2017 CLA CASE COMPETITION

COLLABORATE • LEARN • ADAPT

Case Title:

Using knowledge management typologies to foster networks and situational awareness

The synthesizer group diligently considering challenges to knowledge sharing among the Jhpiego programs in Tanzania. Photo credit: Cindy Arciaga, 2016

Submitter Name: Jarret Cassaniti and Cindy Arciaga*

Organization: Johns Hopkins Center for Communication Programs and Jhpiego

Summary:

Knowledge sharing is an inherently social act and individuals share knowledge in different ways. Knowledge management (KM) and collaborating, learning, and adapting (CLA) approaches can greatly improve organizational effectiveness, but can be challenging concepts for individuals to understand and embrace.
In fall of 2016, Jhpiego staff led a training in their Tanzania office to introduce staff members to the concept of KM personality types, or typologies, with the intent of improving the office's knowledge sharing culture by making KM more personal and accessible. The training was designed to help staff realize their role in the office's larger CLA and KM systems, consider how they could contribute to improved knowledge sharing and adaptation in the workplace, and identify colleagues to collaborate with. The activity encouraged more open communication, new relationships and networks, and adaptive thinking, and was inspired by a Global Health Knowledge Collaborative (GHKC) meeting

*The development of the exercise was a collaborative process; the authors would like to acknowledge the contributions of Johns Hopkins Center for Communication Programs (CCP) staff James Bon Tempo, Sara Mazursky, and Sarah Harlan. Kate Howell and Anuja Shah from the Maternal and Child Survival Program (MCSP) assisted in the delivery of the exercise. This case study was edited by Kathi Fox and Anne Kott of CCP.

1. Which subcomponents of the Collaborating, Learning and Adapting Framework are reflected *most* in your case (select up to 5 subcomponents)?

- [x] Pause & Reflect
- [ ] Adaptive Management
- [ ] Technical Evidence Base
- [ ] Theories of Change
- [ ] Scenario Planning
- [ ] M&E for Learning
- [x] Internal Collaboration
- [ ] External Collaboration
- [ ] Openness
- [x] Relationships & Networks
- [ ] Continuous Learning & Improvement
- [x] Knowledge Management
- [ ] Institutional Memory
- [ ] Decision-Making
- [ ] Mission Resources
- [ ] CLA in Implementing Mechanisms

2. What is the general context in which the case takes place?

Tanzania is one of Jhpiego's largest country offices. Program staff work on a variety of projects and technical topics, including HIV and maternal and child health, particularly as part of the USAID-funded Maternal Child Survival Program (MCSP). While a tremendous amount of important work was being done, knowledge sharing within the office remained siloed, with communication generally remaining within technical areas. Knowledge sharing that did occur was not always deliberate or intentional. People were sharing, but not necessarily in a systematic way.
In fall of 2016, Jhpiego's Senior KM Director and two MCSP staff members visited the office. Tanzania's country director seized on the opportunity to address the knowledge management (KM) needs of the office by encouraging the visiting staff to develop approaches for knowledge sharing that could be used by the country team. The KM team wanted to break down barriers to improve interoffice knowledge sharing and collaboration. They recalled a Global Health Knowledge Collaborative (GHKC) meeting they had attended where Johns Hopkins Center for Communication Programs (CCP) staff led an exercise on 12 common typologies of KM professionals**, which had been developed to raise awareness of KM as a strategic approach within the health and development sectors.

The KM team organized a training for over 30 Jhpiego/MCSP staff in Tanzania, for which the facilitators adapted the typologies to five key roles: facilitator, synthesizer, networker, monitor, and problem solver. After providing background and introducing the five types, the facilitators asked the participants to consider two things:
1. The roles they play in their country teams and which one of the five types most closely match their day-to-day work
2. The role they want to exemplify—this could include a role they are currently doing but only secondarily, or a brand new role they would like to take on.

Staff were grouped according to their self-reported type and asked to discuss several questions about internal knowledge sharing, with the idea that like-minded/like-type personalities would find solutions together, and that when they reported back, the larger group would see these different perspectives, which could provide a richer solution to break down internal knowledge sharing barriers. The activity also showed how the office worked as individuals and as teams.

**The 12 types of KM roles identified in the exercise draw on the work of Fahy and Nisbet (2011) and Reinhardt et al. (2011). The types are: monitor, sharer, learner, networker, organizer, retriever, scout, solver, synthesizer, tracker, translator, and champion.

3. Why did you use a collaborating, learning, and adapting approach?

Knowledge sharing is an inherently social act and individuals share knowledge in different ways. KM and collaborating, learning, and adapting (CLA) approaches can greatly improve organizational effectiveness, but can be challenging concepts for individuals to understand and embrace. KM typologies have the potential to make KM more personally relevant and professionally accessible. By covering a range of knowledge sharing approaches, the typologies showcase KM's interdisciplinary nature and highlight KM work people may already engage in on an ad-hoc basis. Additionally, by highlighting these personality types, teams can acknowledge the value of different perspectives and, collaboratively, create a workable sustainable knowledge-sharing culture.

