of KM throughout the City of Johannesburg and its entities.
- To facilitate the integration of a KM culture, related institutional structure and the appropriate IT platform for the City of Johannesburg.
- To facilitate and enhance the ability of the decision makers to make informed decisions by improving access to the city’s strategic knowledge.
- To foster partnerships for broader knowledge sharing.

The implementation of the GKMS will focus on five strategic knowledge pillars:

- Entrench a culture of knowledge sharing and learning.
- Strengthen the generation of improved and new knowledge.
- Enhance knowledge sharing and learning.
- Encourage the application of knowledge.
- Leverage knowledge through partnerships.

**Core KM aspects**

Three core areas of action are the basis on which a range of knowledge-related products and processes can be built:

1. Develop a group-wide knowledge management culture.
2. Ensure appropriate and supportive institutional structure.
3. Ensure supportive IT infrastructure.
What is a knowledge assessment?

A knowledge assessment maps out what knowledge and information exists, where the gaps are, and where knowledge flows need to be improved in order to address the municipality’s developmental goals. It answers the question: how does the municipality assess, acquire, build, learn, contribute and use knowledge. A knowledge assessment may look at knowledge assets (identifies knowledge products and content) and knowledge flows (shows existing knowledge sharing patterns and gaps using flowcharts or maps that highlight bottlenecks). A knowledge assessment is also called a knowledge audit or a knowledge scoping exercise.

Why is a knowledge assessment important?

Strategic decision making in a municipality needs to be informed by useful knowledge, which results from knowing what information is collected, how it is stored, who uses it and for what purposes, how it is transferred or disseminated, and how it is transformed into useful knowledge.

Components of a knowledge assessment

A formal knowledge assessment is not essential to embark on KM. Some well-resourced municipalities with fairly sophisticated KM strategies have not yet embarked on a knowledge assessment (e.g. eThekwini). A knowledge assessment can vary, from an extensive (and expensive) exercise to an informal study of how information is generated, flows and is used in the municipality. Whatever the scale, an assessment contains the following components:

1. **Identify stakeholders**
   To understand how knowledge is created, used and shared, identify the knowledge creators (owners) and knowledge users. This can be done through (i) net-mapping or value network analysis: identify who is involved in a particular network, how they are linked, how influential they are and their goals; (ii) a snowball approach: having identified a knowledge asset (i.e. product), identify who created it and who uses it. A picture of the network will then develop, including people who may not have previously been consulted or considered.

2. **Build trust with stakeholders**
   Building trust during the knowledge assessment is vital to encourage people to share knowledge. Some people may be reluctant because of fear that they will be worse off if they do not keep knowledge to themselves. A solution is to prepare a written briefing (see page 27) for all senior managers, so they can understand how KM benefits the municipality by sharing knowledge across different departments.

3. **Determine assessment outputs**
   Decide on the outputs, how they should be organised and who will have access to them. Examples of outputs are: a knowledge inventory, which is like a stocktake of knowledge and involves counting and categorising explicit and tacit knowledge in the organisation (e.g. databases, libraries, subscriptions to external resources, employees’ qualifications and skills); a knowledge map, which visually represents the organisation’s knowledge; and a knowledge flow analysis, which shows how knowledge moves around the organisation, i.e. how people find the knowledge they need and how they share the knowledge they have.
4. Design data collection and collect data
To understand all aspects of knowledge and its use in the municipalities, information is collected from a number of sources:

From knowledge owners and users, who are the best qualified to identify the knowledge that is most important to them but may take for granted (or not remember) all important sources of knowledge during the audit. Find out information they use and knowledge they might want.

From tangible knowledge assets, such as documents, photos and tools, which validate information gained from staff and help understand better what is being reported. However, this information does not provide insight into non-tangible forms of knowledge, such as experience or relationships, and does not easily communicate how this knowledge is used in practice or its importance.

From observation of how knowledge is being used in real situations, thereby identifying unreported knowledge assets and understanding how knowledge is used. However, observation does not provide a comprehensive picture of knowledge in use, or easily identify tacit, non-visible knowledge being used.

Questions to consider
- What are we currently doing?
- How do we find knowledge?
- What is known? Ask someone what they know, and how they do different things, which enables them to talk about different processes where they use knowledge without thinking about it.
- Where is it known? Highlight areas of overlap as well.
- Who knows it? Ask staff through interviews, e-mailed questions or on the intranet.
- How do we know they know it? Storytelling (page 42) helps people to think about how they know what they do.
- How does or can knowledge flow? An understanding of this develops as you hear how people know what they do, who knows different things etc.
- What prevents knowledge from flowing in a particular way? Anecdotes and storytelling help identify and discuss situations where people were unable to do something as they didn’t have the necessary knowledge, and why.

CASE STUDY

BUFFALO CITY METROPOLITAN MUNICIPALITY (BCM) KNOWLEDGE AUDIT PROCESS
The 2010 knowledge audit built on the earlier audit in 2008. For full details see the background report to this toolkit. Some of the highlights are described below.

Stakeholder engagement
A participatory approach was adopted. A sample of 30 people (including directors, heads of departments and middle managers) were interviewed using a structured questionnaire. The questionnaire was also sent to managers outside the sample in order to identify (and add to the mapping) knowledge kept in departments, but the response was not very good.
STEP 3 KNOWLEDGE ASSESSMENT

Analysis
The data collected through the interview process was sorted manually and analysed by theme, topic and semantics, source and the sections of directorates within BCM.

Desktop research
Documents reviewed included legislation and municipal strategic documents, thereby ensuring the KM strategy aligns to the municipal strategy. A comprehensive review of individual departmental strategies was not possible, but the IDP provided a sufficiently clear understanding of the BCM’s vision, objectives, goals, weaknesses, threats, strengths and opportunities.

Institutional overview
BCM’s key performance areas are divided into six thematic clusters or key performance areas, which are reflected in the municipality’s institutional structure: the Office of the Municipal Manager and eight directorates, which are further subdivided into departments/units. The knowledge audit considered the objectives and strategic intent of each directorate.

