

Knowledge Management & Learning: What, Why and How?

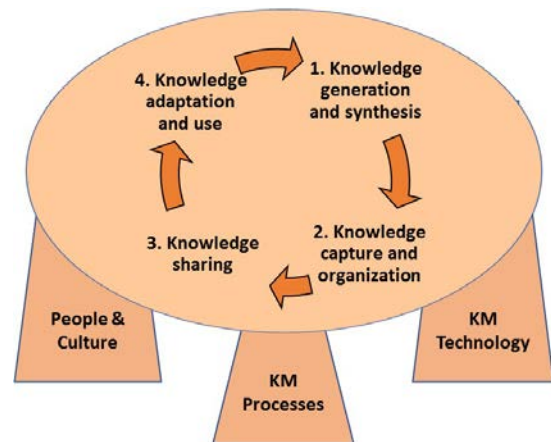
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“CARE’s primary asset in the fight against poverty is the knowledge, ideas, and experience gained through its implementation of coherent programs that draw on rights-based perspectives and gender analysis...While the emphasis on mobilizing financial resources is essential, CARE has increasingly demonstrated that broader and deeper impact can be achieved by mobilizing people and ideas...CARE’s knowledge of successful approaches to addressing the underlying causes of poverty, in particular gender discrimination, is systematically captured and utilized through an interconnected information and knowledge management culture and system. This has become the key strategic resource to support CARE’s mission. The knowledge acquired is highly regarded globally and is used daily by numerous CARE staff and a broad and diverse range of partners and peers in the CARE network.” CARE 2020

What do we mean by Knowledge Management and Learning?

Knowledge management is about **capturing, creating, distilling, sharing and using know-how**. That know-how includes **explicit and tacit knowledge**. It is not about books of wisdom and best practices, it’s more about the **communities** that keep the know-how of a topic alive by **sharing what they know, building on it and adapting it to their own use**¹. At CARE, knowledge management and learning (KML) connects people and ideas to learn and innovate for greater impact. Making sure that people are at the centre of our KML approach is essential for making CARE the **learning organization** of our 2020 vision.

We will achieve this vision by ensuring KML is built into our policies, processes and organizational culture, as well as improving the technology we use to connect teams and manage our knowledge. Knowledge management is best seen as a three-legged stool²: **People and organizational culture**; **KM processes**; and **KM technology**, that together enable CARE and our partners to **generate, organize, share and use** knowledge and learning across our global organization.



This document provides a quick overview for all CARE staff, on what we mean by Knowledge Management and Learning, why it is important, some of the ways we are already doing this well across CARE, as well as a set of initial priorities.

Why is KML so important?

CARE’s 2020 vision rightly puts knowledge management and learning (KML) at the heart of our work. Having the right evidence and learning is essential for advocacy and influencing. Better distilling and sharing our knowledge will increase our successes in mobilizing resources and building partnerships. Bringing the best of our learning and knowledge to every programme we develop – adapted to the local context and to local knowledge – is essential for being relevant, and will significantly increase the impact of our work. It will increase our efficiency, and reduce the thousands of hours wasted re-inventing wheels, or trying to find critical information

The healthiest organization is the one in which sharing knowledge is so deeply ingrained in day to day life that people cannot help but learn (Peter Senge).

¹ This definition is taken from Collison and Parcell (2005), *Learning to Fly*.

² See further details in Annex A.

across multiple document storage systems. This in turn should increase the time and space people have for reflection, dialogue and collaboration. A culture of learning is also critical for staff motivation and retention. Knowledge management and learning is core to what we do, relevant for everyone, not an add-on to be given to KM specialists to manage.