CLA's focus on culture and collaboration is particularly relevant to this activity. The KM typologies helped in-country staff get to know each other better (culture), build capacity in the area of KM (collaboration), learn of challenges and opportunities to knowledge sharing (learning), and encourage the use of KM approaches for advancing program goals (process). The KM trainers sought a way to discuss the work culture and types of team members that went beyond discussion of general personality types. The exercise was designed to help staff realize their role in the office's larger CLA and KM systems, consider how they could contribute to improved knowledge sharing and adaptation in the workplace, and identify colleagues to collaborate with. The activity encouraged more open communication, new relationships and networks, and adaptive thinking.

4. Describe how you used collaborating, learning, and adapting in this case.

The exercise included five subcomponents of the CLA Framework that interacted and supported one another: Culture – Relationships & Networks; Collaborating – Internal Collaboration; Adapting – Pause & Reflect; Processes – Knowledge Management; and Resources – CLA in Implementing Mechanisms. It addressed the program culture by fostering greater openness in theoretical, actual, and desired roles and responsibilities. Staff were asked to pause and reflect on themselves as knowledge management practitioners, their role in the larger KM system, and how they contribute to the system via individual strengths. They were able to identify who else played the same roles and also collaborate with others in similar roles. KM trainers also expected staff to view their colleagues from additional perspectives and discuss ways to collaborate with each type for improved knowledge sharing.

5a. Organizational Impact: What impact, if any, has collaborating, learning, and adapting had on your team, mission or organization?

Before the training, staff hadn't realized they were all doing some form of KM. Following the training, the KM team noticed increased sharing across technical areas. Staff particularly took greater advantage of an existing technology resource (Yammer) to facilitate discussion. While the KM trainers can't directly tie this to the typologies activity, they believe the training was a contributing factor.

During the interactive exercise, participants were active and enthusiastic about the process. It was evaluated through immediate feedback, in which participants said it was a fun way to learn new professional sides of colleagues. By steering participants to think about their roles and how they like to share and receive knowledge and information, it allowed them to consider opportunities and challenges to knowledge sharing with like-minded colleagues.

The trainers also noted that the exercise could further help develop a knowledge management culture with follow-up discussions. Thoughts for expanding the activity include:
- Asking participants to find someone who picked a different type than they did for the first question and tell them about the type they chose.
- Asking participants to modify the type to more closely reflect their existing or desired roles. (A different title or nickname such learnologist, griot, rapporteur, or documentalist can help staff more fully take ownership of their role.)
This exercise in self-branding could also extend to development of an internal tag line such as "Knowledge moves at the speed of Muleshe."
Asking participants to describe how they could use their identity to bolster their individual work and/or their work as a member of a team (probe on how they could be used to discuss work with a supervisor).

The KM trainers also thought the typology exercise could be used at the project manager level for related purposes such as recruitment of new staff. By asking job candidates to identify their KM type, managers will have an additional technique for hiring appropriate staff.

5b. Development Results: What impact, if any, has CLA had on your development outcomes?

While it would be challenging to measure whether the activity had direct impact on development outcomes, there's an argument to be made that the concepts covered – thinking across technical areas, considering individual- and group-level needs – have applications in development approaches like integrated programming and human-centered design. Additionally, by sharing across technical areas, teams learn from each other, and the knowledge shared can lead to creative solutions in other technical areas, for example, using successful approaches in HIV prevention to address gender-related challenges.

6. What factors affected the success or otherwise of your collaborating, learning and adapting approach? What were the main enablers or barriers?

The same CLA subcomponents that facilitators used to drive the activity – collaboration, culture, adaptation – also contributed to its success. The activity was easily adaptable to Jhpiego's Tanzania country office context. Participants displayed an openness to pause and reflect on what they learned and how it could be used in their organization. The country director's enthusiastic support for creating a CLA culture allowed the KM team to design and implement an innovative and personalized exercise to improve internal sharing. The director considered the costs of the exercise (meeting space, staff time, and office supplies) to be small compared to the potential benefits (greater efficiency, time saved in the long term, improved outputs) to the office. Finally, existing tools and sharing platforms that had already been introduced, including social media, communities of practice, and after action reviews, supported the face-to-face nature of the event.

The greatest challenge was to change the culture and sustain those changes. Since the typologies activity had not been implemented with the MCSP team before, trainers had initial doubts about its effectiveness because the activity and its impact had not previously been measured. While no formal monitoring or evaluation activities had been built in to measure the short- and long-term value and sustainability of the activity, the team conducted an AAR as a way to uncover feedback and determine next steps.

7. Based on your experience and lessons learned, what advice would you share with colleagues about using a collaborating, learning, and adapting approach?

KM typologies have great potential to bring about behavior change by making CLA and KM more accessible and personal. By helping staff see themselves as a KM type through a fun exercise, there is a greater chance that KM roles and responsibilities will be owned and embraced, leading to more systematic organizational learning.

This exercise can be delivered in a variety of ways, from a one-off icebreaker to a series of exercises spanning several years. When considering if the exercise is right for your team, ensure there is high-level buy-in then adapt according to organizational or project goals.