Information flow and management
The knowledge audit revealed a lack of central data repository and data sharing, which was hampering the data-capturing process within most of the BCM directorates. In some cases, data collection efforts were being duplicated; in others only one person had access to certain, possibly vital information. What was needed was to remove bottlenecks in the knowledge flow across the municipality and to provide a central, accessible facility to store information.

IT infrastructure and system
The enablers required to support KM in the short and long term were assessed, including the internet, email, internal communication, and electronic archiving systems. An IT infrastructure that is not integrated will further limit the flow of information sharing in BCM.

Knowledge resources
The location, availability, ease of access, relevance, usability and format of knowledge resources were assessed, together with the users and custodians of the resources. Intra-directorate access was found to be significantly better than inter-directorate access. However, document sharing was limited and only staff keeping the documents knew about them, which led to poor document update and poor content management.

Knowledge tools and mechanisms
The existing tools and mechanisms that support KM in the municipality were assessed, with those that promote knowledge sharing within BCM being rated between good and average. Intra-departmental/directorate tools were rated much more effective than inter-departmental/directorate tools, which is understandable because the level of trust would be expected to be higher within directorates/departments than between directorates/departments.

Impediments to knowledge sharing
Most of the impediments identified and assessed will have a high impact on the efficacy of knowledge sharing. However, despite a general lack of management support, senior managers are willing to support KM.

Knowledge Mapping
A knowledge asset map was developed which showed that knowledge is to a large extent preserved in silos within the municipality. However, some processes, information and knowledge flow between Legal, Supply Chain, Payroll, Internal Audit and Finance.
What is a KM implementation plan?

A KM implementation plan is the practical manifestation of a KM strategy. It details what will be done, when and by whom. A KM implementation plan should be simple, user-friendly, flexible and include an evaluation section.

Why is a KM implementation plan important?

Without a detailed implementation plan, a KM strategy cannot be effective. The implementation also serves as a basis for allocating human and financial resources and enables progress to be monitored and evaluated.

Components of a KM implementation plan

KM is not easily demonstrated in a tangible way and can be difficult to motivate for. Therefore, a good idea is to start with small actions that show some results (e.g. a pilot KM project before rolling out across the whole municipality) and adopt a phased approach over 1–5 years. Some of the important components to consider are:

1. Discuss incentives
   Staff performing the KM function need to feel the benefits of their participation from the outset. Therefore, have some quick wins early and include incentives in individual performance scorecards.

2. Include evaluation
   This means developing indicators or measures to determine whether the activities are achieving the expected results, which could be done in consultation with the reference group or steering committee. Evaluation can address two areas:
   a. Received experience: how people feel about the effect of KM on their work.
   b. Objective measurement of efficiencies: in job execution, turnaround, client response etc.

3. Allocate resources
   Even large and well-capacitated municipalities are unlikely to be able to allocate sufficient resources to maximise KM. When allocating resources to KM, consider the following issues: budget, size and location (in organogram) of department, IT infrastructure, and any other required resources.

4. Identify KM people
   Depending on the municipality’s resources, the KM function could lie with one dedicated KM department or with one person within another department (who either is solely responsible for KM or incorporates KM into their existing job description) – see page 12. What is important is to ensure that the KM people are enthusiastic and committed, understand the municipality’s strategic goals, can assess what information is needed to create useful knowledge, and are good communicators who can help entrench a KM culture in the municipality.
Questions to consider

- Where should the KM function be located within the municipality?
- What mechanisms are in place to ensure that KM becomes an integral part of the municipality (in all departments)?
- Are the right KM people in place?
- In what areas are the quick wins?
- What monitoring, evaluation and measuring indicators are in place?

CASE STUDY

ETHEKWINI MILE

In 2009 eThekwini municipality conceptualised its Municipal Institute of Learning (MILE), which was launched in 2010. MILE’s strategic objectives include enhancing the professional and technical capacity of local government professionals in Africa; positioning the eThekwini Municipality as a platform for innovating, learning and sharing with other municipalities, associations and networks, both locally and internationally; leveraging partnerships with tertiary institutions in collaborative research to improve the effectiveness of local government; providing a municipal technical support service to other municipalities; and coordinating the internal knowledge management agenda within the eThekwini Municipality.

MILE is currently structured along four learning pillars: Capacity Enhancement, Supporting Learning Networks, Collaborative Research and Municipal Technical Support, underpinned by an integrated KM system. KM interventions in the municipality include the following:

- Knowledge documentation (good practice and lessons learned, publications, procedures and manuals).
- Knowledge sharing (communities of practice and master classes, learning exchanges).
- Knowledge storage (knowledge portal, document management system).

MILE extracts knowledge from key officials who have been with the city for a long time, obtains relevant information on good systems and practices from officials, and packages it into information which can be used in master classes etc. MILE focuses on learning exchanges, providing municipal technical support to other municipalities, and on developing linkages with universities and similar institutions. For MILE, KM is more linked to municipal good practice, developing communities of practice (which are written up) and developing learning notes, than the internal KM system. A documentation management system (DMS) and intranet are in place for internal sharing of information.

Two institutional structures are responsible for identifying knowledge:

- A steering committee of very senior officials responsible for governance, planning, skills, and strategy.
- A working group consisting of the “champions” who need to document and learn from officials in departments, such as the planning and housing departments — they are not the decision makers but are passionate about particular issues.

For managing internal information, eThekwini has a communications manager responsible for the Communications Forum, the intranet and the DMS. As yet the IT system does not integrate information across departments, although the city is currently exploring developing a common platform to facilitate greater collaboration. The municipality is moving to Sharepoint as, like Johannesburg, they believe it is important to have a standardised platform built on readily available software.
There is no one set way to implement KM. For example, Cape Town’s approach to KM implementation differs from that of eThekwini. Whereas eThekwini’s has a strong focus on enhancing human capacity, Cape Town’s implementation drive is more about systems and processes. Both approaches are legitimate and can be explained by the cities’ different contexts and priorities.

**CASE STUDY**

The development of knowledge management in the City of Cape Town involved initially conducting a KM audit. The decision was taken to focus first on data management and operational systems and identify and address those issues that contribute to improving service delivery. “Soft” IKM techniques were then introduced into these projects, rather than introducing them in isolation.