The value of KML: quantifying the difference

Organizations and companies that have invested significantly in knowledge management and learning have also had to demonstrate the returns on these investments, in savings of time and resources, or increases in efficiencies³, staff retention and satisfaction. The Knoco Stories website [lists over 110 stories](#) of quantified value, including Shell having saved €400m to €500m a year by rolling out social media to make it easier for employees to communicate and share ideas, or Mars delivering knowledge-enabled value in excess of £1 billion. In CARE, mobilizing knowledge and evidence of successful strategies to reduce malnutrition in Peru and using these to influence national policy, enabled us to [scale up our impact](#), from a large-scale project that enabled 4,000 children to escape stunting, to contributing to national-level change that saw 600,000 children no longer stunted. Evidence from CARE's global experience in nutrition also helped CARE to play a leading role on the issue in Zambia, positioning CARE to win over \$30m of new donor funding. Having our learning well documented also allows others to use our evidence: US Senators are using examples of CARE's GRAD program as a way to justify foreign aid in Senate hearings, because the project has put a premium on documenting [results and learning](#) from best practice.

How do we do it right? What does effective KML look like?

CARE has told itself the story that it is failing in knowledge management, and while there are aspects of our systems that are clearly dysfunctional⁴, in different parts of the organization we are already seeing KML successes, often in close collaboration with partners from academia, Government and civil society. We need to draw on these examples of effective work, to improve our KML practice more systematically across the organization.

But there is no one-fits-all KML model to apply: KML serves multiple purposes – facilitating the learning of others, influencing broader social change, strengthening our staff and partner capacity, adapting to changes in the context, or mobilizing resources and partnerships - and so effective Knowledge Management & Learning looks different, depending on what we are ultimately trying to achieve, as these examples show:

- [Facilitating the learning of others](#): Enabling learning between marginalized communities and groups, so effective approaches can be adapted and expanded far beyond where CARE and partners are working:
 - A key strategy for sustainability and empowerment involves this type of “Social learning”, as in the example of communities learning and mobilizing for themselves in Bangladesh in Annex B, or the Learning and Practice Alliances ([LPAs](#)) on water smart agriculture in East Africa.
 - Learning partnerships with other organizations, such as the MasterCard Foundation [Savings Learning Partnership](#).
 - Supporting other organization to scale up proven approaches, through setting up social enterprises aiming at scaling Community Score Cards ([CSC Consulting](#)), or CARE's Gender Equity and Diversity

³ An International Data Corp report ([2014](#)) estimates that an enterprise with 1,000 knowledge workers loses an average of \$5.7 million annually to lost productivity due to employees searching for, but not finding, relevant information.

⁴ In particular, CARE's multiple platforms for information storage (Minerva, The Village, other CMP systems, wikis, etc.), often requiring different passwords.

training ([Inclusion Solutions](#)), or providing detailed implementation guidance on tools (such as the Farmer Field & Business School [toolkit](#)).