Following the KM audit, an IKM and implementation plan were developed. These resulted in the development of a Knowledge Hub (Integrated Information), IKM Policy (Improving Practices and governance) and IKM Partnerships (Change Management and building content). One of the key success factors of knowledge management in the city is that the Executive Director is very supportive of KM and the programme.

Cape Town’s phased approach to IKM implementation stretches over five years and covers these phases: (1) Enabling IKM infrastructure, (2) Embedding IKM culture (3) Entrenching IKM practice, as shown below.
ABOUT THE TOOLS

This section provides an overview of 20 common knowledge management (KM) tools and methods that can help promote and facilitate knowledge management in municipalities. They are guidelines and not intended to be a “how to” manual. Some additional, useful resources are provided on page 48.

For each tool, a guideline is given for when and how to use the tool, expected outcomes and some tips on using the tool. Where tools can be combined or used together, this is indicated on the tool pages. A list is also provided below of KM tools and methods commonly used by private and public sector organisations that are similar to the 20 tools included in this toolkit.

The tools are listed alphabetically, and icons are used to indicate whether the tool is suitable for:

- Individual use
- Collaborative use
- Sharing knowledge
- Learning knowledge

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AFTER ACTION REVIEW (AAR)

When to use

- To enable people to provide constructive suggestions and actionable recommendations during or after a project or activity.
- To apply lessons and recommendations at any point of a project.
- To capture the knowledge gained in a project or activity before a team disbands.

Outcomes of the tool

- Documented knowledge of successes, mistakes and recommendations for immediate or future application.
- Shared team perspective on which future work can be based.

How to use the tool

1. Call a meeting and include the project manager, key team members and people who are about to undertake similar work.
2. State that the objective is to extract lessons from the project to improve future projects.
3. Appoint an objective facilitator to guide the discussion and include all participants.
4. Revisit the project’s objectives and deliverables, asking ‘what were we trying to do’ and ‘what did we achieve’. A flowchart is useful for showing what happened when.
5. Identify key achievements, asking ‘what went well’ and ‘why did it go well’.
6. Identify the challenges and problems, asking ‘why didn’t it go well’ and ‘what could be done better’.
7. Document the AAR session and include background information, lessons and guidelines for the future, key people and documents such as project plans or reports.
8. Ensure the AAR documentation is readily accessible. Consider using a knowledge database, intranet (page 33) or library to share the lessons and recommendations.

TIPS

- Conduct the AAR as soon as possible after the project ends and possibly during the project.
- Prepare some lead-in questions in case the participants are slow to respond.
- The facilitator can gather individual responses to questions before the session.
- Take detailed notes of the session and request that recommendations are specific.

For further information, see Swiss Development Agency’s Knowledge Management Toolkit
When to use

- To generate ideas quickly about a question, problem or opportunity, through stimulating the creativity and innovation of a group of people.
- Particularly useful at the beginning of a project, as well as when problems arise.

Outcomes of the tool

- High quality ideas and results in a short space of time.
- Motivated participants and broader support within the organisation for projects and initiatives.

How to use the tool

1. Have a clearly stated objective or purpose, agreed meeting guidelines, and appropriate brainstorming techniques for your circumstances.
2. Invite all participants to share in the session, which takes place in a room or an electronic space (e.g. conference call).
3. Reassure the participants that their responses will be anonymous (if the topic is sensitive).
4. Ask participants to respond to the question or problem with as many ideas or suggestions as possible, using one word, a phrase, or a short sentence.
5. Encourage innovative and different suggestions, and make no comment or judgements on the feasibility of any suggestion.
6. Record all responses in writing, electronically, on a flipchart or on cards.
7. Group the responses by themes/topics.
8. Prioritise and analyse the responses, elaborating on further steps needed.

TIPS

- State the question/problem correctly and simply to ensure people give appropriate responses.
- Do not criticise anyone for their idea, as this stifles creativity and may prevent the best solutions being put forward.
- Include people from different levels (junior and senior) and departments, to encourage cross-fertilisation of ideas and to generate more innovative solutions.
- Select facilitators who guide discussion and encourage all participants to contribute freely.
- Choose facilitators who are not direct seniors of the participants (i.e. not their line managers), so people are willing to put forward more outrageous suggestions.
- Ensure a comfortable physical environment and provide water, coffee, tea and snacks.
- Ask participants to switch off their cell phones, so that they are not distracted.

For further information, see Swiss Development Agency’s Knowledge Management Toolkit http://www.deza.admin.ch/ressources/resource_en_183581.pdf
BRIEFINGS

When to use

- To inform senior managers or the executive of a project or policy issue.
- To reflect on the results or outcome of a project or an event.
- To check content issues, clarify questions and communicate clear guidelines efficiently.

Outcomes of the tool

- Efficient transfer of information or knowledge.
- Documented information or post-project learning in concise form.

How to use the tool

1. Decide on the audience and topic of a briefing. Briefings may be needed before the start of a project or following the completion of a project, in the form of a debriefing.
2. Call a meeting and invite interested parties.
3. Supplement oral briefings with written communication. A good briefing note contains a clearly stated issue, topic or purpose and why this is important, a summary of the facts or background, what is currently happening, key considerations and a conclusion or recommendation.
4. Keep the briefing to the point and specific to the issue. Invite reflection from all parties.
5. Circulate key points and outcomes in writing to all parties.

TIPS

- Make briefing notes short, clear and reliable.
- Consider the audience and edit the note to meet the audience’s needs.
- A debriefing is an opportunity to glean tacit knowledge from project participants including perceptions and ideas for the future.

For further information, see Swiss Development Agency’s Knowledge Management Toolkit http://www.deza.admin.ch/ressources/resource_en_183581.pdf
COMMUNITIES OF PRACTICE

When to use

- To enable experts to collaborate in sharing their tools, practices and experiences related to a specific topic over an extended period.
- To stimulate learning across institutional boundaries and hierarchies and link different units and departments.

Outcomes of the tool

- Greater professional collaboration and discussion between domain experts in the field.
- Learning from the past experiences and current practices of others.
- Creation of new knowledge and assets to advance an area of professional practice within the institution.

How to use the tool

1. Identify the audience, purpose and goals of the proposed CoP by starting discussions with a core group.
2. Contact potentially interested people by phone, email, and in informal talks during workshops and gatherings.
3. Specify the technologies, processes, roles and activities of the CoP, which may include meetings, online discussions, contributions in newsletters, posts on the website and intranet.
4. Pilot the CoP with knowledge-sharing activities by the core group and pay attention to developing roles within an inner core group (owner, facilitator, convenor).
5. Roll out the community to a broader audience and welcome newcomers. An outer group will form in addition to the inner core group.
6. Grow the community by encouraging participation in knowledge sharing through group projects and networking events. Strive to produce and disseminate concrete products that encourage a cycle of participation and contribution.
7. Sustain the CoP by cultivating and assessing the knowledge produced and providing opportunities for members to play new roles and participate in new activities.

TIPS

- Be sure to reward and recognise members for their contributions, so as to increase motivation and participation.
- Remember that facilitating a CoP is not a one time event but requires ongoing commitment and activities to encourage collaboration and knowledge sharing.
- If a CoP is becoming less relevant, consider phasing it out or determine whether a reorientation might open a new vision.

For further information, see ABC of Knowledge Management (NHS National Health Library UK)
CONFERENCES AND SEMINARS

When to use

- To provide employees with opportunities to network, interact with and learn from peers working in a similar field.
- To share with and present the experiences, good practice and lessons learned in one municipality to other municipalities and interested parties.

Outcomes of the tool

- Professional development and training for individuals.
- Creation of contacts and networks beyond the municipality.
- Bringing back and sharing of good practice within the municipality.

How to use the tool

1. Establish the potential benefits for the individual and the institution of attending a conference or seminar. If appropriate, ask potential attendees to motivate for attendance by stating their goals in writing.
2. Confirm budget, travel and dates with all parties.
3. If the employee is presenting or participating at the conference, confirm scope of presentation and allocate preparation time. Confirm all equipment such as audiovisual requirements.
4. On completion of the conference, organise a feedback session, so knowledge gained can be disseminated through the organisation. Convene a workshop to communicate lessons learned (page 35) and post on intranet or website (page 33) or via other internal communications.
5. Store and publicise any relevant conference materials such as presentations, videos and documents on the intranet or website.

TIPS

- Set clear goals for attending a conference.
- Establish at the outset how the attendee will share knowledge gained at the conference.

For further information, see Organising seminars and conferences (Coalesce Corporation) http://www.coalesce.com/pubs/OrganizingSeminars.pdf and Top 10 ways to get the most out of a conference (Career Life) http://www.careerlife.net/careers/conference/
When to use

- To help employees find others who have the necessary knowledge and expertise for a particular task or project.
- To discover skills, experience and interests of employees and colleagues.
- To seek guidance from co-workers situated elsewhere in the organisation.

Outcomes of the tool

- Electronic round table for specific tasks and projects.
- Fast answers and solutions to queries and problems.

How to use the tool

1. When setting up the Directory, include common fields such as job title, team, brief job description, past job titles, qualifications and areas of interest. Include an option for personal information and a photograph.
2. Include additional information in the employees’ profiles that is outside the field they currently work in.
3. Encourage employees to write descriptions of their skills and a list of projects they are working on, which can then be posted on the Directory.
4. Make employee input into the Directory part of the employees’ annual performance review, as getting the correct information in the system is critical.
5. Send out automatic reminder notices if an individual hasn’t updated their profile in the last six months.
6. Record in the Directory the name and contact details of the main author or key people responsible, which should appear in all reports and documents produced by the municipality.

TIPS

- Remember that employees gain new skills and new insights all the time and so make updating their profile easy.
- A Directory of Experts is only as good as the quality of the information provided, so the system requires vigilant attention.
- Get feedback from users on a regular basis, to ensure that the Directory of Experts is indeed helpful and being used.

For further information, see ABC of Knowledge Management (NHS National Health Library UK)
EXIT INTERVIEWS

When to use

- To understand why an employee is leaving.
- To gather employee feedback on how to improve the role or job area.
- To ensure vital knowledge is not lost when an employee leaves.

Outcomes of the tool

- Capture of previously unknown information about issues of concern or ideas that may lead to institutional improvement.
- Gathering of information and knowledge that will be helpful to a new incumbent or others in a similar role.
- Employee may leave with a more positive view of the institution.

How to use the tool

1. Plan the handover and interview as soon as you know that a person is leaving.
2. Identify who in the organisation might benefit from that person’s knowledge and what they will need to know.
3. To capture explicit knowledge, make sure the leaver moves relevant files – both hard copy and electronic – into shared folders or a document library.
4. Conduct a face-to-face interview to glean tacit knowledge. Base the interview discussion on the leaver’s job description or annual performance plan, probing for what knowledge or skills are required and what problems or pitfalls are of concern.
5. Ask the leaver about their network of contacts or sources of knowledge.
6. After the interview, review and reflect on the answers and take action as necessary. Inform others who might benefit from the information.

TIPS

- Ask ‘what/why/how’ open-ended questions rather than ‘yes/no’ questions to promote an atmosphere of sharing and openness.
- While face-to-face interviews are preferable, consider electronic or postal questionnaires if an employee is reluctant to attend a face-to-face meeting.
- Consider both tacit and explicit knowledge of the person leaving.

For further information, see Swiss Development Agency’s Knowledge Management Toolkit
GOOD PRACTICE

When to use

- To generate and share lessons from an issue, practice or project that has worked well so that the lessons can be reproduced or adapted in other situations.
- To share knowledge with people from different departments who perform similar tasks.
- To record and share tacit knowledge.

Outcomes of the tool

- Sharing of knowledge or improvement in planning and performance.
- Greater communication among people in different departments performing similar tasks.

How to use the tool

1. Identify the areas and people needing attention due to poor performance or recurring challenges.
2. Consider how staff will access and use good practices, e.g. via a database.
3. Find out who is producing excellent results, by asking internal and external experts for their good practices. Other tools can be used here e.g. communities of practice (page 29), AARs (page 25) and exit interviews (page 31).
4. Document good practices by recording on a template, which may include a brief description of the context, processes and steps followed, skills and resources used, improvement measures, lessons learned, links to resources (such as experts’ contact details or transcripts of review meetings), tools and techniques used, and, if possible key words to assist in searching a database. Lessons learned (page 35) can also be used to document good practice.
5. Ensure a demonstrable link between what is practiced and the end result. For example, get a review panel of experts and peers to evaluate a potential good practice against their knowledge of existing practice. Good practice should be based on sound research evidence and on-the-job experience.
6. Publicise documented good practices (via email, intranet or websites). Good practices can be shared through communities of practice (page 29), visits to other departments or municipalities, and exchanges or study tours (page 43).