- **Influencing broader social change:** Feeding knowledge and learning into advocacy on the policies, programs and actions of Government, the private sector, donors or other power-holders:
 - Influencing international development thinking, for example through generating evidence on the impact of women’s empowerment on nutrition outcomes in [Bangladesh](#), or on the effects of community score cards on reproductive health-related outcomes in [Malawi](#).
 - Using our evidence and learning to influence global or regional policy and actions, such as on women’s economic empowerment in the [Syria crisis](#), or global climate change [negotiations](#).
 - Influencing national policy and practice, such as bringing [research](#), policy and programmatic evidence on masculinities and GBV in Sri Lanka to influence the actions of Government, UN agencies, private sector and academia, or using evidence from CARE and partners’ nutrition programmes [in Peru](#) to influence Government priorities, budgeting, and programmes.
 - Influencing state-level action, by piloting together with Government the innovative use of [technology](#) or [team-based incentives](#) for frontline-health providers in Bihar (India), to ensure future scale up and roll-out.
 - In the Strengthening the Dairy Value Chain project [in Bangladesh](#), having an online data platform that tracked milk sales, extension services, and profits in real time meant that BRAC scaled from using CARE’s producers as 2% of their supply chain to 55%.
- **Strengthening our staff and partner capacity:** Ensuring our best approaches and most important institutional knowledge are available to, and applied and adapted by CARE and partner staff, across more of our work:
 - Building staff capacity, through training programs and manuals, such as the CARE Emergency Group’s CHEOPS and ELMP [training](#), and [Emergency Toolkit](#).
 - Ensuring new and existing staff understand CARE’s approaches, priorities and top learnings, through wikis ([gender](#), or [governance](#), or [health](#)), guidance notes ([resilience](#)), and orientation materials for staff (on [gender](#), or [resources](#) for the Program Strategy, or the [knowledge map](#) on Food & Nutrition Security).
 - Identifying and sharing promising practices and inspiring results, such as the Food & Nutrition Security Team’s 5 mins of inspiration [series](#), highlighting exciting results and key learning, from evaluations and studies.
 - Improving our organizational capacity in specific thematic areas, through webinars, communities of practice or learning events (e.g. on [gender](#), [governance](#), [climate-resilient agriculture](#), or [nutrition](#)).
 - Incentivizing the scale up of innovations and promising practices, such as CARE USA’s Scale X Design [Accelerator program](#).
 - Focusing learning and influencing on a specific theme in a sub-region, to multiply our impact, through the Impact Growth Strategies.
- **Adapting to changes in the context:** Leveraging knowledge for dynamic program design, adjusting program strategies and plans based on emerging lessons:
 - Learning together with others about what works, and what doesn’t, and using that knowledge to adapt our program plans, as in these Collaborate Learn Adapt (CLA) case studies on CARE’s work with partners in [Africa](#), [Bangladesh](#), [Malawi](#), and [Niger](#).
 - Testing the Theories of Change, and the hypotheses behind these, in our Program strategies (see [Part IV](#) of the Women’s Empowerment Impact Measurement Initiative guide).
- **Mobilizing resources and partnerships:** Strengthening CARE’s reputation amongst key stakeholders, donors and partners, to improve resource mobilization and shape future partnerships:

- Building and strengthening our reputation on a critical issue, through websites ([CARE Climate Change](#), CARE UK's [Insight series](#)) or journal articles/publications (on [health](#), or [value chains](#)).
- Demonstrating thought leadership, through sharing our learning in key events and conferences (such as around [participatory scenario planning](#) on climate change, or our work promoting [family planning](#))
- Ensuring the evidence and learning from successful programs are documented in Past Performance Reference ([PPRs](#)), to be used in funding proposals, to demonstrate our organizational capacity.

KML priorities for FY18

While we are already making progress, in pockets across the organization, and we should continue to encourage and celebrate such ongoing learning and experimentation. But we also need to generate concrete knowledge products to support the global Program Strategy, and take advantage of the shift to Office 365 for all CARE Members to harmonize and improve our global KM technology systems. These three individual and twelve collective KML priorities⁵ for FY18 will help accelerate our progress:

Three things everyone in CARE can do:

- Include activities to generate and share knowledge and learning in your annual workplan & objectives;
- Organize a meeting with your team to reflect on how you are drawing on and contributing to CARE's learning;
- Document how your team is mobilizing knowledge and learning, and the difference that is making, and share with [us](#).

- KM Processes:
 - 1) Synthesize the top learnings for each Outcome/Approach area that we want all staff working on these areas to be familiar with;
 - 2) Develop and publish a Costs of Violence Against Women report, drawing on learning from Bangladesh, Cambodia, Sri Lanka and Zambia, as well as from other organizations;
 - 3) Use the '5 minutes of inspiration' as a template for all outcome areas to share exciting results and learning;
 - 4) Identify knowledge and evidence priorities (learning objectives, and the key partners to collaborate with in generating this knowledge) for each Outcome/Approach area;
 - 5) Create infographics from PIIRS data to clearly illustrate our impact (overall, by outcome areas, regions);
- People & Culture:
 - 6) Collaborate with CI HR working group to review how KML are incentivized, rewarded and celebrated (or not) across our human resource systems and procedures (job descriptions, competencies, interviews, induction, training, appraisal, reward, space for reflection & learning);
 - 7) Document two cases (CARE Canada as CMP, and one CO/project team) of how a true learning culture has been instilled in CARE, and share along with other examples of people or teams who are going the extra mile to generate, share and use knowledge;
 - 8) Celebrate teams who are prioritizing KML, and managers who are actively promoting KML amongst their staff;
- KM Technology:

⁵ These suggested priorities come from the agreements of the Program Quality & Impact Senior Leadership Team [meeting](#) in October 2016, and recommendations from different CARE stakeholders working on knowledge management and learning consulted in 2017.

- 9) Start using Facebook Workplace as the [agreed](#) organizational tool for work-focused social networking⁶;
 - 10) Develop a shared, searchable, information storage platform for CARE International (or the great majority of CI Members and teams), to succeed Minerva and The Village, that responds to the [key recommendations](#) from a survey in early 2017.
- Overall:
 - 11) Calculate and document the value generated by these actions, to build a stronger, evidence-backed case for why focusing on KML matters;
 - 12) Set up an informal KML steering group from across CARE to support these activities⁷.

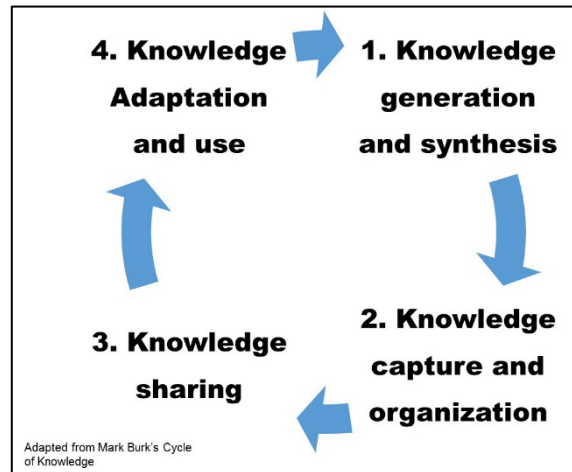
⁶ Some teams are also testing out tools for team-based collaboration, such as [Slack](#) or [Microsoft Teams](#), and this experience will be drawn on to develop further recommendations late in Fy18.

⁷ Given the existence of many different groups across CARE working on similar issues – the Office 365/Global IT Steering Committee, the CARE International Monitoring Evaluation & Learning group, and CARE USA’s Knowledge Management Working Group – it is not the right moment to re-establish the CI KMWG (CARE International Knowledge Management Working Group); better to have an informal group to help steer these efforts in the interim. This would be reviewed during FY18.

Annex A: Four stages and three pillars of KML

CARE has adopted a KML cycle, adapted from Mike Burk's Cycle of Knowledge⁸ (see figure to right). This cycle is similar to that used by USAID⁹, and many other development actors, such as [UNDP](#) or [ADB](#):

1. **Knowledge Generation:** gaining knowledge by processing and analysing data and information from our programmatic experience, through conversations, meetings, research and impact studies, as well as from reports, conferences, or training programs;
2. **Knowledge Capture and Organization:** sorted, organizing and converting knowledge into a form that can be shared;
3. **Knowledge Sharing:** sharing knowledge for wide accessibility, through publications, cross visits, websites, databases, communities of practice, presentations and other communication media;
4. **Knowledge Adaptation and Use:** through CARE, partners or other stakeholders accessing, adapting and applying the knowledge, in improved programming and new innovations, in new contexts, new programs, proposals for expanded funding, or policy influencing work.



Knowledge management and learning depends on three pillars: people and culture, KM processes, and KM technology. Experience within CARE and from many other organizations¹⁰ show that effective knowledge management does not occur unless actions are undertaken to address organizational culture and leadership, put in place specific processes to promote learning, as well as establishing technology-based systems to support KML.