TIPS

- Be sure to document good practices so that they are easily accessible to others.
- Don’t be too prescriptive and rigid when identifying and documenting good practice. People will be more motivated to be involved if they are allowed some flexibility.

For further information, see Swiss Development Agency’s Knowledge Management Toolkit
IT-BASED TOOLS

Information technology (IT) provides tools and systems that help KM fulfil its goals. As presenting the thousands of available options is beyond the scope of this toolkit, an overview of the main categories is provided.

Groupware systems

Groupware refers to technology designed to help people collaborate. Applications include communication tools (e.g. email, wikis), conferencing tools (e.g. video conferencing) and collaborative management tools (e.g. information management systems). Successful groupware implementation happens in organisations with a culture where collaboration and sharing are the norm.

Intranet and extranet

An intranet is a computer network using the same protocols and technology as the internet but restricted to users within an institution. It provides easy access to commonly used documents, stores data securely online and creates a community in the virtual environment. Its most important function is knowledge sharing and collaboration, through publishing, searching, transacting, interacting and recording functions. An extranet extends the intranet to the organisation’s external network, which might include suppliers, partners etc. It can enhance collaboration with partners. For security reasons, access to internal information and resources should be limited. A content management system usually manages the content of both intranets and extranets.

Content and document management systems (CMS and DMS)

A CMS is software used to create, review and publish electronic text. Content is created, managed and distributed on the intranet, extranet or website. It is also easy to edit and control versions and allows for collaborative work. If properly implemented, a CMS improves the quality of explicit knowledge, provides limited support to tacit knowledge and supports collaborative projects. Often part of a CMS is a DMS, which is a computer system used to track and store documents. It captures (scans), classifies (using metadata), searches and retrieves, and stores and manages the different versions of documents. A DMS reduces operational costs, improves efficiency and speed of retrieval, consistency and safety (in terms of file backups and security measures).

Data warehousing and mining

Warehousing data is when data from multiple sources is stored in a centralised system. If properly designed and implemented, data warehousing can drastically reduce the time required in the decision-making process. Data warehousing is commonly used to analyse trends and patterns. Data mining is a very complex process that analyses and summarises data from different perspectives into useable knowledge or information.

For further information, see KMT An Educational KM Site http://www.knowledge-management-tools.net/knowledge-management-tools.html
KNOWLEDGE FAIRS

When to use

- To showcase information about the municipality or a particular topic/issue.
- To recognise employee and team achievements.
- To foster informal networking and problem solving.

Outcomes of the tool

- The institution’s learning assets are increased.
- Knowledge shared with a wide range of people.

How to use the tool

1. Get top-level support and publicise the Fair widely.
2. Choose a location where there is a lot of foot traffic (e.g. in the main hall).
3. Use a common theme across booths, to have an integrated look.
4. Be realistic about how much time it takes to prepare and display.
5. Allow presenters to organise their own booths (don’t be prescriptive).
6. Showcase the activities of your communities of practice (page 29).
7. Have fun and capture what happens (e.g. take pictures, interview participants).
8. Reflect on and publicise the event by creating publications (page 40) and social media (page 41).

TIPS

- Have technicians on standby in case something breaks down.
- Encourage people to visit the booths by organising an activity such as a treasure hunt – visitors have to find answers to questions or ‘knowledge nuggets’ from the various booths.
- Make eye contact and smile at visitors – the more people around your booth, the more you will attract!

For further information, see Swiss Development Agency’s Knowledge Management Toolkit
LESSONS LEARNED

When to use

- To learn from mistakes at the end of any project or activity.
- To help in the planning and preparation of new projects.
- To give credit to individual or team efforts made during a project.

Outcomes of the tool

- Collection and documentation of experiences, mistakes and risks during a project.
- Improved project management through avoiding making the same mistakes in the future.

How to use the tool

1. Establish the area of activity and scope for which lessons are to be drawn and who might have an interest in the lessons.
2. Invite participants to a physical meeting or ask questions by email.
3. Ask specific questions such as ‘did we do it right’ and ‘did we do the right thing’ for a particular issue.
4. Collect answers to these questions and capture any other spontaneous ideas.
5. Consolidate individual lessons into lessons for teams or the institution.
6. Present the lessons learned with relevant context to interested parties. Use tools such as good practice (page 32) and study tours and delegations (page 43) to share lessons learned.

TIPS

- Remember that individual team members often draw different lessons despite going through the same process and may require help to consolidate their differences in order to arrive at team lessons learned.
- Be aware that strategic considerations may lead to the institution drawing conclusions that are different from those of a team or individuals.

For further information, see Swiss Development Agency’s Knowledge Management Toolkit http://www.deza.admin.ch/ressources/resource_en_183581.pdf
MENTORING

When to use

- To enable inexperienced staff or people in new jobs to acquire new skills and knowledge.
- To use existing expertise and knowledge in the institution to develop junior or inexperienced staff.
- To transfer tacit knowledge and retain expertise within the institution.

Outcomes of the tool

- Enhanced sense of professional skills.
- Stronger professional ties with colleagues.
- More cohesive organisational culture and working climate.

How to use the tool

1. Identify mentors who are familiar with the municipal procedures and culture, willing to share their experiences, self-aware and good at listening.
2. Select mentees who are active in their own development, able to discuss issues openly and accept challenges willingly.
3. At the first meeting, clarify the respective roles of the mentor and mentee, agree on specific outcomes and set regular meeting times.
4. Follow a set agenda at the meetings. An agenda might be: hellos; tasks to be covered in the session; update on progress since last meeting; challenges and successes encountered; future actions/tasks to do.
5. At the end of each discussion, write down the agreed actions/tasks.
6. Ensure that a process for checking in between sessions is in place.

TIPS

- Maintain regular contact between mentor and mentee.
- Provide constructive feedback.
- Remain professional at all times.

For further information, see Swiss Development Agency’s Knowledge Management Toolkit
PARTNERSHIPS

When to use

- To improve the knowledge base of municipalities by drawing on expertise from research communities such as tertiary education facilities.
- To learn and share knowledge and information between the parties.
- To enhance skills, knowledge and service delivery.

Outcomes of the tool

- A formalised relationship, through partnership agreement or memorandums of understanding (MOU), between the academic institution and the municipality.
- Specialised academic research that informs municipal planning and activities.
- Practical experience of municipalities that influences academic research.

How to use the tool

1. Select an academic institution, based on its specialised research focus areas.
2. Identify the objectives of the MOU or partnership agreement.
3. Agree on areas of collaboration (e.g. research outputs, sharing of knowledge, information and expertise, human capacity development, and academic support).
4. Establish a steering committee.
5. Agree on roles and financial responsibilities of each party.
6. Sign the agreement.

TIPS

- Record any proposed expenditure as agreed by both parties in a separate document attached to the agreement as an annexure.
PEER ASSIST

When to use

- To gather knowledge before embarking on a project.
- To gain inputs and insights from people outside the team.
- To identify new lines of enquiry when facing a specific challenge.

Outcomes of the tool

- Solutions to problems based on prior experience of others.
- Mitigation of risks by ‘learning before doing’.

How to use the tool

1. Clarify your purpose and define the specific problem. Find out who else has already solved a similar problem. Share with other teams so that they can also assist, if necessary, in the peer assist.
2. Get a facilitator and plan a date for the peer assist early in the project.
3. Select the 6–8 participants with the necessary diversity of knowledge, skills and experience from across the organisation.
4. Be clear on what you hope to achieve during the peer assist and provide participants with any briefing materials in advance, to give them adequate time to prepare.
5. Allow time for socialising, so that the teams can get to know each other and will be able to work more openly together.
6. Define the purpose, set the ground rules and share information and context.
7. Encourage the visitors to ask questions and give feedback, while considering what else they need to know to address the problem and where to find that knowledge.
8. Analyse and reflect on what has been learned and examine options.
9. Present the feedback and agree actions,
10. Acknowledge the contribution of all team members.

TIPS

- Consider carrying out an AAR (page 25) following your peer assist to look at whether the process went according to plan, what was different and why, and what can you learn from that for the next time.

For further information, see ABC of Knowledge Management (NHS National Health Library UK) [http://www.fao.org/fileadmin/user_upload/knowledge/docs/ABC_of_KM.pdf](http://www.fao.org/fileadmin/user_upload/knowledge/docs/ABC_of_KM.pdf)
PEER COACHING

When to use

- To accelerate the development of leaders.
- To focus on a particular area of personal or professional development.
- To share new ideas between colleagues or to solve problems in the workplace.

Outcomes of the tool

- Improved and wider repertoire of professional skills.
- Reduced isolation among leaders and stronger professional ties with colleagues.
- More cohesive organisational culture and working climate.

How to use the tool

1. Match the peers so that their personal values and levels of ambition are aligned (can be one-on-one or a group).
2. Agree on a specific performance issue for the coaching interventions (with objectives).
3. Set regular meeting and checking-in times.
4. Follow an agenda. For example: hellos; summary of issues from last session; update on problems talked about in the previous session; progress; update on actions; results.
5. Use questions to guide the discussion. For example, what is your goal and is it challenging enough? What is the situation right now? How did you solve this challenge last time? What are you going to do about it?
6. At the end of each discussion, write down and distribute the actions agreed on.

TIPS

- Check in regularly with the other peer coaches.
- Make time to reflect on the value of peer coaching sessions.
- Consider pairing coaches across departments.

For further information, see AIESEC Peer Coaching Guide (Rosemary McLean)
PUBLICATIONS

When to use

- To share knowledge around particular practices, events and information.
- To engage employees in the activities of the municipality and department.

Outcomes of the tool

- Informed and motivated staff.
- Attractive and informative knowledge assets to showcase the municipality’s practice.
- Culture that promotes sharing of information, good practices and lessons learned.

How to use the tool

1. Determine the audience and purpose of the publication. Consider whether the publication will be for external and/or internal communication.
2. Consider the format and delivery of the publication. This may be print or electronic.
3. Establish the frequency and style of the publication. A newsletter may be a regular online publication, while a formal report may be less frequent and delivered in print.
4. Appoint an editor or project leader and assign resources. Confirm a publication and delivery schedule.
5. If a new publication, commission a designer to develop a template.
6. Determine the content required and commission writers.
7. If interviews are required, identify subjects and commission interviewers. Commission photographs where necessary, obtaining necessary permissions.
8. Develop content for publication. If a content management system (page 33) is in place, the publication may be incorporated into the CMS workflow.
10. Edit and proofread final publication.
11. Distribute publication or upload to relevant electronic repository (website or intranet).

TIPS

- Make the publication available in both print and electronic formats for maximum exposure and use the intranet, website or email to publicise the publication’s availability.
- Consider frequent low-cost electronic newsletters rather than print-based publications for information that needs to be communicated soon after the event or which will lose currency if delayed.
SOCIAL MEDIA

When to use

- To facilitate informal, self-directed and social learning using online (often free) web-based resources.
- To encourage knowledge sharing and networking through collaborative and social tools.
- To connect and communicate with stakeholders, customers and partners.

Outcomes of the tool

- Creation and sharing of learning resources.
- Culture of lifelong and informal learning practices.
- Engagement with stakeholders and citizens to promote transparency.

How to use the tool

1. Develop a social media strategy with a clear purpose for why social media is used in the institution. For example, to encourage informal learning and collaboration within the municipality, or to interact with citizens and stakeholders using social media.
2. Establish and communicate to all staff a social media policy that outlines the level of access to social media sites, with guidelines for appropriate use for internal and external communications.
3. Develop infrastructure to support social media engagement such as intranet pages, Facebook business pages or Twitter accounts.
4. Offer appropriate training in social media etiquette and monitor use.
5. Evaluate effectiveness of social media strategy on an ongoing basis.

TIPS

- Establish clear goals for a social media strategy.
- Encourage and reward the creation and sharing of content via social media to inculcate a culture of knowledge sharing and collaborative learning.