The 'people and culture' pillar is related to organizational culture, values and behaviours. Is investing time in knowledge management recognized as useful and important? Is the team open to drawing on learning from outside, or just focus on how "CARE does things"? Does competition amongst teams or units lead to the protection of knowledge, or is there a culture of sharing? Does the organizational culture allow to admit failure with the objective to learn, or is failure punished and so hidden? People are at the centre of knowledge management – and so people, and their behaviours, need to be the main focus when promoting knowledge management and learning. Unless the organizational culture changes to value the promotion of learning and innovation, and to reinforce open, inquisitive and collaborative behaviours of staff at all levels, KML will remain a marginal add-on, not the heart of CARE's business, and KML efforts will fail. As Peter Drucker is supposed to have said, "***Culture eats strategy for breakfast***".



⁸ Mike Burk (1999). [Knowledge management: Everyone benefits by sharing information](#). Public Roads, 63(3).

⁹ USAID (2014), [Knowledge Management Support](#).

¹⁰ This includes learning from the CARE International Knowledge Management [working group](#), peer INGOs (see [NetHope survey](#)) or leading thinking on KML from the business sector (such as the [Harvard Business Review](#)).

The 'processes' pillar refers to specific procedures, processes and structures that enable the generation, capturing, sharing and application of knowledge and learning. As far as possible, KML needs to be embedded into existing processes (of staff and talent management, of project or team planning and review), rather than require additional KML-specific processes, which will tend to be deprioritized in a context of heavy workload and already busy agendas.

Finally, 'technology' should be an important enabler of knowledge management. Technology plays a huge part of good knowledge management practice. But if you rely too heavily on only technology KM will not be successful. **KM must be people focused, supported by great technological platforms. Without the right culture, processes and incentives, technology is unlikely to be used.** It is also vital that technology fits the organization and the people who are to use it, to ensure its being used effectively.

The three pillars are closely inter-related. When KM processes become part of how the organization works, organizational culture is changed. KM Technologies support both processes and changes related to culture. And of course, it is people that use and apply processes, and the KM systems and technologies developed to support learning across the organization.

Annex B: Multiplying Impact for flood-prone communities

Communities in Kewarjore Union in the Haor belt had lost a season's crop every year for the past ten years due to flash floods, intensifying dynamics of poverty and food insecurity. In 2006, the USAID-funded SHOUHARDO program started an initiative to motivate communities in the area to construct a submergible earthen embankment to counteract the damage due to the flood. The embankment was deliberately temporary, to allow the flood waters eventually to come into the agriculture land, as this is essential to maintain the fertility of the soil. With no cash inputs besides donating a few livestock for celebratory feasts at the end of each day, CARE's local partners were able to mobilize over 5,000 people from several unions in the area to construct a 7-km submergible embankment in just five days.

As seen in The Daily Star article to the right, women and men worked side by side, made new friends from neighbouring villages, and government support departments joined in, connecting directly with the communities. As a result, flood waters that year were kept at bay for over a week, enabling around US\$1.5M of crops to be harvested and saved, a huge impact for these communities.

The following year, CARE took 400 visitors from different parts of the country to observe the embankment being rebuilt. Again, around 5,000 people came together and constructed the embankment, this time with no in-kind contributions at all from the program. The community themselves arranged the livestock to continue with the festive spirit as they worked on the embankment. The visitors were highly motivated, went back to their own communities, and started doing the same. CARE began to see a mushrooming of similar initiatives all over the country. In one prominent example in Raipur, 20,000 people got together and constructed a 7.2km long permanent embankment, six feet high and six feet wide - in only five days. This structure alone saved an annual crop of over US\$11.5M.

Apart from the direct impact on food security, connecting of these communities to Government support structures was just as profound, enabling direct access to services they were previously not able to take advantage of. Women and men worked together in getting these structures made, influencing gender dynamics. A great example of facilitating knowledge sharing and application to support scale up and multiplying impact.