For further information, see The Essential Guide to Social Media (Brian Solis)
# STORYTELLING

## When to use
- To share knowledge, values and organisational culture.
- To develop trust and commitment.
- To capture past knowledge that can be adapted to the present.

## Outcomes of the tool
- Shared understanding about future direction.
- Lasting personal connections and reusable stories.
- Shifts in attitudes and behaviour.

## How to use the tool
Weaving in narrative elements into more traditional reports can be a powerful way to get your points across. Storytelling can be used in conjunction with other tools, such as Good practice (page 32) or Lessons learned (page 35).

1. Identify your story’s main point or lesson learned, which should be a moment of change.
2. Close your eyes and think of a response to the question ‘what do other people need to know about my story’.
3. Write down key points of your story.
4. Make sure your story has a clear beginning, middle and end.
5. Create strong visual images.
6. Tell your story to your partner (or the group), describing the events before, during and after the moment of change.
7. Allow your partner (the group) to ask questions in order to get more details.
8. Record the key points of the story, the names of the author (or narrator) and co-author (partner).

## TIPS
- Allow time for people to accept storytelling as a valuable tool for sharing knowledge.
- Keep your stories short enough to be remembered and focus on the positive.
- Balance anecdotal knowledge (i.e. from a story) with evidence-based knowledge.

For further information, see Swiss Development Agency’s Knowledge Management Toolkit http://www.deza.admin.ch/ressources/resource_en_183581.pdf
STUDY TOURS AND DELEGATIONS

When to use

- To interact and discuss with people doing similar work.
- To enable knowledge sharing between municipalities and local government counterparts internationally.
- To develop networks and communities of practice with peers to reflect on good practice.

Outcomes of the tool

- Development of contacts and networks across municipalities.
- Increased capacity and knowledge of individuals on the study tour or delegation.
- Establishment of international relationships within local government in Africa and worldwide.

How to use the tool

1. Have a focused or practical goal for the study tour or visit. Recognise where your organisation or department needs to improve and what you want to find out. Answer the question ‘why do we want to do a study tour’ (or ‘what do we want to achieve from this visit’, in the case of a delegation).
2. Select participants based on certain criteria such as experience, commitment, observation skills, diversity and availability. It is important to match participants and tour/visit objectives.
3. Before a study tour or visit, share your ideas and expectations for the day with your hosts, so that they can understand what you want to achieve. Specify who you would like to meet.
4. If hosting a delegation or visit, issue invitations, circulate a draft programme and make hospitality and accommodation arrangements.
5. Prepare a final agenda and programme. This may include general discussions and/or one-on-one meetings with individual delegates. Tools such as peer assist (page 38) may be useful.
6. During the tour/visit, record discussions through notes, photos etc.
7. After the tour or delegation visit, share knowledge among colleagues and take action as necessary. Use tools such as Good practice (page 32) and Lessons learned (page 35).
8. Disseminate shared learning materials by posting on the intranet (page 34) and through social media (page 41).

TIPS

- International visits need to be planned in good time to allow for paperwork, visas and associated administration.
- Appoint a liaison person for each study tour or delegation to be the main point of contact.
- For high level delegations confirm protocol arrangements.
When to use

- To learn and acquire new skills and qualifications.
- To enable ongoing professional development.
- To motivate and retain key employees.

Outcomes of the tool

- Skilled and qualified staff.
- Culture that promotes professional development.

How to use the tool

1. Determine the skills or qualification required. Reviewing an employee’s performance appraisal or job description may highlight training needs.
2. Select a training provider. Consult with HR. Determine the nature of the training intervention required (short-term, long-term, classroom based or online/e-learning).
3. Ask for the course outline and determine if any content needs customising for the municipal context or skills set required.
4. Agree with employee/managers about dates and time away from the job to complete the training, including time for completing any assessments.
5. If the training is delivered onsite, book venue and arrange for catering. If the training is delivered online or via e-learning, confirm technical equipment is adequate.
6. Agree on a method to evaluate the training’s effectiveness. This may include formal assessment as part of the training and/or sharing of good practice and outcomes on completion of the training. Tools such as sharing Good practice (page 32) and Lessons learned (page 35) may be useful.
7. Enable application and practising of new skills on the job, with feedback from managers and other appropriate staff.

TIPS

- A training intervention will be more effective if employees are encouraged to reflect on and apply the new skills to the job with support by managers.
- Members of a Community of Practice can be good sources of information for training providers and experts.
- Mentoring (page 36), Peer coaching (page 39) and learning in a Community of Practice (page 29) can supplement or enhance formal training and development programmes.

For further information, see KMT An Educational KM Site http://www.knowledge-management-tools.net/knowledge-management-tools.html
KM GLOSSARY

After Action Review (AAR): a systematic process to extract the learning from an event or activity (see p. 25).

Balanced Scorecard: a performance measurement system incorporating financial and non-financial measures.

Benchmarking: a systematic process for comparing the performance of an activity or process across organisations or departments.

Best Practice: see Good Practice.

Brainstorming: a group technique for generating new ideas, stimulating creative thinking, amassing information and solving problems.

Briefing: a meeting for giving information or instructions.

Case Study: the analysis of an individual unit (e.g. person, group, event).

Classification: a key process in the knowledge-sharing cycle, when documents are classified and indexed according to their core terms and concepts.

Coaching: one-on-one relationship, in which the coach facilitates the enhancement of an individual’s work performance, personal growth and skills in specific areas.

Community of Interest: a group of people who share knowledge and experience around a common interest.

Community of Practice: a group of people who share and develop their knowledge in pursuit of a common purpose or task (see p. 28).

Concept Mapping: a visual representation of core concepts showing the relationships between them.

Content Analysis: analysis of a body of content (text) into its key concepts, used to discern trends and generate keywords/thesaurus terms to improve text search and retrieval.

Content Management System (CMS): software used to create, review and publish electronic text (see p. 33).

Data Mining: a computer technique for extracting meaningful knowledge from masses of data (see p. 33).

Directory of Experts: a searchable database of personnel and their skills and project experience (see p. 30).

Discussion List: a common email address that is shared with list subscribers, so any email sent to that address is forwarded to everyone on that list.

Document Management System (DMS): a computer-based system for storing and retrieving documents (see p. 33).

Exit Interview: a final formal meeting between an employee who is leaving and the employer, to find out reasons for leaving and views on organisation.

Explicit Knowledge: knowledge that is codified and articulated, and appears in the form of documents, procedures and in databases (see p. 8).


Good Practice: the distillation of accumulated wisdom about the most effective way to carry out a business activity or process (see p. 32).

Groupware: computer software that supports collaborative working (see p. 33).

Human Capital: the competencies, know-how, capabilities and experience possessed by individuals.

Information Audit: see knowledge assessment.

Information Resources Management (IRM): the techniques of managing information as an organisational resource.

Instant Messaging: an internet or intranet facility in which users type messages into a window that is simultaneously viewed by other participants in that chat room or area.

Intangible Assets: assets that are not physical or tangible in nature, e.g. knowledge.

Intellectual Capital (IC): the intangible assets of a company not normally valued on the balance sheet. It is roughly – but not exactly – the difference between the market and book value of a company.

Intellectual Property (IP): the intellectual capital that is identifiable and protectable in law, including copyrights, patents, designs, trademarks.

KM Maturity: the level of adoption of KM within an organisation.

Knowledge Analyst: a person or business that interprets the needs of a knowledge seeker and finds the most suitable sources.

Knowledge Archaeology: the process of rediscovering an organisation’s historical knowledge that has become lost.

Knowledge Assessment: the systematic analysis of an organisation’s information and knowledge entities (see p. 17). Also known as information audit, knowledge audit, knowledge inventory and knowledge mapping.

Knowledge Asset: an identifiable piece of knowledge that has some intrinsic or extrinsic value.

Knowledge Base: a computer-held database that records knowledge in an appropriate format for later extraction.

Knowledge Broker: an intermediary that connects knowledge seekers to knowledge providers.

Knowledge Café: a (virtual or real) informal meeting area for the exchange of knowledge.
**Knowledge Capital:** the capital of an organisation that is not physical or financial.

**Knowledge Centre:** a central function for managing knowledge resources.

**Knowledge Codification:** the process of articulating knowledge in a more structured way.

**Knowledge Cycle:** a sequence of core knowledge processes resulting in new knowledge.

**Knowledge Economy:** an economy in which knowledge is one of the main factors of production and constitutes the major component of economic output.

**Knowledge Fair:** an event designed to showcase information about an organisation or a topic.

**Knowledge Inventory:** see knowledge audit.

**Knowledge Leakage:** the loss of critical or damaging knowledge from an organisation to the outside world (e.g. competitors, unauthorised personnel), either deliberately or unintentionally.

**Knowledge Mapping:** see knowledge audit.

**Knowledge Object:** a piece of knowledge held in a well-defined and structured format, such that it is easy to replicate and disseminate.

**Knowledge Practice:** a specific method or technique used to manage or process knowledge.

**Knowledge Process:** a broad knowledge activity often performed at an aggregated level.

**Knowledge Product:** a product which consists almost entirely of information or knowledge.

**Knowledge Recipe:** the transformation processes that uses existing knowledge assets as inputs and combines them in distinctive ways to create useful outputs and outcomes.

**Knowledge Refining:** the process of filtering, aggregating and summarising knowledge drawn from a wide range of resources.

**Knowledge Repository:** a store of knowledge (e.g. documents and databases, human-held knowledge).

**Knowledge Value Chain:** a sequence of knowledge processes including creation, organising, dissemination and use that create value from knowledge stocks.

**Knowledge Worker:** an individual whose primary contribution is through the knowledge that they possess or process.

**Learning Network:** a network of individuals who share knowledge for the primary purpose of personal development and learning.

**Learning Organisation:** an organisation which has in place systems, mechanisms and processes that are used to continually enhance its capabilities and those who work with it or for it.

**Mentoring:** a relationship between a less experienced individual (the mentee) who is advised and guided by a more experienced individual (mentor), often in same organisation and over a long time.

**Message Board:** an area on a website where messages can be exchanged and viewed by a workgroup or community, sometimes referred to as a bulletin board.

**Metadata:** data about data, a structured piece of data that describes the contents of a database record.

**Meta-knowledge:** knowledge about knowledge, for example knowledge inventories, knowledge maps, expertise directories (see p. 30).

**Organisational Learning:** the processes by which an organisation ‘learns’, so as to share best practice and avoid repeating mistakes.

**Organisational Memory:** the core knowledge of an organisation’s past, or as a place (e.g. database) where organisational knowledge is stored and is readily accessible for reuse.

**Peer assist:** a technique to facilitate knowledge exchange or transfer.

**Peer coaching:** a confidential process through which two or more professional colleagues work together to reflect on current practices.

**Portal:** a single point of entry on the web or an intranet to a wide range of information and knowledge resources and tools that enable a person to do their job more effectively.

**Richness:** the depth of knowledge, such as contextual knowledge, that enhances a piece of core knowledge.

**Storytelling:** the use of stories, as a way of sharing knowledge and helping the process of learning (see p. 42).

**Structural Capital:** a measure of the intangible value of the organisation embedded in its processes, systems and other non-human elements, a component of Intellectual Capital.

**Tacit knowledge:** the knowledge that is not codified but held in people’s heads (see p. 8).

**Taxonomy:** a system of classification (e.g. a hierarchy of terms where lower level terms are more specific instances of higher level ones).

**Thesaurus:** a controlled vocabulary of terms for a corpus of information, an extension of a taxonomy.

**Videoconferencing:** communications over an electronic network using video (e.g. desktop conferencing).

**Virtual Organisation:** an organisation whose participants are geographically separated but who work together through online communications.
“Knowledge is power.” (FRANCIS BACON)

Useful online KM resources

- IMARK – Information Management Resource Kit: www.imarkgroup.org
- Knowledge Management Resource Centre: http://www.kmresource.com/
- National Electronic Library for Health, Specialist Library on Knowledge Management: http://www.nelh.nhs.uk/knowledge_management/
“The more extensive a man’s knowledge of what has been done, the greater will be his power of knowing what to do.” (BENJAMIN DISRAELI)